

Montgomery County Action Council

Economic Development Strategic Plan

May 31, 2019

Provided to:

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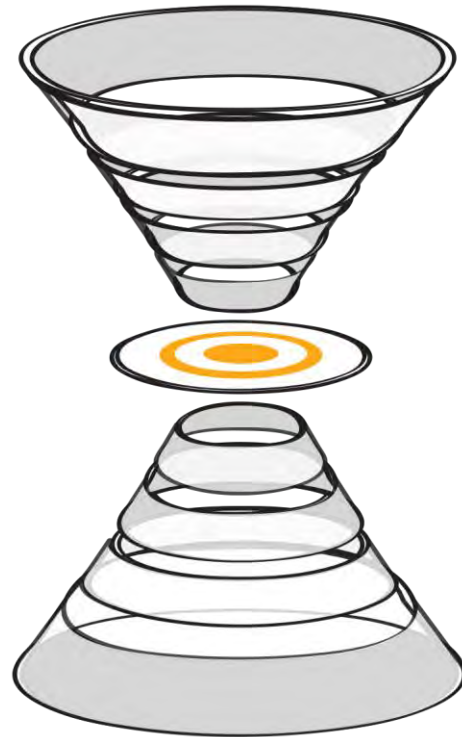


Section 1: Executive Summary

Executive Summary

ADY ADVANTAGE APPROACH

The following approach below was used by Ady Advantage to create an economic development strategic plan for Montgomery County Action Council.



PHASE 1: DISCOVER

- Project initiation meeting
- Market assessment
- On-site visit

PHASE 2: DISTILL

- Talent-focused target industry analysis
- Interim report
- Asset analysis and mapping
- Goals and vision workshop

PHASE 3: DO

- Economic development strategic plan
- Final presentation

The project included an on-site analysis that required primary research with area employers, stakeholders, and other key community leaders. It also involved an evidenced-based approach to economic development that recruited a variety of data sources that resulted in market focused research, an economic base analysis, target industry analysis, and an analysis of primary data. The overall plan was supported by a goals and visioning session that provided stakeholders the opportunity to develop unique strategies related to economic development. The following pages represent a summary of this comprehensive work.

Executive Summary

KEY THEMES

During the on-site analysis, Ady Advantage conducted a variety of one-on-one interviews, small group interviews, roundtables, surveys, and stakeholder sessions to gain direct input. Key themes were identified through all these means of input, aggregated together and analyzed. Questions aimed to understand the area's competitiveness related to operating conditions and operating costs along with key opportunities around talent, partnerships, growth, etc. The questions also aimed to understand barriers to growth and other challenges the employer may experience. The following themes emerged:

1. The most reoccurring theme and perhaps the largest challenge for the Montgomery County region was the fierce rivalry between Coffeyville and Independence. This was identified by stakeholders in both cities, and showed up in all inputs collected during the on-site visit. While many stakeholders interviewed understood that what benefited one city was ultimately beneficial for the other city and the region, there was a general consensus that the communities as a whole did not embrace that mentality.
2. Related to the above key theme, Cherryvale and Caney also feel disconnected and independent from Coffeyville and Independence. Furthermore, they tend to feel neglected and ignored by efforts that are supposedly regional in scope. Montgomery County Action Council has made strides in advocating for regionalism, but communication of the value of this could be improved and Montgomery County still has a ways to go in embracing this approach systematically.
3. Housing is a significant challenge across the region, and was noted repeatedly in the roundtables and in the input surveys collected from stakeholders. Many stakeholders noted the current housing market was in a blighted and dilapidated state. Housing was seen as a barrier for both talent within the region and for attracting new talent from outside the region.
4. The vast majority of stakeholders expressed their support for the potential Tyson project that may locate in the Montgomery County region. They also believed the pulse of the community was in favor of the project as well. There seemed to be an understanding that the project would provide a great deal of momentum and help reverse negative long-term trends in the area, such as the declining population. There was also a recognition that there would inherently be growing pains that would come with a project like Tyson, and that investments in infrastructure and the school system would have to be made in order for the project to be successful and sustainable.
5. The Fab Lab at Independence Community College was identified as key asset in the Montgomery County, and as a source of opportunity that can be leveraged to cultivate entrepreneurship and start-ups in the region.
6. Retention of youth was identified as a huge challenge and threat to the long-term sustainability and viability of Montgomery County. Stakeholders noted that the quality of life and amenities offered in the region often does not appeal to young people beyond the subset that highly desires outdoor recreation opportunities. Many young people leave the region to attend four-year universities and never come back.
7. Between Coffeyville Community College and Independence Community College, there is a strong pipeline for trade skills and skilled labor in the region. However, many stakeholders noted the duplication of services that resulted from having two community colleges, and noted that Montgomery County was the only county in Kansas where there were two community colleges in one county. Many stakeholders speculated that the inefficiencies created by this would implicate the long-term sustainability of both community colleges.

Executive Summary

TARGET INDUSTRIES

Ady Advantage conducted thorough research on a variety of industries and subsectors. As a result of this analysis, we recommend the following industries as targets for the Montgomery County region. Each target industry will have a specific strategy.

Target Industry	Subsectors of Focus	Comments
Agribusiness	<ul style="list-style-type: none"> • Crop Production (NAICS 111000) • Farm Labor Contractors and Crew Leaders (NAICS 115115) • Animal Production (NAICS 112000) • Dog and Cat Food Manufacturing (NAICS 311111) • Animal (except Poultry) Slaughtering (NAICS 311611) • Other Animal Food Manufacturing (NAICS 311119) • Meat Processed from Carcasses (NAICS 311612) 	<p>Kansas and the region have a strong agriculture and food processing industry. This ecosystem presents value-added opportunities for the region. The region has a level of supply chain leakage that is largely non-value added goods. This area will provide opportunities to reduce leakage and create greater value. Furthermore, the Tyson project will create greater opportunity for value-added agribusiness in the area should the project land in the region.</p>
Heavy/Light Industrial Manufacturing	<ul style="list-style-type: none"> • Metal Tank (Heavy Gauge Manufacturing (NAICS 332420) • Sheet Metal Work Manufacturing (NAICS 332322) • Industrial Valve Manufacturing (NAICS 332911) • Other Metal Container Manufacturing (NAICS 332439) • Metal Window and Door Manufacturing (NAICS 332321) • Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996) • Construction Machinery Manufacturing (NAICS 333120) • Farm Machinery and Equipment and Equipment Manufacturing (NAICS 333111) • Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414) • Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132) • Fluid Power Pump and Motor Manufacturing (NAICS 333996) • Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413) 	<p>The region has a strong existing industry base in this area, and many of these particular subsectors are projected to grow. The region has strong programs related to manufacturing that can benefit this industry, provided by Coffeyville Community College and Independence Community College. Additionally, the region has several sites that can serve manufacturing companies that have access to transportation assets with existing utility infrastructure in place. In particular, the region should aim to further build out a cluster around aircraft and aviation.</p>
Supply Chain Support	<ul style="list-style-type: none"> • Other Warehousing and Storage (NAICS 493190) • General Freight Trucking, Long-Distance, Truckload (NAICS 484121) • Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230) • General Freight Trucking, Local (NAICS 484110) • General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122) • Rail Transportation (NAICS 482110) • Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220) • Support Activities for Rail Transportation (NAICS 488210) • General Warehousing and Storage (NAICS 493110) • Commercial Screen Printing (NAICS 323113) • Cement Manufacturing (NAICS 327310) • Ready-Mix Concrete Manufacturing (NAICS 327320) • Cut Stone and Stone Product Manufacturing (NAICS 327991) 	<p>There are various supply chain opportunities in the region as it relates to supporting the other recommended target industries. Focus should be on further cultivating clusters in these areas and leveraging downstream opportunities. These industries help provide greater retention of other industries.</p>

Executive Summary

TARGET INDUSTRIES

In addition to the recommended target industries for Montgomery County, we also recommend an aspirational target industry of Professional, Scientific and Technical Services. Additional strategies and likely greater amount of resources would need to be applied to attract these companies. However, a business case can be made and developed that would result in greater diversification of the economic base.

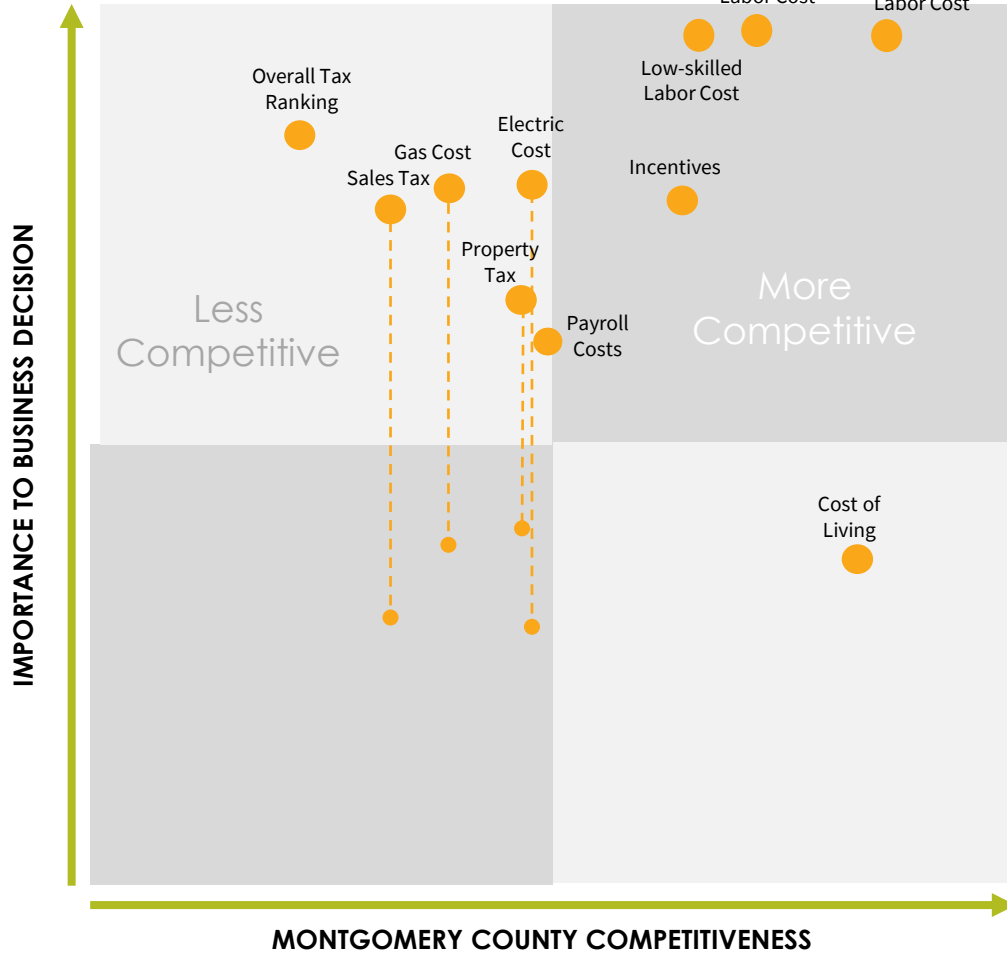
Aspirational Target Industries		
Target Industry	Subsectors of Focus	Comments
Professional, Scientific and Technical Services	<ul style="list-style-type: none"> • Computer Systems Design Services (NAICS 541512) • Engineering Services (NAICS 541330) • Other Accounting Services (NAICS 541219) • All Other Professional, Scientific, and Technical Services (NAICS 541990) • Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114) 	<p>These types of industries will more likely tend to be located in Tulsa, Wichita and Kansas City, where highly educated talent is more abundant. To some degree, the region does pull some of this highly educated talent who live in Tulsa but work in Montgomery County for those employers who provide higher wages. Greater focus and resources will be needed to build up this industry area. The aim within this targeted area is to diversify the region's economy to create indirect and induced jobs.</p>

Executive Summary

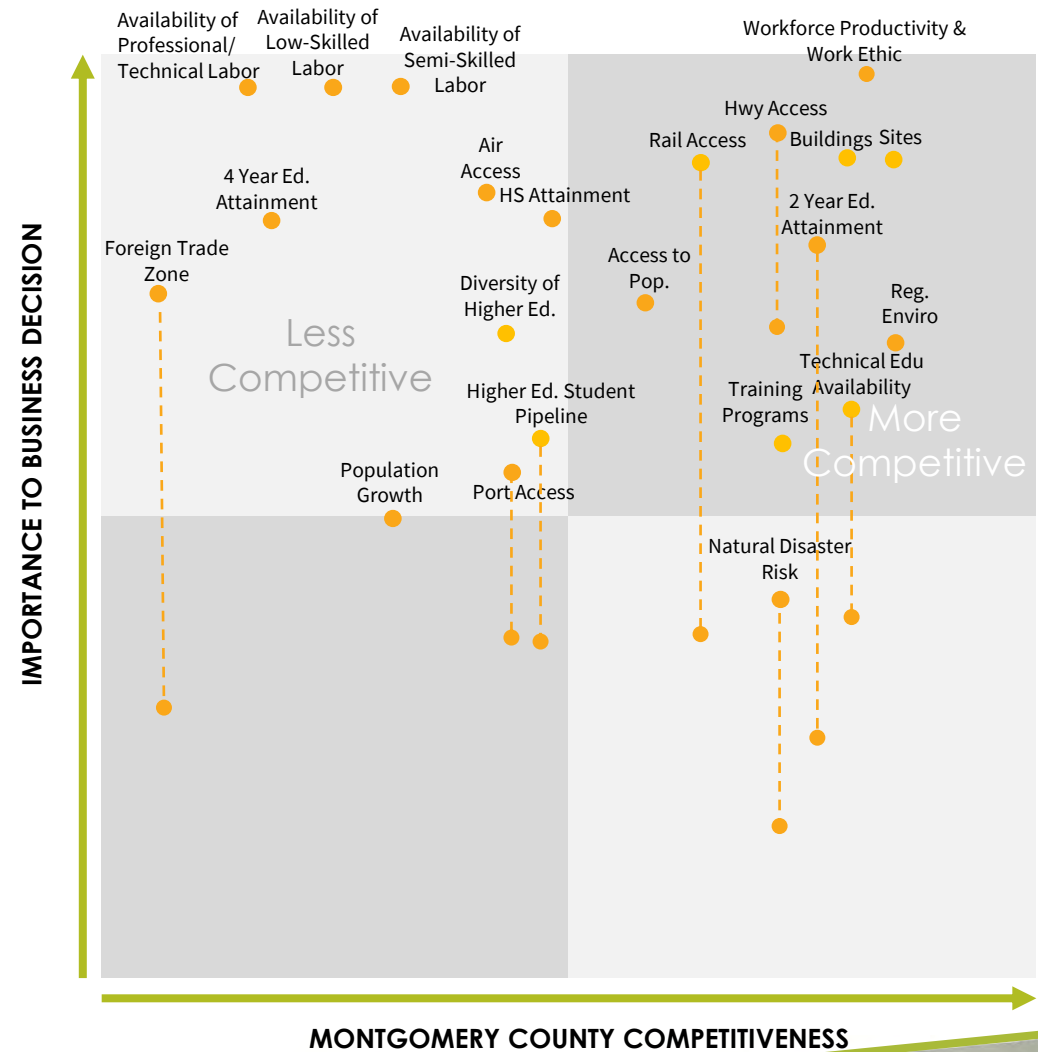
ASSET MAPS

The assets maps below depict the county's general competitiveness compared with the State of Kansas and the US averages. The dotted lines up and down show the variability of importance of the factors depending on the industry.

GENERAL BUSINESS COSTS ASSET MAP



GENERAL CONDITIONS ASSET MAP

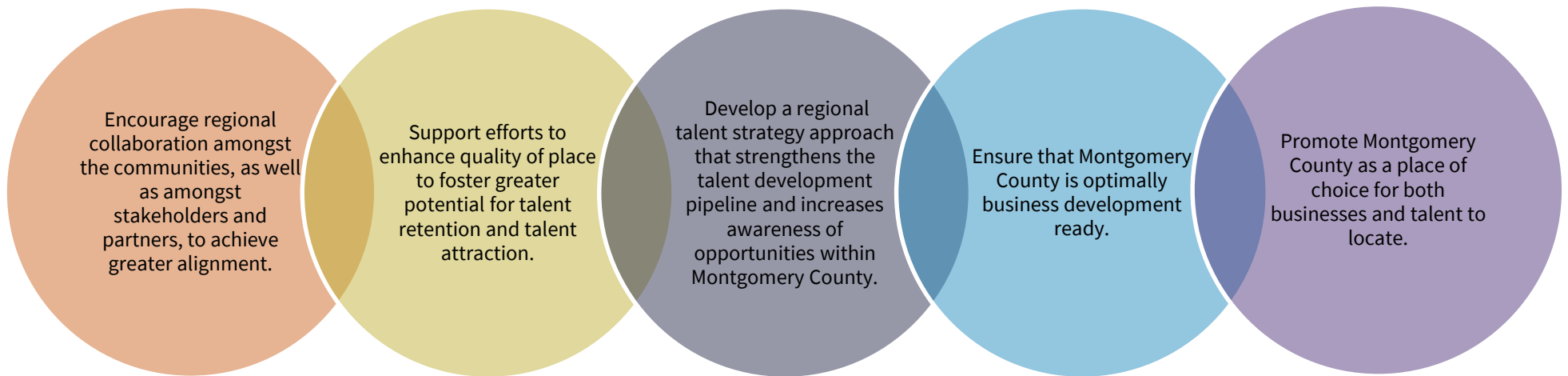


Note: Dotted lines down represent the variability of importance of each factor depending on the industry.

Executive Summary

GOALS FOR THE FUTURE

The goals for the future were determined and thoroughly discussed during a facilitated Goals and Visioning work session on Tuesday, April 23, 2019. These goals will serve as the basis for the Economic Development Strategic Plan in the last section of this report.





Section 2: Introduction

Introduction

BACKGROUND

Montgomery County, Kansas is located in southeast Kansas roughly one hour north of the City of Tulsa, Oklahoma. The area is home to about 34,000 residents and has four main communities, including Coffeyville, Independence, Caney, and Cherryvale. It is situated less than three hours from four major metro areas: Tulsa, OK; Joplin, MO; Kansas City, MO; and Wichita, KS.

The county is well known for its heavy industry and aviation base. John Deere, Cessna, and Standard Motors are among those well-known manufacturers that are located in the area. Montgomery County has the highest participation in the rural opportunity zone program with 35 participants. In 2015, it lost three major employers (Amazon, Southwire, and Mercy Hospital), resulting in a nearly 1,600 job reduction. About 20 percent of these positions have since been filled. However, the county maintains a high number of underemployed individuals at nearly 13,500.

Montgomery County also has a strong base to build a talent supply. It is home to two community colleges and was recently selected for a Kansas Department of Education program aimed at overhauling and improving K-12 public education.

The county has also been identified as a finalist for the Tyson Poultry Processing facility. The proposed project would result in 1,600 jobs with nearly \$50 million in payroll impact. Given its opportunity for growth, the Montgomery County Action Council (MCAC) has identified the need to complete an economic development strategic plan to ensure readiness for the Tyson project that will lead to sustained and targeted growth.

MCAC was created in the early eighties to create county-wide collaboration. It is governed by a board of directors made up of representatives from each of the four main communities mentioned above. The executive board is very active and made up of representatives from the private sector.

OBJECTIVE

The methodology of this project aims to answer three primary questions.

1. How should the county grow?
2. How does the county sustain that growth?
3. If the Tyson project does not land in the county, what strategy for growth does it implement to realize other opportunities for economic growth.



Section 3: Regional Market Assessment

Regional Market Assessment

INTRODUCTION

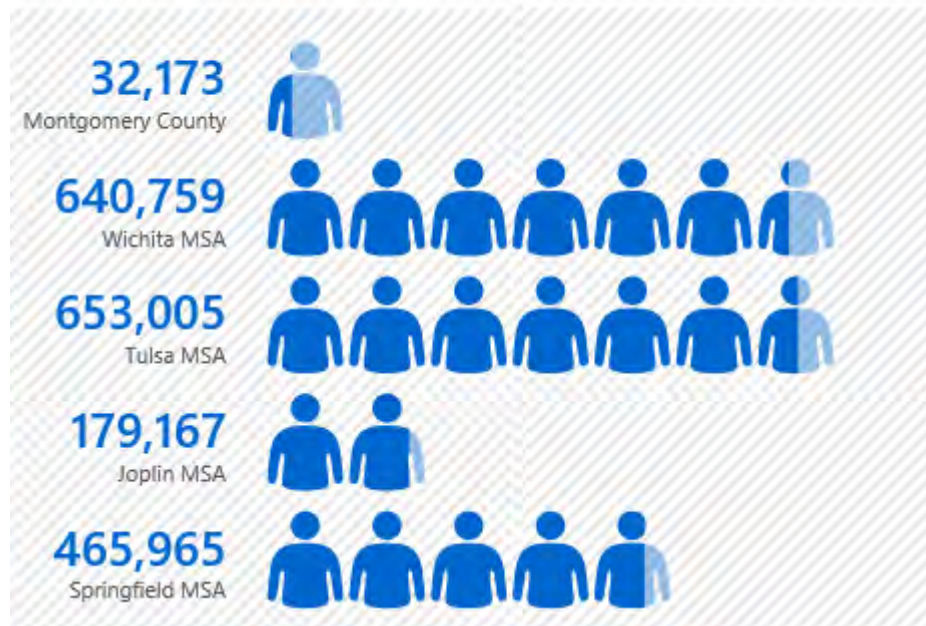
The following section provides a brief overview of key location criteria that may factor into the decision-making processes a site selector, company and/or talent may be looking into before deciding to locate in your community. This includes information on demographics, economics, education and quality of life. All data included in this section is secondary research available from public sources. This is not meant to be an exhaustive analysis of these location criteria factors, but simply provide a baseline starting point for understanding how your community will be perceived by those outside of it without a boots-on-the-ground perspective. It is important to be aware of this data and use it to build your best business case possible.

Regional Market Assessment

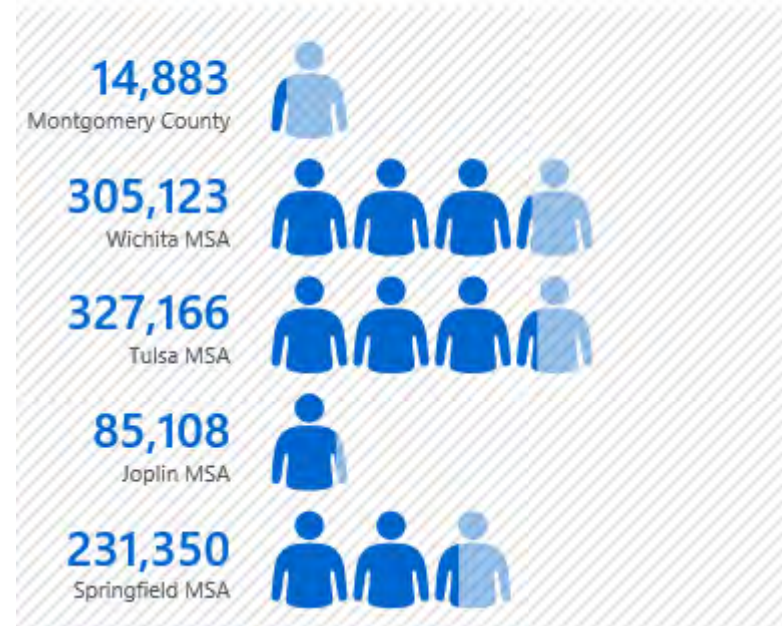
DEMOGRAPHICS

POPULATION AND LABOR FORCE

POPULATION



LABOR FORCE



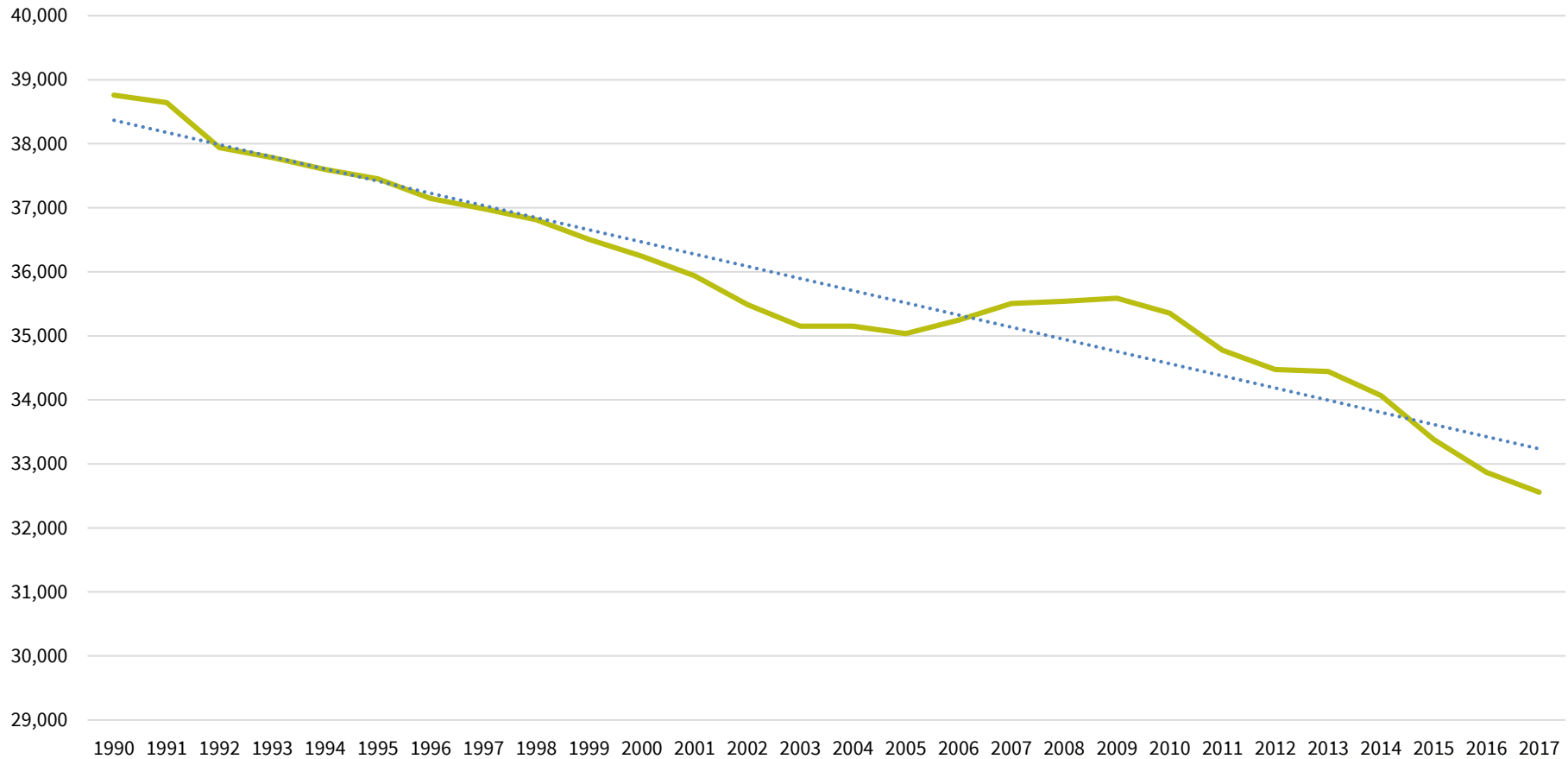
Source: EMSI 2018

Regional Market Assessment

DEMOGRAPHICS

POPULATION OVER TIME

COUNTY POPULATION CHANGE



Green Line = Actual change over time
Dotted Line = Average trend over time

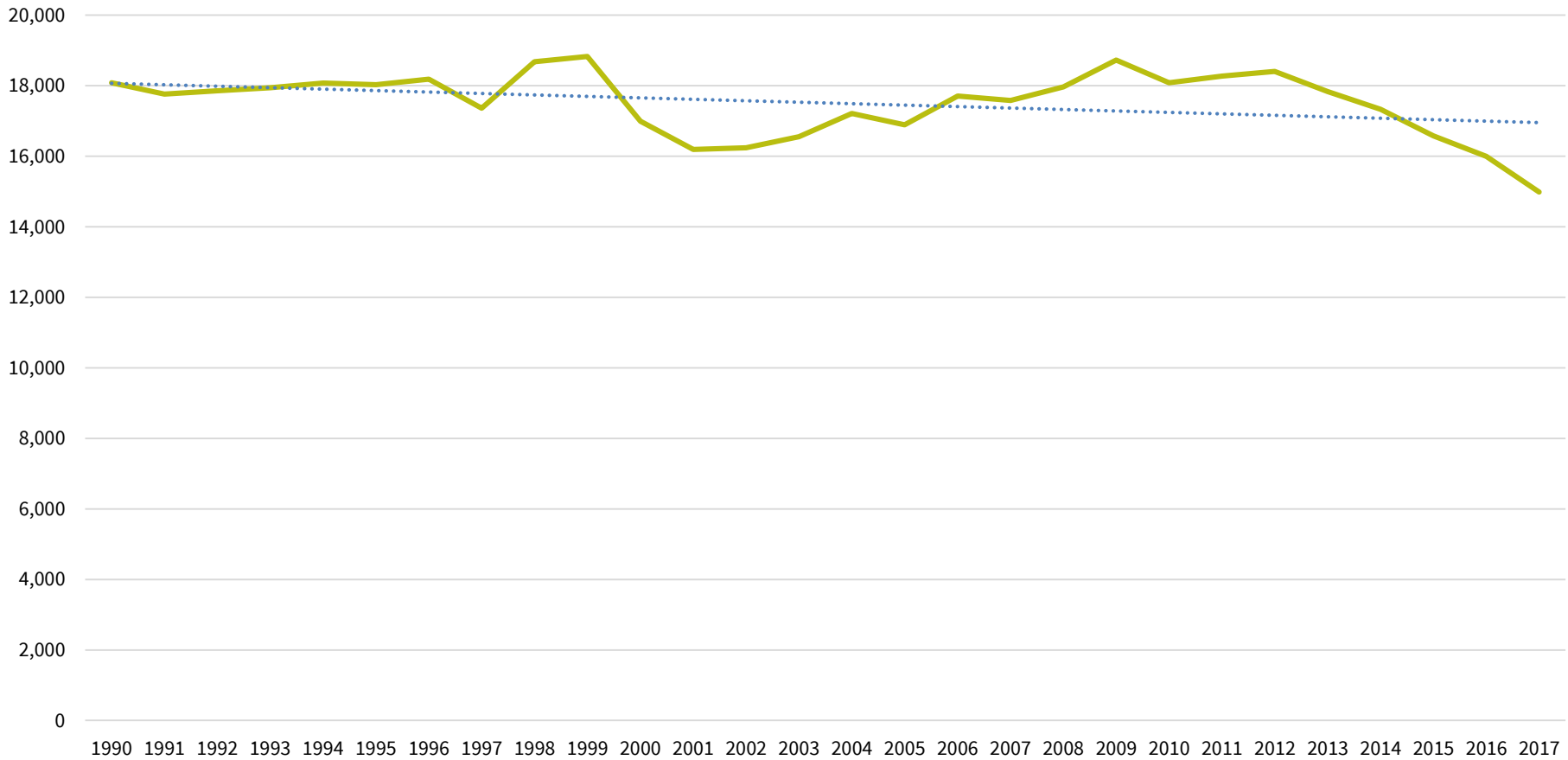
Source: U.S. Census Bureau, 2017

Regional Market Assessment

DEMOGRAPHICS

LABOR FORCE OVER TIME

COUNTY LABOR FORCE CHANGE



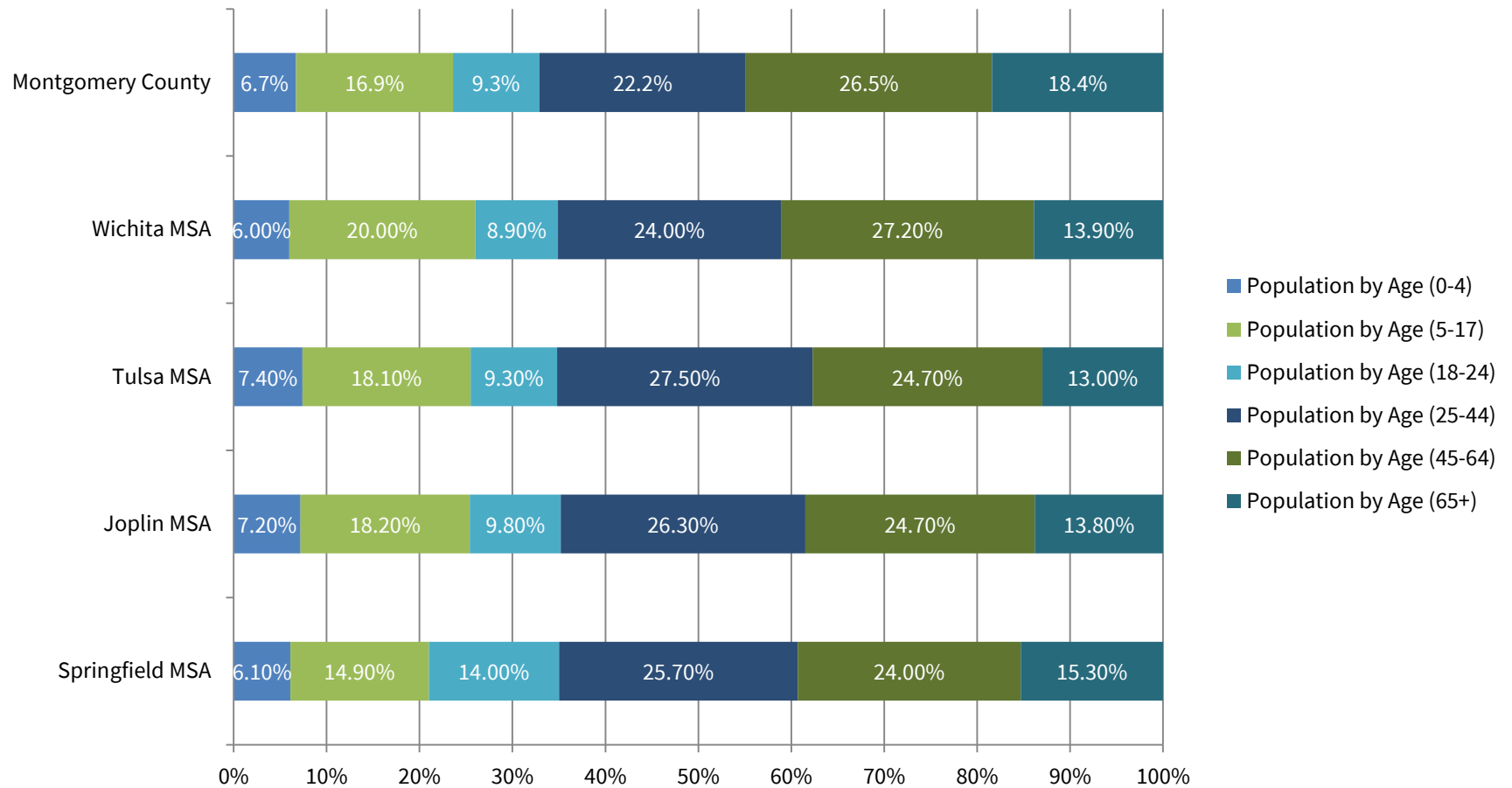
Green Line = Actual change over time
Dotted Line = Average trend over time

Source: U.S. Census Bureau, 2017

Regional Market Assessment

DEMOGRAPHICS

POPULATION RANGE BY AGES

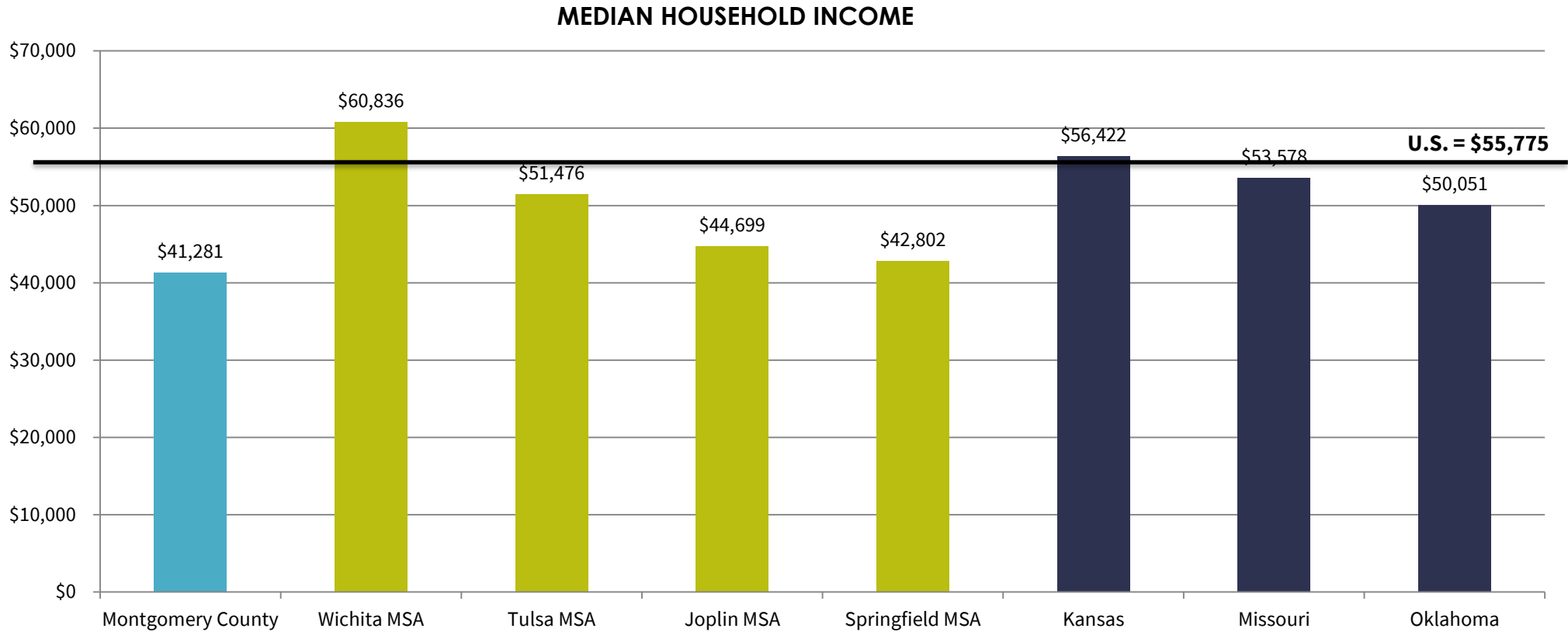


Source: U.S. Census Bureau, 2017

Regional Market Assessment

ECONOMICS

MEDIAN HOUSEHOLD INCOME

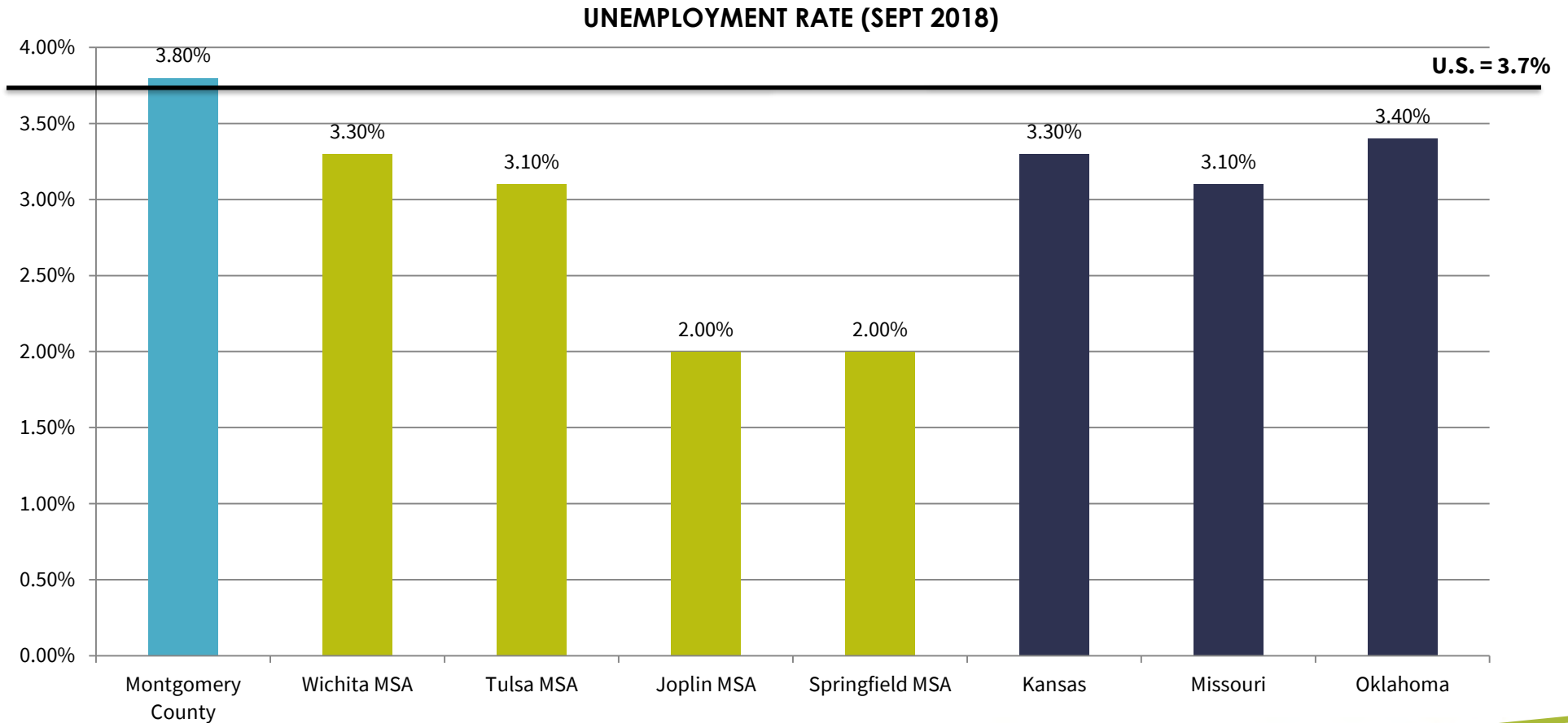


Source: U.S. Census Bureau, 2017

Regional Market Assessment

ECONOMICS

UNEMPLOYMENT RATE (SEPTEMBER 2018)

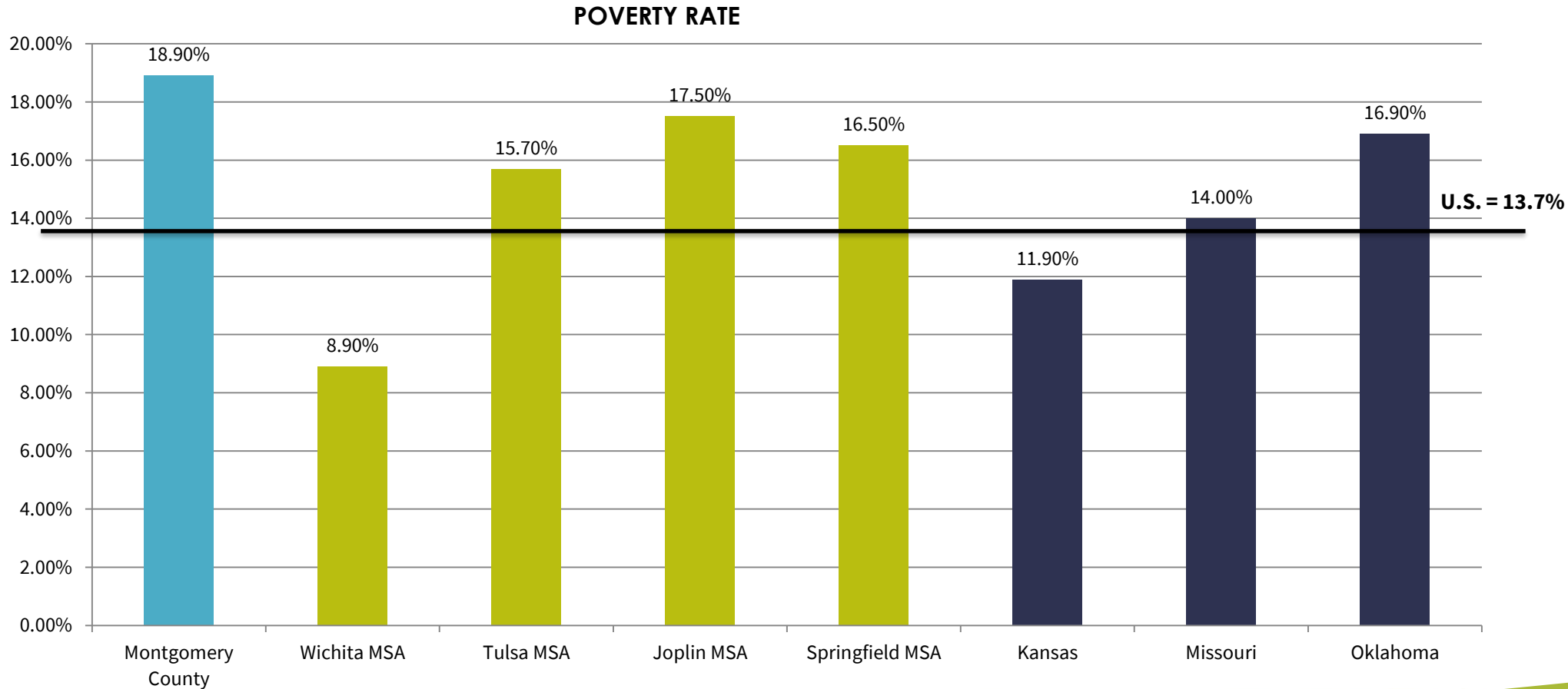


Source: U.S. Census Bureau, 2017

Regional Market Assessment

ECONOMICS

POVERTY RATE



Source: U.S. Census Bureau, 2017

Regional Market Assessment

ECONOMICS

TAX RANKINGS – 2018 STATE BUSINESS TAX CLIMATE

	KANSAS	MISSOURI	OKLAHOMA
Individual Income Tax Rate	5.70%	5.90%	5.00%
Corporate Income Tax Rate	7.00%	6.25%	6.00%
State Sales Tax Rate	6.50%	4.23%	4.50%
Overall Tax Ranking (out of 50)	28	14	26
Sales Tax Ranking (out of 50)	31	25	39
Unemployment Insurance Tax Rank (out of 50)	15	8	1
Property Tax Rank (out of 50)	20	7	19

Source: Tax Foundation, 2018

The color scale for each row goes from highest (dark red) to lowest (dark green)

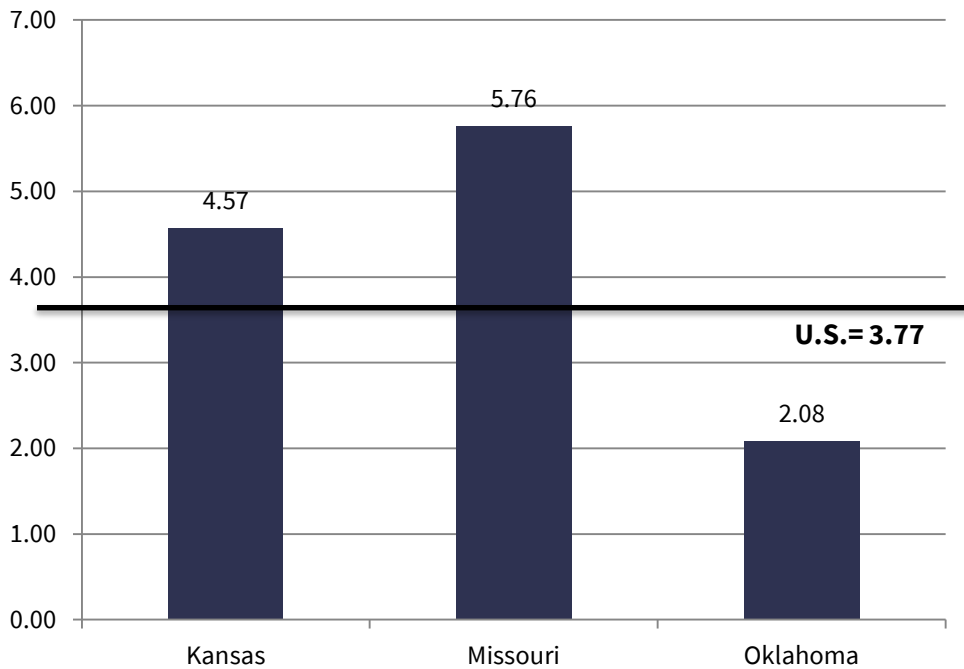
Note: Tax rankings only factor in state sales tax rates, local sales tax rates not included in state level comparison.

Regional Market Assessment

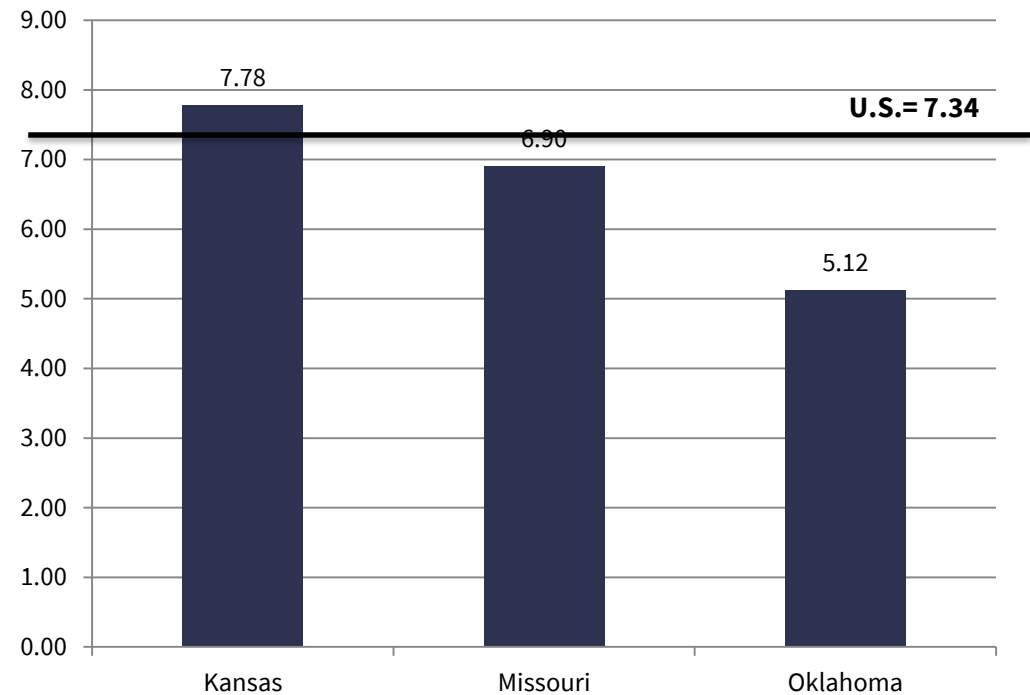
ECONOMICS

ELECTRIC AND GAS COSTS

**AVERAGE INDUSTRIAL GAS COSTS
(IN DOLLARS PER THOUSAND CUBIC FEET)**



**AVERAGE INDUSTRIAL ELECTRIC COSTS
(IN CENTS PER KILOWATT-HOUR)**

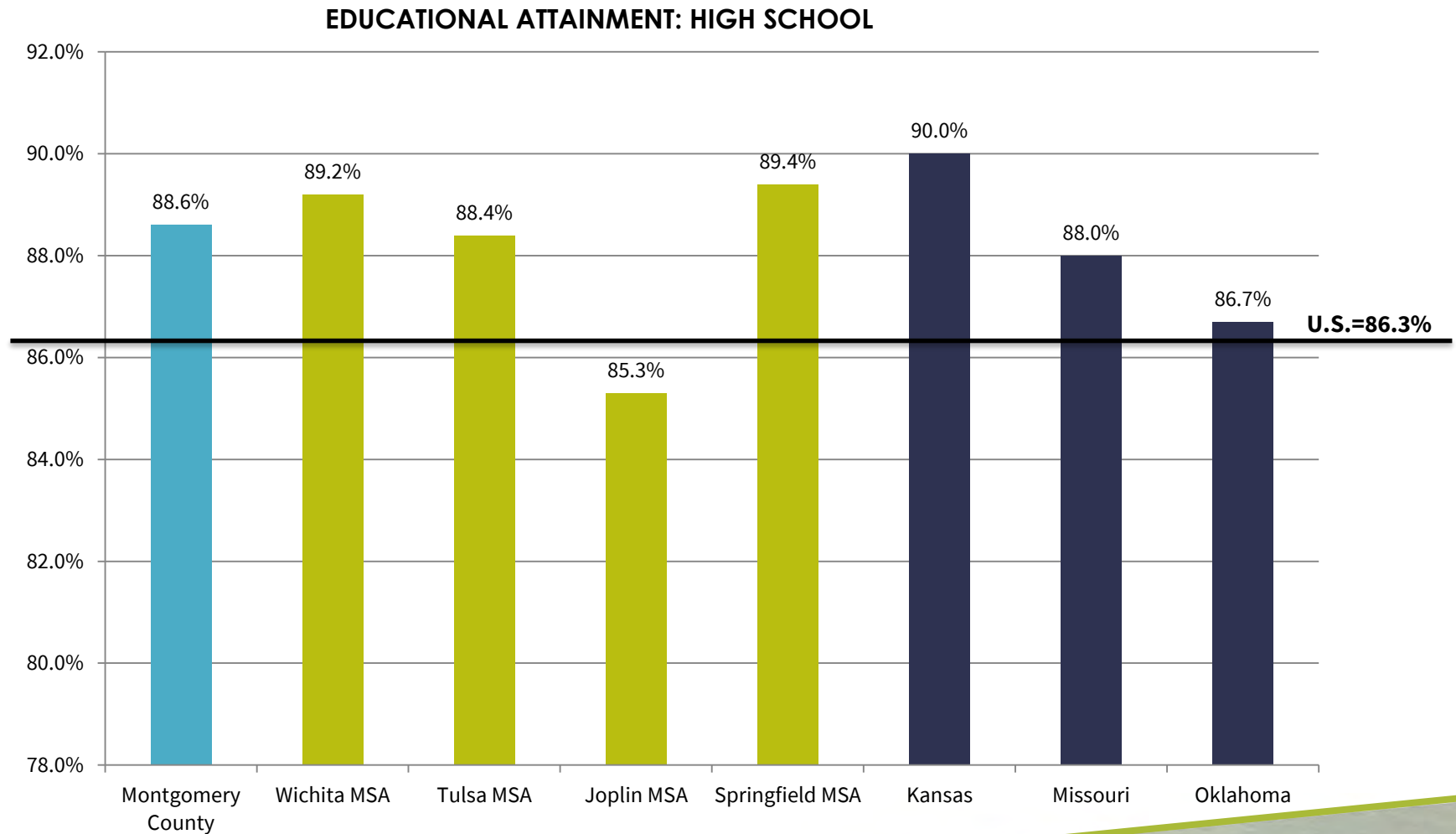


Source: EIA.gov, July 2018

Regional Market Assessment

EDUCATION

EDUCATIONAL ATTAINMENT



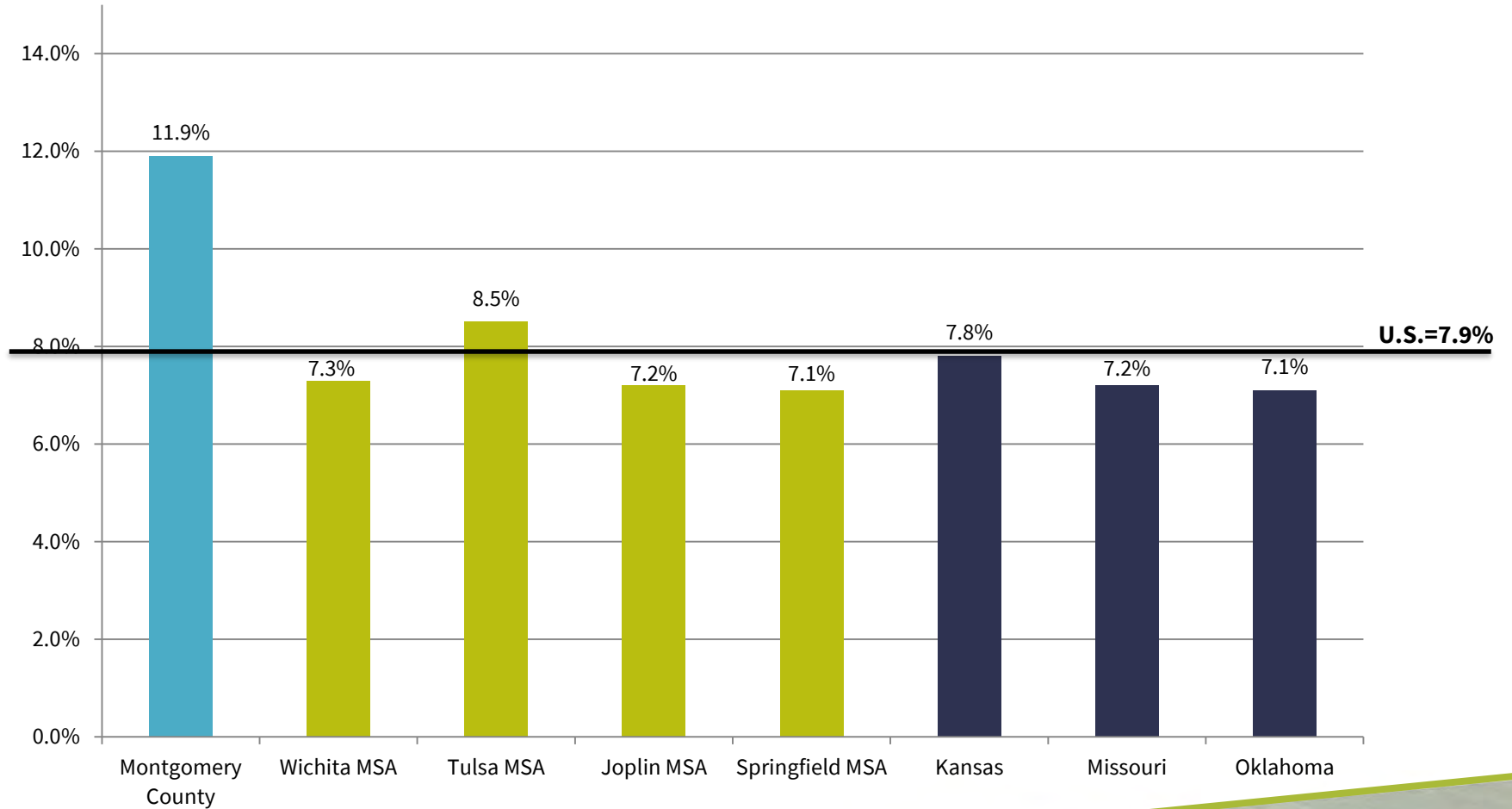
Source: U.S. Census Bureau, 2017

Regional Market Assessment

EDUCATION

EDUCATIONAL ATTAINMENT

POST HS - 2-YEAR

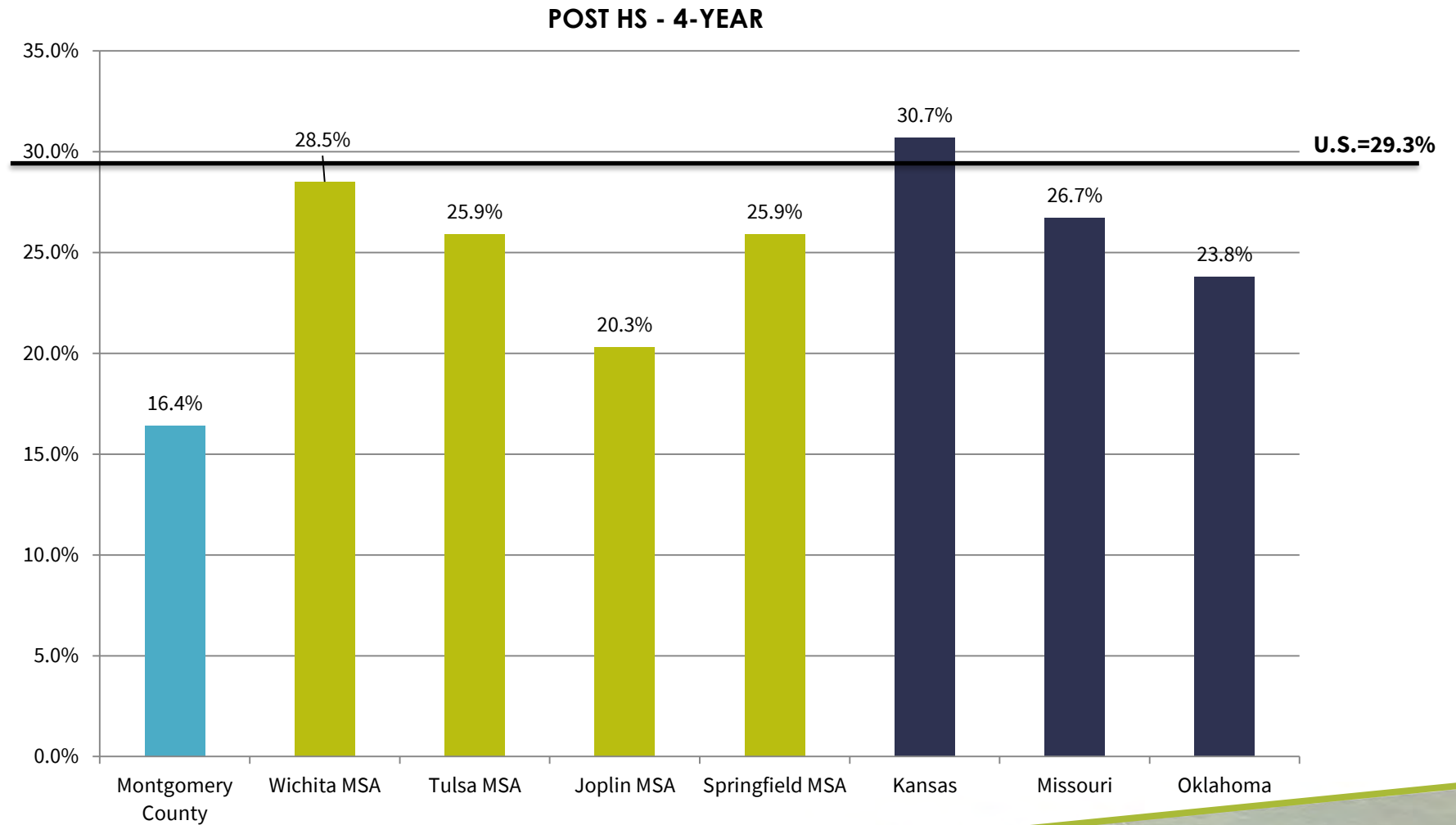


Source: U.S. Census Bureau, 2017

Regional Market Assessment

EDUCATION

EDUCATIONAL ATTAINMENT



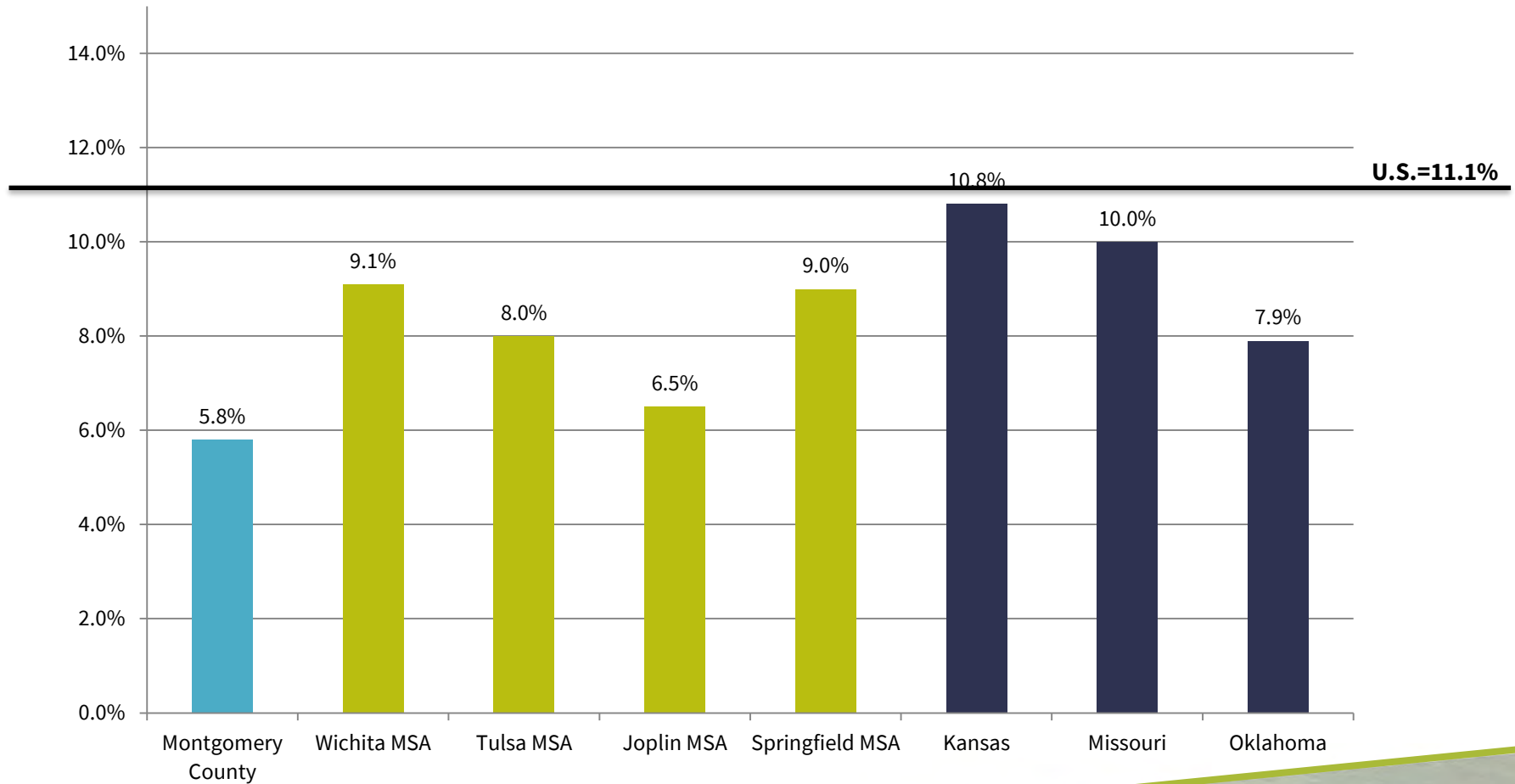
Source: U.S. Census Bureau, 2017

Regional Market Assessment

EDUCATION

EDUCATIONAL ATTAINMENT

POST HS - GRAD SCHOOL



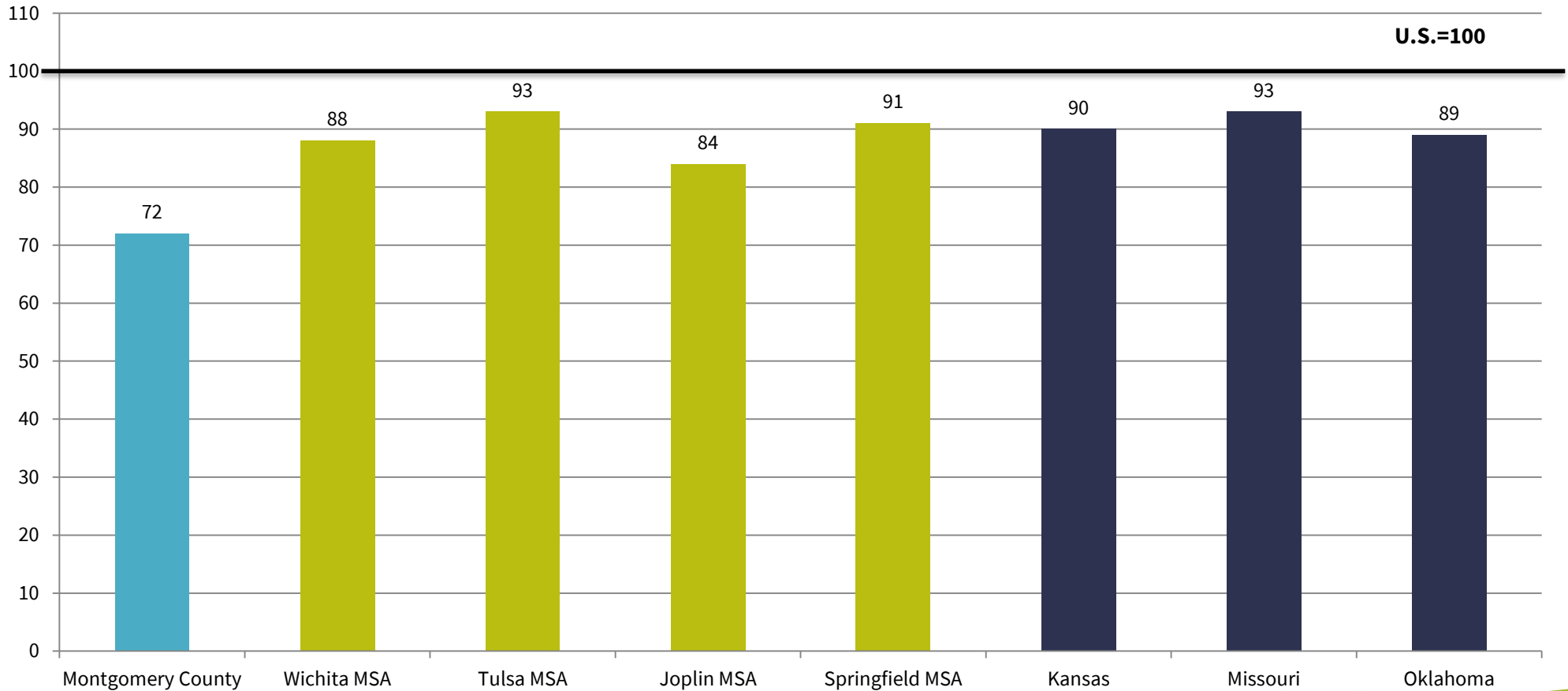
Source: U.S. Census Bureau, 2017

Regional Market Assessment

QUALITY OF LIFE

COST OF LIVING

COST OF LIVING: OVERALL

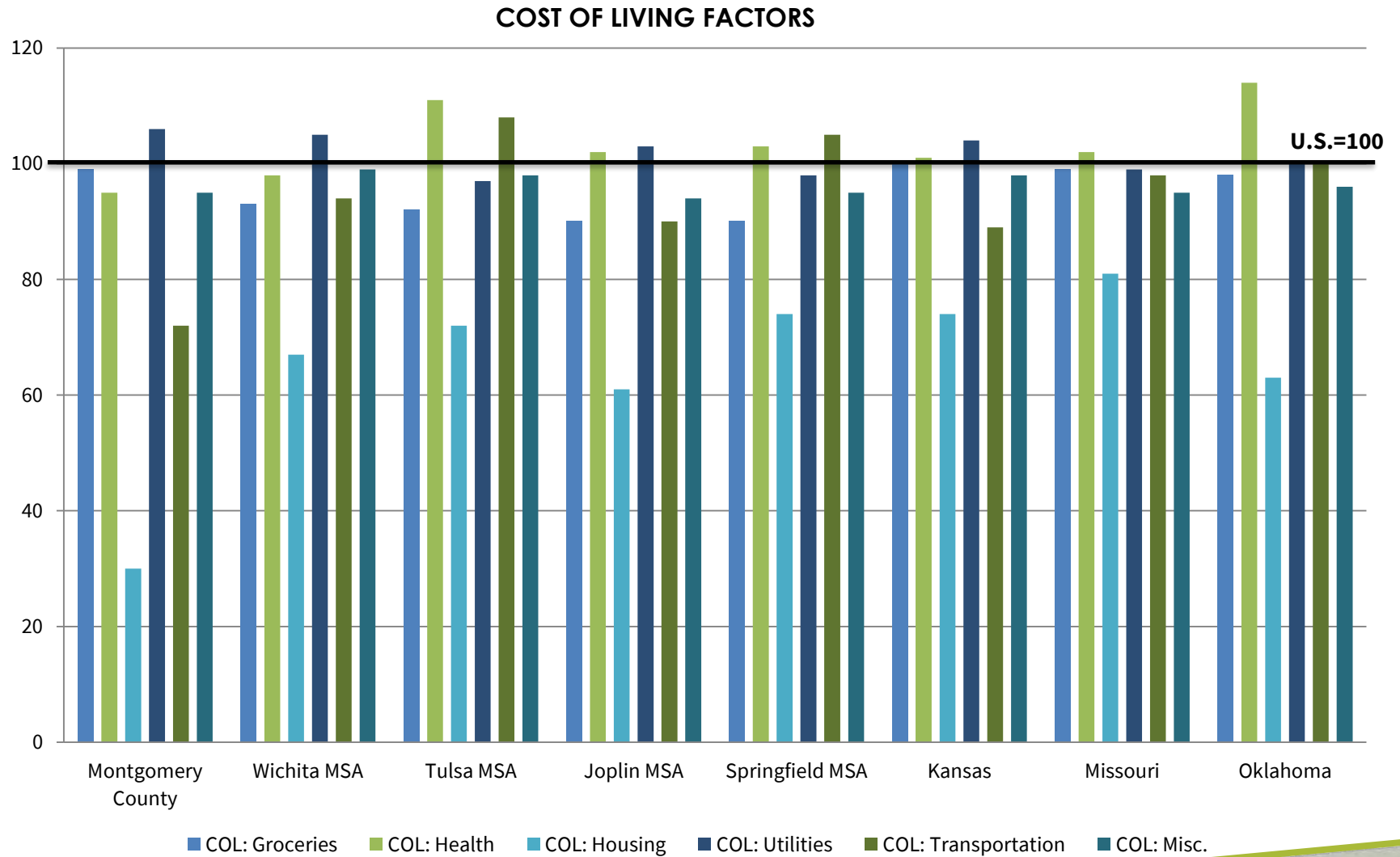


Source: Sperling's Best Places, 2017

Regional Market Assessment

QUALITY OF LIFE

COST OF LIVING

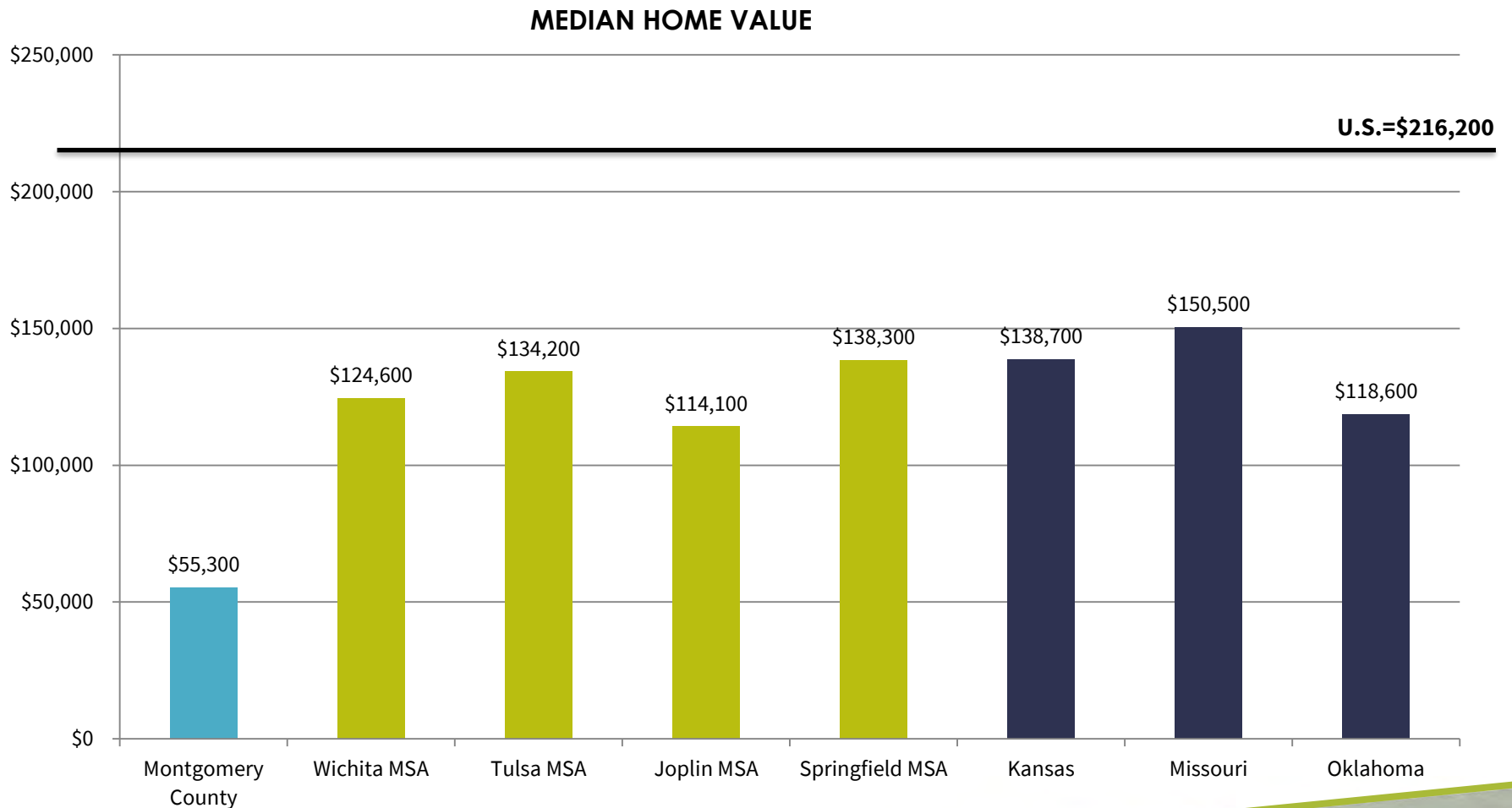


Source: Sperling's Best Places, 2017

Regional Market Assessment

QUALITY OF LIFE

MEDIAN HOME VALUE

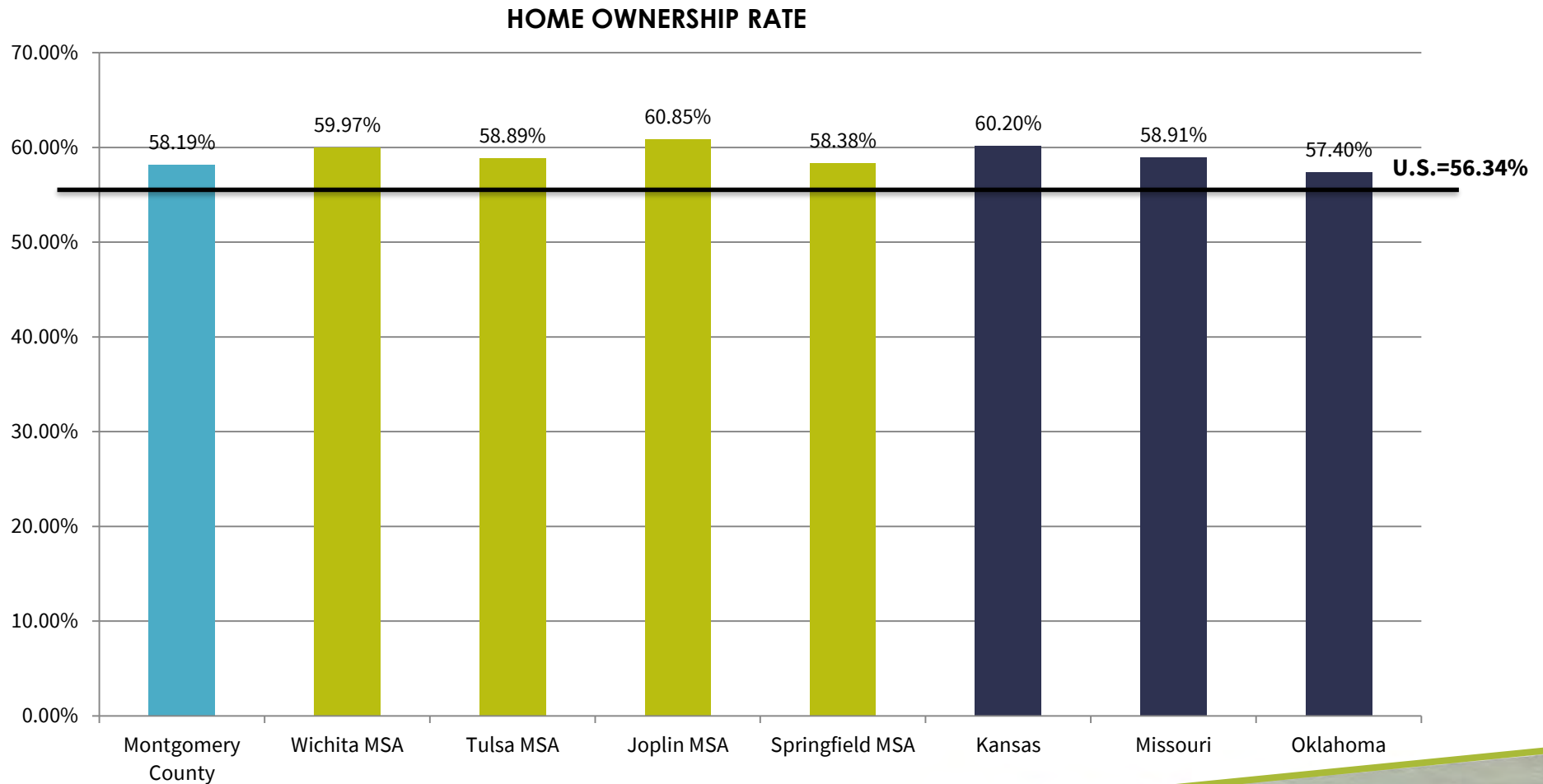


Source: Sperling's Best Places, 2017

Regional Market Assessment

QUALITY OF LIFE

HOME OWNERSHIP RATE

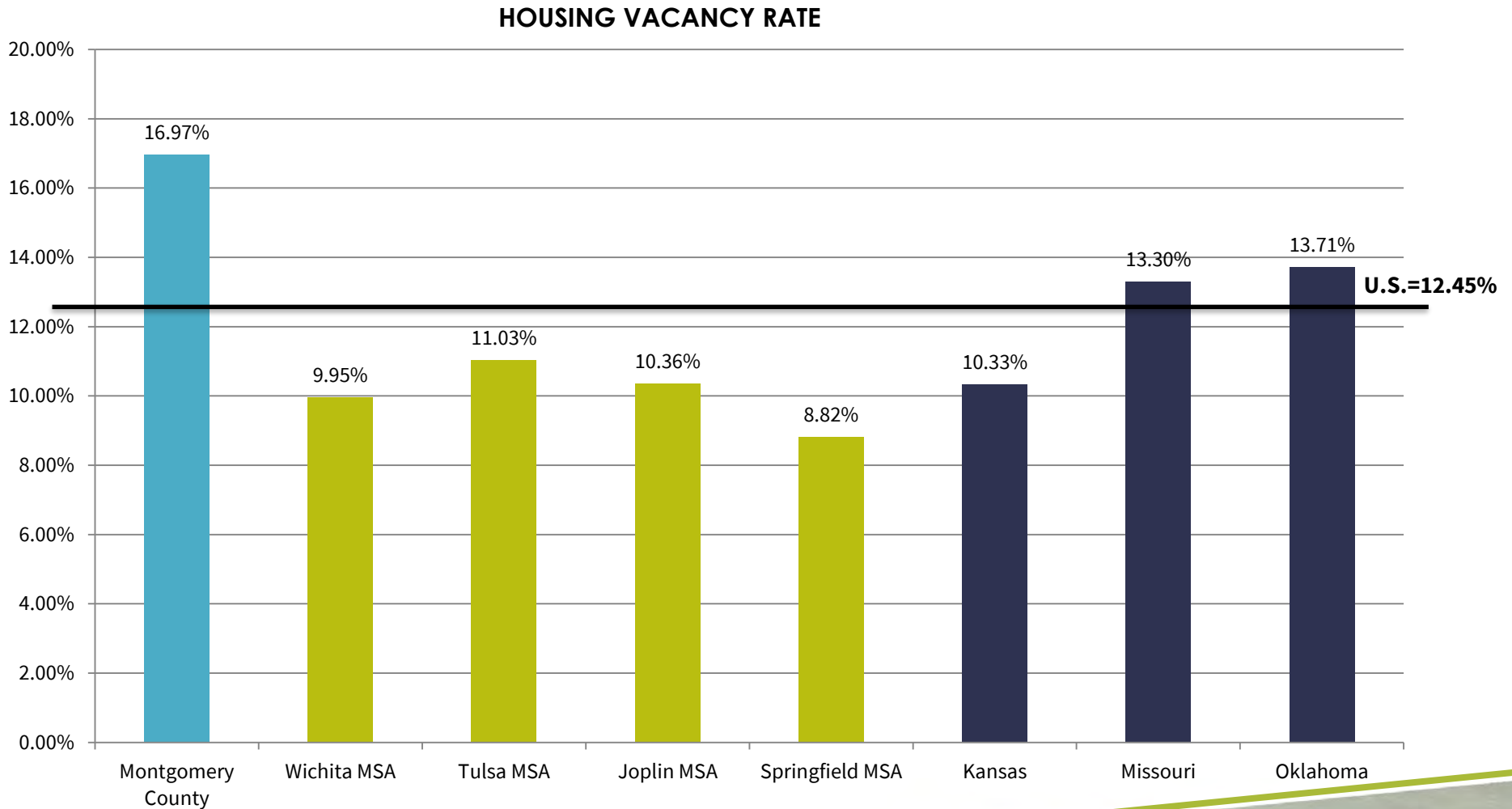


Source: Sperling's Best Places, 2017

Regional Market Assessment

QUALITY OF LIFE

HOUSING VACANCY RATE



Source: Sperling's Best Places, 2017



Core Economic Assets and Business Environment

Core Economic Assets and Business Environment

INFRASTRUCTURE

Highway

Montgomery County has access to US Routes 75, 160, 166, 169, and 400. US Route 169 has been identified as a primary freight line by the Governor's office, and it currently planned to receive a new interchange within Montgomery County. While much of the roads are currently 2-lane only, KDOT has acquired all the land in Montgomery County necessary to allow for the roads to become 4-lanes, as is intended in their 50-year plan.

Rail

Montgomery County has access to five Class I railroads, and is most served by Union Pacific and South Kansas & Oklahoma Railroad. A number of the industrial parks and sites/buildings throughout the county have direct rail access to the Port of Catoosa, including the former Amazon Distribution Center and the former Southwire Building.

Air

Montgomery County has access to the Coffeyville and Independence municipal airports. The Tulsa International Airport is located in under an hour and a half drive from the County, and the Wichita Dwight D. Eisenhower National Airport is located in under a two and a half hour drive. The Kansas City International Airport is located a three hour drive from the County and offers a variety of national and international flight destinations.

Port

While Montgomery County has no major port in its immediate vicinity, it is located in under an hour and a half by rail from the Tulsa Port of Catoosa, offering access to the greater Arkansas River.

Core Economic Assets and Business Environment

INFRASTRUCTURE

Sites

Montgomery County has a number of sites and industrial parks, including the West Laurel Industrial Park (56.58 acres), the South Airport Industrial Park (68 acres), the Caney Industrial Park (58.65 acres) and the Cherryvale Industrial Park (62.19 acres). These industrial parks are all utility served, have multiple entrances/exits onto the highways, and are ready for development.

Buildings

Montgomery County likewise has a number of recently vacated buildings on the market that are highly suitable for prospective businesses locating to relocate or expand. This includes the former Amazon Distribution Center (877,250 sq. ft.) the former Southwire Building (406,027 sq. ft.), and the former Arco Building (100,000 sq. ft.).

Utilities

Utilities were noted by employers to be competitive. As compiled by the US Energy Information Administration, relative to its neighboring states Kansas's gas costs are lower than Missouri's but higher than Oklahoma's, and its electricity costs are higher than both states. Broadband was noted to be limited outside of city boundaries.

Core Economic Assets and Business Environment

LABOR AND TALENT

Community Colleges, Tech Schools, and Training Programs

- **Coffeyville Community College**, with an enrollment of about 1,800 students. The community college offers a number of skilled trade and technical degrees in various fields, including agriculture, welding, precision machining, construction, information systems, automotive services, and collision repair, among others. Coffeyville Community College was praised by numerous employers as being highly responsive to industry needs throughout the Montgomery County region.
- **Independence Community College**, with an enrollment of about 900 students. The community college offers programs in engineering, business and computer information technology. The community college also offers a strong entrepreneurship program, including the only Fab Lab in the state of Kansas, which provides a space for creativity and innovation. This includes state-of-the-art welding stations, a vehicle-sized paint booth, collaborative entrepreneur incubator space, and new work tables and offices.

Four-Year Universities

There are no four-year universities within the immediate Montgomery County region; however, there are numerous four-year universities located within close proximity in the nearby cities of Pittsburg, Tulsa, Wichita and Kansas City. The most prominent are Pittsburg State University, the University of Tulsa, Wichita State University, and the University of Missouri-Kansas City.

Educational Attainment

Montgomery County has lower high school attainment rates than the state of Kansas average, but higher than the average of the neighboring states of Oklahoma and Missouri, as well as the US average. The County has lower four-year degree and grad school degree attainment than all comparison regions, but significantly higher 2-year degree attainment than all comparison regions.

Availability of Labor

Montgomery County has higher unemployment rates than all comparison regions, as well as slightly higher than the national average. This suggests that the County is not at full employment and has additional labor capacity that can potentially be leveraged. It should also be noted that the region has experienced a steady decline in population over the past 10-year period, which tightens the labor market.

Work Ethic/Productivity of Labor

Employers generally noted a strong work ethic in the workforce, although many employers noted a subsection of the population that they considered to be “unemployable”, often due to drug issues. There are some turnover issue, however this varied greatly from employer to employer.

Core Economic Assets and Business Environment

REGULATIONS AND INCENTIVES

Regulatory and Permitting

Kansas ranks 11th out of all 50 states on Forbes Best States for Business-Regulatory Environment (2018). A few employers noted challenges working with the state on regulations, but generally found that it was not unusually burdensome. Most employers had no issues working with the local government.

Incentives

The State of Kansas offers a variety of incentives, with a number tailored towards industrial training, as well as machinery and equipment tax exemptions and expense deductions. Kansas offers the ROZ (Rural Opportunity Zone) Program, which is most often used for student loan repayments. Montgomery County also offers the standard mix of financing and abatements commonly offered at the local level, as well as a targeted manufacturing /industrial business cash incentive program.

State Business Climate

Kansas ranks 28th on “Forbes Best States for Business”. As part of this overall ranking, Forbes ranks Kansas 11th for Regulatory Environment, 26th for Labor Supply, 29^h for Business Costs, Growth Prospects and Quality of Life, 37th for Economic Climate and 39th for Business Costs. News & World Report ranks Kansas the #29 state in the country.

Core Economic Assets and Business Environment

KEY STATEWIDE INCENTIVES - KANSAS (FROM KANSAS DEPARTMENT OF COMMERCE)

- **High Performance Incentive Program (HPIP):** Up to a 10% tax credit on new capital investment over first \$50,000 of investment (or \$1 Million in 5 metro counties). Exemption from sales tax for eligible capital investment/expenditures. Eligibility: Pay an above average wage for NAICS category; and Invest at least 2% of payroll in training.
- **Promoting Employment Across Kansas (PEAK):** Companies retain 95% of the payroll tax of the “PEAK eligible” jobs for a period of up to 10 years. The PEAK job’s wages must meet or exceed the county median wage. Must be creating at least five new jobs in Kansas (10 in Metro).
- **Machinery & Equipment Expense Deduction:** Expense deduction for business machinery and equipment. The one-time deduction for each purchase of machinery and equipment. The expensing deduction program and HPIP cannot both be utilized for the same item/asset.
- **Kansas Industrial Training (KIT) Program:** Workforce training funds to companies to help offset costs of training new employees. Maximum award per trainee is \$2,000; however, the average award is typically \$200-400 per trainee. Wide range of eligible costs is allowed (i.e. instructors’ salaries/fees, training curriculum/manuals).
- **Kansas Industrial Retraining (KIR) Program:** Workforce training funds to companies to help offset costs of training existing employees. Maximum funding is 50% of total costs – requires dollar-for-dollar match from company. Average award (per trainee), wage requirement, health care requirement and eligible costs same as KIT Program.
- **Machinery & Equipment Property Tax Exemption:** Exemption of personal property taxes on machinery and equipment purchased or leased by Kansas companies. Exemption on M&E acquired or brought into the State for use in a Kansas business facility. M&E can be new or used.
- **Utilities Sales Tax Exemption:** Electricity, gas, and water consumed to run machinery and equipment which will produce, manufacture, process, mine, drill or refine personal property is exempt from state and local sales tax.
- **Rural Opportunity Zones:** By moving into a ROZ county, employees may qualify for income tax abatements or student loan repayments. Employees can receive a tax credit for Kansas income tax for five years. Individuals must move to a ROZ county, and live there for a year. Repayment of student loans up to \$15,000 in 20 percent increments for up to five years.

Core Economic Assets and Business Environment

KEY LOCAL/REGIONAL INCENTIVES – MONTGOMERY COUNTY (FROM MONTGOMERY COUNTY ACTION COUNCIL)

- **Manufacturing Industrial Business Cash Incentive Program:** Cash incentives based on jobs and employee residency from \$500 - \$1,000 per new job. Additional \$250/Employee who lives in Coffeyville School District. Grants, Forgivable Loan Programs, and Low interest Loan Programs are available.
- **Industrial Revenue Bonds:** City will issue up to \$30 Million in IRB's and pay up to \$10,000 on Issuance Costs of Bonds.
- **Electricity Utility Incentive Program:** Depending on Demand: Either an Economic Development Rider or an incentive that would offer At-Cost Electricity for 3 years, then 75% Discount in Year 4, 50% in year 5, and 25% Discount in year 6, depending on community and electrical provider.
- **County: Job Creation Forgivable Loan/Grant:** Cash Incentives based on jobs, economic impact, and employee residency from \$500 - \$1,000 per job created.
- **Micro-Loan Programs:** City of Coffeyville: \$75,000. CDBG Micro-Loan: \$25,000. MCAC Micro-Loan: \$25,000. E-Community: \$40,000+.

Core Economic Assets and Business Environment

GENERAL BUSINESS COSTS ASSET MAP

GENERAL BUSINESS COSTS ASSET MAP COMMENTS

The asset map to the right depicts the Montgomery County region's competitiveness compared to the state of Kansas, surrounding states, as well as the United States as a whole.

- Labor costs in the Montgomery County region are lower than average for the majority of industries compared to the state of Kansas and the national average. In no industries are the labor costs in the Montgomery County region higher than the national average.
- Kansas generally has less competitive tax rankings relative to its neighboring states. The exceptions are the individual income tax rate, which is lower than Missouri but higher than Oklahoma, and the sales tax ranking, which ranks behind Missouri but ahead of Oklahoma. Kansas ranks 28th overall on "Forbes Best States for Business".
- Industrial gas costs in Kansas lower than Missouri but higher than Oklahoma. Industrial electricity costs are higher in Kansas than both Missouri and Oklahoma. For both costs, they are slightly higher in Kansas than the US average.
- Montgomery County offers the standard mix of financing and abatements. Kansas offers a variety of incentives, with a number tailored towards industrial training, as well as machinery and equipment tax exemptions and expense deductions. Kansas offers the ROZ (Rural Opportunity Zone) Program.
- The cost of living in Montgomery County is 38% lower than the national average, and the cost of living in Kansas is 10% lower than the national average. The cost of housing in Montgomery County is 70% lower than the national average.



Note: Dotted lines down represent the variability of importance of each factor depending on the industry.

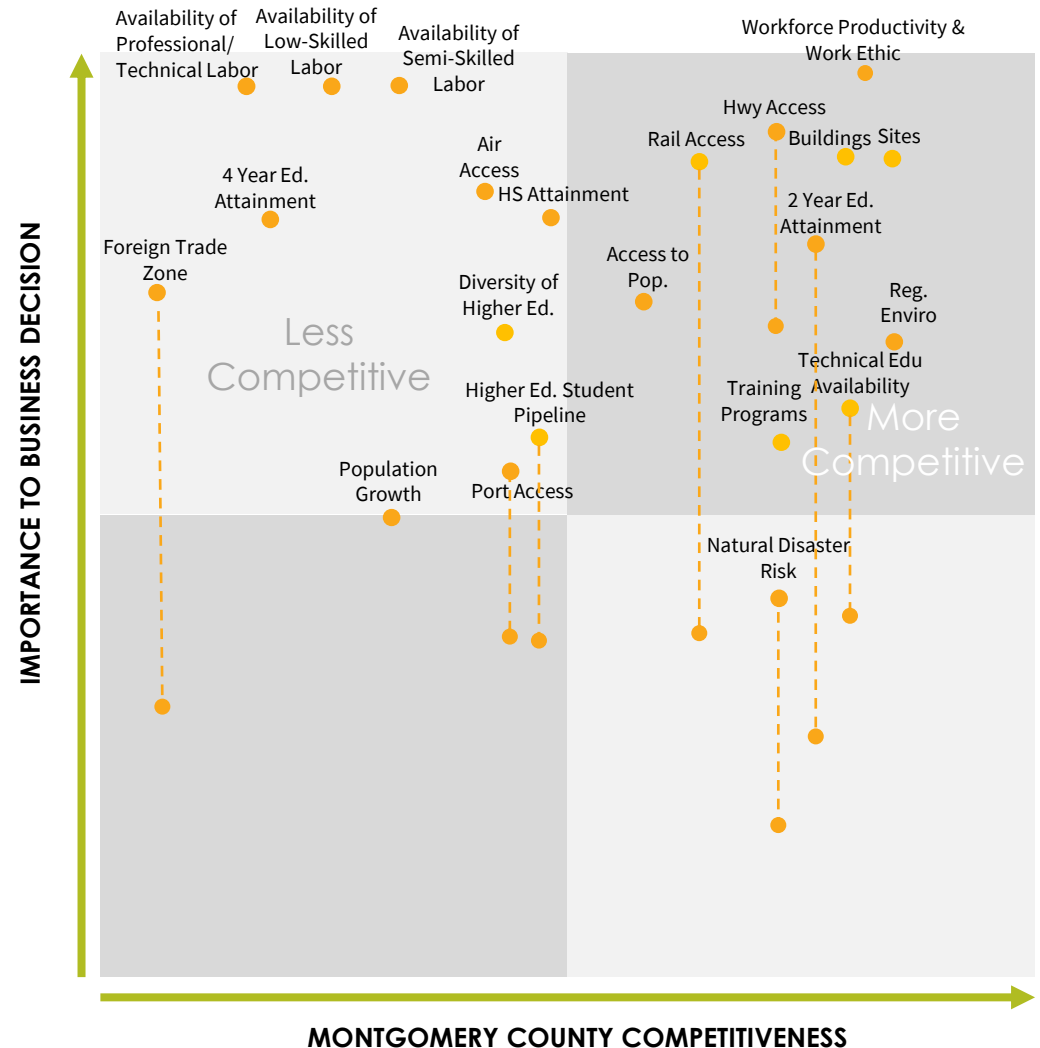
Core Economic Assets and Business Environment

GENERAL BUSINESS CONDITIONS ASSET MAP COMMENTS

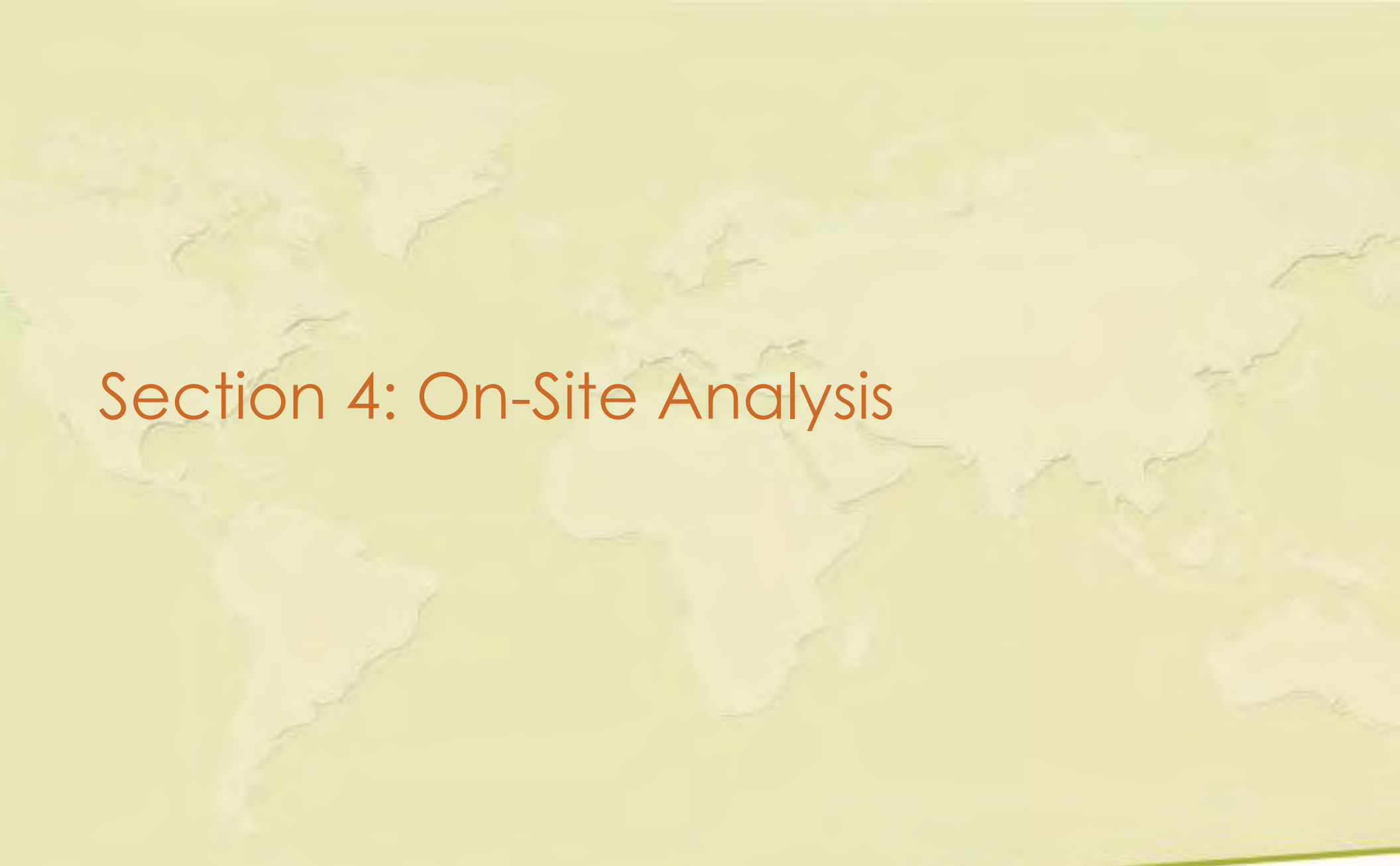
The asset map to the right depicts the Montgomery County region competitiveness compared to the state of Kansas, surrounding states, as well as the United States as a whole.

- There has been negative population growth over in the Montgomery County region, decreasing by -8.2% since 2010. The state of Kansas has experienced the weak but positive population growth of 0.96% over the past 5-year period.
- Availability of labor was noted by employers as a key challenge, regardless of labor type. Low-skilled labor and semi-skilled labor seemed to be the most acute challenges, as the majority of industry require these positions.
- The Montgomery County region has a large amount of land sites and buildings available for companies looking to expand or relocate. For sites, these include the West Laurel Industrial Park, the South Airport Industrial Park, the Caney Industrial Park, and the Cherryvale Industrial Park. For buildings, these include the former Amazon Distribution Center and the former Arco Building.
- The Montgomery County region has access to Coffeyville Community College and Independence Community College. Independence Community College provides access to the only Fab Lab in the state of Kansas. There are no 4-year universities in the immediate region, however there are a number of 4-year universities in the nearby metro areas of Pittsburg, Tulsa, Wichita and Kansas City.
- Work ethic was generally found to be of a good quality by employers. Many employers specified that their long-term workforce was of a good quality, especially in regards to productivity and low turnover. A number of employers noted a subsection of the population that they considered to be “unemployable”, often due to drug issues.
- Montgomery County has lower high school attainment rates than the state of Kansas average, but higher than the average of the neighboring states of Oklahoma and Missouri, as well as the US average. The County has lower four-year degree and grad school degree attainment than all comparison regions, but significantly higher 2-year degree attainment than all comparison regions.
- The state of Kansas ranks 11th by Forbes for Regulatory Environment. Employers generally found Kansas easy to work with and do business in.

GENERAL CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry.



Section 4: On-Site Analysis

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Employer Interviews

Employer Interviews

INTRODUCTION

Ady Advantage conducted confidential interviews with representatives from six companies in the Montgomery County region that represent and impact the region's economy. Participants were almost all involved in company management, such as owners, directors, managers and vice presidents. Companies ranged in size from 35 employees to 550 and from manufacturing, healthcare, agriculture, and supply chain related industries. All participants were very forth coming and willing to participate in these interviews, which were conducted during our on-site visit to the Montgomery County region during the week of January 21, 2019.

The following table lists the employers interviewed as part of this process.

Company	Name	Title
CVR Energy	Brent Traxel	VP Refinery Manager
John Deere	Joe Fons	Manager
Textron Aviation - Cessna	Paula Schabel Michelle Gifford	General Manager Director, Workforce & Employee Development
Thompson	Rick Thompson Ryan Thompson	Owner Owner
Windsor Place	Monte Coffman	Executive Director
Acme Foundation	Scott Tatman Rick Voss	Sales & Marketing Supervisor VP Marketing Director

Employer Interviews

HOW LONG HAS YOUR COMPANY HAD OPERATIONS HERE? WHERE ELSE DO YOU HAVE LOCATIONS?

There was a large degree of variation in the length of operations between employers, but all employers have operated in the region for at least 20 years. Some have operated in the region for over 100 years.

- We've been here since 1906. We have another refinery in Oklahoma, and a fertilizer plant in Iowa near Dubuque.
- Since 1905.
- 27 years.
- We also have locations in Fredonia and other nearby communities.
- 29 years.
- We build this facility here in 1996. We have other facilities in Wichita, Mexico, and we have a global manufacturing presence.

Employer Interviews

HOW DID YOU CHOOSE TO LOCATE HERE? / WHY ARE YOU LOCATED HERE? IF A LEGACY SITE: HAVE YOU OR WOULD YOU CONSIDER LEAVING?

Companies cited a variety of reasons for locating in the region. These included access to natural resources in the area, the strong economy at the time of locating, and for supply chain and market access.

- We located here due to the oil in the area. There used to be 7 different refineries in a 50-mile radius.
- We built here to make mold for brick companies. We have considered leaving but the cost is prohibitive.
- Coffeyville was booming at the time, and the owners were from the area.
- We located this facility here to specialize in drive drain design and expand our manufacturing.
- This facility was opened due to us reaching maximum capacity in Wichita.

Employer Interviews

WHERE IS YOUR COMPANY'S PRIMARY PRODUCT/SERVICE IN ITS LIFE CYCLE?

About three-quarters of companies identified that their primary product/service was in the growing stage of its life cycle. The remaining quarter identified that their primary product/service was in the maturing to declining phase of its life cycle, with most adding that their company was looking to innovate or add new products to address this reality.

WHAT IS YOUR BIGGEST OPPORTUNITY IN YOUR BUSINESS RIGHT NOW? DO YOU HAVE ANY PLANS TO EXPAND, INVEST OR INTRODUCE NEW PRODUCTS/SERVICES, ETC.?

Employers identified various opportunities, including supply chain opportunities, new product line opportunities, new service offering opportunities, and new investment opportunities.

- Capturing regular crude opportunities on the refining side. Also the resurgence on local crude supply.
- Getting new materials. We have another product line we could make.
- Telehealth services. Broadband is not as much of a challenge.
- We're expanding into a new plant, which should let us hit the next level. We're also still family-owned, unlike much of the rest of the competition, which I think gives us opportunities.
- Our hybrids product line, if they take off in off-road markets.

Employer Interviews

WHAT IS YOUR BIGGEST CHALLENGE IN YOUR BUSINESS RIGHT NOW OR WHAT DO YOU THINK IS THE NUMBER ONE THING THAT IS HOLDING YOU BACK? WHY?

Employers identified a number of challenges, but workforce availability was the most frequently cited. Employers noted the challenge in recruiting and retaining talent, especially skilled/technical labor. Also identified was regulatory challenges, both at a local level and federal.

- Environmental regulations. Manpower and recruiting. Recruiting technical skill is difficult because of the location.
- Manpower - the quantity and the quality.
- Workforce availability. Also, we do a lot of Medicare and Medicaid related work, so public funding can be a concern.
- City regulations. The city can be less friendly to development.
- Being globally competitive. Montgomery County is not a low cost area relative to other areas. There are more regulations and overhead expenses, it's less competitive here than in India or China.
- Trying to find workforce and sustain people across the board.

Employer Interviews

PLEASE DESCRIBE ANY RECENT EXPANSIONS OR LARGE INVESTMENTS AT THIS FACILITY OR ELEWHERE. HOW DID YOU CHOOSE WHERE TO EXPAND? WHAT WERE THE DRIVERS OF THAT PROJECT?

Nearly all the companies that responded to this question noted recent and ongoing investments or expansions. Investments included building expansions, investments in technology, and relocating other locations operations to the facility in the Montgomery area.

- The last major investment was in 2007, with ongoing total investment of \$1.5 billion.
- We have a \$10 million expansion on our shipping building and M&E.
- We're invested in technology.
- We're expanding into a new plant, which should let us hit the next level.
- We've moved some assembly lines here, and we're looking into expanding our warehouse.
- Investments have been made here.

Employer Interviews

IS YOUR COMPANY'S PRIMARY MARKET: LOCAL, REGIONAL, NATIONAL OR INTERNATIONAL?

The orientation of markets for the companies interviewed were mixed among regional and international markets, with about one-half distribution to each.

WHAT PERCENT OF YOUR COMPANY'S LABOR FORCE IS REPRESENTED BY ONE OR MORE UNIONS?

About one-third of companies interviewed had a union presence. Employers indicated that in certain industries in the region there was a noticeable presence of unions, and that influenced wage structures in the region to some degree.

WHAT IS THE AVERAGE EMPLOYEE COMMUTING DISTANCE (ONE-WAY)?

The commuting distance for most employees ranged from about 10 miles to 30 miles, with an average of about 20 miles. Employers noted the frequency of employees living in Coffeyville and commuting to Independence for work, and vice versa.

Employer Interviews

WHAT IS THE AVERAGE EDUCATIONAL LEVEL OF YOUR EMPLOYEES?

All employers identified a high school degree as the average educational level of employees, due to the production nature of much of the industry. Some employees in skilled positions had certifications or some college education.

- Mostly high school, some of the trades have certifications.
- High school.
- Minimum of high school.
- All have their high school diploma, a few have 1-2 years of college.
- For the shop/floor, a high school degree, although some have more. For salaried/office, a degree.
- High school diploma.

WHAT POSITIONS REQUIRE A CERTIFICATE/DEGREE BEYOND HIGH SCHOOL? ARE THOSE DEGREES OFFERED IN THE REGION?

Employers indicated that skilled, technical or professional positions require additional education beyond high school. This included machinists, electricians and engineers.

- Only the technical positions.
- Some - engineering mostly.
- Nurses and other advanced positions.
- Any that do require something beyond high school, we will train if they're the right candidate.
- The salaried positions require degrees. Machinists and electricians require community college or apprenticeship.
- A&P mechanics, support functions for engineers, pilots. We have to look outside Montgomery County for a lot of the talent we need.

Employer Interviews

HOW WOULD YOU RATE THE AVAILABILITY OF WORKERS IN THIS AREA, ON A SCALE FROM 1 TO 5, WITH 5 BEING THE BEST?

For most companies that Ady Advantage interviewed, the availability of workers was low and difficult, although there was some variance between production and professional positions. Overall, the average availability was 2.5.

- 1, it is hard to grow because of all our open positions. It took us 2 years to get to this point.
- 1 or a 2.
- 3
- 3-4 for operators. 1 for technical and skilled professionals.
- 3 to a 4.
- For production a 5, because UWA wages are higher and so it's easy for us to get workers. For salaried, a 2, this takes longer.

WHAT ARE THE HARDEST JOBS TO FILL? WHICH POSITIONS WILL YOU NEED EVEN MORE OF IN THE FUTURE?

Employers generally cited skilled positions to be the most difficult to recruit and retain – electricians, machinists, maintenance, engineers etc. Employers also noted professional, educated positions to be a challenge.

- Technical positions. Some engineers have been unfilled for 2-3 years, especially computer engineering. We have an aging workforce for most positions.
- General labor, it's hard positions and early work.
- Higher education.
- All are tough, but white-collar and educated are the hardest. Quality of life is the barrier, and trailing spouses.
- Skilled trades - electricians, machine maintenance, mechanical engineers.
- Specialized training positions.

Employer Interviews

DESCRIBE YOUR RECRUITMENT PROCESS. HOW EASY IS IT TO RECRUIT EMPLOYEES FROM OUTSIDE THE REGION? HOW DO YOU RECRUIT FROM OUTSIDE THE REGION?

Employers cited a wide range of recruitment activities they are undertaking to try and recruit employees. Avenues identified include the local paper, social media, word of mouth, an career fairs, employee referrals and tech college recruitment.

- We post in local pubs, job boards, our corporate site. For technical we use recruiters.
- We use print and word of mouth. We have bonus for employee referrals.
- Indeed, social media. We have to look outside for key positions.
- Word of mouth, the local paper, Kansas Works.
- For production positions, we use word of mouth and online applications. For salaried positions, we post on Indeed, LinkedIn, etc.
- We go to career fairs and job fairs. We work with the high schools to try to expose high school students to careers here, give the students tours. We do some recruiting at tech colleges in Kansas and across the country.

FROM YOUR PERSPECTIVE, WOULD YOU SAY YOUR COMPANY IS A PREFERRED EMPLOYER, COMPETITIVE OR BELOW MARKET RATE? WHY?

Most employers that identified themselves as being competitive to preferred employers in the region, primarily due to wages and benefits.

- Competitive, for some positions.
- Competitive.
- Preferred - due to UWA wages.
- Preferred - we have competitive pay and offer benefits. We're part of a larger Fortune 500 company so the benefits are very good.
- Preferred.

Employer Interviews

HOW WOULD YOU RATE THE PRODUCTIVITY AND WORK ETHIC OF YOUR EMPLOYEES, ON A SCALE FROM 1 TO 5, WITH 5 BEING THE BEST?

Overall, the employers rated the productivity and work ethic of their workforce highly, with an average of 4.

- 2 to 3. The output isn't where it should be.
- 3.50
- 4
- 4
- 5, no issues.
- 5, very good. UWA helps.

HOW WOULD YOU RATE THE STABILITY OF YOUR EMPLOYEES, ON A SCALE FROM 1 TO 5, WITH 5 BEING THE BEST? DO YOU HAVE ANY ISSUES WITH TURNOVER, ABSENTEEISM RATES?

Overall, the employers rated stability a 3.4, with some but not all employers having some degree of difficulty in terms of stability of their workforce. Turnover and attendance issues varied by employer.

- 5 for the local operators, a 2 to a 3 for the technical workforce. It's a typical Midwest workforce.
- 2. We have a high percentage of temps so high turnover. About 10% are nearing retirement. We have a lot of no-shows.
- 4. Over half our employees have been with us more than 5 years.
- We don't have a lot of turnover. Retired people can stay on part-time.
- It's fairly good, 4. There is occasionally some absenteeism but very little turnover. The only drug issues we see is during the recruitment screenings.
- The stability is fairly good, nothing unusual on turnover.

Employer Interviews

DO YOU CURRENTLY WORK WITH ANY LOCAL EDUCATIONAL INSTITUTIONS ON TRAINING PROGRAMS OR DO YOU PRIMARILY TRAIN IN-HOUSE?

Most of the employers interviewed have worked with the community colleges in the area at some point, although the degree of relationship between the business and the community colleges varied. Employers leveraged the community colleges most on technical training.

- Some basic training is being potentially planned. We do some interfacing with the community college on welding.
- Electrical and some specialized skills. But most of our training is in-house. We have some cross training for general labor.
- We do some with the community colleges - Coffeyville, Labette, Oklahoma Wesleyan.
- We work with Coffeyville Community College, all our sales and service guys go through their courses. We also use them for welding. We hire a lot of people out of there.
- We don't work with any to develop curriculum, the community colleges in the area already generally have a pretty robust program selection. But we give our employees tuition reimbursement to pursue classes, both for production and salaried.
- We mostly do in-house training on-site here in our facility.

WHAT TRAINING NEEDS WILL YOU HAVE IN THE FUTURE? CAN THESE BE DONE LOCALLY?

Employers identified a variety of training needs that they will need or have greater demand for going forward. Most frequently this involved technical/skilled training, such as engineers, mechanists and maintenance. Employers generally found these training needs to be available locally.

- Potentially specialized instrument training.
- Getting mechanists and maintenance.
- Mental health needs.
- No, Coffeyville Community College does a great job, and the high school is very accommodating as well.
- Automation engineering, skilled trades and engineers. The community colleges and the state colleges do offer these programs.
- Aviation.

Employer Interviews

TO WHAT EXTENT DOES YOUR FACILITY USE AUTOMATION? WHAT ARE YOUR FUTURE PLANS ON AUTOMATION?

The majority of employers have implemented some automation technologies, although for most these processes are only supplemental and in their early stages. Employers foresaw automation becoming a bigger component of their facilities in the future.

- We have a digital control station, wireless functions in the network. In the future we will emphasis reliability, performance improvement, and pushing automation into the production area.
- Just in internal processes. We do see a lot of opportunity to expand in automation. Our current plant layout is a challenge to some extent however, there are prohibitive costs.
- We're looking into some automation for telehealth.
- The new plant will have a lot of automation, components will be fully automated. We will be needing more IT skilled people as a result.
- The production we do consists of unique individual tasks, so it doesn't lend itself well to automation. Lots of small components of a process may be automated though. This will increase going forward.
- Some, but its more supplemental. We're always looking at new technology.

Employer Interviews

WHAT STRATEGIC PARTNERSHIPS DO YOU HAVE WITH NON-PROFITS, HIGHER EDUCATION OR OTHER ENTITIES?

Employers identified a variety of partnerships with non-profits, organizations and entities. Examples include the Medical Center, the Salvation Center, the Boys & Girls Club, etc.

- We work with the Kansas universities, the Medical Center, the state government.
- We're on the boards or organizations here. We have partnerships with the workforce institutions, etc.
- We do volunteerism and donations. We put \$150 thousand into the early learning center. We work with the Salvation Center, the Boys & Girls Clubs, and other community engagement projects.
- We are a partner and support the community.

Employer Interviews

COSTS OF DOING BUSINESS IN THE REGION

In general, costs in the Montgomery County region seem to be competitive. Labor costs, generally the largest expense for manufacturing, were seen to be competitive to low. Employers universally found tax costs to be the cost that was most uncompetitively high – specifically property taxes and sales taxes. Distribution costs were seen as competitive to high, due to the rural nature of the region and the distance from markets. Utility costs and utility costs were seen as competitive.

Labor

- Competitive to high - UWA wages
- Competitive - on a global scale
- Competitive
- Competitive
- Low to competitive
- Low to competitive

Utilities

- High – electric
- Competitive, although electricity has gone up
- Competitive - comparable rates to other communities in Kansas.
- Competitive
- Competitive

Taxes

- High
- High - property taxes
- High
- High - property and sales
- High - property taxes. We also have a decreasing tax base but are still offering the same services.
- High - property. Some people live in Oklahoma and commute here for work due to property and sales taxes.

Occupancy

- Competitive to high
- Competitive
- Competitive to low
- Low
- Low
- NA

Distribution

- High - some suppliers are very high, especially with the railroad
- Competitive - although since we're rural we have to drive further. A 4-lane would lower the costs
- Competitive
- Competitive
- Competitive to low
- NA

Employer Interviews

HAVE YOU HAD ANY REGULATORY OR PERMITTING ISSUES AT THE STATE-LEVEL THAT WILL IMPACT YOUR BUSINESS?

Employers interviewed had mixed opinions on working with the state of Kansas. Some employers cited challenges as it relates to regulations and ease of working with state agencies, however other employers stated no issues at all and that the state of Kansas was easy to work with.

- We have challenges with the state, some ongoing issues.
- We have challenges with the EPA and landfill, it's 2 years to get the landfill permitted.
- The regulatory environment for care facilities is higher.
- We have a pretty good relationship with the state.
- The state of Kansas is very easy to do business with, it's very business friendly.
- No issues.

HAVE YOU HAD ANY REGULATORY OR PERMITTING ISSUES AT THE LOCAL-LEVEL THAT WILL IMPACT YOUR BUSINESS?

One employer cited significant frustrations working with the city, stating the city was difficult to work with and that they were aware of other employers experiencing challenges too. This employer was the exception however, all other employers interviewed stated having no issues with regulations or permitting at a local level.

- None
- The city claims streets should be taken care of by local businesses, but nothing really beyond that.
- None
- The city can be burdensome. There were regulations in our expansion, we had to abandon some ideas in it as a result. Other companies have had issues too we know. It's more the way these regulations are handled than the fact that they exist, we understand why they exist.
- We work very well with the local area.
- No issues.

Employer Interviews

DO YOU KNOW OF OR HAVE YOU TAKEN ADVANTAGE OF ANY STATE INCENTIVES?

Companies were generally aware that the state likely has incentives or programs, and some companies have taken advantage of them or know that they have in the past. Many had not however, citing the hurdles of qualifications, limits and timelines.

- We looked but did not qualify for them.
- We just got a grant from the USDA. In the past we have taken advantage of other state incentives.
- Some tax incentives.
- Limits and timelines are hurdles to taking advantage of these incentives.
- No, we generally don't use incentives. We hired over 100 new employees and didn't take any workforce grants, etc. We would rather these resources go to small businesses in the area than a big employer like us.

DO YOU KNOW OF OR HAVE YOU TAKEN ADVANTAGE OF ANY LOCAL INCENTIVES?

Similar to state incentives, companies were also generally aware that local incentives and programs existed. Exemptions from property taxes and tax abatements are some local incentives leveraged by employers.

- None
- IRBs. M&E are exempt from property taxes.
- Some tax abatements.
- ManTech's USDA REAP grant.
- No, we generally don't use incentives. We hired over 100 new employees and didn't take any workforce grants, etc. We would rather these resources go to small businesses in the area than a big employer like us.
- We've worked with Montgomery County on something in the past.

Employer Interviews

WHAT INDUSTRY, TYPES OF BUSINESSES OR SPECIFIC COMPANIES DO YOU THINK WOULD BE A GOOD FIT FOR THE REGION?

Manufacturing was the most noted industry by employers as an industry that would be a good fit for the region, with other identified industries being distribution, warehousing, warehousing, agriculture, and metal manufacturing. Employers noted Tyson as a business that would fit industry in the region.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Employer Interviews

IF THE REGION COULD DO ONE THING DIFFERENT TO HELP EXISTING BUSINESSES, WHAT WOULD IT BE?

Employers provided a variety of responses. Most frequently noted the need for talent development, retention and attraction efforts. Employers noted that quality of life and offering amenities should be a priority to help with these goals. One employer noted the unsustainability of having two community colleges in the county. Another employer noted that the Tyson project would be a boon to the region if it is won, and that it would help reverse the declining population trends in the region.

- We need to recruit people to a place they want to be. We need to grow the area to attract people and amenities to create a different community.
- Anything that would get people to move here and work here.
- We need a more supportive environment.
- Is there a way to expand the opportunity zone to cover the downtown? The downtown needs improvement and development. We also need to exempt agriculture equipment from taxes like other states do. We also need efforts to bring back kids who leave the region.
- We need to educate people. We have people who want to work here, but not live here. We need to improve the quality of life. In regards to Tyson, I think it's a good thing. We need a big project like that to survive, we just recently lost a grocery store due to declining population. We need to grow jobs here, whether Tyson or otherwise. If Tyson brings in immigrant labor, give it 50 years and they will become just as much a community resident as anyone else.
- The technical training schools need to strive to better align what they teach with what employers need. It's also very strange that we are the only county in the state with two technical schools, I don't think that is sustainable.



Stakeholder Interviews

Stakeholder Interviews

INTRODUCTION

Ady Advantage conducted stakeholder interviews on-site during the week of January 21, 2019. The purpose of these interviews was to receive insightful input and perspective from important stakeholders as it relates to supporting efforts to addressing challenges and opportunities within the Montgomery County region. As part of these interviews and focus groups, all participants were provided a brief survey to fill out. An analysis of the Ady Advantage stakeholder interviews can be found on the following slides.

Organization	Name	Title
Boys and Girls Club	Griffin Walker	Director
Chamber of Commerce - Independence	Lisa Wilson	Executive Director
Coffeyville Area Chamber	Aaron Heckman	Chamber Board
Coffeyville Community College	Yvonne Hull	Sr. Director of College Relations, Marketing & Recruitment
Coffeyville Unified School District 445	Michael Speer	Chief Professional Officer
Fab Lab - Independence Community College	Jim Lorrell Tim Haynes	Fab Lab Director Fab Lab Manager
Farm Bureau	David Gordon Scott Gordon Chuck Voelker	Extension Board VP of Farm Bureau President of Farm Bureau
Kansas Works	Lacie Bohr Irene Brennen	Business Service Representative Assistant to Executive Director
SEKTAM of Independence	Chris Moore	Owner
Young Professionals	Joscelyn Kusiak Britany Thomton Nick Riesner	Young Professional Individuals

Stakeholder Interviews

WHAT ARE THE POSITIVE PERCEPTIONS OF THE REGION?

Stakeholders noted a number of positive perceptions about the region, with the most stand-out response being the level of community involvement by the people who live in Montgomery County. Stakeholders noted the passion of individuals about where they live. Also noted were the central location, the local industry, the low costs of doing business, the small-town feel, and the availability of buildings.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Interviews

WHAT ARE THE NEGATIVE PERCEPTIONS OF THE REGION?

Stakeholders also noted a number of negative perceptions about the region, with the most frequently response being that of the youth leaving the region. Stakeholders noted that the kids of the region leave for school and then never come back after graduation, either perceiving a lack of opportunity back home for them or desiring the quality of life and amenities they had been accustomed to elsewhere while attending school. Also identified were the labor shortage in the region, the high taxes, and crime.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Interviews

WHAT INDUSTRY, TYPES OF BUSINESSES OR SPECIFIC COMPANIES DO YOU THINK WOULD BE A GOOD FIT FOR THE REGION?

Agriculture, aviation, transportation, distribution and retail were some of the most identified industries as a good fit for the region, as well as the availability of buildings in the area for relocating companies to move into. Frequently noted was Tyson, as the potential project was very top of mind for many stakeholders. Stakeholders also noted the supply chain and value-added opportunities that would come if Tyson landed in the region.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Interviews

HOW WOULD YOU DESCRIBE THE LEVEL OF ALIGNMENT WITHIN THE AREA? HOW WOULD YOU DESCRIBE THE LEVEL OF REGIONALISM?

Stakeholders repeatedly noted the animosity and intense rivalry between Coffeyville and Independence. Many noted this was lessening over time and as the generations changed, but that there was still a long ways to go before it would stop being an issue. Stakeholders approvingly noted the work that MCAC does in bringing partners together and advocating for greater alignment and regionalism within the area.

- We're getting there. MCAC tries to bring all the players to the table. Some of the state and federal legislation is nudging people to all work more collaboratively. We're looking at ways to not duplicate the services we provide.
- Independence and Coffeyville have rivalry issues. Montgomery County does not act cohesively, there is a divide. There may be a looming reorganization of the community colleges, but this of course depends on funding and enrollment.
- MCAC is the driving force to try and align everybody behind the same goal, and think more regionally. The local Chambers haven't been that involved in these efforts to my awareness.
- There is a strong rivalry between Independence and Coffeyville, but it is slowly fading over time. Leadership Coffeyville and Independence have County Day now, and MCAC does good work in this area. For our organization, we have a specific service area but we'll help industry anywhere in the County - Coffeyville, Independence, Cherryvale, Caney, etc.
- Coffeyville and Independence don't tend to get along well. I think it would be easier to convince Independence to work with Coffeyville, since Independence has more of the downtown restaurants and shops, a free park and zoo. As such, Coffeyville might feel more threatened.
- The farmers get along better than any other groups, the agriculture producers are all fighting for the same thing.
- The last several years people have been much better at working towards the same, common goals. There is still animus between the cities, but it's getting better and there is agreement behind seeking growth. There could be better alignment with the other smaller cities like Caney though. Regional thinking will become more common as the generations turnover.

Stakeholder Interviews

WHAT DO YOU SEE AS SOME OF THE MOST PROMINENT OPPORTUNITIES IN THE REGION?

Stakeholders identified a number of areas that they saw as opportunities for the region. The Tyson project was noted repeatedly, with stakeholders noting it has the potential to reverse long-term trends in the area including declining population and declining industry. The Fab Lab was also identified as an asset with great opportunity and potential. Stakeholders also noted that there were opportunities to market the region better and create more awareness of the things that Montgomery County has to offer.

- 30-40% of kids do not go to school after high school. There is untapped potential there.
- The Fab Lab at ICC is a great asset and opportunity. They do great things, but they need more funding. We could do more to leverage it.
- The Fab Lab is an opportunity. There is lots of equipment, and only a small membership fee. You don't have to attend ICC to use the lab. We need to generate more marketing/awareness of this asset.
- There are opportunities to do a better job at marketing and raising awareness of Montgomery County and what it has to offer.
- The Tyson project is a great opportunity. People don't have their eyes open to how badly the community needs to land a project like this. We need to educate people on the importance of this, and also make infrastructure and school improvements to handle the additional capacity that will be needed.
- MCAC has worked very hard to educate the community on the value and merits of the Tyson project. It's not perfect, but nothing is and it presents a great opportunity for the region. There will be lots of supply chain opportunities that come with it.
- The Tyson project has the potential to turn around the population decline that the region has been experiencing. It has the potential to bend the curve and change the trajectory of the area.

Stakeholder Interviews

WHAT DO YOU SEE AS SOME OF THE MOST PROMINENT CHALLENGES IN THE REGION?

Stakeholders likewise identified a number of areas that they saw as challenges for the region. Having two community colleges in the region was noted to provide duplicated services and thus inefficiencies, and stakeholders speculated on the long-term sustainability of having both. Concerns about the Tyson project were voiced; less so about objections to the project itself and more so about the growing pains that will accompany landing it. As previously noted, the animosity and rivalry between Coffeyville and Independence was identified as a challenge.

- Transportation is a key barrier, this is a very large area and there is essentially no public transportation.
- The Chamber stays active and visible, but they're very inefficient. They're supposed to be in charge of tourism but they don't advocate across Kansas very well. They're too focused on events.
- Almost all highways in the region are 2-lane, not 4-lane. There is no appetite for tax increases to improve this infrastructure, people already see taxes as too high.
- Soft skills in the workforce is a challenge, the schools just don't teach it the way they used to but they are putting an emphasis back into this again.
- The animosity between Coffeyville and Independence.
- If the Tyson project is landed, there will be a lot of growing pains that come with it. We will more workforce, and if we bring in other labor sources like immigrants, the school system will need to be prepared for the influx of bilingual students. The schools are currently unprepared and do not have enough teachers.
- Downtown Coffeyville is drying up, we're losing a lot of businesses and it's not at all what it once was.
- The workforce coming out of high school lacks soft skills and work ethic. I believe this is due to technology and the way parents raise kids today. Showing up on time, proper attendance are crucial skills.
- We have a lot of inefficiencies and duplicated services. Five counties in Kansas have two courthouses. We have two community colleges in our county. Consolidation needs to happen on a very broad scale, across all of the state.
- Having two community colleges in the county is unnecessary and wasteful. Independence Community College has a less strong tech training offering, and Coffeyville Community College tends to do better at matching the needs of employers in the area. They also seem to lack strong leadership, and switch gears frequently. Also, Independence Community College requires a car to get to, whereas Coffeyville Community College is located on a main thoroughfare with easy foot traffic.
- The rivalry between Independence and Coffeyville is holding us back. The two cities are very territorial. The earlier generations still have a "prideful" mentality and don't see the need to work together.

Stakeholder Interviews

WHAT STRATEGIES OR INITIATIVES IS YOUR ORGANIZATION OR OTHER ORGANIZATIONS IN THE AREA PURSUING TO ADDRESS THESE AND OTHER CHALLENGES AND OPPORTUNITIES?

Stakeholders identified a number of strategies and initiatives their organization was undertaking, or that they were aware of partner organizations doing. Some examples include the Workforce Innovation Fund, the Fab Lab, the Legends & Legacies initiative, and the upcoming Talent Turnaround Program and MCAC will launch.

- MCAC - The Talent Turnaround Program. ICC is in the process of doing their strategic plan right now. The community colleges work with employers on curriculum and programs. Pre apprenticeship programs are becoming the norm. There are the Workforce Innovation Fund and Job Try-Out programs, it provides assistance to workers to try and get them participating in the workforce. It assists them with issues like childcare, car repairs, etc.
- There is the Legends & Legacies initiative, creating videos promoting Coffeyville and its history. The Chamber works on entrepreneurship and start-up business.
- The Chamber puts on a membership breakfast, a big group gathering to be more manageable since there are something like 265 members. These breakfasts would be a perfect opportunity for BRE activities.
- Southeast Kansas Inc. is a 12-county regional organization that focuses on economic development, workforce and regionalism efforts. They provide a great value to the region but there is pretty low awareness of them here.
- The Fab Lab is a unique initiative and offering - there is no other Fab Lab in the state of Kansas. It offers entrepreneurship opportunities to students and community residents.
- We provide after school programming, and Courageous Conversations. We have a lot of efforts focused around developing an early foundation for career readiness.

Stakeholder Interviews

WHAT ARE YOUR CONCERNS ABOUT GROWTH AND THE FUTURE SUCCESS OF THE REGION?

Stakeholders identified a number of concerns they had about growth and the future of the region. Stakeholders noted the growing pains that will accompany Tyson should the project land in the region. Stakeholders also noted the limited workforce, which would make recruiting anything too large difficult to carry through on. Diversification of the economy was identified as being an important goal, and that long-term sustainability should be emphasized in development efforts.

- The ability of the community to embrace diversity as it changes. The state of infrastructure in the region. The declining tax base that we have while still offering the same services.
- We have a very limited workforce, so anything too large would be a real challenge.
- Some people don't want anything to change, they don't see a need for it. The Tyson project is controversial to many. Making sure that the industry and growth we attract is not just manual labor, that it provides good wages and a good life. We need to ensure that there is diversification of the economy, we don't want everything to be just based on manufacturing. We want our growth to be sustainable.
- If the Tyson project is landed, there will be a lot of growing pains that come with it. We will need more workforce, and if we bring in other labor sources like immigrants, the school system will need to be prepared for the influx of bilingual students. The schools are currently unprepared and do not have enough teachers.
- Without a long-term plan, there won't be a future for Montgomery County.



General Input Survey Analysis

General Input Survey Analysis

INTRODUCTION

As part of our roundtable discussions, Ady Advantaged provided each participant a short input survey to fill out to provide a framework for the discussions that were to be had, as well as capture general input and feedback on opportunities and challenges within the region. A total of 35 input surveys were collected throughout this process; roundtable participants can be found under the Key Themes section at the end of the On-Site Visit Analysis. Participants were asked the following seven questions:

1. Ideally, what would you like the headlines to say about Montgomery County in the next 5 to 10 years?
2. If nothing changes, what do you think the headlines will say about Montgomery County in the next 5 to 10 years?
3. Specifically thinking about Montgomery County's main audiences, what would you like each of these groups to be saying about Montgomery County in five to ten years?
 1. Employers/Businesses
 2. Residents
 3. Employees
 4. Visitors

General Input Survey Analysis

IDEALLY, WHAT WOULD YOU LIKE THE HEADLINES TO SAY ABOUT THE REGION IN THE NEXT 5 TO 10 YEARS?

Headlines created by participants fell into four categories/themes. 1) Growth and expansion of industries and new industries, 2) Quality of life improvements and attraction, 3) Population growth, 4) General success/growth for the region.

Growth and Expansion

- New growth and attracts new industry or expands current industry
- Shows remarkable comeback - population improving and new industries
- Positioned to be attractive to businesses across the board
- Sees growth in business and industry, expansion of tax base

Quality of Life

- Through cooperation and community involvement Montgomery County has reversed the trend and is now a place where people are enjoying a quality of life that is second to none
- County and downtowns thriving
- Continues to grow and create a strong community attracting families

Regional Success

- Montgomery County bucks the rural trend
- They did it! They succeeded
- County spurred regional growth through community-based initiatives. County is growing, looks alive
- Montgomery county is back!

Population Growth

- One of the fastest growing counties in rural America
- Coffeyville changes the trend and shows positive growth of residents and employment opportunities
- Population growth, industry booming again

General Input Survey Analysis

IF NOTHING CHANGES, WHAT WILL THE HEADLINES SAY ABOUT THE REGION IN THE NEXT 5 TO 10 YEARS?

Similarly, headlines created by participants fell into two categories: 1) Decline of industries and industries leaving 2) A declining, directionless town that lacks quality of life with increasing taxes

Declining Industry and Opportunity

- Industry closures sealed the fate of Montgomery County
- Loss of industry due to lack of workforce
- Montgomery County loses more population and has less people supporting an overwhelming infrastructure
- Population declining
- Our population continues to decline
- Ghost towns
- Coffeyville was once a growing community with a population of over 20,000 but today is a sad story with a population of no more than 5,000 and several businesses that have left the community
- Our community is becoming older and is in decline
- Decreasing population, all Medicare age, no forward movement
- Montgomery continues to decline in population

Declining Quality of Life and Montgomery County

- County continues to decline
- Slow growth/ no growth
- Montgomery County continues to shrink
- Where is it? They had no vision for the future
- Montgomery County is still waiting, moving in a confused manner
- Rural America counties like Montgomery continue to decline and struggle
- Montgomery County continues downward spiral
- High taxes, poor housing, lack of cooperation between communities continue to plague the area
- Increasing taxes

General Input Survey Analysis

SPECIFICALLY THINKING ABOUT MONTGOMERY COUNTY'S MAIN AUDIENCES, WHAT WOULD YOU LIKE EACH OF THESE GROUPS TO BE SAYING ABOUT MONTGOMERY COUNTY IN 5 TO 10 YEARS? EMPLOYERS/BUSINESSES

Most phrases regarding employers and businesses that came to mind were about two subjects: 1) The positive state of the workforce of Montgomery County 2) Growth in industry and opportunities with expansion and pro business support in Montgomery County

Workforce Growth in Montgomery County

- If business continues to improve, I look forward to expanding in Montgomery County
- Great expansion opportunities
- Clearable tax burden
- My business thrives here
- Very pro-business county, low cost of doing business
- Great place to have a business and growing opportunities
- Montgomery County provides opportunity to sustain and grow
- Working better together to support each others business and compliments each others businesses
- All business supports hospital healthcare, long-term care, etc.
- City government chamber, MCAC support local business growth

Industry Growth and Opportunities

- Adequate number of skilled and available workers
- Large pipeline to talent
- Well-trained individuals
- We have the best trained most dependable workforce we have ever had
- Large applicant pool of qualified and skilled workers
- Great place to have a business and proper, great talent pool to pull from
- We've been working hard on recruiting/growing talent, it's easier to fill jobs
- Have enough employees to draw from
- Strong workforce, educated, skilled workforce
- What a great workforce
- Tyson not only brought employees for them, they helped bring more population to employ for existing employers

General Input Survey Analysis

SPECIFICALLY THINKING ABOUT MONTGOMERY COUNTY'S MAIN AUDIENCES, WHAT WOULD YOU LIKE EACH OF THESE GROUPS TO BE SAYING ABOUT MONTGOMERY COUNTY IN 5 TO 10 YEARS? RESIDENTS

Most phrases regarding residents that came to mind were about the quality of life: great neighbors, neighborhoods, and a wonderful place to raise the family.

- We have our challenges but residents come together to solve whatever comes our way
- Wonderful quality of life. Available good paying jobs. Access to markets
- Montgomery County is a wonderful place to raise children, the area offers outstanding education and opportunities for activated for all
- Good housing, good schools, clean and safe neighborhoods, healthcare, events and things to do
- Safe communities, great school and housing
- My family wouldn't be anywhere else
- We love the new look to our downtown area and appreciate the opportunities to shop and dine at home
- There are housing options with room & options to grow. Its safe and fun to live here
- Best place to live, community support, lots to do, safe place to raise family
- Great place to live, opportunities for the family and my kids to do great
- Montgomery County provides me with opportunity to succeed in every part of my life
- It has taken a long time to get to the point where we are finally talking to each other
- Pride in the their home
- Safety is important, schools are an asset. I enjoy raising family here - things to do
- Keep the money in Montgomery County - Try to shop local!
- My quality of life is amazing and the communities are so friendly and supporting each other
- By the expansion of industry it also brought a housing boom

General Input Survey Analysis

SPECIFICALLY THINKING ABOUT MONTGOMERY COUNTY'S MAIN AUDIENCES, WHAT WOULD YOU LIKE EACH OF THESE GROUPS TO BE SAYING ABOUT MONTGOMERY COUNTY IN 5 TO 10 YEARS? EMPLOYEES

Most phrases regarding employees that came to mind were about work and job opportunities. Most comments regarded wages, opportunities, and the cost of living coming to Montgomery County.

- I feel empowered to help the business I work for make positive changes
- Good paying jobs, affordable housing, excellent schools
- Fair wages paid, good schools, employment to be found, childcare resources
- Multiple workplace opportunities
- Best place to work
- I love my job and the low cost of living here
- There are quality and plentiful job opportunities
- Good wages, lots of choices on where to work, benefits
- Great place to work, business community lets us get involved in the community as well as opportunity to grow in the business
- I have the opportunity to make a fair wage and enjoy my employment
- There's lots of opportunities and at many levels
- Plenty of jobs
- Competitive wages (I can live without fear of poverty because of low wages)
- Be the best employee you can be - leadership for this community and the businesses. Each owner/CEO encourage those employees to be "more", incentivize them to do so if possible. Make possible by "Thinking outside the box"
- My employer is great to work for and supports me and my family
- The level of employees have really improved

General Input Survey Analysis

SPECIFICALLY THINKING ABOUT MONTGOMERY COUNTY'S MAIN AUDIENCES, WHAT WOULD YOU LIKE EACH OF THESE GROUPS TO BE SAYING ABOUT MONTGOMERY COUNTY IN 5 TO 10 YEARS? VISITORS

Most phrases regarding visitors that came to mind were about work and job opportunities. Most comments regarded the appeal of the county and the potential to live and raise a family there.

- I would like them to feel the positive energy of our community
- Unique experience, excellent accommodations
- Clean, visually appealing, activities and events, hotels/restaurants
- Shopping , restaurants and hotel selections
- I want to live here!
- Wow, what a great place to visit, people are friendly and helpful
- It's a great place to shop and visit
- Place to come back to time and time again, lots to do, generations of families coming back
- Great place to visit, clean community, and a very nice accommodating population
- Strong appearance quality of life is addressed, good transportation network, good utilities
- As people are travelling its important to us to see opportunities. What have we done?
- Community looks like a good place to live
- Quaint, things to do, I would love to move here. Charming!
- Take them to all cities in county. Utilize snippets or facts throughout website (chamber) and to showcase all opportunities
- Wow, what an amazing county so much to see, do eat, and play
- People visiting also think this would be a good place to relocate

General Input Survey Analysis

WHAT IS ONE ELEMENT OF THE REGION AND COMMUNITY THAT CURRENTLY EXISTS THAT YOU WOULD LIKE TO CHANGE?

Participants indicated a number of elements or areas of focus that they would like to change or improve. One of the most frequently cited elements was the current state of the housing market, with a lack of available housing or affordable housing, as well as the dilapidated and blighted state of much of the housing that does exist. Also frequently identified was the negativity of the many members of the community, with pessimistic attitudes about the ability to change the trajectory of the community and the negative public perceptions. Other identified elements are the existence of two community colleges, the lack of communication and direction, and the predominance of low wages in the region.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

General Input Survey Analysis

WHAT IS ONE ELEMENT OF THE REGION AND COMMUNITY THAT YOU'D LIKE TO KEEP AND ENHANCE?

The most identified element of the region participants wanted to keep and enhance was the sense of support and community involvement that the people and region offered. Participants noted the small town feel community pride that many members exhibited. Also highly identified was the school system.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

General Input Survey Analysis

WHAT ARE THE REGION'S GREATEST ECONOMIC ASSETS?

Participants identified a large number of economic assets to the region, with the most cited being the central location and available land, the highways, the refinery, the schools and community colleges, the people and their work ethic, and the existing industry and employers like Cessna and John Deere.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

General Input Survey Analysis

WHAT INDUSTRIES DO YOU THINK THE REGION IS, OR COULD BE COMPETITIVE IN?

Participants universally agreed that manufacturing and agriculture were the top industries the region was most competitive in. Participants also noted Aviation due to Cessna, as well as transportation, distribution, education, healthcare and tourism.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

General Input Survey Analysis

WHAT IS ONE PROGRAM, PRIORITY, IMPROVEMENT, OR AREA OF FOCUS THAT THE REGION CURRENTLY IS NOT PURSUING THAT YOU THINK IT SHOULD?

Participants identified a large number of programs and areas of focus that the region should be channeling its efforts into. The most frequently cited included workforce development, addressing the housing challenges and blighted housing, business recruitment activities, retention of the youth and offering them opportunities, small business support, and increased efforts at regionalism.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.



Stakeholder Session Survey Input Analysis

Stakeholder Session Input Survey Analysis

INTRODUCTION

As part of our stakeholder input session on the final day on-site, Ady Advantaged provided each participant a short input survey to fill out to identify goals and visions for the region, as well as capture other general input and feedback on general opportunities and challenges within the region. A total of 12 input surveys were collected throughout this process. Stakeholder session participants can be found on the following page. Participants were asked the following nine questions:

1. Imagine you are a company executive from outside the area, looking to relocate or expand your current business. What would you want to know about the area?
2. Imagine you are looking to relocate to a new area. What would you want to know about the area?
3. How do you define community success?
4. What are the area's greatest economic assets?
5. What are the biggest opportunities for growth in the area?
6. What are the biggest challenges currently facing the area?
7. What are the biggest barriers to collaboration and partnering among communities and organizations throughout the area?
8. Who is most responsible for the success and growth of the area? For example, area businesses, local government, the economic development organization, the residents, the state, etc. Explain why.
9. Do you think there are any projects or initiatives that are under leveraged or underutilized? How can we build more awareness on these?

Stakeholder Session Input Survey Analysis

PARTICIPANTS

Organization	Name	Title
Baroness Properties	Peggy Steele	Owner
Caney Alumni Association Caney Historical Society Caney Community Betterment Group	Dale McBride	Officer / Board Member
Caney Alumni Association Caney Historical Society Caney Community Betterment Group	Gina McBride	Officer / Board Member
City of Coffeyville	Justin Duane	Commissioner
Coffeyville Area Community Foundation	Janie DeVore Gillis	Director
Commercial Bank	Charles Goad	President
Dream On Marketing	Lisa Kuehn	Consultant
Independence Daily Reporter	Taina Copeland	Senior Editor
Montgomery County Action Council	Kyle Stephens	Board Member
Montgomery County Action Council	Trisha Purdon	Director
Midland Theater Foundation	Haylie Bagwell	President
Muller Construction	Mark Mueller	Owner
The Image of Wellness & Caney Community Betterment Group	Paula Benson	Owner / Board Member

Stakeholder Session Input Survey Analysis

IMAGINE YOU ARE A COMPANY EXECUTIVE FROM OUTSIDE THE AREA, LOOKING TO RELOCATE OR EXPAND YOUR CURRENT BUSINESS. WHAT WOULD YOU WANT TO KNOW ABOUT THE AREA?

Participants indicated a number of factors that they would want to know about a region if they were executives looking to relocate or expand. The most frequently cited by far was workforce availability, followed by other factors including infrastructure, incentives, buildings, the business climate, workforce development and training,



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Session Input Survey Analysis

IMAGINE YOU ARE LOOKING TO RELOCATE TO A NEW AREA. WHAT WOULD YOU WANT TO KNOW ABOUT THE AREA?

In contrast to the previous question, stakeholders unsurprisingly focused much more largely on quality of life features if they were looking to relocate to a new area. This included factors like the schools, housing, recreation opportunities, and entertainment options. Job opportunities was also highly identified, as would be expected.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Session Input Survey Analysis

HOW DO YOU DEFINE COMMUNITY SUCCESS?

By far, a community that was working together towards a shared, common goal was the most identified way that participants would define success. Many stakeholders took this a step further and included that it be for the betterment of all members of the community.

Responses

- A community that works together, plays together, and always has what's best for the whole community in mind when decision making.
- Working together to make a community better for current citizens while encouraging growth. Supporting small business and local organizations.
- Is the population working together? Are the school districts creating successful academic kids? What are the state ratings?
- Community pride. Pinpointing the challenges and working together towards solutions. Progressive.
- Everyone working together towards a common goal.
- A community that works together to help improve and has improved the quality of financial security of its community members. Rising median wages, better maintained homes, new homes and investments into the community - new businesses, both retail and industrial.
- Prosperous, happy, content citizens.
- Ability to meet the basic needs of people and provide room to grow as individuals and pursue their dreams.
- Highest possible quality of life given the size of the community. Education, recreation, medical and cultural opportunities.
- All community members working together for the betterment of all.
- Healthy community that is growing.
- Factions moving forward together.

Stakeholder Session Input Survey Analysis

WHAT ARE THE AREA'S GREATEST ECONOMIC ASSETS?

Participants indicated a variety of economic assets to the region. Some items identified include the community colleges and workforce development, the education and schools system, and the existing manufacturing employers like John Deere.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Session Input Survey Analysis

WHAT ARE THE BIGGEST OPPORTUNITIES FOR GROWTH IN THE AREA?

Participants indicated a number of growth opportunities in the region, with agriculture being the most cited, including value-added agriculture, food processing, and supply chain. Many stakeholders noted that unlike other communities, there is still room for growth in Montgomery County.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Session Input Survey Analysis

WHAT ARE THE BIGGEST CHALLENGES CURRENTLY FACING THE AREA?

Participants universally identified the lack of collaboration to be the greatest challenge facing the region, and hand in hand with that the lack of leadership. Also identified was the population decline, the perception of high taxes in the region, and the presence of a significant subsection of the population that was dependent on government assistance.



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

Stakeholder Session Input Survey Analysis

WHAT ARE THE BIGGEST BARRIERS TO COLLABORATION AND PARTNERING AMONG COMMUNITIES AND ORGANIZATIONS THROUGHOUT THE AREA?

Participants primarily indicated competition and rivalry between the cities in the region, chiefly Coffeyville and Independence, to be the biggest barriers to collaboration and partnering.

Responses

- Government agencies and schools not working together
- Selfishness, mis-understanding situations, and time constraints.
- Making city councils, civic groups, etc. realize what they need to do and how to support.
- Everyone still guarding their turfs. Fear of failure.
- The culture of the community, the historical competitiveness between the cities.
- Tribalism
- The old feelings of competition and rivalry between Independence and Coffeyville.
- Fear. World of scarcity mentality that we have.

Stakeholder Session Input Survey Analysis

WHO IS MOST RESPONSIBLE FOR THE SUCCESS AND GROWTH OF THE AREA? FOR EXAMPLE, AREA BUSINESSES, LOCAL GOVERNMENT, THE ECONOMIC DEVELOPMENT ORGANIZATION, THE RESIDENTS, THE STATE, ETC. EXPLAIN WHY?

Participants primarily indicated the economic development group and local government to be responsible for economic growth in the region, but that without resident buy-in and a shared common goal that all efforts would be futile. Participants said that all parties should work together for the betterment of the region as a whole.

Responses

- Residents. It's our community, we vote in our government offices and we have the economic development people.
- The area economic organization, they have the contacts that locals don't.
- Economic development group and local government.
- Success begets success. To truly succeed, all these entities need to be responsible for growth and success.
- Government
- The team - EDO, city, county, workforce center, colleges, healthcare, education, the state.
- Individuals. No business, government or organization can succeed without people to see the vision through.
- The economic development group - MCAC. They have members from all of the county businesses.
- The residents. The local government has to support and embrace.

Stakeholder Session Input Survey Analysis

DO YOU THINK THERE ARE ANY PROJECTS OR INITIATIVES THAT ARE UNDER LEVERAGED OR UNDERUTILIZED? HOW CAN WE BUILD MORE AWARENESS ON THESE?

Participants identified a number of areas of focus that are being underutilized or underserved. Workforce training, tax education, marketing of the region, and leveraging of young professionals are some examples cited.

Responses

- The community is blessed right now with a large number of 30's aged individuals whom have come home to work in and carry on their family businesses. There are at least 15 area businesses that are transitioning management and ownership to 3rd and 4th generation family members. This next gen. group are all well educated, hard working individuals who need the help of the community to be successful and carry on their family heritage.
- The tax misconceptions. We should create a tagline to promote that the taxes are comparable.
- Promotion of the current needs and their importance.
- There are many. I'm unsure how to build effective awareness campaigns when only 20% of the population is even somewhat engaged.
- Our agricultural base - proximity to markets and the railroad.
- Workforce training. Infrastructure - if you don't care about your community, why should anyone else?
- Technology. More education for technology and getting the word out.
- The Midland Theater and Event Center. Neighborhood revitalization.



Key Themes

Key Themes

INTRODUCTION

Ady Advantage conducted roundtables on-site in each of the four largest cities in Montgomery County (Caney, Cherryvale, Coffeyville and Independence) during the week of January 21, 2019. The purpose of these roundtables was to receive insightful input and perspective from important stakeholders relating to the challenges and opportunities within each of the largest cities, and to help identify key themes across the broader Montgomery County region. Participants are listed on the following slides, and full roundtable and interview notes by city can be found in the appendix.

These key themes were also informed by input collected in the employer interviews, the stakeholder interviews, the general input survey, and the stakeholder session input survey, aggregated together and analyzed. The key themes are supported by direct responses from participants across all these varying input formats, listed in the bullet points that follow the key theme.

Key Themes

PARTICIPANTS

Organization	Name	Title
Caney Roundtable		
Caney Drug	Gavin Duley	Pharmacist
City of Caney	Fred Gress	City Administrator
City of Caney	Thomas Burb	Mayor
Community Bank Community Betterment Group	Danny Scott	President
Cross Point Baptist Church	Josh Eaton	Pastor
Safari Zoological Park	Tom Harvey	Owner/Director
USD 436	Jimmy Littleford	High School Principal

Key Themes

PARTICIPANTS

Organization	Name	Title
Cherryvale Roundtable		
CNB&T	Joe Marchant	President
CNB&T	Jayne Hosier	Internal Audit Officer
Public Works (Former)	Wade Webber	Retired - Formerly
Sun State Properties	Dwight Ellison	Owner
Sun State Properties	Michelle Ellison	Owner
USD 447	Shelly Kiblinger	Superintendent

Key Themes

PARTICIPANTS

Organization	Name	Title
Coffeyville Roundtable		
American Homes Realty	Dean LeLaCheur	Sales Agent
Carter Automotive Warehouse	Debbie Carter	Owner
Commission	Justin Doane	City Commissioner
Community State Bank	Mike Ewy	CEO
MCAC	Kyle Stephens	Board Member
USD 445 / Boys & Girls	Griffin Walker	CEO
Visit Coffeyville	Sam Kudrick	Tourism Director

Key Themes

PARTICIPANTS

Organization	Name	Title
Independence Roundtable		
1st District	Robert Bever	1st District Commissioner
Atmos Energy	David Harsin	Operations Manager
Chamber of Commerce	Lisa Wilson	President
City of Independence	Craig Whitehead	City Manager
City of Independence	Kelly Passauer	Assistant City Manager
Coldwell Banker	Debbie Johnson	Broker/Owner
First Oak Bank	Tyson Oakes	Vice President
Four Co. MHC	Gregg Hennens	Executive Director
Hugo's Industrial Supply	Corey Hugo	Owner
IACC / CMIH	Dean Hayse	Board Member
Independence Community College	Dan Barwick	President
Kelley Spine & Sport	Bret Kelley	Owner
Main Street	Tabatha Snodgrass	Director
USD 446	Rusty Arnold	Superintendent of Schools

Key Themes

KEY THEMES

1. The most reoccurring theme and perhaps the largest challenge for the Montgomery County region was the fierce rivalry between Coffeyville and Independence. This was identified by stakeholders in both cities, and showed up in all inputs collected during the on-site visit. While many stakeholders interviewed understood that what benefited one city was ultimately beneficial for the other city and the region, there was a general consensus that the communities as a whole did not embrace that mentality.
 - There is not a great deal of it alignment. People don't work together well and there is not a lot of cooperation. There is a north-south conflict. This is slowly changing however, out of necessity.
 - The rivalry between Independence and Coffeyville is holding us back. The two cities are very territorial. The earlier generations still have a "prideful" mentality and don't see the need to work together.
 - There is a strong rivalry between Independence and Coffeyville, but it is slowly fading over time.
 - Independence and Coffeyville have rivalry issues. Montgomery County does not act cohesively, there is a divide.
 - The animosity between Coffeyville and Independence is a big challenge.
 - Coffeyville and Independence don't tend to get along well. I think it would be easier to convince Independence to work with Coffeyville, since Independence has more of the downtown restaurants and shops, a free park and zoo. As such, Coffeyville might feel more threatened.
 - Alignment and leadership is a challenge. Some of those have resentment. People would rather die than go to Coffeyville and vice versa to Independence.
2. Related to the above key theme, Cherryvale and Caney also feel disconnected and independent from Coffeyville and Independence. Furthermore, they tend to feel neglected and ignored by efforts that are supposedly regional in scope. Montgomery County Action Council has made strides in advocating for regionalism, but communication of the value of this could be improved and Montgomery County still has a ways to go in embracing this approach systematically.
 - We feel MCAC tends to focus on Independence/Coffeyville. There is some cooperation but its loose.
 - There is not a regional thinking, every community is very independent. There is not unity.
 - We're getting there. MCAC tries to bring all the players to the table.
 - MCAC has been trying hard, and has been making some headwinds.
 - Leadership Coffeyville and Leadership Independence have been working together more. Cherryvale and Caney need to be participating in this more.
 - The last several years people have been much better at working towards the same, common goals. There is still animus between the cities, but it's getting better and there is agreement behind seeking growth. There could be better alignment with the other smaller cities like Caney though. Regional thinking will become more common as the generations turnover.
 - MCAC is the driving force to try and align everybody behind the same goal, and think more regionally. The local Chambers haven't been that involved in these efforts to my awareness.

Key Themes

KEY THEMES

3. Housing is a significant challenge across the region, and was noted repeatedly in the roundtables and in the input surveys collected from stakeholders. Many stakeholders noted the current housing market was in a blighted and dilapidated state. Housing was seen as a barrier for both talent within the region and for attracting new talent from outside the region.
 - Workforce housing is a challenge. I think there is plenty of starter homes but not step-up housing.
 - There is a housing blight.
 - Housing stock is older and more rundown.
 - If the focus is on bringing in higher paying jobs, we are close to another community that has newer housing so we'll lose out.
 - The market for houses for sale is at a reasonable price, but the rent prices are too high. \$800-\$900 a month, that is too high.
 - The first impression on housing is not good, it's a problem for anybody coming into the area from the outside.
 - Housing challenges. Only Independence has any housing availability.
 - No senior housing.

4. The vast majority of stakeholders expressed their support for the potential Tyson project that may locate in the Montgomery County region. They also believed the pulse of the community was in favor of the project as well. There seemed to be an understanding that the project would provide a great deal of momentum and help reverse negative long-term trends in the area, such as the declining population. There was also a recognition that there would inherently be growing pains that would come with a project like Tyson, and that investments in infrastructure and the school system would have to be made in order for the project to be successful and sustainable.
 - Landing Tyson would slow outmigration of people, create positive momentum.
 - The Tyson project is a great opportunity. People don't have their eyes open to how badly the community needs to land a project like this. We need to educate people on the importance of this, and also make infrastructure and school improvements to handle the additional capacity that will be needed.
 - In regards to Tyson, I think it's a good thing. We need a big project like that to survive, we just recently lost a grocery store due to declining population. We need to grow jobs here, whether Tyson or otherwise. If Tyson brings in immigrant labor, give it 50 years and they will become just as much a community resident as anyone else.
 - The Tyson project has the potential to turn around the population decline that the region has been experiencing. It has the potential to bend the curve and change the trajectory of the area.
 - If the Tyson project is landed, there will be a lot of growing pains that come with it. We will more workforce, and if we bring in other labor sources like immigrants, the school system will need to be prepared for the influx of bilingual students. The schools are currently unprepared and do not have enough teachers.

Key Themes

KEY THEMES

5. The Fab Lab at Independence Community College was identified as key asset in the Montgomery County, and as a source of opportunity that can be leveraged to cultivate entrepreneurship and start-ups in the region.
 - Fab Lab is a great asset for entrepreneurship. It helps keep young kids in the area.
 - The Fab Lab at ICC is a great asset and opportunity. They do great things, but they need more funding. We could do more to leverage it.
 - The Fab Lab is an opportunity. There is lots of equipment, and only a small membership fee. You don't have to attend ICC to use the lab. We need to generate more marketing/awareness of this asset.
 - The Fab Lab is a unique initiative and offering - there is no other Fab Lab in the state of Kansas. It offers entrepreneurship opportunities to students and community residents.

6. Retention of youth was identified as a huge challenge and threat to the long-term sustainability and viability of Montgomery County. Stakeholders noted that the quality of life and amenities offered in the region often does not appeal to young people beyond the subset that highly desires outdoor recreation opportunities. Many young people leave the region to attend four-year universities and never come back.
 - There are no jobs or opportunities for younger folks. There is no nightlife for them.
 - We need young people to fill the shoes of those that are retiring.
 - Quality of life is not where it needs to be, there is a lack of amenities (dining, shopping, etc.)
 - No opportunities or activities for young people. There is a pool and a park, but nothing else.

7. Between Coffeyville Community College and Independence Community College, there is a strong pipeline for trade skills and skilled labor in the region. However, many stakeholders noted the duplication of services that resulted from having two community colleges, and noted that Montgomery County was the only county in Kansas where there were two community colleges in one county. Many stakeholders speculated that the inefficiencies created by this would implicate the long-term sustainability of both community colleges.
 - There is no need for two community colleges, we can't afford to support both.
 - Everyone agrees that having two community colleges is unsustainable. But nobody wants to give their community college up.
 - We have a lot of inefficiencies and duplicated services. Five counties in Kansas have two courthouses. We have two community colleges in our county. Consolidation needs to happen on a very broad scale, across all of the state.
 - There may be a looming reorganization of the community colleges, but this of course depends on funding and enrollment.
 - Having two community colleges in the county is unnecessary and wasteful. Independence Community College has a less strong tech training offering, and Coffeyville Community College tends to do better at matching the needs of employers in the area. They also seem to lack strong leadership, and switch gears frequently. Also, Independence Community College requires a car to get to, whereas Coffeyville Community College is located on a main thoroughfare with easy foot traffic.



Section 5: Target Industry Analysis

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Economic Base Analysis

Economic Base Analysis

INTRODUCTION

In order to gain some background knowledge on Montgomery County's current industry and occupation make-up, Ady Advantage conducted analysis at the 2-digit NAICS code level (industry). The data that we look at in the following section include:

- Number of employees
- Concentration (location quotient)
- Wages
- Past five-year growth
- Future expected five-year growth

The data found on the following pages was obtained through EMSI. Note that while EMSI provides information on industries and their impact on the local economy, it does not include identities of specific firms. Additional information about EMSI's data and how its used for economic development are provided below.

- EMSI Information on Data Descriptions and Sources: <http://www.economicmodeling.com/data/usa-data/>
- EMSI for Economic Development: <http://www.economicmodeling.com/our-clients/emsi-for-economic-developers/>

Economic Base Analysis

RESULTS PRESENTED ON GRAPHS

The various bubble charts, shown on the following pages, graphically show this first-level industry analysis for Montgomery County (Core Region), as well as for the greater region. The core region is defined as Montgomery County, Kansas. The greater region is defined as including the following counties: Chautauqua, Crawford, Elk, Labette, Montgomery, Neosho, Nowata, Washington and Wilson County. The same analytical and graphical approach is used throughout this target industry analysis to help visually show the various industries at increasingly granular levels of analysis (e.g., from a 2-digit level up to and including a 6-digit analysis).

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

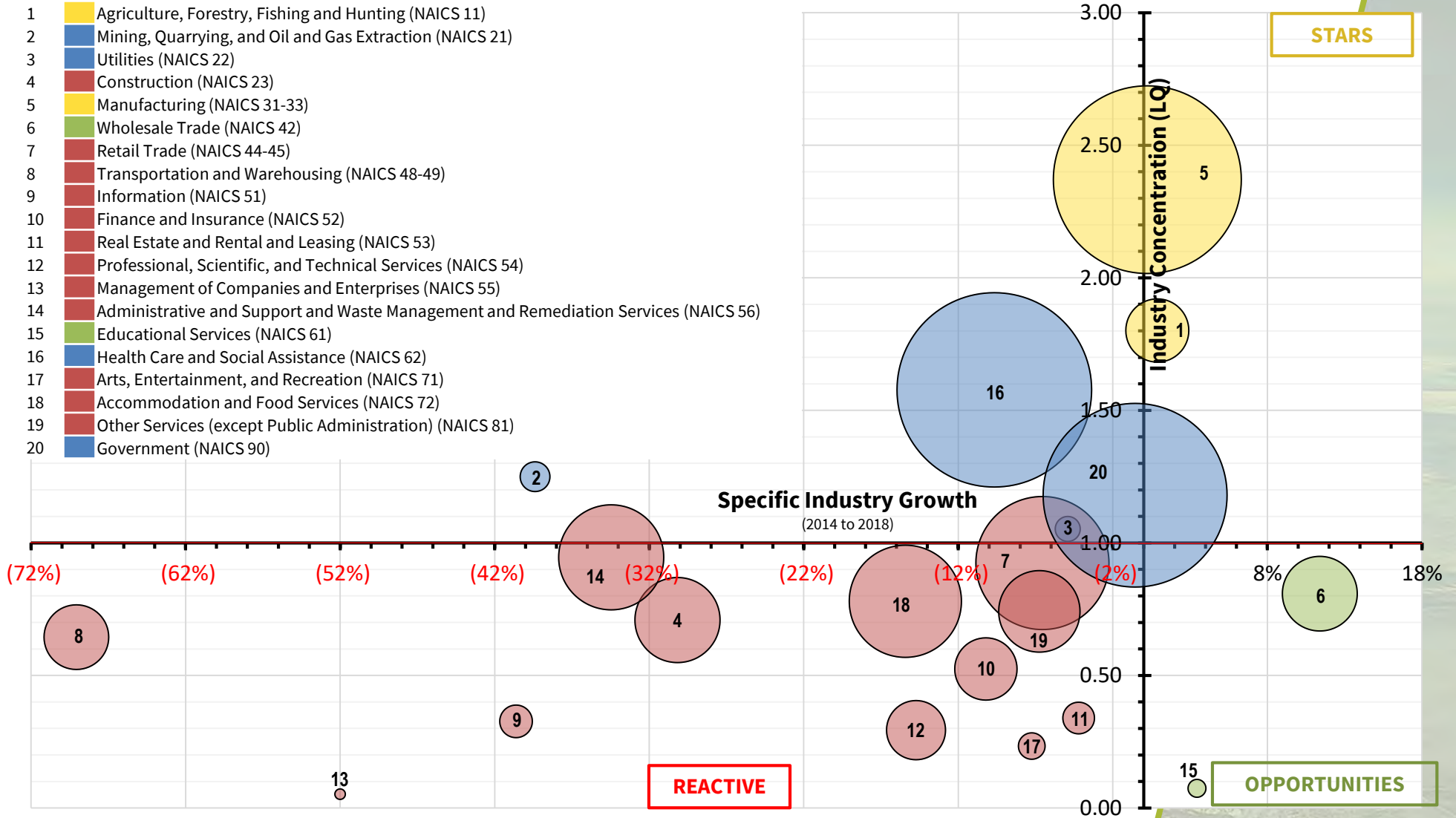
- **Stars (Gold)**: Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- **Mainstays (Blue)**: Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- **Opportunities (Green)**: Positive Growth / Below Average Concentration: These industries have been growing, but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- **Reactive (Red)**: Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.

Economic Base Analysis

MAINSTAYS

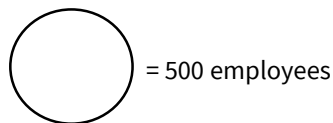
GRAPH 4.1 CORE REGION INDUSTRY ANALYSIS

- 1 Agriculture, Forestry, Fishing and Hunting (NAICS 11)
- 2 Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- 3 Utilities (NAICS 22)
- 4 Construction (NAICS 23)
- 5 Manufacturing (NAICS 31-33)
- 6 Wholesale Trade (NAICS 42)
- 7 Retail Trade (NAICS 44-45)
- 8 Transportation and Warehousing (NAICS 48-49)
- 9 Information (NAICS 51)
- 10 Finance and Insurance (NAICS 52)
- 11 Real Estate and Rental and Leasing (NAICS 53)
- 12 Professional, Scientific, and Technical Services (NAICS 54)
- 13 Management of Companies and Enterprises (NAICS 55)
- 14 Administrative and Support and Waste Management and Remediation Services (NAICS 56)
- 15 Educational Services (NAICS 61)
- 16 Health Care and Social Assistance (NAICS 62)
- 17 Arts, Entertainment, and Recreation (NAICS 71)
- 18 Accommodation and Food Services (NAICS 72)
- 19 Other Services (except Public Administration) (NAICS 81)
- 20 Government (NAICS 90)



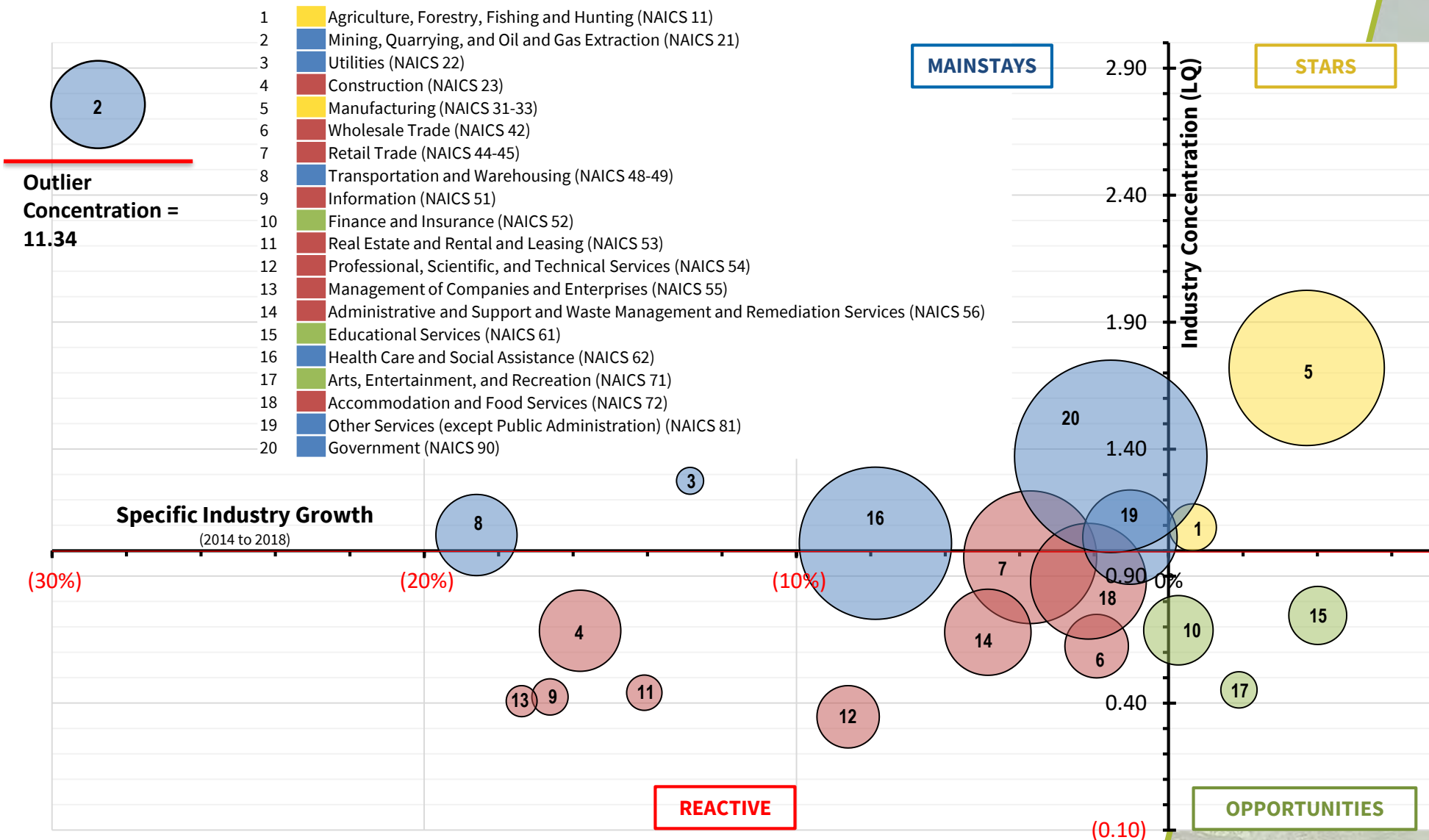
Circle Size = Number of employees in Montgomery County
Source: EMSI 2018

Total Employees in Montgomery County: 15,887



Economic Base Analysis

GRAPH 4.2 GREATER REGION INDUSTRY ANALYSIS



Circle Size = Number of employees in the Greater Region
 Source: EMSI 2018

Total Employees in Greater Region: 82,953

○ = 2,500 employees

Economic Base Analysis

COMPARISON OF INDUSTRY CONCENTRATION

There are some marked differences in concentration between the core region and the greater region. It is instructive to examine these differences because it helps indicate how Montgomery County may fit within the larger region. Note: clusters where the core region is more highly concentrated are highlighted in green.

The following industries have a significantly higher concentration (>0.2) in the core region than that of the greater region:

- Agriculture, Forestry, Fishing and Hunting (NAICS 11)
- Manufacturing (NAICS 31-33)
- Administrative and Support and Waste Management and Remediation Services (NAICS 56)
- Health Care and Social Assistance (NAICS 62)

The only other industry in which the core region has a significantly high concentration (>1.0) is Government (NAICS 90); the greater region does as well.

It should also be noted that the greater region has a significantly higher concentration (>0.2) than the core region in the following industries:

- Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- Utilities (NAICS 22)
- Transportation and Warehousing (NAICS 48-49)
- Management of Companies and Enterprises (NAICS 55)
- Educational Services (NAICS 61)
- Arts, Entertainment, and Recreation (NAICS 71)
- Other Services (except Public Administration) (NAICS 81)

Economic Base Analysis

Table 4.2.A: Existing Industry Concentration Comparison	Core Region Total Employment	Greater Region Total Employment	Core Region Location Quotient	Greater Region Location Quotient
Total All Industries	15,888	82,953	-	-
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	342	1,083	1.80	1.09
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	80	3,794	1.25	11.34
Utilities (NAICS 22)	58	366	1.05	1.27
Construction (NAICS 23)	618	3,120	0.71	0.68
Manufacturing (NAICS 31-33)	2,959	11,207	2.37	1.72
Wholesale Trade (NAICS 42)	479	1,931	0.81	0.62
Retail Trade (NAICS 44-45)	1,496	8,236	0.92	0.97
Transportation and Warehousing (NAICS 48-49)	361	3,108	0.64	1.06
Information (NAICS 51)	95	647	0.33	0.42
Finance and Insurance (NAICS 52)	334	2,284	0.52	0.69
Real Estate and Rental and Leasing (NAICS 53)	91	616	0.34	0.44
Professional, Scientific, and Technical Services (NAICS 54)	301	1,857	0.29	0.35
Management of Companies and Enterprises (NAICS 55)	12	480	0.05	0.41
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	936	3,508	0.95	0.68
Educational Services (NAICS 61)	30	1,608	0.07	0.75
Health Care and Social Assistance (NAICS 62)	3,168	10,797	1.58	1.03
Arts, Entertainment, and Recreation (NAICS 71)	64	647	0.23	0.45
Accommodation and Food Services (NAICS 72)	1,064	6,268	0.78	0.88
Other Services (except Public Administration) (NAICS 81)	566	4,195	0.74	1.05
Government (NAICS 90)	2,834	17,200	1.18	1.37

Source: EMSI 2018

Core Region LQ > than Greater Region (by ≥ 0.2)

Core Region LQ < than Greater Region (by ≥ 0.2)

Core Region LQ and Greater Region LQ are not significantly different

Economic Base Analysis

COMPARISON OF INDUSTRY WAGES

For over half of the industries, the core region's wages are lower when compared to the greater region, the Kansas average and the national average (highlighted in green). Of those industries in which the core region's wages are not lower than all the comparison regions, in all but one the core region's wages are lower than two of the three comparison regions (highlighted in yellow).

The one industry in which they are not, Manufacturing (NAICS 31-33), the wages are higher in the core region than the greater region and the Kansas average, but lower than the national average.

There may be opportunities in those industries in which the core region is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.

Economic Base Analysis

Table 4.2.B: Existing Industry Wage Comparison	Core Region Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Total Industry (Average Wage)	\$43,322	\$46,452	\$53,551	\$64,748
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	\$30,629	\$32,278	\$34,826	\$36,734
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	\$64,019	\$138,634	\$69,291	\$121,049
Utilities (NAICS 22)	\$109,211	\$96,283	\$125,936	\$146,815
Construction (NAICS 23)	\$51,755	\$43,314	\$57,329	\$63,800
Manufacturing (NAICS 31-33)	\$79,237	\$63,880	\$73,012	\$83,094
Wholesale Trade (NAICS 42)	\$53,657	\$47,968	\$78,316	\$87,565
Retail Trade (NAICS 44-45)	\$30,659	\$29,445	\$31,677	\$36,992
Transportation and Warehousing (NAICS 48-49)	\$60,292	\$67,300	\$56,714	\$62,566
Information (NAICS 51)	\$39,400	\$49,996	\$73,029	\$120,144
Finance and Insurance (NAICS 52)	\$49,804	\$58,695	\$84,390	\$121,674
Real Estate and Rental and Leasing (NAICS 53)	\$26,303	\$35,522	\$46,432	\$60,728
Professional, Scientific, and Technical Services (NAICS 54)	\$53,822	\$55,766	\$75,339	\$99,757
Management of Companies and Enterprises (NAICS 55)	\$57,620	\$71,886	\$118,540	\$141,289
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	\$35,910	\$32,202	\$41,832	\$43,989
Educational Services (NAICS 61)	\$16,826	\$20,092	\$34,967	\$49,486
Health Care and Social Assistance (NAICS 62)	\$29,609	\$38,100	\$50,308	\$59,054
Arts, Entertainment, and Recreation (NAICS 71)	\$16,742	\$15,846	\$21,735	\$40,016
Accommodation and Food Services (NAICS 72)	\$14,748	\$16,881	\$18,644	\$24,162
Other Services (except Public Administration) (NAICS 81)	\$19,600	\$25,376	\$28,436	\$33,168
Government (NAICS 90)	\$39,229	\$43,968	\$55,962	\$76,301

Source: EMSI 2018

Core Region wages < Greater Region, Kansas and U.S. wages
 Core Region wages > Two of three of the comparison region. wages
 Core Region wages < Two of three of the comparison region wages



Economic Base Analysis

COMPARISON OF INDUSTRY GROWTH

Looking at growth by industry cluster provides some indication of potential strengths of an industry in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2014 - 2018), as well as the projected five-year growth (2018 - 2022). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to five percent in the respective period and was highlighted red where growth was less than or equal to negative five percent.

Wholesale Trade (NAICS 42) is the one industry that has experienced and will experience growth of over five percent in the core region. No other industry has experienced significant growth over the past 5-year period; however, two industries are projected to experience significant growth over the next 5-year period: Agriculture, Forestry, Fishing and Hunting (NAICS 11) and Utilities (NAICS 22). In the greater region, these two industries are also projected to experience significant growth, along with Transportation and Warehousing (NAICS 48), Administrative and Support and Waste Management and Remediation Services (NAICS 56) and Educational Services (NAICS 61).

Industries which have experienced a significant decline of over five percent in the past 5-year period and are projected to continue to significantly decline over the next 5-year period in the core region include:

- Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- Transportation and Warehousing (NAICS 48)
- Information (NAICS 51)
- Finance and Insurance (NAICS 52)
- Administrative and Support and Waste Management and Remediation Services (NAICS 56)
- Accommodation and Food Services (NAICS 72)
- Other Services (except Public Administration) (NAICS 81)

Economic Base Analysis

Table 4.2.C: Existing Industry Growth Comparison	Core Region 5-year Growth (2014 - 2018)	Core Region 5-year Projected Growth (2018 - 2022)	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Total All Industries	(13%)	(3%)	(5%)	1%	1%	3%	5%	5%
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	1%	9%	1%	7%	(8%)	(1%)	1%	2%
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	(39%)	(20%)	(29%)	(1%)	(33%)	(4%)	(24%)	6%
Utilities (NAICS 22)	(5%)	48%	(13%)	11%	(16%)	7%	1%	4%
Construction (NAICS 23)	(30%)	(4%)	(16%)	(4%)	(2%)	1%	11%	6%
Manufacturing (NAICS 31-33)	0%	(4%)	4%	3%	0%	1%	3%	1%
Wholesale Trade (NAICS 42)	11%	8%	(2%)	3%	(2%)	2%	1%	3%
Retail Trade (NAICS 44-45)	(7%)	(4%)	(4%)	(2%)	0%	1%	3%	3%
Transportation and Warehousing (NAICS 48)	(69%)	(12%)	(19%)	9%	15%	10%	13%	7%
Information (NAICS 51)	(41%)	(7%)	(17%)	(3%)	(30%)	(5%)	3%	3%
Finance and Insurance (NAICS 52)	(10%)	(6%)	0%	0%	3%	4%	5%	4%
Real Estate and Rental and Leasing (NAICS 53)	(4%)	2%	(14%)	0%	1%	2%	8%	4%
Professional, Scientific, and Technical Services (NAICS 54)	(15%)	(1%)	(9%)	2%	12%	9%	8%	8%
Management of Companies and Enterprises (NAICS 55)	(52%)	Insf. Data	(17%)	(4%)	35%	17%	6%	6%
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	(34%)	(8%)	(5%)	6%	(6%)	4%	6%	6%
Educational Services (NAICS 61)	3%	0%	4%	8%	(3%)	5%	7%	8%
Health Care and Social Assistance (NAICS 62)	(10%)	(1%)	(8%)	0%	4%	7%	8%	10%
Arts, Entertainment, and Recreation (NAICS 71)	(7%)	(3%)	2%	4%	4%	7%	10%	7%
Accommodation and Food Services (NAICS 72)	(15%)	(10%)	(2%)	1%	4%	3%	9%	6%
Other Services (except Public Administration) (NAICS 81)	(7%)	(9%)	(1%)	0%	3%	4%	5%	4%
Government (NAICS 90)	(1%)	(2%)	(2%)	1%	(1%)	1%	2%	2%

Source: EMSI 2018

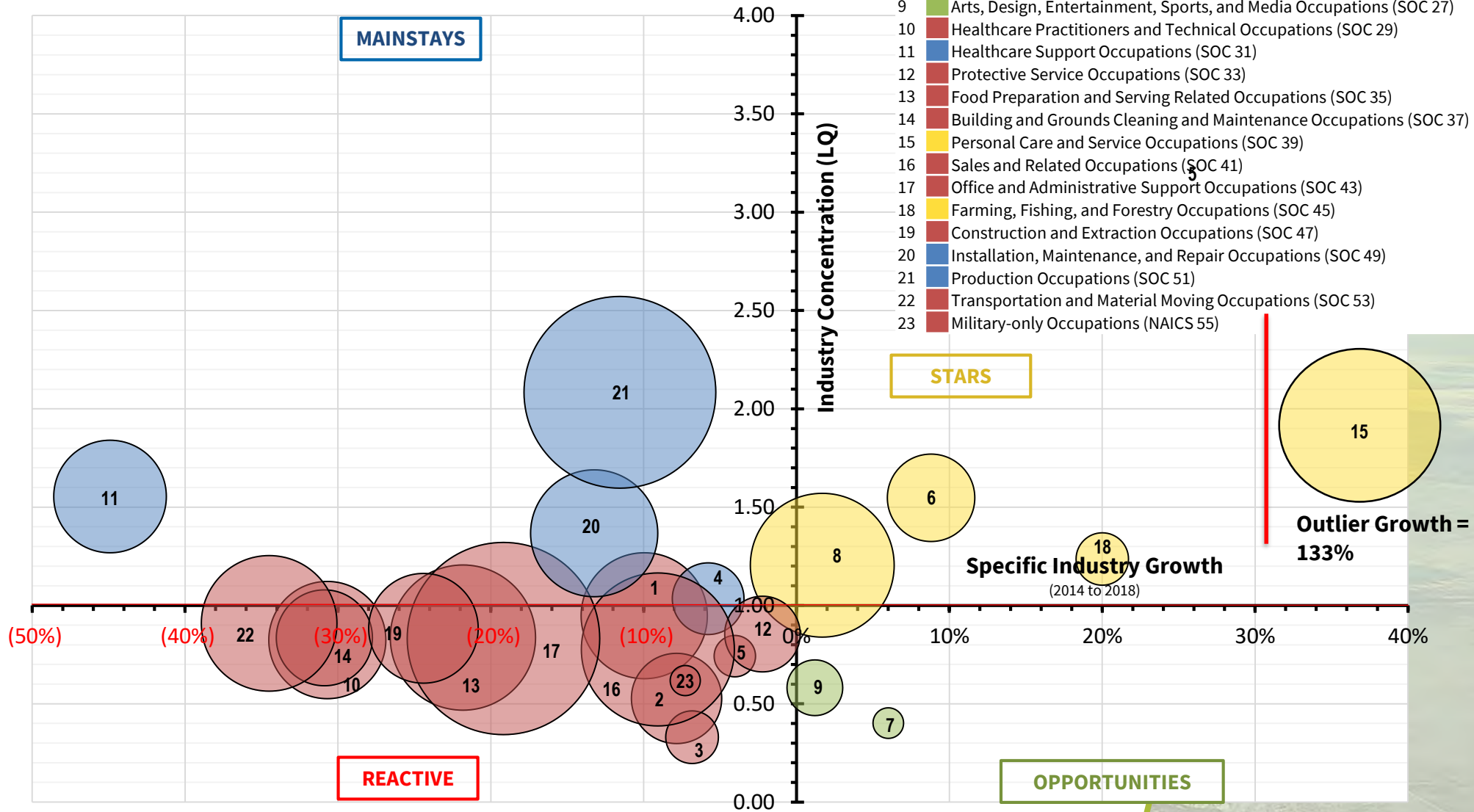


Industry growth greater than or equal to five percent in the respective region and time frame.

Industry growth is less than or equal to negative five percent in the respective region and time frame.

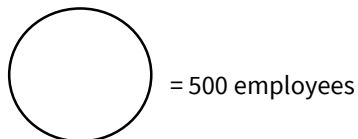
Economic Base Analysis

GRAPH 4.3 CORE REGION OCCUPATION ANALYSIS



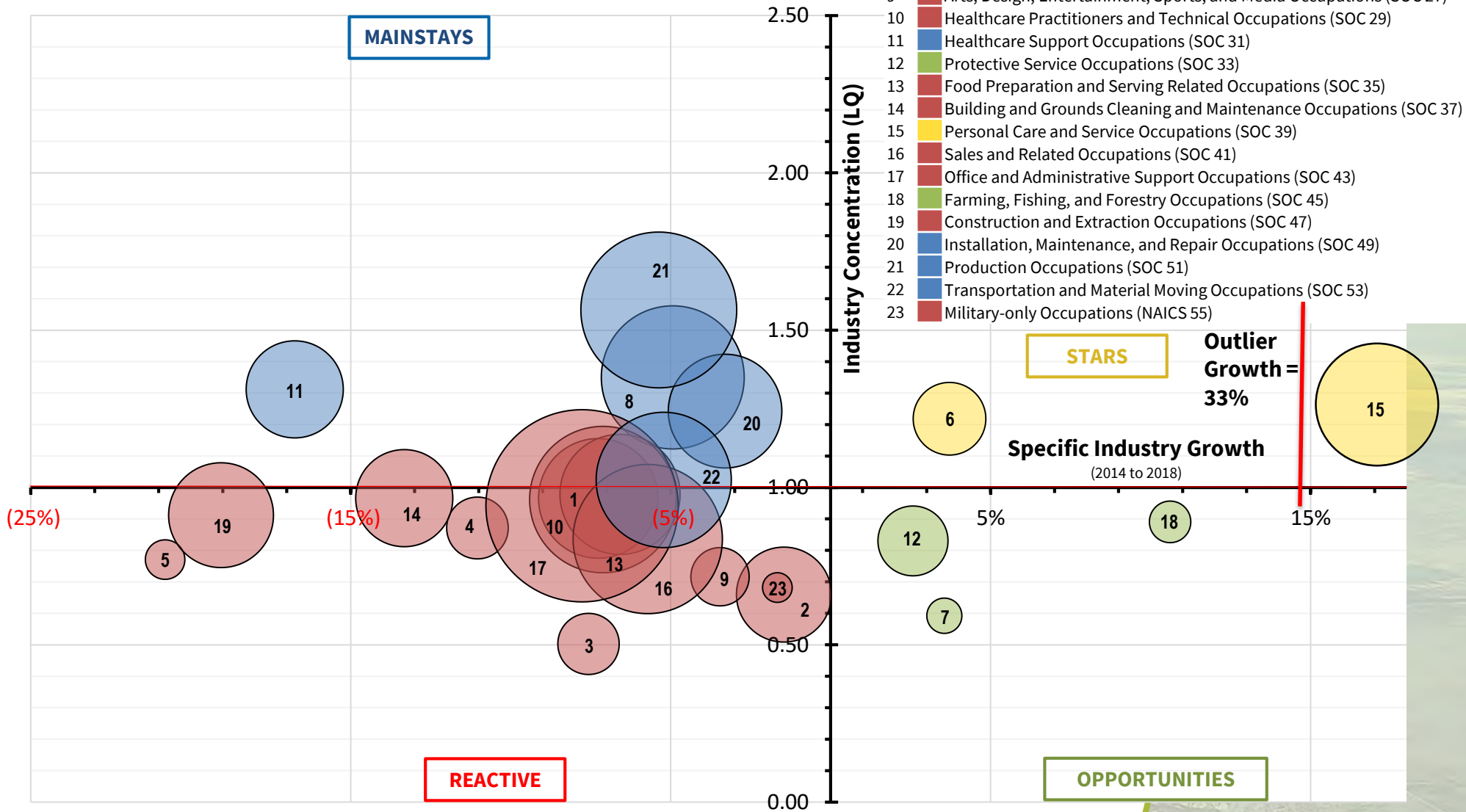
Circle Size = Number of employees in Montgomery County
Source: EMSI 2018

Total Employees in Montgomery County: 15,888



Economic Base Analysis

GRAPH 4.4 GREATER REGION OCCUPATION ANALYSIS



- 1 Management Occupations (SOC 11)
- 2 Business and Financial Operations Occupations (SOC 13)
- 3 Computer and Mathematical Occupations (SOC 15)
- 4 Architecture and Engineering Occupations (SOC 17)
- 5 Life, Physical, and Social Science Occupations (SOC 19)
- 6 Community and Social Service Occupations (SOC 21)
- 7 Legal Occupations (SOC 23)
- 8 Education, Training, and Library Occupations (SOC 25)
- 9 Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)
- 10 Healthcare Practitioners and Technical Occupations (SOC 29)
- 11 Healthcare Support Occupations (SOC 31)
- 12 Protective Service Occupations (SOC 33)
- 13 Food Preparation and Serving Related Occupations (SOC 35)
- 14 Building and Grounds Cleaning and Maintenance Occupations (SOC 37)
- 15 Personal Care and Service Occupations (SOC 39)
- 16 Sales and Related Occupations (SOC 41)
- 17 Office and Administrative Support Occupations (SOC 43)
- 18 Farming, Fishing, and Forestry Occupations (SOC 45)
- 19 Construction and Extraction Occupations (SOC 47)
- 20 Installation, Maintenance, and Repair Occupations (SOC 49)
- 21 Production Occupations (SOC 51)
- 22 Transportation and Material Moving Occupations (SOC 53)
- 23 Military-only Occupations (NAICS 55)

Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

Total Employees in Greater Region: 82,953

○ = 2,500 employees

Economic Base Analysis

COMPARISON OF OCCUPATION CONCENTRATION

The following occupations have a significantly higher concentration (>0.2) in the core region than that of the greater region:

- Community and Social Service Occupations (SOC 21)
- Healthcare Support Occupations (SOC 31)
- Personal Care and Service Occupations (SOC 39)
- Farming, Fishing, and Forestry Occupations (SOC 45)
- Production Occupations (SOC 51)


Additional occupations in which the core region has a high concentration (>1.0), but is not significantly higher than that of the greater region (>0.2) include:


- Architecture and Engineering Occupations (SOC 17)
- Education, Training, and Library Occupations (SOC 25)
- Installation, Maintenance, and Repair Occupations (SOC 49)


Economic Base Analysis

Table 4.4.A: Existing Occupation Concentration Comparison	Core Region Total Employment	Greater Region Total Employment	Core Region Location Quotient	Greater Region Location Quotient
Total All Occupations	15,888	82,953	-	-
Management Occupations (SOC 11)	840	4,469	0.95	0.97
Business and Financial Operations Occupations (SOC 13)	434	2,833	0.53	0.66
Computer and Mathematical Occupations (SOC 15)	150	1,197	0.33	0.50
Architecture and Engineering Occupations (SOC 17)	277	1,217	1.03	0.87
Life, Physical, and Social Science Occupations (SOC 19)	95	514	0.74	0.77
Community and Social Service Occupations (SOC 21)	408	1,675	1.55	1.22
Legal Occupations (SOC 23)	53	408	0.40	0.59
Education, Training, and Library Occupations (SOC 25)	1,090	6,377	1.20	1.35
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	169	1,088	0.58	0.72
Healthcare Practitioners and Technical Occupations (SOC 29)	727	4,510	0.82	0.98
Healthcare Support Occupations (SOC 31)	671	2,957	1.55	1.31
Protective Service Occupations (SOC 33)	307	1,555	0.85	0.83
Food Preparation and Serving Related Occupations (SOC 35)	1,114	6,684	0.84	0.96
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	490	2,959	0.84	0.97
Personal Care and Service Occupations (SOC 39)	1,303	4,510	1.91	1.26
Sales and Related Occupations (SOC 41)	1,233	6,930	0.78	0.84
Office and Administrative Support Occupations (SOC 43)	1,939	11,468	0.83	0.94
Farming, Fishing, and Forestry Occupations (SOC 45)	150	563	1.24	0.89
Construction and Extraction Occupations (SOC 47)	638	3,437	0.88	0.91
Installation, Maintenance, and Repair Occupations (SOC 49)	852	4,043	1.37	1.24
Production Occupations (SOC 51)	1,929	7,557	2.08	1.56
Transportation and Material Moving Occupations (SOC 53)	970	5,706	0.91	1.02
Military-only Occupations (NAICS 55)	51	295	0.62	0.68

Source: EMSI 2018

Core Region LQ > than Greater Region (by ≥ 0.2) 

Core Region LQ < than Greater Region (by ≥ 0.2) 

Core Region LQ and Greater Region LQ are not significantly different 

Economic Base Analysis

COMPARISON OF OCCUPATION WAGES

For three-quarters of the occupations, the core region's wages are lower when compared to the greater region, the Kansas average and the national average (highlighted in green). Of those occupations in which the core region's wages are not lower than all the comparison regions, in all but two the core region's wages are lower than two of the three comparison regions (highlighted in yellow).

The two occupations in which they are not are Building and Grounds Cleaning and Maintenance Occupations (SOC 37) and Production Occupations (SOC 51).

There may be opportunities in those occupations in which the core region is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.

Economic Base Analysis

Table 4.4.B: Existing Occupation Wage Comparison	Core Region Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Total Occupation (Average Wage)	\$17.68	\$18.65	\$21.21	\$23.85
Management Occupations (SOC 11)	\$33.27	\$36.14	\$41.83	\$51.70
Business and Financial Operations Occupations (SOC 13)	\$27.29	\$29.25	\$32.41	\$36.29
Computer and Mathematical Occupations (SOC 15)	\$25.61	\$31.36	\$35.26	\$42.43
Architecture and Engineering Occupations (SOC 17)	\$35.03	\$37.59	\$36.71	\$41.05
Life, Physical, and Social Science Occupations (SOC 19)	\$31.22	\$32.19	\$32.96	\$35.72
Community and Social Service Occupations (SOC 21)	\$16.54	\$18.73	\$20.24	\$22.91
Legal Occupations (SOC 23)	\$34.87	\$32.57	\$38.35	\$49.15
Education, Training, and Library Occupations (SOC 25)	\$18.15	\$17.64	\$20.62	\$26.12
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	\$15.65	\$16.62	\$19.75	\$25.23
Healthcare Practitioners and Technical Occupations (SOC 29)	\$29.15	\$32.43	\$34.09	\$39.55
Healthcare Support Occupations (SOC 31)	\$10.71	\$12.39	\$13.58	\$15.03
Protective Service Occupations (SOC 33)	\$15.99	\$16.40	\$19.08	\$22.76
Food Preparation and Serving Related Occupations (SOC 35)	\$9.98	\$10.20	\$10.36	\$11.88
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	\$12.41	\$11.68	\$12.31	\$13.28
Personal Care and Service Occupations (SOC 39)	\$9.32	\$10.29	\$11.31	\$12.44
Sales and Related Occupations (SOC 41)	\$15.33	\$15.38	\$18.67	\$19.83
Office and Administrative Support Occupations (SOC 43)	\$14.86	\$15.08	\$16.75	\$18.24
Farming, Fishing, and Forestry Occupations (SOC 45)	\$13.26	\$13.91	\$14.05	\$13.47
Construction and Extraction Occupations (SOC 47)	\$18.93	\$18.31	\$20.60	\$22.24
Installation, Maintenance, and Repair Occupations (SOC 49)	\$21.28	\$21.49	\$21.93	\$22.54
Production Occupations (SOC 51)	\$18.32	\$17.47	\$18.99	\$18.26
Transportation and Material Moving Occupations (SOC 53)	\$15.98	\$16.95	\$18.70	\$18.00
Military-only Occupations (NAICS 55)	\$17.86	\$18.33	\$18.23	\$18.52

Source: EMSI 2018

Core Region wages < Greater Region, Kansas and U.S. wages
 Core Region wages > Two of three of the comparison region wages
 Core Region wages < Two of three of the comparison region wages



Economic Base Analysis

COMPARISON OF OCCUPATION GROWTH

Looking at growth by occupation cluster provides some indication of potential strengths of an occupation and talent in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2014 - 2018), as well as the projected five-year growth (2018 - 2022). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to five percent in the respective period and was highlighted red where growth was less than or equal to negative five percent.

Personal Care and Service Occupations (SOC 39) is the only occupation that has experienced or is projected to continue experiencing growth of over five percent in all regions (entire row highlighted in green).

Occupation groups that have experienced significant past 5-year growth and are projected to continue experiencing significant growth over the next 5-year period in the core region include:

- Community and Social Service Occupations (SOC 21)
- Personal Care and Service Occupations (SOC 39)
- Farming, Fishing, and Forestry Occupations (SOC 45)

Occupation groups that have declined significantly in the core region over the past 5-year period and are projected to continue declining over the next 5-year period include:

- Healthcare Practitioners and Technical Occupations (SOC 29)
- Healthcare Support Occupations (SOC 31)
- Food Preparation and Serving Related Occupations (SOC 35)
- Building and Grounds Cleaning and Maintenance Occupations (SOC 37)
- Office and Administrative Support Occupations (SOC 43)
- Production Occupations (SOC 51)
- Military-only Occupations (SOC 55)

Economic Base Analysis

Table 4.4.C: Existing Occupation Growth Comparison	Core Region 5-year Growth (2014 - 2018)	Core Region 5-year Projected Growth (2018 - 2022)	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Total All Occupations	(13%)	(3%)	(5%)	1%	1%	3%	5%	5%
Management Occupations (SOC 11)	(10%)	1%	(7%)	3%	(2%)	3%	7%	5%
Business and Financial Operations Occupations (SOC 13)	(8%)	(2%)	(1%)	4%	7%	6%	9%	6%
Computer and Mathematical Operations (SOC 15)	(7%)	5%	(8%)	4%	9%	8%	12%	8%
Architecture and Engineering Occupations (SOC 17)	(6%)	3%	(11%)	8%	(1%)	3%	5%	5%
Life, Physical, and Social Science Occupations (SOC 19)	(4%)	(1%)	(21%)	0%	(2%)	6%	2%	6%
Community and Social Service Occupations (SOC 21)	9%	10%	4%	10%	1%	6%	7%	8%
Legal Occupations (SOC 23)	6%	2%	4%	5%	2%	3%	4%	3%
Education, Training, and Library Occupations (SOC 25)	2%	(0%)	(5%)	0%	(2%)	2%	4%	5%
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	1%	1%	(3%)	3%	4%	4%	8%	4%
Healthcare Practitioners and Technical Occupations (SOC 29)	(31%)	(14%)	(7%)	(1%)	6%	6%	9%	8%
Healthcare Support Occupations (SOC 31)	(45%)	(22%)	(17%)	(3%)	(1%)	6%	3%	11%
Protective Service Occupations (SOC 33)	(2%)	(1%)	3%	4%	(0%)	2%	3%	3%
Food Preparation and Serving Related Occupations (SOC 35)	(22%)	(13%)	(7%)	(1%)	3%	3%	8%	7%
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	(31%)	(13%)	(13%)	(2%)	(3%)	4%	2%	6%
Personal Care and Service Occupations (SOC 39)	133%	16%	33%	7%	16%	9%	14%	10%
Sales and Related Occupations (SOC 41)	(9%)	(3%)	(6%)	0%	(2%)	2%	2%	3%
Office and Administrative Support Occupations (SOC 43)	(19%)	(6%)	(8%)	(0%)	(3%)	1%	1%	3%
Farming, Fishing, and Forestry Occupations (SOC 45)	20%	13%	11%	9%	9%	4%	6%	3%
Construction and Extraction Occupations (SOC 47)	(24%)	(2%)	(19%)	(2%)	(4%)	1%	7%	5%
Installation, Maintenance, and Repair Occupations (SOC 49)	(13%)	(4%)	(3%)	3%	(1%)	3%	5%	4%
Production Occupations (SOC 51)	(12%)	(5%)	(5%)	1%	(3%)	1%	1%	1%
Transportation and Material Moving Occupations (SOC 53)	(35%)	(3%)	(5%)	5%	5%	6%	9%	5%
Military-only Occupations (SOC 55)	(7%)	(8%)	(2%)	(5%)	1%	1%	5%	(0%)

Source: EMSI 2018

Industry growth greater than or equal to five percent in the respective region and time frame.

Industry growth is less than or equal to negative five percent in the respective region and time frame.

Economic Base Analysis

Target Industry Analysis Screening

In order to narrow down the list of industries for further analysis at the two-digit level, we created a screening process. This process takes into account the growth and concentration (chart quadrant), and the stakeholder input from the on-site visit. The industries highlighted in green will be explored further in the following section.

Industry	Montgomery County Chart Quadrant	Greater Region Chart Quadrant	Stakeholder Input	Include in further analysis? Comments
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	Star	Star	Yes	Yes. This industry is projected to grow in the future across all territories and regions, and is a foundational industry in the region. The region is a finalist for the potential Tyson project, and there are significant agribusiness opportunities that the region can support related to value-add and supply chain.
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	Mainstay	Mainstay	No	No. This industry has experienced significant declines in the region and is projected to continue doing so over the next 5-year period.
Utilities (NAICS 22)	Mainstay	Mainstay	No	No. This is not typically an industry to recruit.
Construction (NAICS 23)	Reactive	Reactive	Yes	No. This industry tends to lag/follow the economy.
Manufacturing (NAICS 31-33)	Star	Star	Yes	Yes. Manufacturing has experienced growth in the greater region, and is projected to continue experiencing growth in the greater region, the state of Kansas and nationally over the next 5-year period. The majority of employers fall within this industry, and the region has a highly skilled manufacturing workforce.
Wholesale Trade (NAICS 42)	Opportunity	Reactive	No	No. While not a target industry, this industry should be supported as it relates to distribution opportunities for other industry clusters.

Economic Base Analysis

Target Industry Analysis Screening

Industry	Montgomery County Chart Quadrant	Greater Region Chart Quadrant	Stakeholder Input	Include in further analysis? Comments
Retail Trade (NAICS 44-45)	Reactive	Reactive	Yes	No. This industry is not a focus of this research. These subsectors tend to follow the economy and are consumer-driven.
Transportation and Warehousing (NAICS 48-49)	Reactive	Mainstay	Yes	Yes. Although this industry has experienced significant decline in the region, it is projected to experience significant growth in the greater region, the state of Kansas and nationally over the next 5-year period. There are significant distribution opportunities that can be tied into other target industries, as was also mentioned by several stakeholders.
Information (NAICS 51)	Reactive	Reactive	Yes	No. This is a small industry in the county that is expected to decline in the greater region and state levels. Examples include newspapers and telecommunication carriers.
Finance and Insurance (NAICS 52)	Reactive	Opportunity	No	No. These subsectors tend to follow the economy and are consumer-driven. Examples include commercial banking, credit unions and insurance agencies.
Real Estate and Rental and Leasing (NAICS 53)	Reactive	Reactive	No	No. These subsectors tend to follow the economy and are consumer-driven.
Professional, Scientific, and Technical Services (NAICS 54)	Reactive	Reactive	Yes	Yes. Although this industry has experienced overall decline in the region, it also offers opportunities for diversification of the economy and there may be opportunities for IT, consulting and research operations in the future as they relate to supporting other industry clusters.
Management of Companies and Enterprises (NAICS 55)	Reactive	Reactive	No	Yes. While this is only made up of one industry in the region, it may show opportunities for regional offices related to target industries. This data will be combined with NAICS 54 for analysis purposes.

Economic Base Analysis

Target Industry Analysis Screening

Industry	Montgomery County Chart Quadrant	Greater Region Chart Quadrant	Stakeholder Input	Include in further analysis? Comments
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	Reactive	Reactive	No	No. Most of the subsectors of this industry follow the economy, and the focus should be to support rather than recruit.
Educational Services (NAICS 61)	Opportunity	Opportunity	Yes	No. This is not an industry to recruit, but rather, support.
Health Care and Social Assistance (NAICS 62)	Mainstay	Mainstay	Yes	No. This industry is not a focus of this research. These subsectors tend to follow the economy and are consumer-driven.
Arts, Entertainment, and Recreation (NAICS 71)	Reactive	Opportunity	Yes	No. This industry is not a focus of this research. These subsectors tend to follow the economy and are consumer-driven.
Accommodation and Food Services (NAICS 72)	Reactive	Reactive	Yes	No. This industry is not a focus of this research. These subsectors tend to follow the economy and are consumer-driven.
Other Services (except Public Administration) (NAICS 81)	Reactive	Mainstay	No	No. The subsectors within this industry are consumer-customer driven and will follow the economy.
Public Administration (NAICS 92)	Mainstay	Mainstay	No	No. This is not an industry to recruit, but rather, support.



Target Industry Identification Analysis

Target Industry Analysis - Overview

Overview

The following target industry analysis follows the same format as the analysis in the previous section. However, this section focuses on the industries identified in the screening of the 2-digit NAICS code industry analysis. In order to determine which specific industries drive the greater region's economy, a 6-digit NAICS code analysis was conducted on the following industries.

- Agriculture, Forestry, Fishing and Hunting (NAICS 11)
- Manufacturing (NAICS 31-33)
- Transportation and Warehousing (NAICS 48-49)
- Professional, Scientific, and Technical Services (NAICS 54-55)
 - Management of Companies and Enterprises (NAICS 55)

As stated above, this analysis will show, for example, which sub-industries within manufacturing are driving the overall industry, which are growing opportunities, and which are declining. This exercise helps provide a deeper understanding of the region and identify possible niche markets, allowing us to more accurately recommend the industries that are the best fit for the Montgomery County region.

Target Industry Analysis - Methodology

Methodology and Purpose

To identify the region's economic drivers, data on industry concentration and historic growth were gathered for several specific industry clusters; the data covered two regions. The core region is defined as Montgomery County, Kansas. The greater region is defined as including the following counties: Chautauqua, Crawford, Elk, Labette, Montgomery, Neosho, Nowata, Washington and Wilson County. This region is used throughout the target industry analysis to identify opportunities that may not currently exist in the immediate county, but are strong and growing.

The clusters are defined by the North American Industry Classification System (NAICS) and the data for this analysis was obtained through Emsi . Note that while Emsi provides information on industries and their impact on the local economy, it does not include identities of specific firms.

Our methodology focuses on industry size (measured by number of employees), industry growth or contraction (measured by historic change in number of employees from 2014 to 2018), industry competitive effect, industry concentration, as well as wages by industry. We used the most recent five-year period for the historical analysis.

Industry concentration is measured using a location quotient methodology. A location quotient measures the presence of industry employment within a specific region compared to national averages. For example, if a region has a location quotient of 1.25 this means the industry's share of regional employment is 25% higher than would be expected based on the industry's share of national employment.

Target Industry Analysis - Methodology

Results Presented on Graphs

The various bubble charts, shown on the following pages, graphically show the industry analysis at a six-digit NAICS code level.

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

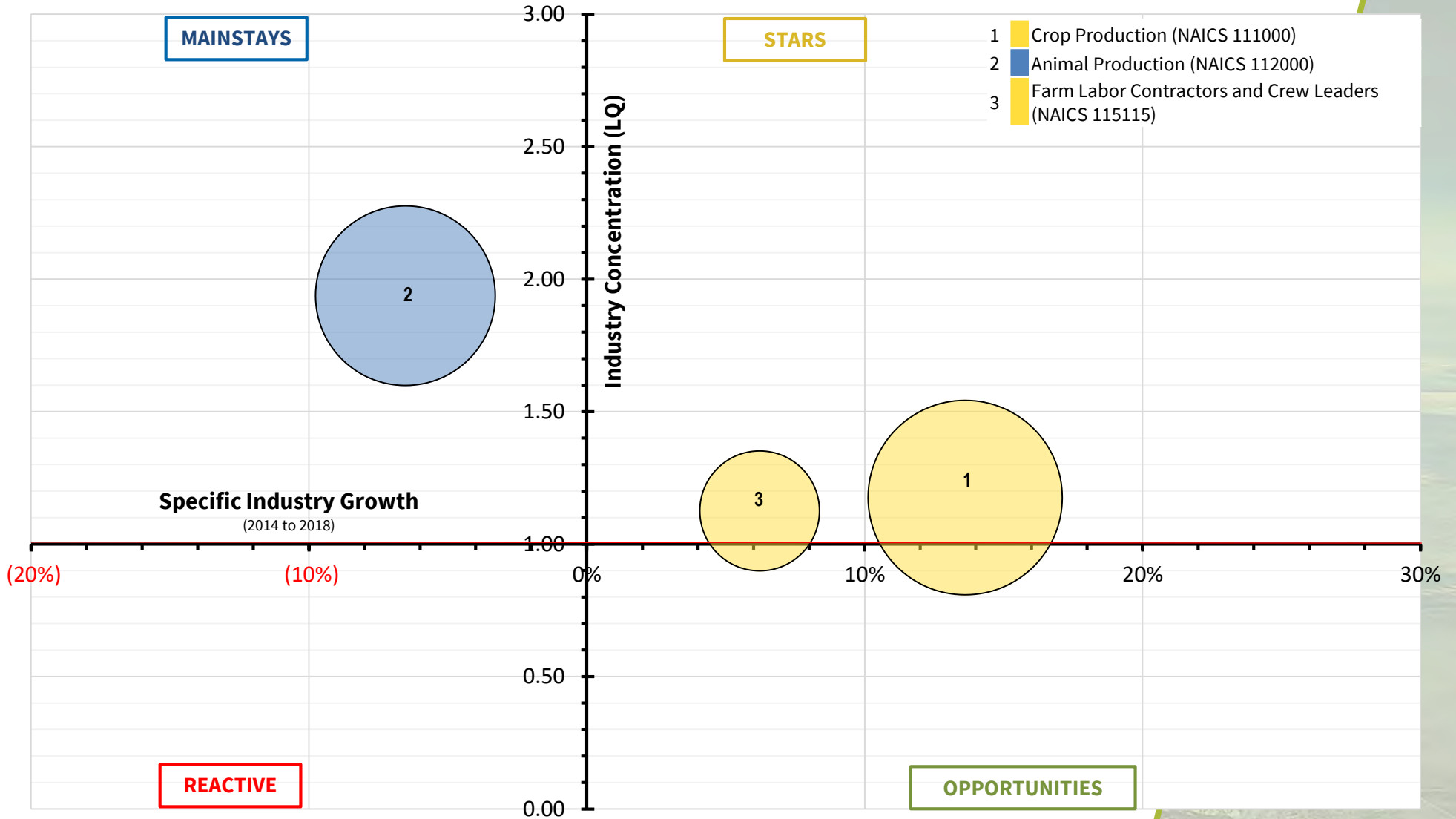
- **Stars (Gold): Positive Growth / Above Average Concentration:** Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- **Mainstays (Blue): Negative Growth / Above Average Concentration:** These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- **Opportunities (Green): Positive Growth / Below Average Concentration:** These industries have been growing, but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- **Reactive (Red): Negative Growth / Below Average Concentration:** These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.



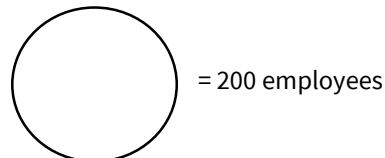
Target Industry Analysis – Agriculture, Forestry, Fishing and Hunting

Target Industry Analysis – Agriculture, Forestry, Fishing and Hunting (NAICS 11)

GRAPH 4.5 AGRICULTURE, FORESTRY, FISHING AND HUNTING



Total Employees in Greater Region: 1,197




Circle Size = Number of employees in the Greater Region
Source: EMSI 2018


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Target Industry Analysis – Agriculture, Forestry, Fishing and Hunting (NAICS 11)

Table 4.5.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Crop Production (NAICS 111000)	534	12,339	1.18	1.55	71
Animal Production (NAICS 112000)	458	12,990	1.94	3.14	(34)
Farm Labor Contractors and Crew Leaders (NAICS 115115)	205	3,783	1.13	1.19	4

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5) 

Greater Region LQ < than Kansas (by ≥ 0.5) 

Greater Region LQ and Kansas LQ are not significantly different 

Target Industry Analysis – Agriculture, Forestry, Fishing and Hunting (NAICS 11)

Table 4.5.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Crop Production (NAICS 111000)	\$31,177	\$32,340	\$34,460
Animal Production (NAICS 112000)	\$34,739	\$38,439	\$37,109
Farm Labor Contractors and Crew Leaders (NAICS 115115)	\$27,220	\$26,322	\$30,379

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only



Target Industry Analysis – Agriculture, Forestry, Fishing and Hunting (NAICS 11)

Table 4.5.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Crop Production (NAICS 111000)	14%	8%	(12%)	(2%)	(1%)	1%
Animal Production (NAICS 112000)	(7%)	10%	(6%)	(2%)	0%	(1%)
Farm Labor Contractors and Crew Leaders (NAICS 115115)	6%	4%	5%	5%	4%	5%

Source: EMSI 2018



Industry growth greater than or equal to ten percent in the respective region and time frame.
 Industry growth is less than or equal to negative ten percent in the respective region and time frame.



Target Industry Analysis - Manufacturing

Target Industry Analysis - Manufacturing

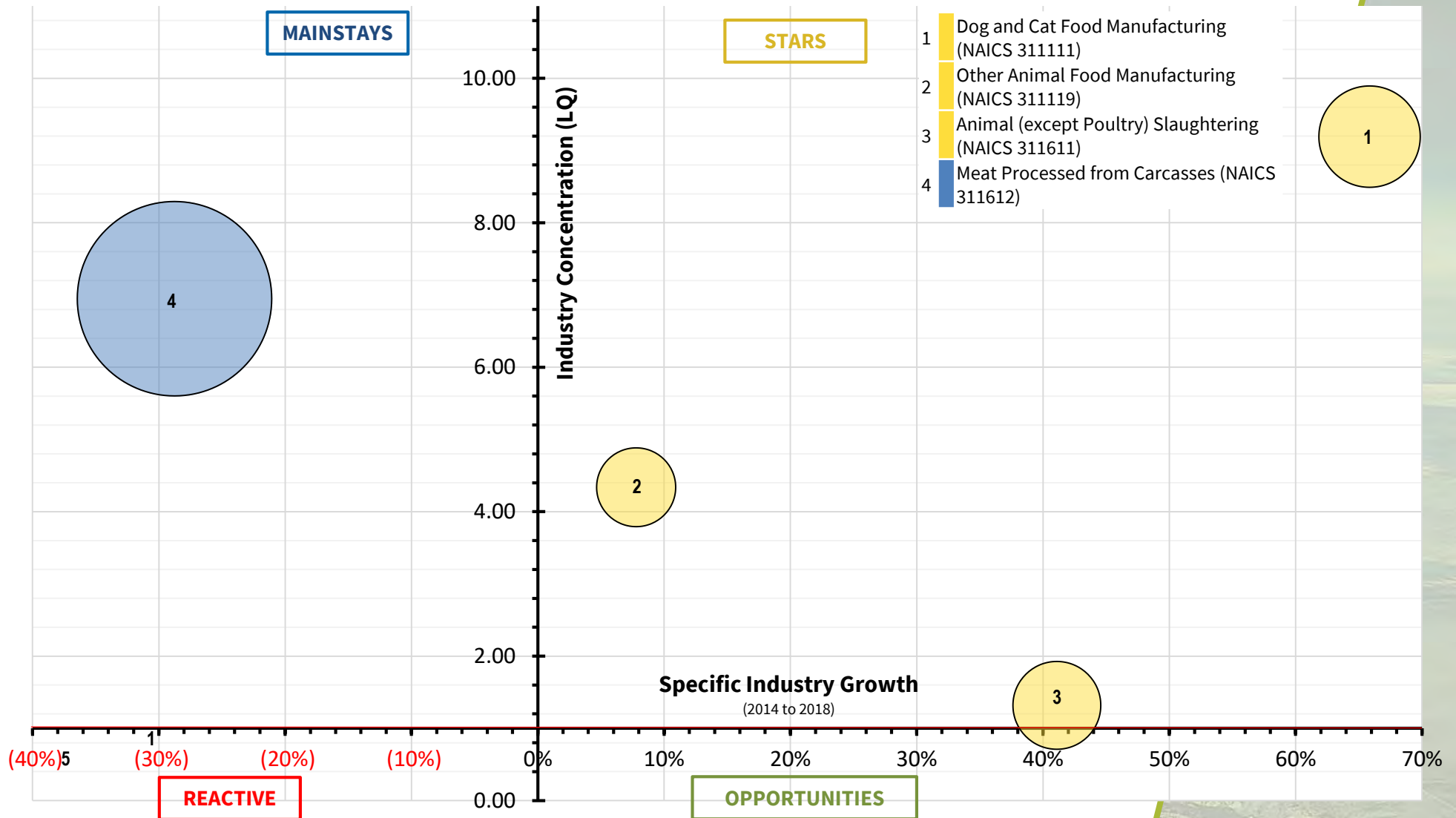
Overview

Because the manufacturing industry in the greater region is so diverse the manufacturing analysis is broken down into the following groups:

- Food and Beverage Manufacturing (NAICS 311)
- Wood Product and Paper Manufacturing & Printing Activities (NAICS 321-323)
- Chemical, Plastic and Nonmetallic Mineral Product Manufacturing (NAICS 324-327)
- Metal Manufacturing (NAICS 331-332)
- Machinery Manufacturing (NAICS 333)
- Computer and Electronic Component Manufacturing (NAICS 334-335)
- Transportation Equipment Manufacturing (NAICS 336)

Target Industry Analysis – Food and Beverage Manufacturing (NAICS 311)

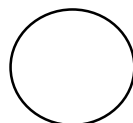
GRAPH 4.6 FOOD AND BEVERAGE MANUFACTURING



Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

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Total Employees in Greater Region: 815

 = 100 employees

Target Industry Analysis – Food and Beverage Manufacturing (NAICS 311)

Table 4.6.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Dog and Cat Food Manufacturing (NAICS 311111)	136	2,569	9.19	9.94	40
Other Animal Food Manufacturing (NAICS 311119)	83	1,340	4.34	4.00	0
Animal (except Poultry) Slaughtering (NAICS 311611)	103	11,229	1.32	8.24	27
Meat Processed from Carcasses (NAICS 311612)	493	6,922	6.95	5.57	(274)

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5) 
 Greater Region LQ < than Kansas (by ≥ 0.5) 
 Greater Region LQ and Kansas LQ are not significantly different 

Target Industry Analysis – Food and Beverage Manufacturing (NAICS 311)

Table 4.6.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Dog and Cat Food Manufacturing (NAICS 311111)	\$65,109	\$68,117	\$82,282
Other Animal Food Manufacturing (NAICS 311119)	\$59,542	\$95,416	\$71,620
Animal (except Poultry) Slaughtering (NAICS 311611)	\$45,395	\$63,085	\$54,480
Meat Processed from Carcasses (NAICS 311612)	\$31,894	\$54,767	\$56,963

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only



Target Industry Analysis – Food and Beverage Manufacturing (NAICS 311)

Table 4.6.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Dog and Cat Food Manufacturing (NAICS 311111)	66%	(4%)	23%	9%	18%	8%
Other Animal Food Manufacturing (NAICS 311119)	8%	4%	7%	5%	8%	5%
Animal (other Poultry) Slaughtering (NAICS 311611)	41%	25%	7%	(1%)	4%	3%
Meat Processed from Carcasses (NAICS 311612)	(29%)	4%	(6%)	19%	11%	7%

Source: EMSI 2018

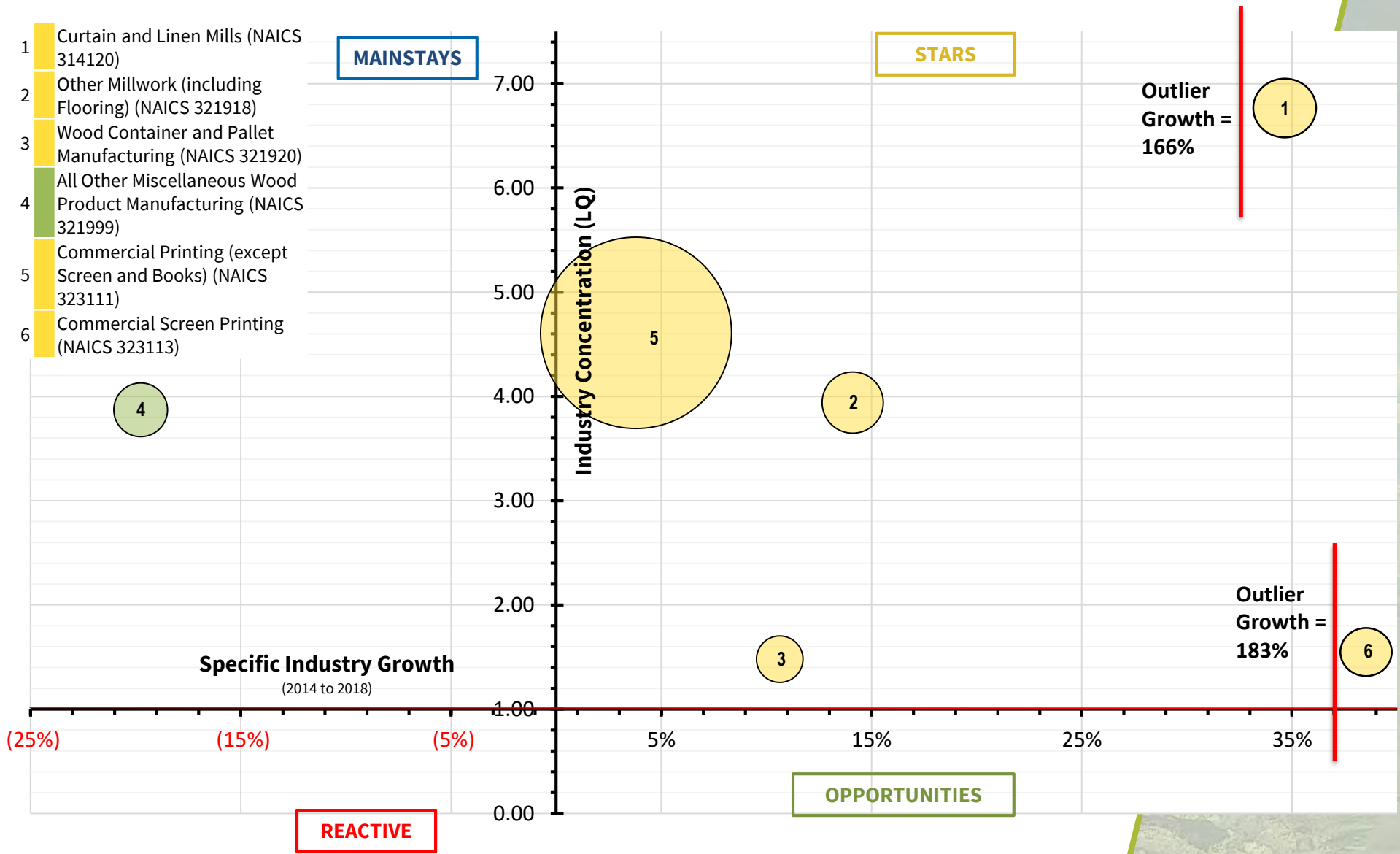


Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Wood Product and Paper Manufacturing & Printing Activities (NAICS 321-323)

GRAPH 4.7 WOOD PRODUCT AND PAPER MANUFACTURING & PRINTING ACTIVITIES



Total Employees in Greater Region: 1,212

Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

○ = 100 employees

Target Industry Analysis – Wood Product and Paper Manufacturing & Printing Activities (NAICS 321-323)

Table 4.7.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Curtain and Linen Mills (NAICS 314120)	85	59	6.77	0.27	52
Other Millwork (including Flooring) (NAICS 321918)	89	148	3.94	0.37	8
Wood Container and Pallet Manufacturing (NAICS 321920)	52	357	1.48	0.58	2
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	69	315	3.87	1.00	(31)
Commercial Printing (except Screen and Books) (NAICS 323111)	847	4,779	4.61	1.49	69
Commercial Screen Printing (NAICS 323113)	68	1,793	1.53	2.30	42

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)

Greater Region LQ < than Kansas (by ≥ 0.5)

Greater Region LQ and Kansas LQ are not significantly different

Target Industry Analysis – Wood Product and Paper Manufacturing & Printing Activities (NAICS 321-323)

Table 4.7.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Curtain and Linen Mills (NAICS 314120)	\$55,626	\$42,408	\$43,741
Other Millwork (including Flooring) (NAICS 321918)	\$42,810	\$47,294	\$49,053
Wood Container and Pallet Manufacturing (NAICS 321920)	\$31,256	\$41,734	\$44,753
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	\$45,358	\$39,441	\$46,051
Commercial Printing (except Screen and Books) (NAICS 323111)	\$46,538	\$50,639	\$60,134
Commercial Screen Printing (NAICS 323113)	\$33,037	\$42,361	\$42,846

Source: EMSI 2018


Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only




Target Industry Analysis – Wood Product and Paper Manufacturing & Printing Activities (NAICS 321-323)

Table 4.7.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Curtain and Linen Mills (NAICS 314120)	166%	12%	23%	15%	3%	(7%)
Other Millwork (including Flooring) (NAICS 321918)	14%	11%	5%	4%	4%	(1%)
Wood Container and Pallet Manufacturing (NAICS 321920)	11%	13%	(11%)	0%	5%	2%
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	(20%)	3%	32%	8%	16%	9%
Commercial Printing (except Screen and Books) (NAICS 323111)	4%	(5%)	(12%)	(12%)	(5%)	(10%)
Commercial Screen Printing (NAICS 323113)	183%	18%	31%	10%	9%	6%

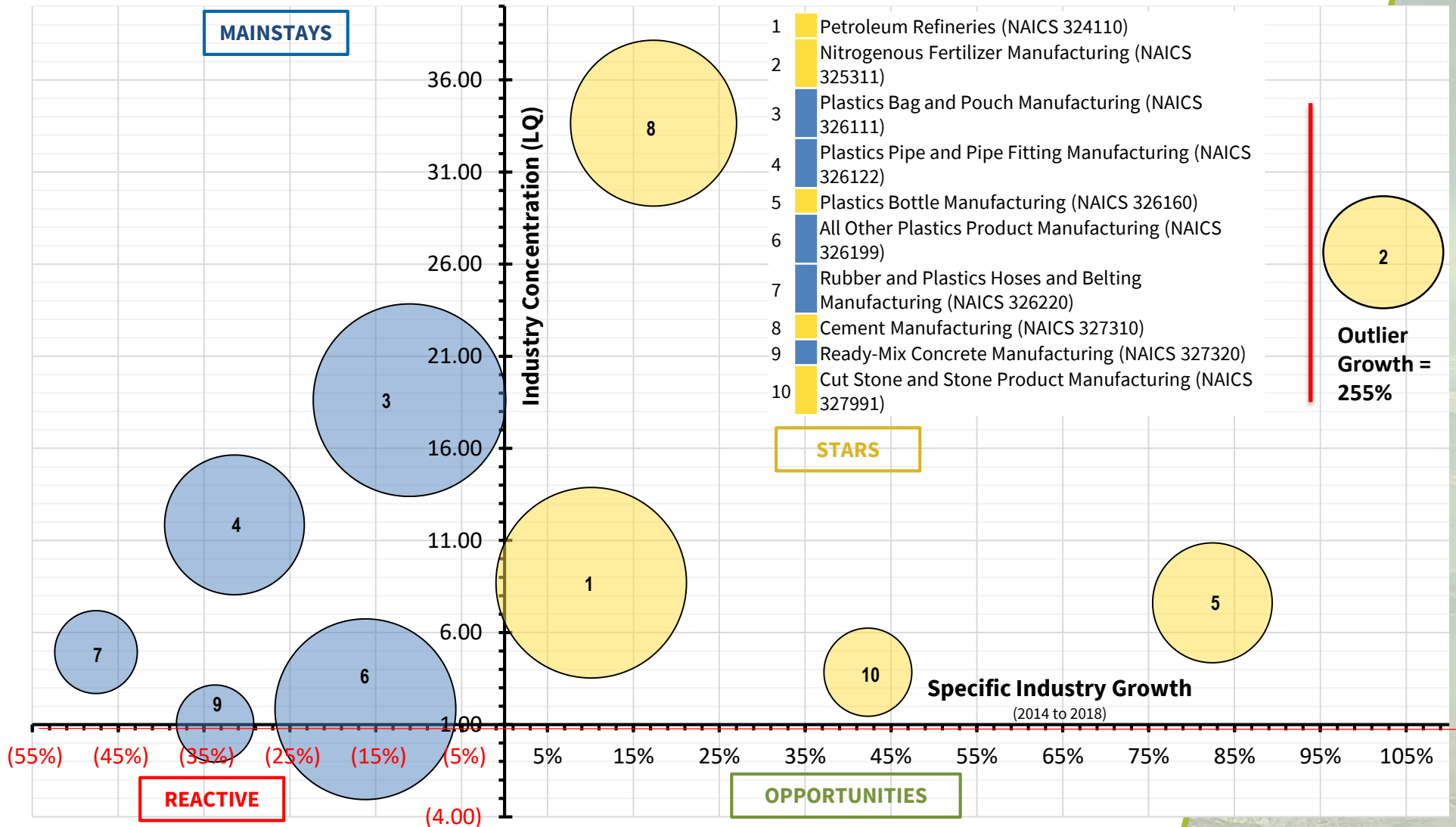
Source: EMSI 2018

 Industry growth greater than or equal to ten percent in the respective region and time frame.

 Industry growth is less than or equal to negative ten percent in the respective region and time frame.

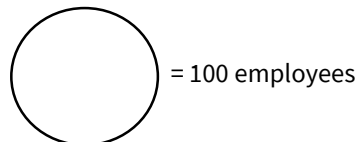
Target Industry Analysis – Chemical, Plastic and Nonmetallic Mineral Product Manufacturing (NAICS 324-327)

GRAPH 4.8 CHEMICAL, PLASTIC AND NONMETALLIC MINERAL PRODUCT MANUFACTURING



Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

Total Employees in Greater Region: 1,875



Target Industry Analysis – Chemical, Plastic and Nonmetallic Mineral Product Manufacturing (NAICS 324-327)

Table 4.8.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Petroleum Refineries (NAICS 324110)	338	1,452	8.70	2.13	26
Nitrogenous Fertilizer Manufacturing (NAICS 325311)	117	232	26.53	3.01	83
Plastics Bag and Pouch Manufacturing (NAICS 326111)	345	374	18.62	1.15	(85)
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	183	805	11.85	2.97	(91)
Plastics Bottle Manufacturing (NAICS 326160)	135	254	7.61	0.82	57
All Other Plastics Product Manufacturing (NAICS 326199)	305	3,039	1.84	1.05	(84)
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	65	1,308	4.94	5.68	(59)
Cement Manufacturing (NAICS 327310)	257	437	33.65	3.27	20
Ready-Mix Concrete Manufacturing (NAICS 327320)	57	1,376	1.06	1.47	(39)
Cut Stone and Stone Product Manufacturing (NAICS 327991)	74	310	3.85	0.93	11

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)

Greater Region LQ < than Kansas (by ≥ 0.5)

Greater Region LQ and Kansas LQ are not significantly different

Target Industry Analysis – Chemical, Plastic and Nonmetallic Mineral Product Manufacturing (NAICS 324-327)

Table 4.8.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Petroleum Refineries (NAICS 324110)	\$172,253	\$174,376	\$214,051
Nitrogenous Fertilizer Manufacturing (NAICS 325311)	\$105,114	\$122,537	\$121,064
Plastics Bag and Pouch Manufacturing (NAICS 326111)	\$42,819	\$43,122	\$63,108
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	\$42,905	\$49,550	\$65,280
Plastics Bottle Manufacturing (NAICS 326160)	\$50,272	\$58,847	\$68,483
All Other Plastics Product Manufacturing (NAICS 326199)	\$80,951	\$56,211	\$61,116
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	\$51,542	\$60,044	\$65,397
Cement Manufacturing (NAICS 327310)	\$70,756	\$75,370	\$97,311
Ready-Mix Concrete Manufacturing (NAICS 327320)	\$52,951	\$57,601	\$71,675
Cut Stone and Stone Product Manufacturing (NAICS 327991)	\$37,963	\$48,234	\$53,689

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only



Target Industry Analysis – Chemical, Plastic and Nonmetallic Mineral Product Manufacturing (NAICS 324-327)

Table 4.8.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Petroleum Refineries (NAICS 324110)	10%	(2%)	(1%)	(3%)	2%	(0%)
Nitrogenous Fertilizer Manufacturing (NAICS 325311)	255%	9%	100%	23%	3%	5%
Plastics Bag and Pouch Manufacturing (NAICS 326111)	(11%)	(15%)	(28%)	(16%)	11%	5%
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	(31%)	(25%)	(4%)	6%	3%	2%
Plastics Bottle Manufacturing (NAICS 326160)	82%	26%	0%	(6%)	5%	1%
All Other Plastics Product Manufacturing (NAICS 326199)	(16%)	(22%)	(9%)	(2%)	7%	(2%)
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	(48%)	(20%)	8%	(1%)	0%	(2%)
Cement Manufacturing (NAICS 327310)	17%	5%	39%	4%	8%	1%
Ready-Mix Concrete Manufacturing (NAICS 327320)	(34%)	(6%)	3%	1%	12%	1%
Cut Stone and Stone Product Manufacturing (NAICS 327991)	42%	8%	3%	5%	21%	7%

Source: EMSI 2018



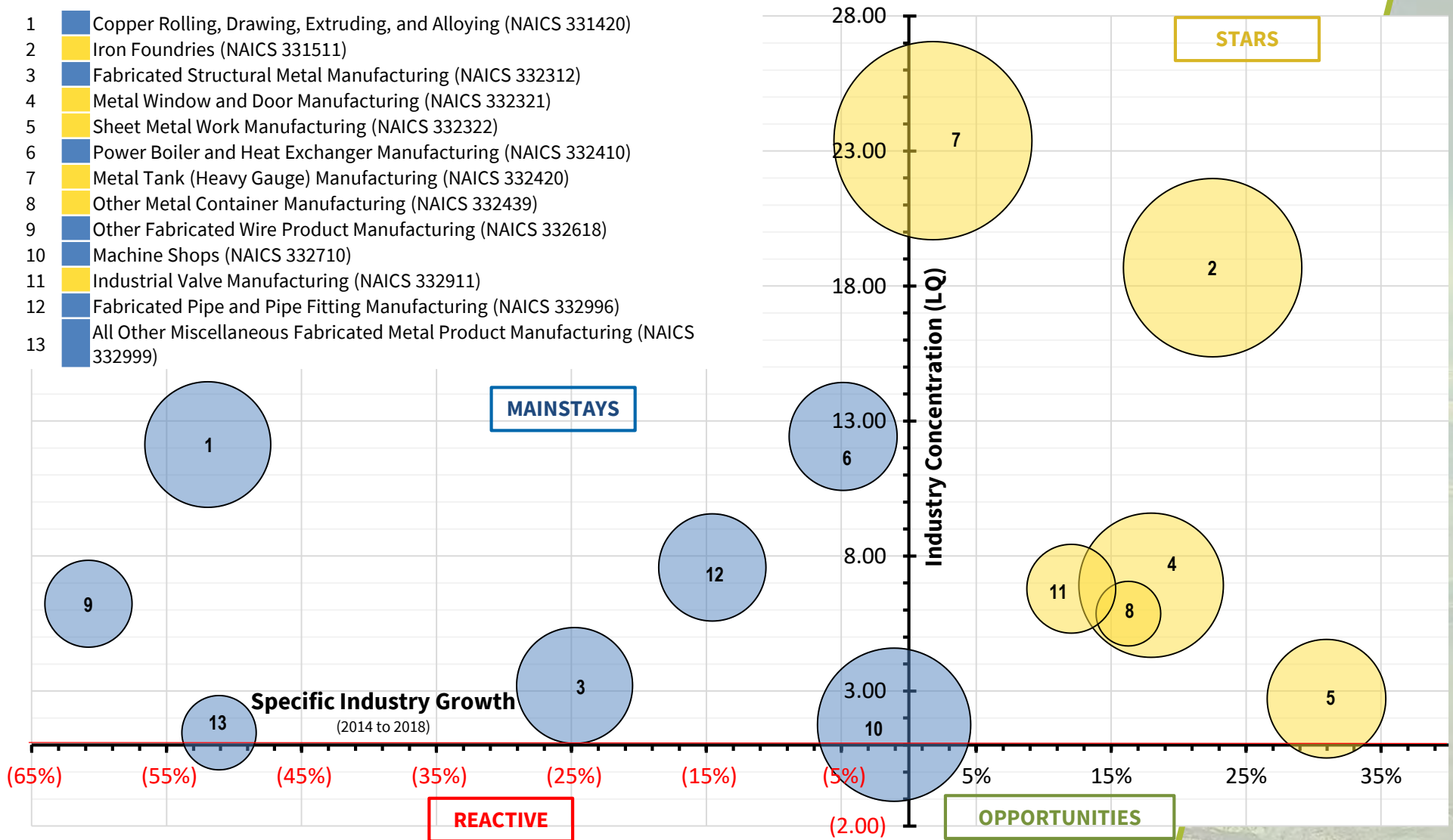
Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

GRAPH 4.9 METAL MANUFACTURING

- 1 Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)
- 2 Iron Foundries (NAICS 331511)
- 3 Fabricated Structural Metal Manufacturing (NAICS 332312)
- 4 Metal Window and Door Manufacturing (NAICS 332321)
- 5 Sheet Metal Work Manufacturing (NAICS 332322)
- 6 Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)
- 7 Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)
- 8 Other Metal Container Manufacturing (NAICS 332439)
- 9 Other Fabricated Wire Product Manufacturing (NAICS 332618)
- 10 Machine Shops (NAICS 332710)
- 11 Industrial Valve Manufacturing (NAICS 332911)
- 12 Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)
- 13 All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)



Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

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Total Employees in Greater Region: 2,419

Circle = 100 employees

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Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 4.9.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	185	355	12.13	1.33	(183)
Iron Foundries (NAICS 331511)	370	688	18.68	1.98	103
Fabricated Structural Metal Manufacturing (NAICS 332312)	158	1,355	3.20	1.57	(51)
Metal Window and Door Manufacturing (NAICS 332321)	243	1,827	6.92	2.97	0
Sheet Metal Work Manufacturing (NAICS 332322)	165	1,376	2.71	1.29	29
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	137	203	12.43	1.05	19
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	455	1,126	23.38	3.30	44
Other Metal Container Manufacturing (NAICS 332439)	50	369	5.87	2.48	8
Other Fabricated Wire Product Manufacturing (NAICS 332618)	89	100	6.23	0.40	(132)
Machine Shops (NAICS 332710)	274	3,014	1.75	1.10	12
Industrial Valve Manufacturing (NAICS 332911)	93	415	6.79	1.73	21
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	135	546	7.58	1.75	0
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	66	719	1.45	0.91	(76)

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)

Greater Region LQ < than Kansas (by ≥ 0.5)

Greater Region LQ and Kansas LQ are not significantly different



Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 4.9.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	\$89,577	\$73,935	\$79,882
Iron Foundries (NAICS 331511)	\$53,706	\$67,918	\$77,169
Fabricated Structural Metal Manufacturing (NAICS 332312)	\$83,726	\$61,011	\$69,807
Metal Window and Door Manufacturing (NAICS 332321)	\$35,469	\$51,785	\$60,152
Sheet Metal Work Manufacturing (NAICS 332322)	\$43,096	\$58,127	\$63,173
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	\$56,800	\$65,258	\$87,471
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	\$65,897	\$62,745	\$73,450
Other Metal Container Manufacturing (NAICS 332439)	\$51,324	\$46,247	\$64,519
Other Fabricated Wire Product Manufacturing (NAICS 332618)	\$37,136	\$39,703	\$62,242
Machine Shops (NAICS 332710)	\$42,626	\$60,664	\$64,757
Industrial Valve Manufacturing (NAICS 332911)	\$51,384	\$65,869	\$84,783
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	\$56,830	\$61,086	\$70,986
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	\$69,612	\$59,701	\$66,341

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages

Greater Region wages > Kansas and U.S. wages

Greater Region wages < Kansas wages only

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 4.9.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	(52%)	(39%)	(38%)	(23%)	(4%)	(4%)
Iron Foundries (NAICS 331511)	23%	1%	(16%)	(7%)	(11%)	(9%)
Fabricated Structural Metal Manufacturing (NAICS 332312)	(25%)	9%	(4%)	4%	(1%)	0%
Metal Window and Door Manufacturing (NAICS 332321)	18%	(12%)	10%	1%	18%	3%
Sheet Metal Work Manufacturing (NAICS 332322)	31%	19%	3%	0%	8%	3%
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	(5%)	(15%)	(20%)	(9%)	(18%)	(5%)
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	2%	20%	(26%)	1%	(8%)	6%
Other Metal Container Manufacturing (NAICS 332439)	16%	0%	13%	9%	(4%)	4%
Other Fabricated Wire Product Manufacturing (NAICS 332618)	(61%)	(55%)	(57%)	(54%)	(2%)	(6%)
Machine Shops (NAICS 332710)	(1%)	9%	6%	9%	(5%)	2%
Industrial Valve Manufacturing (NAICS 332911)	12%	5%	6%	3%	(13%)	(1%)
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	(15%)	(7%)	11%	16%	(15%)	3%
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	(51%)	7%	(0%)	5%	5%	4%

Source: EMSI 2018

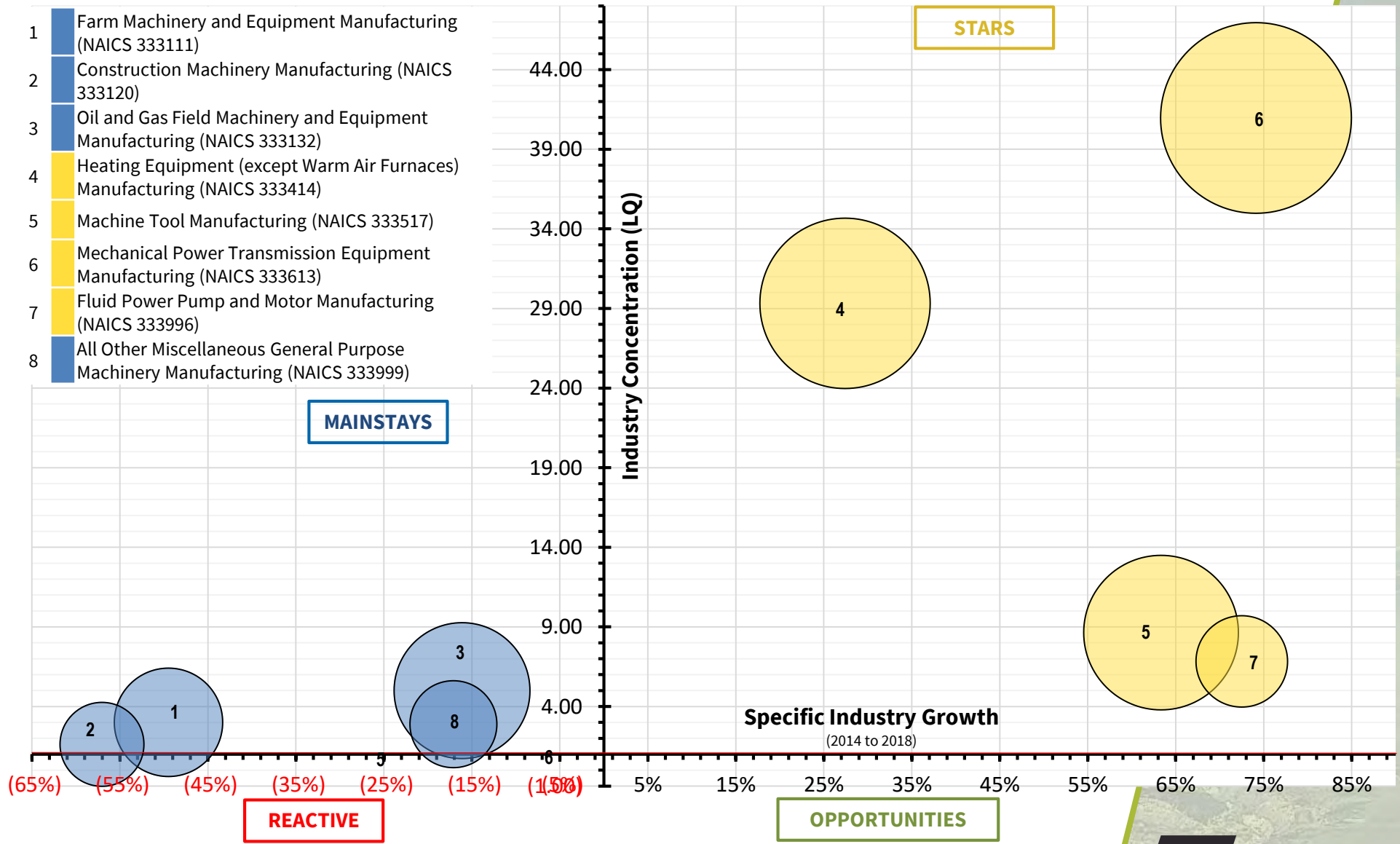


Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

GRAPH 4.10 MACHINERY MANUFACTURING



Circle Size = Number of employees in the Greater Region
 Source: EMSI 2018

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Total Employees in Greater Region: 1,167


○ = 50 employees


Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 4.10.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Farm Machinery and Equipment Manufacturing (NAICS 333111)	97	5,761	3.00	10.22	(70)
Construction Machinery Manufacturing (NAICS 333120)	58	1,532	1.62	2.43	(66)
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	151	150	4.99	0.28	32
Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414)	237	543	29.32	3.84	65
Machine Tool Manufacturing (NAICS 333517)	196	248	8.64	0.63	72
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	296	383	40.97	3.03	137
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	69	468	6.83	2.64	30
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	63	497	2.90	1.31	(9)

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5) 

Greater Region LQ < than Kansas (by ≥ 0.5) 

Greater Region LQ and Kansas LQ are not significantly different 

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 4.10.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Farm Machinery and Equipment Manufacturing (NAICS 333111)	\$50,071	\$64,270	\$77,489
Construction Machinery Manufacturing (NAICS 333120)	\$66,314	\$81,313	\$100,101
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	\$119,153	\$52,001	\$115,964
Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414)	\$56,258	\$53,024	\$69,265
Machine Tool Manufacturing (NAICS 333517)	\$54,905	\$74,842	\$78,746
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	\$116,025	\$110,179	\$77,428
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	\$97,631	\$84,295	\$101,570
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	\$52,809	\$79,154	\$81,279

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 4.10.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Farm Machinery and Equipment Manufacturing (NAICS 333111)	(49%)	12%	(7%)	9%	(13%)	5%
Construction Machinery Manufacturing (NAICS 333120)	(57%)	(45%)	(9%)	5%	(8%)	9%
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	(16%)	16%	(12%)	33%	(34%)	(4%)
Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414)	27%	14%	10%	3%	(8%)	(2%)
Machine Tool Manufacturing (NAICS 333517)	63%	32%	4%	5%	3%	2%
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	74%	16%	45%	19%	(6%)	1%
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	73%	4%	(28%)	(4%)	(3%)	(2%)
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	(17%)	(2%)	(1%)	4%	(5%)	0%

Source: EMSI 2018

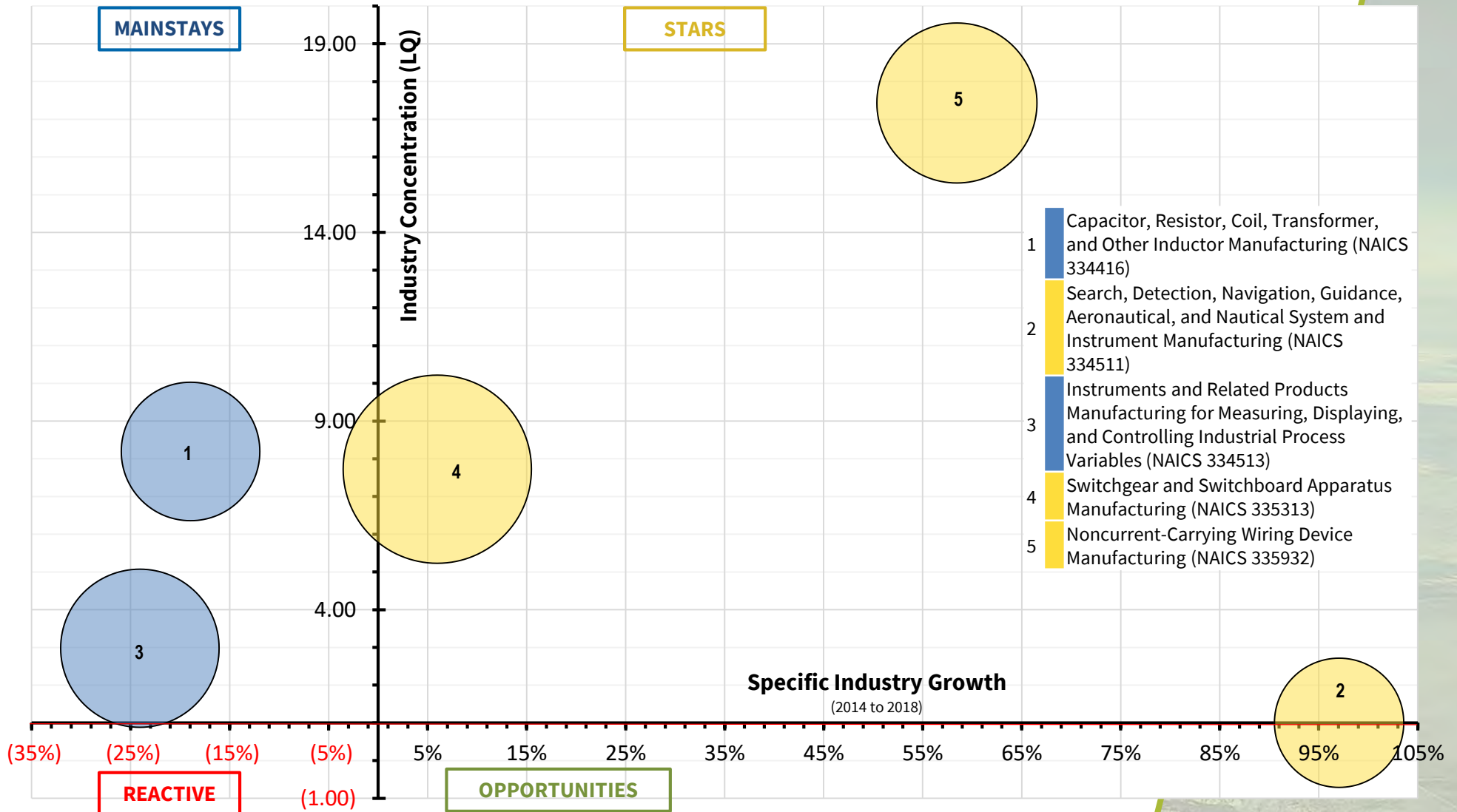


Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Computer and Electronic Component Manufacturing (NAICS 334-335)

GRAPH 4.11 COMPUTER AND ELECTRONIC COMPONENT MANUFACTURING

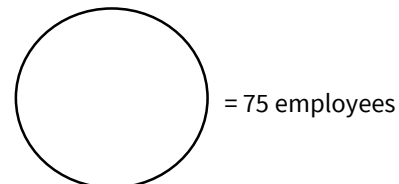


Circle Size = Number of employees in the Greater Region

Source: EMSI 2018

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Total Employees in Greater Region: 491



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Target Industry Analysis – Computer and Electronic Component Manufacturing (NAICS 334-335)

Table 4.11.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	77	220	8.20	1.33	(12)
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	67	739	1.00	0.63	33
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	101	314	2.98	0.53	(29)
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	142	340	7.72	1.06	10
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	103	103	17.43	1.00	37

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)
 Greater Region LQ < than Kansas (by ≥ 0.5)
 Greater Region LQ and Kansas LQ are not significantly different



Target Industry Analysis – Computer and Electronic Component Manufacturing (NAICS 334-335)

Table 4.11.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	\$60,515	\$49,911	\$70,168
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	\$81,904	\$86,928	\$136,806
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	\$176,579	\$81,307	\$99,888
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	\$67,797	\$74,682	\$98,229
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	\$48,486	\$48,486	\$84,719

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages
 Greater Region wages > Kansas and U.S. wages
 Greater Region wages < Kansas wages only



Target Industry Analysis – Computer and Electronic Component Manufacturing (NAICS 334-335)

Table 4.11.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	(19%)	(1%)	1%	1%	(6%)	(3%)
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	97%	(22%)	(6%)	(15%)	(1%)	(6%)
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	(24%)	(13%)	(4%)	(3%)	(2%)	1%
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	6%	10%	(2%)	(3%)	(2%)	2%
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	58%	16%	58%	16%	2%	(0%)

Source: EMSI 2018

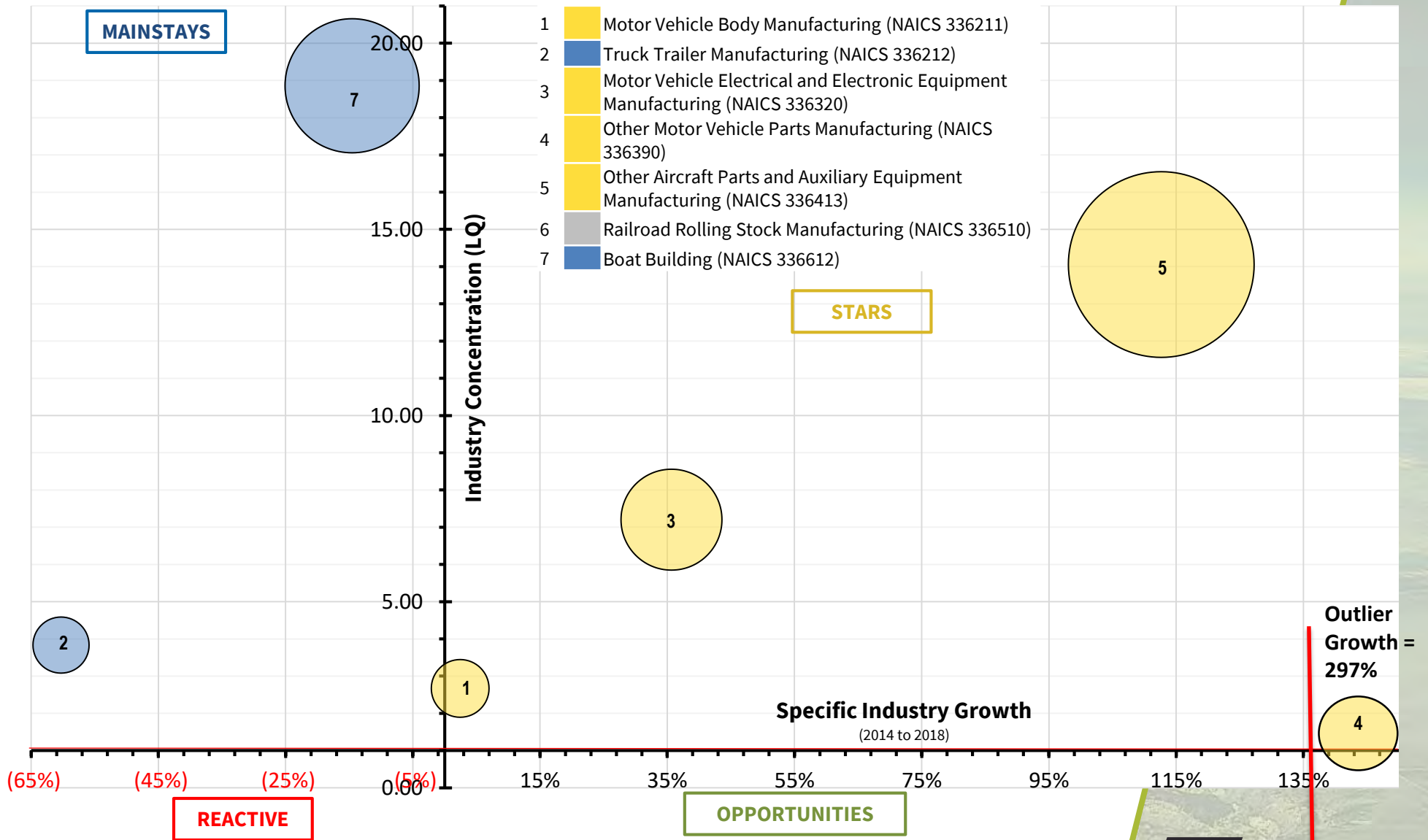


Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

GRAPH 4.12 TRANSPORTATION EQUIPMENT MANUFACTURING



Total Employees in Greater Region: 1,878

○ = 200 employees

Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

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Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 4.12.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Motor Vehicle Body Manufacturing (NAICS 336211)	84	760	2.67	1.38	(2)
Truck Trailer Manufacturing (NAICS 336212)	79	569	3.83	1.58	(128)
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	251	557	7.20	0.91	43
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	127	789	1.48	0.53	92
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	840	7,382	14.05	7.06	437
Railroad Rolling Stock Manufacturing (NAICS 336510)	58	194	4.80	0.92	50
Boat Building (NAICS 336612)	441	512	18.86	1.25	(204)

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)
 Greater Region LQ < than Kansas (by ≥ 0.5)
 Greater Region LQ and Kansas LQ are not significantly different

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 4.12.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Motor Vehicle Body Manufacturing (NAICS 336211)	\$82,875	\$63,068	\$67,812
Truck Trailer Manufacturing (NAICS 336212)	\$63,196	\$51,234	\$58,222
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	\$47,304	\$53,844	\$73,435
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	\$52,653	\$59,529	\$67,598
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	\$67,162	\$71,477	\$93,437
Railroad Rolling Stock Manufacturing (NAICS 336510)	\$119,770	\$96,114	\$89,493
Boat Building (NAICS 336612)	\$65,818	\$63,421	\$58,446

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages

Greater Region wages > Kansas and U.S. wages

Greater Region wages < Kansas wages only



Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 4.12.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Motor Vehicle Body Manufacturing (NAICS 336211)	2%	20%	(10%)	(5%)	3%	1%
Truck Trailer Manufacturing (NAICS 336212)	(60%)	(27%)	(63%)	(26%)	4%	5%
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	36%	(10%)	13%	(2%)	13%	4%
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	297%	47%	9%	(1%)	8%	2%
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	113%	30%	(2%)	4%	2%	5%
Railroad Rolling Stock Manufacturing (NAICS 336510)	Insf. Data	17%	55%	16%	(20%)	(2%)
Boat Building (NAICS 336612)	(15%)	(22%)	(15%)	(15%)	25%	8%

Source: EMSI 2018



Industry growth greater than or equal to ten percent in the respective region and time frame.

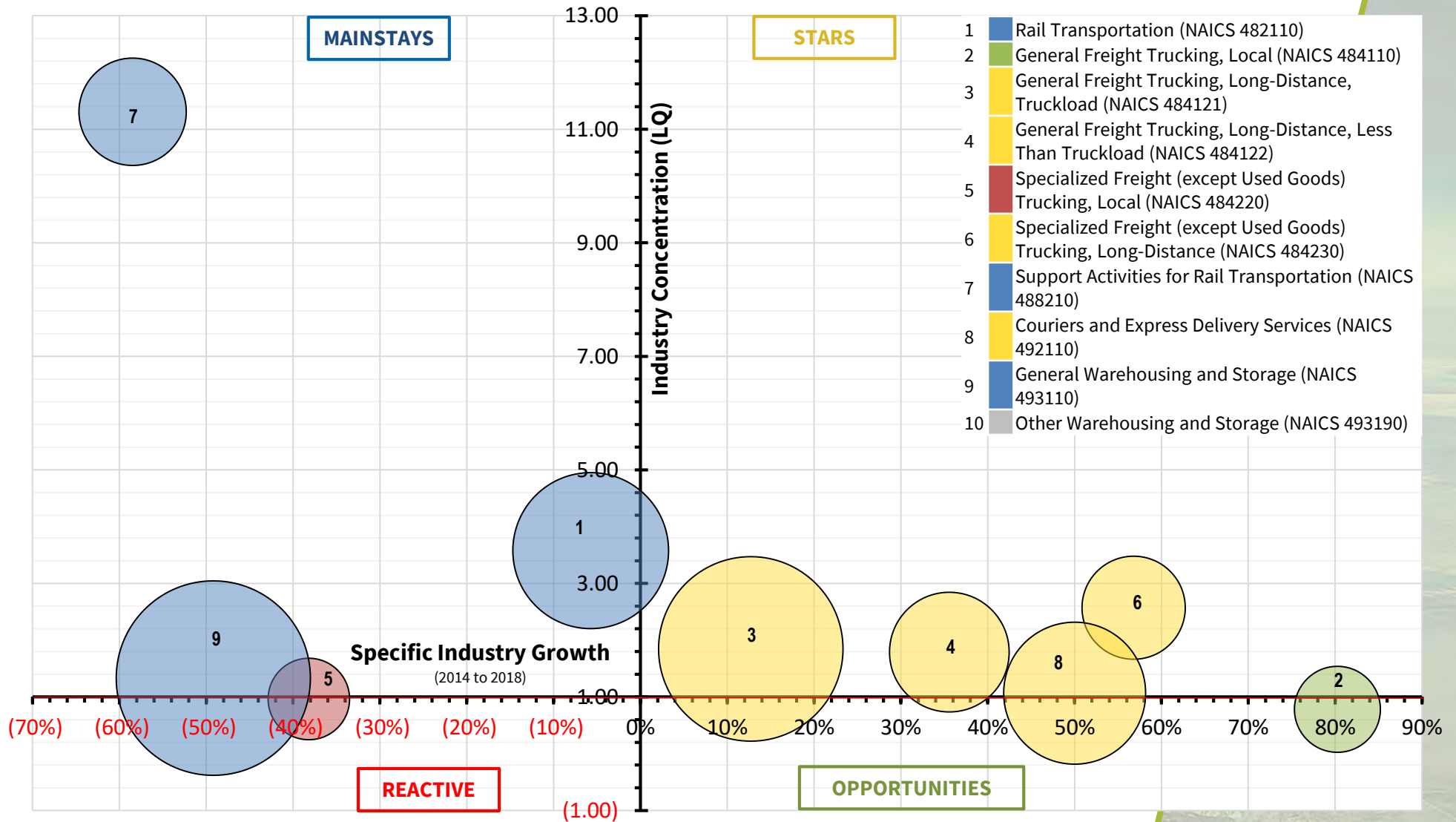
Industry growth is less than or equal to negative ten percent in the respective region and time frame.



Target Industry Analysis – Transportation and Warehousing

Target Industry Analysis – Transportation and Warehousing (NAICS 48-49)

GRAPH 4.13 TRANSPORTATION AND WAREHOUSING

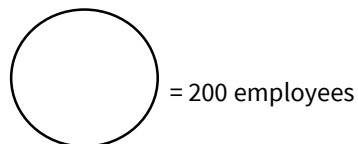


Total Employees in Greater Region: 3,137

Circle Size = Number of employees in the Greater Region

Source: EMSI 2018

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Target Industry Analysis – Transportation and Warehousing (NAICS 48-49)

Table 4.13.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Rail Transportation (NAICS 482110)	444	5,224	3.58	2.40	5
General Freight Trucking, Local (NAICS 484110)	137	1,680	0.78	0.55	57
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	621	8,547	1.85	1.45	68
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	263	3,397	1.79	1.32	53
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	123	2,322	0.96	1.04	(75)
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	196	2,316	2.57	1.73	66
Support Activities for Rail Transportation (NAICS 488210)	213	921	11.31	2.80	(323)
Couriers and Express Delivery Services (NAICS 492110)	369	7,060	1.07	1.17	77
General Warehousing and Storage (NAICS 493110)	688	12,771	1.33	1.41	(1,307)
Other Warehousing and Storage (NAICS 493190)	83	589	3.20	1.30	83

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)

Greater Region LQ < than Kansas (by ≥ 0.5)

Greater Region LQ and Kansas LQ are not significantly different

Target Industry Analysis – Transportation and Warehousing (NAICS 48-49)

Table 4.13.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Rail Transportation (NAICS 482110)	\$92,506	\$92,633	\$95,694
General Freight Trucking, Local (NAICS 484110)	\$61,010	\$49,458	\$55,570
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	\$60,736	\$59,048	\$57,475
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	\$82,470	\$75,018	\$70,361
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	\$86,629	\$52,603	\$63,469
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	\$74,643	\$67,542	\$70,360
Support Activities for Rail Transportation (NAICS 488210)	\$101,061	\$68,464	\$62,940
Couriers and Express Delivery Services (NAICS 492110)	\$50,155	\$51,984	\$55,594
General Warehousing and Storage (NAICS 493110)	\$50,257	\$43,628	\$49,689
Other Warehousing and Storage (NAICS 493190)	\$63,560	\$51,368	\$63,716

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages

Greater Region wages > Kansas and U.S. wages


Greater Region wages < Kansas wages only




Target Industry Analysis – Transportation and Warehousing (NAICS 48-49)

Table 4.13.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Rail Transportation (NAICS 482110)	(6%)	1%	(8%)	(2%)	(7%)	1%
General Freight Trucking, Local (NAICS 484110)	80%	14%	(16%)	(10%)	6%	4%
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	13%	13%	10%	3%	0%	0%
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	36%	13%	4%	6%	8%	6%
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	(38%)	(8%)	(4%)	(2%)	(1%)	3%
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	57%	28%	(1%)	6%	4%	6%
Support Activities for Rail Transportation (NAICS 488210)	(58%)	12%	(9%)	15%	4%	10%
Couriers and Express Delivery Services (NAICS 492110)	50%	13%	13%	4%	19%	6%
General Warehousing and Storage (NAICS 493110)	(49%)	5%	86%	28%	47%	16%
Other Warehousing and Storage (NAICS 493190)	Insf. Data	30%	6%	12%	4%	7%

Source: EMSI 2018

 Industry growth greater than or equal to ten percent in the respective region and time frame.

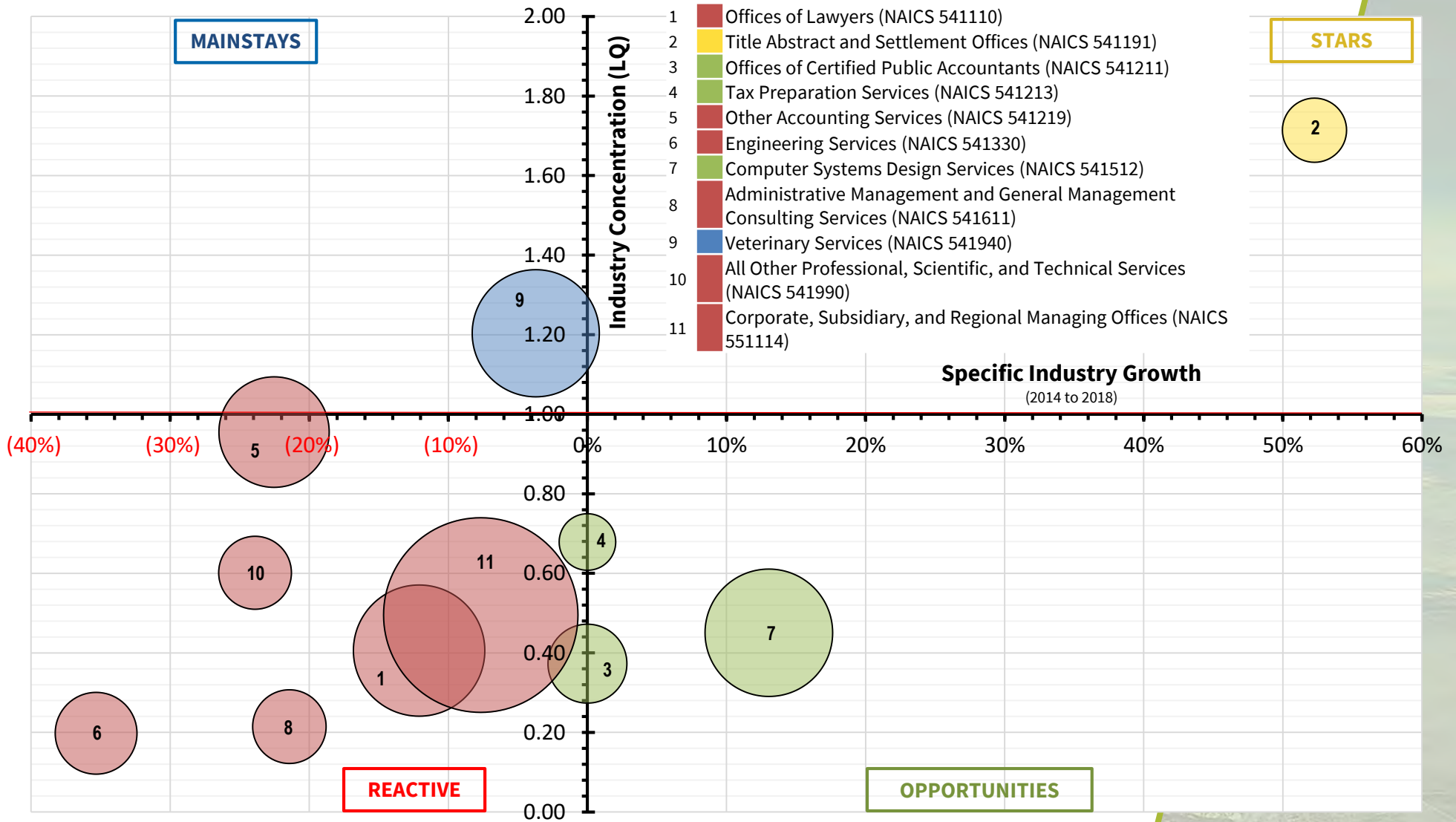
 Industry growth is less than or equal to negative ten percent in the respective region and time frame.



Target Industry Analysis – Professional, Scientific, and Technical Services

Target Industry Analysis – Professional, Scientific, and Technical Services (NAICS 54-55)

GRAPH 4.14 PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES



Circle Size = Number of employees in the Greater Region
Source: EMSI 2018

Total Employees in Greater Region: 2,097

○ = 100 employees

Target Industry Analysis – Professional, Scientific, and Technical Services (NAICS 54-55)

Table 4.14.A: Existing Industry Concentration Comparison	Greater Region Total Employment	Kansas Total Employment	Greater Region Location Quotient	Kansas Location Quotient	Competitive Effect
Offices of Lawyers (NAICS 541110)	276	7,248	0.41	0.61	(36)
Title Abstract and Settlement Offices (NAICS 541191)	67	894	1.71	1.30	19
Offices of Certified Public Accountants (NAICS 541211)	101	3,110	0.37	0.66	(9)
Tax Preparation Services (NAICS 541213)	53	1,236	0.68	0.91	(0)
Other Accounting Services (NAICS 541219)	196	4,550	0.96	1.27	(71)
Engineering Services (NAICS 541330)	108	10,838	0.20	1.13	(66)
Computer Systems Design Services (NAICS 541512)	260	8,415	0.45	0.83	(3)
Administrative Management and General Management Consulting Services (NAICS 541611)	88	6,607	0.21	0.92	(49)
Veterinary Services (NAICS 541940)	259	4,395	1.20	1.17	(49)
All Other Professional, Scientific, and Technical Services (NAICS 541990)	86	3,212	0.60	1.28	(53)
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	602	24,002	0.50	1.13	(94)

Source: EMSI 2018

Greater Region LQ > than Kansas (by ≥ 0.5)
 Greater Region LQ < than Kansas (by ≥ 0.5)
 Greater Region LQ and Kansas LQ are not significantly different

Target Industry Analysis – Professional, Scientific, and Technical Services (NAICS 54-55)

Table 4.14.B: Existing Industry Wage Comparison	Greater Region Average Cluster Wage (Annual)	Kansas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Offices of Lawyers (NAICS 541110)	\$50,506	\$70,423	\$106,405
Title Abstract and Settlement Offices (NAICS 541191)	\$38,940	\$59,602	\$68,080
Offices of Certified Public Accountants (NAICS 541211)	\$60,080	\$72,052	\$98,821
Tax Preparation Services (NAICS 541213)	\$29,204	\$31,219	\$37,438
Other Accounting Services (NAICS 541219)	\$50,985	\$63,024	\$57,374
Engineering Services (NAICS 541330)	\$76,166	\$102,892	\$108,598
Computer Systems Design Services (NAICS 541512)	\$73,459	\$109,304	\$121,067
Administrative Management and General Management Consulting Services (NAICS 541611)	\$84,285	\$80,327	\$107,941
Veterinary Services (NAICS 541940)	\$35,711	\$37,140	\$46,082
All Other Professional, Scientific, and Technical Services (NAICS 541990)	\$53,411	\$51,613	\$63,803
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	\$81,490	\$118,131	\$139,359

Source: EMSI 2018

Greater Region wages < Kansas and U.S. wages

Greater Region wages > Kansas and U.S. wages

Greater Region wages < Kansas wages only

Target Industry Analysis – Professional, Scientific, and Technical Services (NAICS 54-55)

Table 4.14.C: Existing Industry Growth Comparison	Greater Region 5-year Growth (2014 - 2018)	Greater Region 5-year Projected Growth (2018 - 2022)	Kansas 5-year Growth (2014 - 2018)	Kansas 5-year Projected Growth (2018 - 2022)	U.S. 5-year Growth (2014 - 2018)	U.S. 5-year Projected Growth (2018 - 2022)
Offices of Lawyers (NAICS 541110)	(12%)	(8%)	(5%)	(3%)	(0%)	0%
Title Abstract and Settlement Offices (NAICS 541191)	52%	7%	39%	14%	9%	6%
Offices of Certified Public Accountants (NAICS 541211)	0%	(17%)	1%	0%	9%	6%
Tax Preparation Services (NAICS 541213)	0%	(19%)	4%	(0%)	(1%)	0%
Other Accounting Services (NAICS 541219)	(23%)	(1%)	(8%)	6%	6%	4%
Engineering Services (NAICS 541330)	(35%)	(7%)	(2%)	4%	4%	6%
Computer Systems Design Services (NAICS 541512)	13%	12%	21%	12%	14%	13%
Administrative Management and General Management Consulting Services (NAICS 541611)	(21%)	6%	33%	19%	23%	15%
Veterinary Services (NAICS 541940)	(4%)	3%	5%	6%	15%	10%
All Other Professional, Scientific, and Technical Services (NAICS 541990)	(24%)	5%	54%	24%	23%	18%
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	(8%)	(4%)	38%	17%	7%	6%

Source: EMSI 2018



Industry growth greater than or equal to ten percent in the respective region and time frame.

Industry growth is less than or equal to negative ten percent in the respective region and time frame.



Target Industry Talent Analysis

Target Industry Talent Analysis

Introduction

In order to begin the target industry screening process, Ady Advantage first conducted an analysis of talent capacity within the Montgomery County region. This analysis took into account all occupations in which the Montgomery County region had a talent capacity of 10 or greater, meaning Montgomery County had at least 10 or more regional completions than it did annual openings in that specific occupation. Also included are the typical entry-level education required by the occupation.

The results of this analysis can be found on the following pages, and the vast majority of excess talent capacity consisted of occupations that do not induce further job growth or economic growth; rather, these occupations tended to be those that would be driven by local growth of the economy. Examples include occupations within the fields of education, healthcare, hospitality and government. As noted, these are industries that follow the economy, and do not represent target industries to be prioritized. As a result of this talent analysis providing insufficient insight, Ady Advantage then conducted a further target industry screening process using other screening measures, found in the section following this one.

Target Industry Analysis – Talent Capacity

Table 4.15.A: Existing Industry Concentration Comparison	Annual Openings	Regional Completions	Talent Capacity	Typical Entry Level Education
Postsecondary Teachers	74	554	480	Doctoral or professional degree
Registered Nurses	122	448	326	Bachelor's degree
Sales Managers	9	260	251	Bachelor's degree
Construction Managers	14	257	243	Bachelor's degree
Social and Community Service Managers	15	244	230	Bachelor's degree
Transportation, Storage, and Distribution Managers	6	216	210	High school diploma or equivalent
Cost Estimators	10	220	210	Bachelor's degree
Managers, All Other	34	244	210	Bachelor's degree
Industrial Production Managers	13	216	203	Bachelor's degree
Administrative Services Managers	14	216	203	Bachelor's degree
Management Analysts	16	216	200	Bachelor's degree
Chief Executives	24	221	197	Bachelor's degree
Nursing Assistants	264	460	197	Postsecondary nondegree award
First-Line Supervisors of Gaming Workers	12	144	132	High school diploma or equivalent
First-Line Supervisors of Housekeeping and Janitorial Workers	16	144	129	High school diploma or equivalent
First-Line Supervisors of Personal Service Workers	23	144	121	High school diploma or equivalent
General and Operations Managers	103	221	119	Bachelor's degree
Industrial Engineering Technicians	6	115	109	Associate's degree
Middle School Teachers, Except Special and Career/Technical Education	41	146	105	Bachelor's degree
Clinical, Counseling, and School Psychologists	5	107	102	Doctoral or professional degree
Licensed Practical and Licensed Vocational Nurses	54	155	102	Postsecondary nondegree award
Industrial-Organizational Psychologists	0	101	101	Master's degree
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	12	99	87	High school diploma or equivalent
Healthcare Support Workers, All Other	4	89	86	High school diploma or equivalent
Umpires, Referees, and Other Sports Officials	4	83	79	High school diploma or equivalent

Source: EMSI 2018

Target Industry Analysis – Talent Capacity

Table 4.15.A: Existing Industry Concentration Comparison	Annual Openings	Regional Completions	Talent Capacity	Typical Entry Level Education
Secondary School Teachers, Except Special and Career/Technical Education	81	152	71	Bachelor's degree
Writers and Authors	5	76	71	Bachelor's degree
Elementary School Teachers, Except Special Education	107	174	67	Bachelor's degree
Public Relations Specialists	13	76	63	Bachelor's degree
Budget Analysts	4	63	59	Bachelor's degree
Mechanical Engineering Technicians	4	62	58	Associate's degree
Engineering Technicians, Except Drafters, All Other	5	51	47	Associate's degree
Electrical and Electronics Engineering Technicians	4	50	46	Associate's degree
Civil Engineering Technicians	4	43	40	Associate's degree
Marketing Managers	5	44	39	Bachelor's degree
Special Education Teachers, Preschool	3	42	39	Bachelor's degree
Special Education Teachers, Middle School	3	42	39	Bachelor's degree
Education Administrators, Preschool and Childcare Center/Program	5	43	38	Bachelor's degree
Special Education Teachers, Secondary School	5	42	37	Bachelor's degree
Fitness Trainers and Aerobics Instructors	28	65	37	High school diploma or equivalent
Education Administrators, Elementary and Secondary School	20	56	37	Master's degree
Surveying and Mapping Technicians	4	39	35	High school diploma or equivalent
Emergency Medical Technicians and Paramedics	21	56	35	Postsecondary nondegree award
Education Administrators, Postsecondary	13	43	30	Master's degree
Special Education Teachers, Kindergarten and Elementary School	13	42	30	Bachelor's degree
Phlebotomists	5	34	30	Postsecondary nondegree award
Marriage and Family Therapists	4	33	30	Master's degree
Social Workers, All Other	6	33	28	Bachelor's degree
Career/Technical Education Teachers, Secondary School	3	30	27	Bachelor's degree
Probation Officers and Correctional Treatment Specialists	6	33	27	Bachelor's degree

Source: EMSI 2018

Target Industry Analysis – Talent Capacity

Table 4.15.A: Existing Industry Concentration Comparison	Annual Openings	Regional Completions	Talent Capacity	Typical Entry Level Education
First-Line Supervisors of Police and Detectives	8	34	26	High school diploma or equivalent
Computer Network Architects	3	29	26	Bachelor's degree
Web Developers	4	29	26	Associate's degree
Prepress Technicians and Workers	16	41	25	Postsecondary nondegree award
Information Security Analysts	5	29	25	Bachelor's degree
Instructional Coordinators	6	30	24	Master's degree
Coaches and Scouts	42	65	23	Bachelor's degree
Teachers and Instructors, All Other	20	42	23	Bachelor's degree
Sales and Related Workers, All Other	6	28	23	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	78	99	21	High school diploma or equivalent
Chemists	4	24	20	Bachelor's degree
Automotive Service Technicians and Mechanics	51	70	20	Postsecondary nondegree award
Surgical Technologists	5	24	19	Postsecondary nondegree award
Training and Development Specialists	12	30	18	Bachelor's degree
Market Research Analysts and Marketing Specialists	23	40	18	Bachelor's degree
Mechanical Door Repairers	4	21	18	High school diploma or equivalent
Occupational Therapy Assistants	4	20	16	Associate's degree
Computer Network Support Specialists	11	26	15	Associate's degree
Mathematicians	0	15	15	Master's degree
Physical Therapist Aides	6	20	15	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	14	28	14	Bachelor's degree
Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	3	16	14	Postsecondary nondegree award
Financial Specialists, All Other	4	16	13	Bachelor's degree
Statisticians	3	15	12	Master's degree
Medical Equipment Preparers	3	15	12	High school diploma or equivalent

Source: EMSI 2018

Target Industry Analysis – Talent Capacity

Table 4.15.A: Existing Industry Concentration Comparison	Annual Openings	Regional Completions	Talent Capacity	Typical Entry Level Education
Metal Workers and Plastic Workers, All Other	3	14	11	High school diploma or equivalent
Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	3	14	11	High school diploma or equivalent
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	3	14	11	High school diploma or equivalent
Religious Workers, All Other	10	20	11	Bachelor's degree
Personal Financial Advisors	6	16	11	Bachelor's degree
Financial Analysts	6	16	11	Bachelor's degree
Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	4	14	11	High school diploma or equivalent
Forging Machine Setters, Operators, and Tenders, Metal and Plastic	4	14	11	High school diploma or equivalent
Installation, Maintenance, and Repair Workers, All Other	11	21	10	High school diploma or equivalent
Layout Workers, Metal and Plastic	4	14	10	High school diploma or equivalent
First-Line Supervisors of Non-Retail Sales Workers	18	28	10	High school diploma or equivalent
Kindergarten Teachers, Except Special Education	10	20	10	Bachelor's degree
Music Directors and Composers	7	16	10	Bachelor's degree
Security and Fire Alarm Systems Installers	3	12	10	High school diploma or equivalent

Source: EMSI 2018



Target Industry Screening

Target Industry Screening

Overview

Following the talent analysis, Ady Advantage conducted an additional target industry screening analysis. The following section narrows down the target industries by looking at industry competitive effect (the regional growth that cannot be explained by either overall national growth or industry/occupation-specific trends – meaning the growth or decline that is unique to a particular region), industry location quotient (concentration) within the State of Kansas, and industry projected U.S. growth.

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Agriculture				
Crop Production (NAICS 111000)	71	1.55	1%	Yes – Agribusiness. The region has a strong agriculture and food processing industry. More specifically, there is opportunity to leverage the supply chain leakage and create more value on the raw materials. Additionally, looking at opportunities to leverage byproduct materials.
Farm Labor Contractors and Crew Leaders (NAICS 115115)	4	1.19	5%	
Animal Production (NAICS 112000)	-34	3.14	-1%	
Food and Beverage Processing				
Dog and Cat Food Manufacturing (NAICS 311111)	40	9.94	8%	Yes - Agribusiness. Industries within these sectors could provide supply chain opportunities for agriculture and other industries in the region. Furthermore, there is the potential Tyson project that may land in the region.
Animal (except Poultry) Slaughtering (NAICS 311611)	27	8.24	3%	
Other Animal Food Manufacturing (NAICS 311119)	0	4.00	5%	
Meat Processed from Carcasses (NAICS 311612)	-274	5.57	7%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Wood Product and Paper Manufacturing & Printing Activities				
Commercial Screen Printing (NAICS 323113)	42	2.30	6%	Yes – Supply chain support. This industry has a strong competitive effect score in the region, high concentration in the state of Kansas and is projected to grow nationally. There may be supply chain opportunities.
Commercial Printing (except Screen and Books) (NAICS 323111)	69	1.49	-10%	No – These industries are declining and/or have a low concentration in the state of Kansas. Focus should be on BRE and not business recruitment.
Curtain and Linen Mills (NAICS 314120)	52	0.27	-7%	
Other Millwork (including Flooring) (NAICS 321918)	8	0.37	-1%	
Wood Container and Pallet Manufacturing (NAICS 321920)	2	0.58	2%	
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	-31	1.00	9%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Chemical, Plastic and Nonmetallic Mineral Product Manufacturing				
Cement Manufacturing (NAICS 327310)	20	3.27	1%	Yes – Supply chain support. Proximity to other nearby facilities in the region provides companies in these industries a competitive advantage, and these industries generally have a strong concentration in the state of Kansas and projected growth. There may be supply chain opportunities.
Ready-Mix Concrete Manufacturing (NAICS 327320)	-39	1.47	1%	
Cut Stone and Stone Product Manufacturing (NAICS 327991)	11	0.93	7%	
Nitrogenous Fertilizer Manufacturing (NAICS 325311)	83	3.01	5%	No - These industries already have a presence in the region, however focus should be on diversifying the economy. Supply chain opportunities supporting these industries should be pursued, not further recruitment of these companies.
Petroleum Refineries (NAICS 324110)	26	2.13	0%	
Plastics Bottle Manufacturing (NAICS 326160)	57	0.82	1%	No – The region does not have a strong competitive effect score in most of these industries, and transportation assets in the region are not well suited for these industries.
Rubber and Plastics Hoses and Belting Manufacturing (NAICS 326220)	-59	5.68	-2%	
All Other Plastics Product Manufacturing (NAICS 326199)	-84	1.05	-2%	
Plastics Bag and Pouch Manufacturing (NAICS 326111)	-85	1.15	5%	
Plastics Pipe and Pipe Fitting Manufacturing (NAICS 326122)	-91	2.97	2%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Metal Manufacturing				
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	44	3.30	6%	Yes – Heavy/light industrial manufacturing. These industries have a strong competitive effect score in the region, high concentration in the state of Kansas and are projected to grow nationally.
Sheet Metal Work Manufacturing (NAICS 332322)	29	1.29	3%	
Industrial Valve Manufacturing (NAICS 332911)	21	1.73	-1%	
Other Metal Container Manufacturing (NAICS 332439)	8	2.48	4%	
Metal Window and Door Manufacturing (NAICS 332321)	0	2.97	3%	
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	0	1.75	3%	
Iron Foundries (NAICS 331511)	103	1.98	-9%	No - These industries already have a presence in the region, however focus should be on diversifying the economy. Supply chain opportunities supporting these industries should be pursued, not further recruitment of these companies.
Machine Shops (NAICS 332710)	12	1.10	2%	
Power Boiler and Heat Exchanger Manufacturing (NAICS 332410)	19	1.05	-5%	No – These industries have a low competitive effect score in the region and/or are declining. Focus should be on BRE and not business recruitment.
Fabricated Structural Metal Manufacturing (NAICS 332312)	-51	1.57	0%	
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	-76	0.91	4%	
Other Fabricated Wire Product Manufacturing (NAICS 332618)	-132	0.40	-6%	
Copper Rolling, Drawing, Extruding, and Alloying (NAICS 331420)	-183	1.33	-4%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Machinery Manufacturing				
Construction Machinery Manufacturing (NAICS 333120)	-66	2.43	9%	Yes - Heavy/light industrial manufacturing. Proximity to the foundry and other heavy industrial manufacturing in the region provides companies in these industries a competitive advantage.
Farm Machinery and Equipment Manufacturing (NAICS 333111)	-70	10.22	5%	
Mechanical Power Transmission Equipment Manufacturing (NAICS 333613)	137	3.03	1%	No - These industries already have a presence in the region, however focus should be on diversifying the economy. Supply chain opportunities supporting these industries should be pursued, not further recruitment of these companies.
Machine Tool Manufacturing (NAICS 333517)	72	0.63	2%	
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	-9	1.31	0%	
Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414)	65	3.84	-2%	Yes - Heavy/light industrial manufacturing. These industries have a high competitive effect score, and there are consolidation opportunities as national decline occurs in these particular industries.
Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132)	32	0.28	-4%	
Fluid Power Pump and Motor Manufacturing (NAICS 333996)	30	2.64	-2%	
Computer and Electronic Component Manufacturing				
Noncurrent-Carrying Wiring Device Manufacturing (NAICS 335932)	37	1.00	0%	No - These industries generally have a low competitive effect score in the region and/or are declining. Focus should be on BRE and not business recruitment.
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	33	0.63	-6%	
Switchgear and Switchboard Apparatus Manufacturing (NAICS 335313)	10	1.06	2%	
Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (NAICS 334416)	-12	1.33	-3%	
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	-29	0.53	1%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Transportation Equipment Manufacturing				
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	437	7.06	5%	Yes – Heavy/light industrial manufacturing. This industry has a very high competitive effect score and concentration in the state of Kansas. In particular, focus should be on supply chain opportunities and other complimentary industries in order to build out a cluster.
Other Motor Vehicle Parts Manufacturing (NAICS 336390)	92	0.53	2%	No - Transportation assets in the region are not well suited for these industries due to the lack of interstate access, 4-lane roads, and extensive rail. Furthermore, there is not a concentration of this industries value-chain in the region.
Railroad Rolling Stock Manufacturing (NAICS 336510)	50	0.92	-2%	
Motor Vehicle Electrical and Electronic Equipment Manufacturing (NAICS 336320)	43	0.91	4%	
Motor Vehicle Body Manufacturing (NAICS 336211)	-2	1.38	1%	
Truck Trailer Manufacturing (NAICS 336212)	-128	1.58	5%	
Boat Building (NAICS 336612)	-204	1.25	8%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Transportation and Warehousing				
Couriers and Express Delivery Services (NAICS 492110)	77	1.17	6%	No – This industry tend be service-focused and driven by local growth.
Other Warehousing and Storage (NAICS 493190)	83	1.30	7%	Yes – Supply chain support. Focus should be on warehousing and distribution related to the other recommended target industries.
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	68	1.45	0%	
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	66	1.73	6%	
General Freight Trucking, Local (NAICS 484110)	57	0.55	4%	
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	53	1.32	6%	
Rail Transportation (NAICS 482110)	5	2.40	1%	
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	-75	1.04	3%	
Support Activities for Rail Transportation (NAICS 488210)	-323	2.80	10%	
General Warehousing and Storage (NAICS 493110)	-1,307	1.41	16%	

Target Industry Screening

Industry	Competitive Effect	Kansas Location Quotient	Projected U.S. Growth	Include as a target industry? Comments
Professional, Scientific, and Technical Services				
Title Abstract and Settlement Offices (NAICS 541191)	19	1.30	6%	No - These industries tend to be driven by local growth and follow the economy.
Tax Preparation Services (NAICS 541213)	0	0.91	0%	
Offices of Certified Public Accountants (NAICS 541211)	-9	0.66	6%	
Offices of Lawyers (NAICS 541110)	-36	0.61	0%	
Administrative Management and General Management Consulting Services (NAICS 541611)	-49	0.92	15%	
Veterinary Services (NAICS 541940)	-49	1.17	10%	Yes - Aspirational target industry of professional, scientific and technical services. These types of industries will more likely tend to be located in Tulsa, Wichita and Kansas City. However, these particular industries have a higher concentration in the state of Kansas and have shown growth nationally. Focus should be on recruiting these types of functions as they relate to other target industries, with the goal of diversifying the region's economy.
Computer Systems Design Services (NAICS 541512)	-3	0.83	13%	
Engineering Services (NAICS 541330)	-66	1.13	6%	
Other Accounting Services (NAICS 541219)	-71	1.27	4%	
All Other Professional, Scientific, and Technical Services (NAICS 541990)	-53	1.28	18%	
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	-94	1.13	6%	

Recommended Target Industries

Based on the analysis in this section, we recommend the following industries as targets for the Montgomery County region. Each target industry will have a specific strategy.

Target Industry	Subsectors of Focus	Comments
Agribusiness	<ul style="list-style-type: none"> • Crop Production (NAICS 111000) • Farm Labor Contractors and Crew Leaders (NAICS 115115) • Animal Production (NAICS 112000) • Dog and Cat Food Manufacturing (NAICS 311111) • Animal (except Poultry) Slaughtering (NAICS 311611) • Other Animal Food Manufacturing (NAICS 311119) • Meat Processed from Carcasses (NAICS 311612) 	<p>Kansas and the region have a strong agriculture and food processing industry. This ecosystem presents value-added opportunities for the region. The region has a level of supply chain leakage that is largely non-value added goods. This area will provide opportunities to reduce leakage and create greater value. Furthermore, the Tyson project will create greater opportunity for value-added agribusiness in the area should the project land in the region.</p>
Heavy/Light Industrial Manufacturing	<ul style="list-style-type: none"> • Metal Tank (Heavy Gauge Manufacturing (NAICS 332420) • Sheet Metal Work Manufacturing (NAICS 332322) • Industrial Valve Manufacturing (NAICS 332911) • Other Metal Container Manufacturing (NAICS 332439) • Metal Window and Door Manufacturing (NAICS 332321) • Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996) • Construction Machinery Manufacturing (NAICS 333120) • Farm Machinery and Equipment and Equipment Manufacturing (NAICS 333111) • Heating Equipment (except Warm Air Furnaces) Manufacturing (NAICS 333414) • Oil and Gas Field Machinery and Equipment Manufacturing (NAICS 333132) • Fluid Power Pump and Motor Manufacturing (NAICS 333996) • Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413) 	<p>The region has a strong existing industry base in this area, and many of these particular subsectors are projected to grow. The region has strong programs related to manufacturing that can benefit this industry, provided by Coffeyville Community College and Independence Community College. Additionally, the region has several sites that can serve manufacturing companies that have access to transportation assets with existing utility infrastructure in place. In particular, the region should aim to further build out a cluster around aircraft and aviation.</p>
Supply Chain Support	<ul style="list-style-type: none"> • Other Warehousing and Storage (NAICS 493190) • General Freight Trucking, Long-Distance, Truckload (NAICS 484121) • Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230) • General Freight Trucking, Local (NAICS 484110) • General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122) • Rail Transportation (NAICS 482110) • Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220) • Support Activities for Rail Transportation (NAICS 488210) • General Warehousing and Storage (NAICS 493110) • Commercial Screen Printing (NAICS 323113) • Cement Manufacturing (NAICS 327310) • Ready-Mix Concrete Manufacturing (NAICS 327320) • Cut Stone and Stone Product Manufacturing (NAICS 327991) 	<p>There are various supply chain opportunities in the region as it relates to supporting the other recommended target industries. Focus should be on further cultivating clusters in these areas and leveraging downstream opportunities. These industries help provide greater retention of other industries.</p>

Recommended Target Industries - Aspirational

In addition to the recommended target industries for Montgomery County, we also recommend an aspirational target industry of Professional, Scientific and Technical Services. Additional strategies and likely greater amount of resources would need to be applied to attract these companies. However, a business case can be made and developed that would result in greater diversification of the economic base.

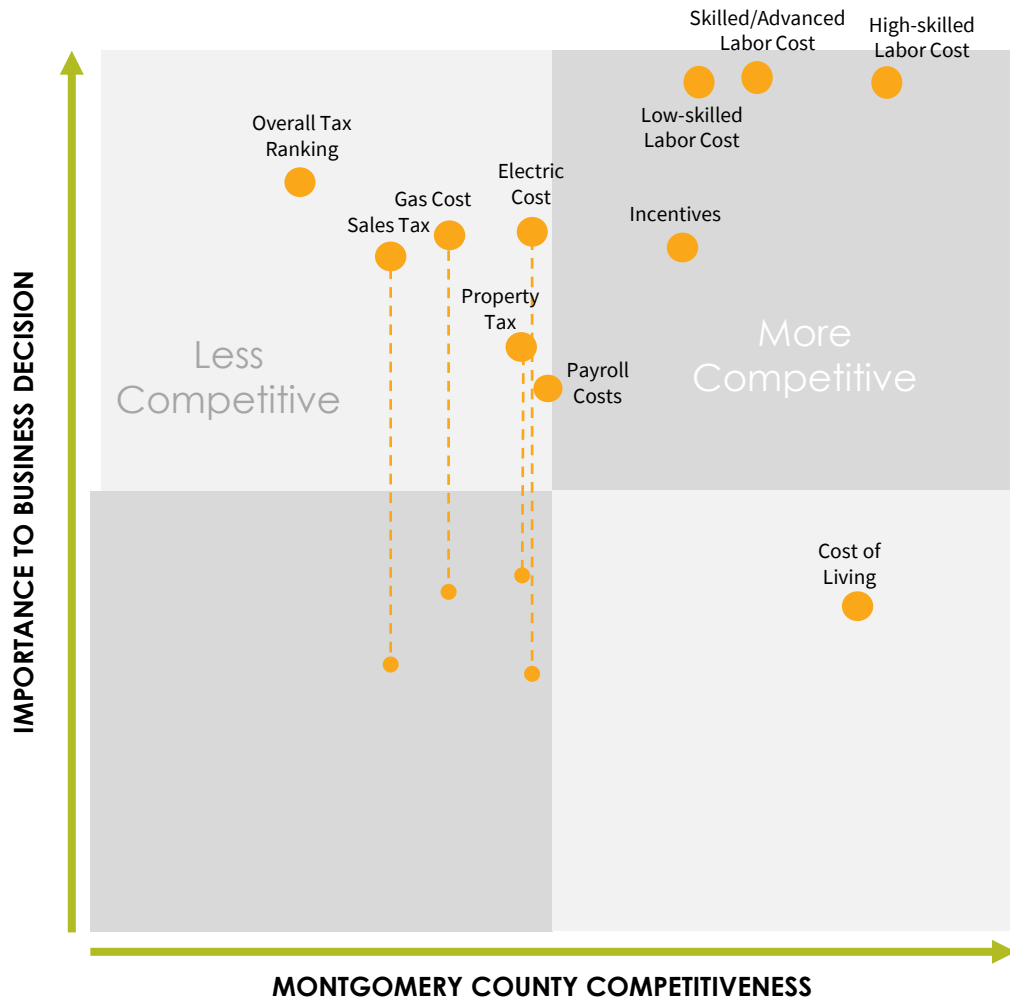
Aspirational Target Industries		
Target Industry	Subsectors of Focus	Comments
Professional, Scientific and Technical Services	<ul style="list-style-type: none"> • Computer Systems Design Services (NAICS 541512) • Engineering Services (NAICS 541330) • Other Accounting Services (NAICS 541219) • All Other Professional, Scientific, and Technical Services (NAICS 541990) • Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114) 	<p>These types of industries will more likely tend to be located in Tulsa, Wichita and Kansas City, where highly educated talent is more abundant. To some degree, the region does pull some of this highly educated talent who live in Tulsa but work in Montgomery County for those employers who provide higher wages. Greater focus and resources will be needed to build up this industry area. The aim within this targeted area is to diversify the region's economy to create indirect and induced jobs.</p>



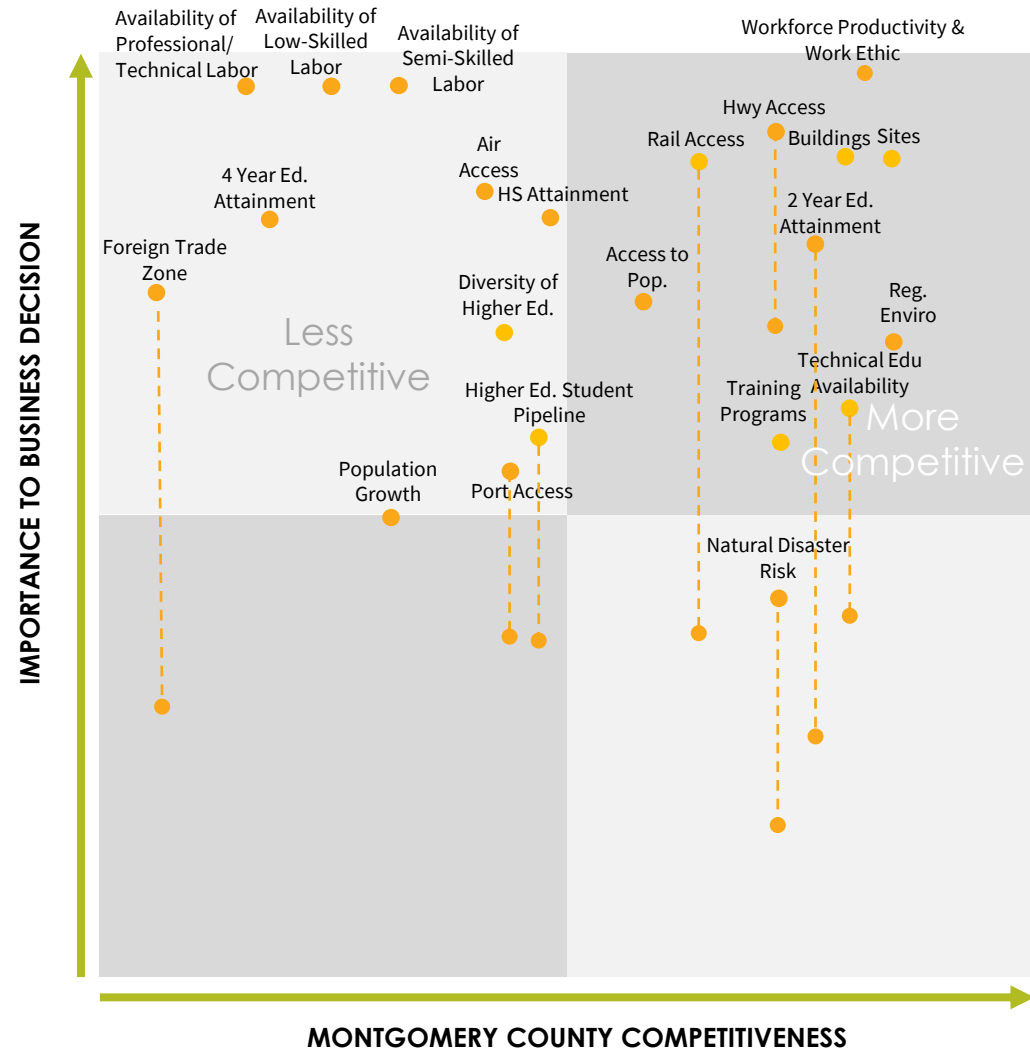
Section 6: Regional Positioning

Montgomery County Regional Positioning

GENERAL BUSINESS COSTS ASSET MAP



GENERAL CONDITIONS ASSET MAP

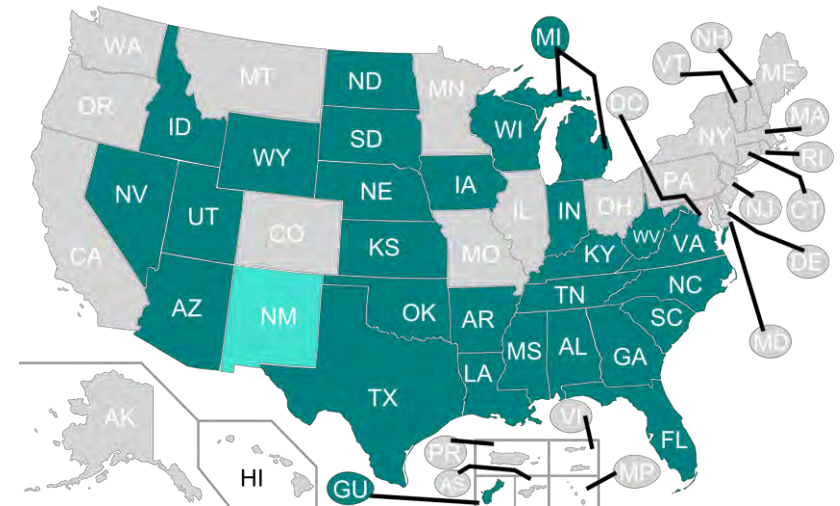


Note: Dotted lines down represent the variability of importance of each factor depending on the industry.

Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Competitive state business climate in Kansas**
 - **Rankings**
 - #7 Infrastructure (CNBC – America’s Top States for Business 2018)
 - #10 Workforce (CNBC – America’s Top States for Business 2018)
 - #10 Education (CNBC – America’s Top States for Business 2018)
 - #11 Regulatory Environment (Forbes Best States for Business 2018)
 - #12 Opportunity (McKinsey & Company – Best States 2018)
 - #16 Infrastructure (McKinsey & Company – Best States 2018)
 - #16 Quality of Life (McKinsey & Company – Best States 2018)
 - All business machinery and equipment are exempt from property tax
- **Right-to-work state**
 - Kansas is a right-to-work state guaranteed by a 1958 constitutional amendment. Of the 24 states that prohibit compulsory union membership, 14 are enacted by state statute rather than as amendments to their state constitutions and are vulnerable to change by state legislatures. Kansas’ right-to-work status can only be changed by a vote of the people.



Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Rural Opportunity Zones (ROZ)**

- Rural Opportunity Zones are 77 counties that have been authorized to offer one or both of the following financial incentives to new full-time residents: Kansas income tax waivers for up to five years, and/or, student loan repayments up to \$15,000.

- **Access to Markets**

- Within 500 miles of Montgomery County, companies are able to reach over 49,000,000 million people, 15% of the total US Population. This includes the large metro areas of:
 - Wichita, KS
 - Kansas City, MO
 - St. Louis, MO
 - Oklahoma City, OK
 - Dallas, TX
 - Austin, TX
 - Memphis, TN
 - Omaha, NE
 - Des Moines, IA

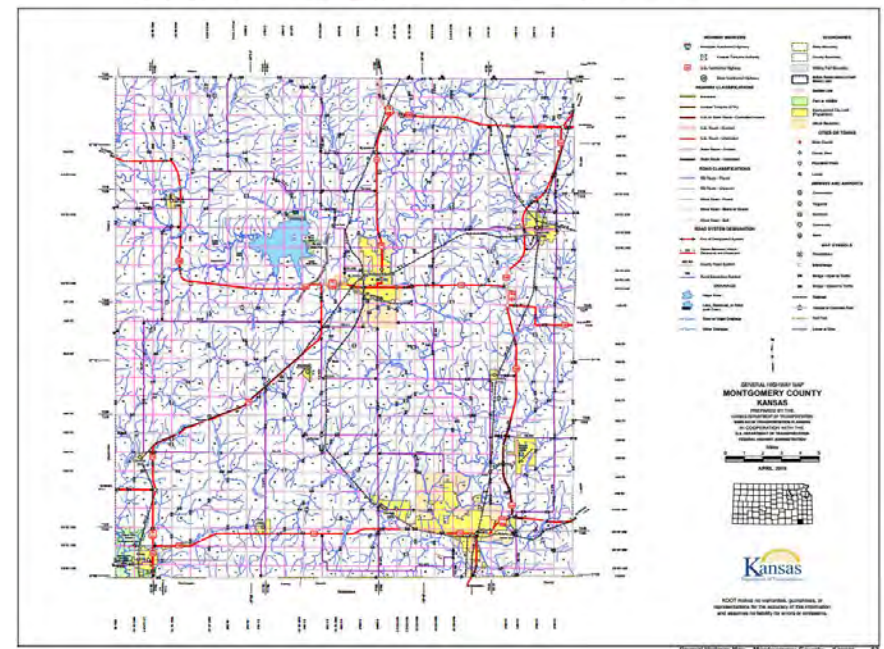
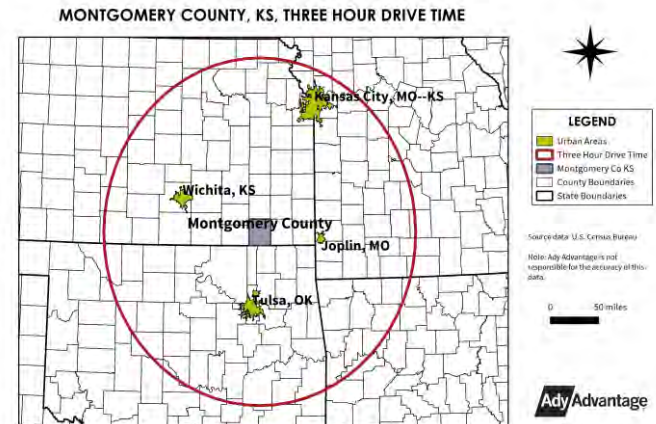


Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Transportation Infrastructure**

- **Highways:** Montgomery County has access to US Routes 75, 160, 166, 169, and 400. US Route 169 has been identified as a primary freight line by the Governor's office, and it currently planned to receive a new interchange within Montgomery County. While much of the roads are currently 2-lane only, KDOT has acquired all the land in Montgomery County necessary to allow for the roads to become 4-lanes, as is intended in their 50-year plan.
- **Rail:** Montgomery County has access to five Class I railroads, and is most served by Union Pacific and South Kansas & Oklahoma Railroad. A number of the industrial parks and sites/buildings throughout the county have direct rail access to the Port of Catoosa, including the former Amazon Distribution Center and the former Southwire Building.
- **Air:** Montgomery County has access to the Coffeyville and Independence municipal airports. The Tulsa International Airport is located in under an hour and a half drive from the County, and the Wichita Dwight D. Eisenhower National Airport is located in under a two and a half hour drive. The Kansas City International Airport is located a three hour drive from the County and offers a variety of national and international flight destinations.
- **Port:** While Montgomery County has no major port in its immediate vicinity, it is located in under an hour and a half by rail from the Tulsa Port of Catoosa, offering access to the greater Arkansas River.



Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Access to a skilled regional workforce**
 - **Coffeyville Community College**, with an enrollment of about 1,800 students. The community college offers a number of skilled trade and technical degrees in various fields, including agriculture, welding, precision machining, construction, information systems, automotive services, and collision repair, among others. Coffeyville Community College was praised by numerous employers as being highly responsive to industry needs throughout the Montgomery County region.
 - **Independence Community College**, with an enrollment of about 900 students. The community college offers programs in engineering, business and computer information technology. The community college also offers a strong entrepreneurship program, including the only Fab Lab in the state of Kansas, which provides a space for creativity and innovation. This includes state-of-the-art welding stations, a vehicle-sized paint booth, collaborative entrepreneur incubator space, and new work tables and offices.
- **4-year degree talent pipeline in the surrounding region**
 - Pittsburg State University
 - University of Tulsa
 - Wichita State University
 - University of Missouri-Kansas City.
- Montgomery County has higher 2-year degree educational attainment than the US average and state average, as well as all of the surrounding metro areas and states.

Educational Attainment	Montgomery County	Wichita MSA	Tulsa MSA	Joplin MSA	Springfield MSA	KS	MO	OK	United States
2-Year Degree	11.9%	7.3%	8.5%	7.2%	7.1%	7.8%	7.2%	7.1%	7.9%

Source: US Census Bureau 2017

Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Availability of Product**

- **Sites:** Montgomery County has a number of sites and industrial parks, including the West Laurel Industrial Park (56.58 acres), the South Airport Industrial Park (68 acres), the Caney Industrial Park (58.65 acres) and the Cherryvale Industrial Park (62.19 acres). These industrial parks are all utility served, have multiple entrances/exits onto the highways, and are ready for development.
- **Buildings:** Montgomery County likewise has a number of recently vacated buildings on the market that are highly suitable for prospective businesses locating to relocate or expand. This includes the former Amazon Distribution Center (877,250 sq. ft.) the former Southwire Building (406,027 sq. ft.), and the former Arco Building (100,000 sq. ft.).



Former Amazon.com Distribution Center
2674 N Hwy 169
Liberty, Montgomery, KS 67351
US
Sale Price: **\$9,000,000.00**
Lease Rate: **\$3.25/sq.ft.**



Southwire Manufacturing Facility
2412 N. Hwy. 169
Coffeyville, Montgomery, KS 67337
US
Sale Price: **\$5,800,000.00**
Lease Rate: **\$3.00/sq.ft.**
Sq. Ft.: **91000**
Acres: **30.8**



Independence Corporate Offices
200 ARCO Pl.
Independence, Montgomery, KS 67301
US
Sale Price: **\$325,000.00**
Sq. Ft.: **130000**

Note: Listings pulled from MCAC website, April 2019.

Montgomery County Regional Positioning

The Montgomery County region offers the following competitive advantages:

- **Low cost of living**

- The cost of living is lower than the national average by 10% in Kansas, and 28% lower in Montgomery County.
- The cost of housing is lower than the national average by 26% in Kansas, and 70% lower in Montgomery County.

Cost of Living	Montgomery County	Wichita MSA	Tulsa MSA	Joplin MSA	Springfield MSA	KS	MO	OK	United States
Cost of Living Overall	72	88	93	84	91	90	93	89	100
Cost of Housing	30	67	72	61	74	74	81	63	100

Source: Sperling's Best Places 2017



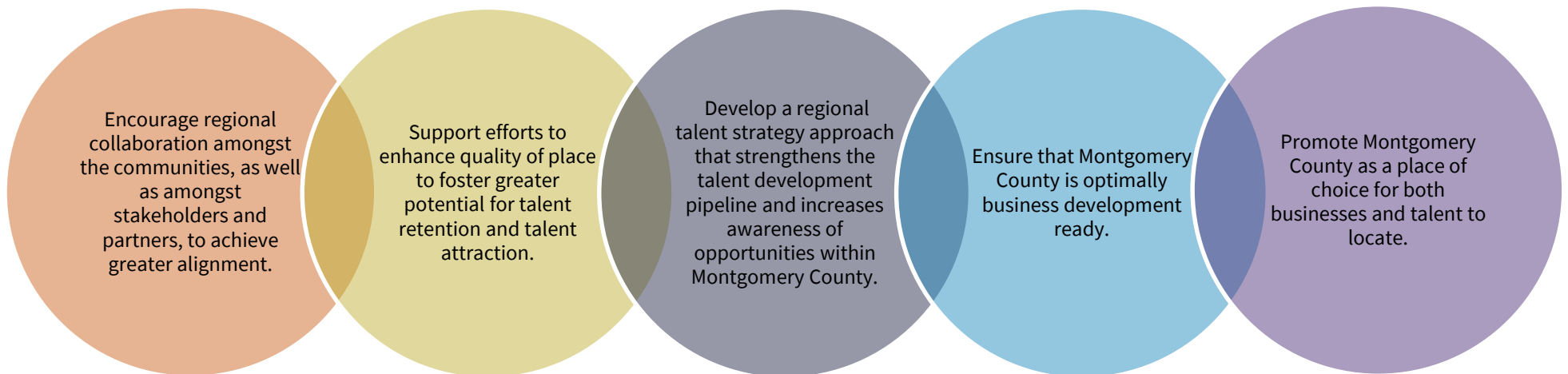
Section 7: Goals for the Future

Goals for the Future

INTRODUCTION

The overarching vision for Montgomery County is drive growth throughout the county that leverages the unique assets of each of the communities within the county. The goals on the following pages are in no particular order. All are considered equally high in importance.

The goals for the future were determined and thoroughly discussed during a facilitated Goals and Visioning work session on Tuesday, April 23, 2019. During the work session, we discussed certain gaps identified in the three main categories of alignment/regionalism, readiness, and marketing/differentiation, as well as key themes identified during our time on-site. Those gaps and key themes then drove the discussion on what goals Montgomery County would like to achieve in the near future. These goals will be discussed further in the following pages and will serve as the basis for the Economic Development Strategic Plan in the last section of this report.



Goals for the Future

INTRODUCTION

The following pages provide each articulated goal along with discussion that was captured during the goals and visioning workshop. The discussion components represent the comments and insights shared by attendees. Viewpoints can appear more than once under multiple goals if they applied accordingly. This section serves to showcase, more generally, the feedback from attendees and how they were organized and fit into each of the five goals. Also included is the feedback from a survey provided to participants at the start of the session to orientate their frame of mind around their long-term goals and vision for the county, up front before the goals to help frame them as was the case for participants during the goals and visioning workshop.

Goals for the Future

PARTICIPANTS

Organization	Name
City of Independence	Craig Whitehead
City of Caney	Fred Gress
Coffeyville Area Chamber Commerce	Candi Westbrook
Coffeyville Area Community Foundation	Janie DeVore Gillis
Coffeyville Reawakening	Peggy Steele
Coffeyville Reawakening	Bill Pratt
Coffeyville Reawakening	Bill Wade
Coffeyville Reawakening	Brent Ortolani
CRMC	Lori Rexwinkle
CVR Energy	Brent Traxel
GRDA	Tom Gray
Housing Authority - Independence	April Ntt
Montgomery County Action Council	Paula Benson
Montgomery County Action Council Executive Board	Ryan Thompson
Montgomery County Action Council Executive Board	Mike O'Malley
Montgomery County Action Council Executive Board	Dickie Rolls
Montgomery County Action Council Executive Board	Sam Blackard
Montgomery County Action Council Executive Board	John Schmidt
Montgomery County	Robert Bever
Muller Construction	Mark Muller
Newton's True Value Cherryvale	Joe Long
SEKWORKS	Laci Behr
Spears Manufacturing	Larry Adams
Textron	Paula Schabel
Westar	Kari West
Windsor Place	Monte Coffman

Goals for the Future

IDEALLY, WHAT WOULD YOU LIKE THE HEADLINES TO SAY ABOUT THE REGION IN 7 YEARS?

Headlines created by participants fell into seven broad categories/themes: 1) economic growth, with growing industry and employers, 2) growing population, with opportunities for kids to come back home after graduation to start families, 3) job opportunities, 4) broadband expansion, 5) education opportunities, 6) highway and transportation infrastructure, and 7) a sense of a rural America comeback.

Economic Growth

- Region Leading the Way
- Economic Boom
- Growing Population
- Growth and Prosperity
- Growing Economy
- Double Digit Economic Growth
- Region in Growth Mode
- Businesses are Growing
- New Industries Have Located in Region
- Major Employer Relocates to the Region
- Large Employer Recruited

Growing Population and Families

- Kids Coming Home After College
- Returning Graduates
- Fastest Growing Region in State
- A Growing Community
- Greatest Place to Raise a Family
- Great Place to Raise a Family
- Region Grows in Population
- Where Everyone Wants to Live, Work and Raise Their Children
- Progressive and Vibrant Community
- This is Where YOU Want to Live!

Job Opportunities

- Careers Available
- Job Growth
- Great Job Opportunities
- Strong Job Market
- Lowest Unemployment in the State
- More Jobs Come to Region
- High Quality Workforce

Goals for the Future

IDEALLY, WHAT WOULD YOU LIKE THE HEADLINES TO SAY ABOUT THE REGION IN 7 YEARS?

CONT'D - Headlines created by participants fell into seven broad categories/themes: 1) economic growth, with growing industry and employers, 2) growing population, with opportunities for kids to come back home after graduation to start families, 3) job opportunities, 4) broadband expansion, 5) education opportunities, 6) highway and transportation infrastructure, and 7) a sense of a rural America comeback.

CONT'D

Broadband Expansion

- High Speed Internet
- Fiber Service Has Been Brought to Rural Customer
- This Region has 100% Broadband Coverage
- Everyone Has Access to Fast Internet

Education Opportunities

- Schools Have Great Teaching Staff
- Education Opportunities
- Students Scoring Above State ACT Scores
- Schools Offering Innovative Programs

Rural Comeback

- Region Finally Realizing its Potential
- Rural Missouri Makes Economic Comeback
- Region Sets the Standard in Rural Economic Development
- Small Town Growth Booming
- Small Town USA Makes a Comeback
- Newfound Growth

Highway Infrastructure

- Crossroads of North Central Missouri
- Highway 36 and 63 Traffic Picks Up
- Highways Upgraded and Improved

Goals for the Future

IF NOTHING CHANGES, WHAT WILL THE HEADLINES SAY ABOUT THE REGION IN 7 YEARS?

Headlines created by participants fell into 5 broad categories/themes: 1) a stagnant economy, or even a declining economy, 2) a declining population, with people and kids forced to leave the region, 3) a continued resistance to change and adapt, 4) a sense being just another “dying” rural America community, and 5) consolidation by necessity to survive.

Stagnant Economy

- Slow Growth
- No Growth in Region
- Stagnant in Economic Growth
- Stagnant Community
- Scarcity of Jobs
- Stagnant
- Steady but No Growth
- Stagnant Region
- Depressed Economy
- Economic Loss in the Area
- Economy in Decline

Population Decline

- Population in Decline
- Older Generation
- Population Continues to Shrink
- Population Decline Continues...
- Region Struggles With Declining Population
- People Forced to Commute Out for Job Opportunities
- People Moving Away from the Region for Job Opportunities
- Population is Down
- Businesses Closing Due to Lack of People
- Population Declining
- Kids Leaving For Education

Goals for the Future

IF NOTHING CHANGES, WHAT WILL THE HEADLINES SAY ABOUT THE REGION IN 7 YEARS?

CONT'D - Headlines created by participants fell into 5 broad categories/themes: 1) a stagnant economy, or even a declining economy, 2) a declining population, with people and kids forced to leave the region, 3) a continued resistance to change and adapt, 4) a sense being just another “dying” rural America community, and 5) consolidation by necessity to survive.

CONT'D

Resistant to Change

- Community Shuns Economic Growth
- Nobody Willing to Adapt
- Region Won't Change
- Missed Opportunities
- An Area Going Backwards
- Why Live Here?
- Nothings Has Changed
- Decreasing Opportunities

“Dying” Community

- Small Town USA is Dead
- Dying Community
- Dying Downtown
- Dead Community Due to a Lack of Interest
- Forgotten America
- Community Dies Out
- Barely Hanging On

Consolidation

- Massive Consolidation
- Schools Have Difficult Time Attracting
- Schools Continue to Consolidate
- Consolidation Continues

Goals for the Future

THE GOAL

Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.

DISCUSSION

- Getting ICC and CCC to talk to each other
- Love to see some consolidation and team work regarding colleges and cities. Leave our agendas at home put the facts on table
- Combine both JR colleges under one administration for more collaborative educational efforts
- Move to one community college that the entire county funds
- What activities and or processes have been used in the past to successfully build better relationships between communities?
- Better collaboration between all communities' counties and rural residents moving forwards. A regional approach for our county. Leadership meetings to address common goals.
- Hard discussions must happen at a county level. City level is great – but if we are to work together as a county then we must have interaction and hard discussions about “How to work together”. Ask the questions – think outside the box and move forward – strong leadership – creativity – AND CHANGE
- Start looking at consolidation of services with the four communities in the county
- Collaboration between communities in county
- Regional studies – communities buy in – public safety
- Several ways to feel involved and connected. Get involved – again more interaction as a county will help drive change as a county. Keep the money spent local to drive up economic development
- How to encourage city, chamber, CMAC collaboration so residents understand each is vital
- Less duplication of services across the board
- County wide collaboration
- A regional plan that addresses assets in each community and fosters collaboration between communities on issues like housing and infrastructure
- Redefine roles and jobs. How to encourage collaboration between entities but not duplication of services. With limited staff, we shouldn't be doing same things.
- Figure out a way to break the territorial lines through collaboration. Geopolitical boundaries are not important to new/outside and have always challenged regional growth.
- Continue existing and establish new groups within the county to collaborate our projects, solutions, etc.
- A unified countywide housing initiative that addresses revitalization, market rate new houses and housing that meets industry demand
- Form a regional or at least county wide housing authority to investigate all options within the county, both urban and rural
- Continue KS Redesign plus expand this program county-wide, better utilizing career pathways and developing mentorships/internships with youth

Goals for the Future

THE GOAL

Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.

DISCUSSION

- More aggressive clean up of all areas, especially along main traffic corridors first. First impressions.
- Vibrant downtown while retail shopping opportunities
- Strong/vibrant downtown
- More consumer services
- Revitalized downtowns
- A focus on “what’s right” with our downtowns, not “what’s wrong” and to foster continued growth and development there
- Thriving in downtown Coffeyville (more shops, more to do), but unique to our location/challenge – we are not Indy
- A unified countywide housing initiative that addresses revitalization, market rate new houses and housing that meets industry demand
- Housing Infill (Ind)
- Development of mid to higher range period housing, which would also open up lower priced housing stock
- Affordable, quality housing
- Form a regional or at least county wide housing authority to investigate all options within the county, both urban and rural
- Want housing for middle to upper income level salary, keep management here – not just low-income wage
- Improve appearance of community: housing, downtown
- Invest in housing infrastructure and new construction of homes
- Attractive, affordable housing
- Housing: opportunities for senior living/ retirement that encourage them to stay, or to come back
- Aggressively remove blighted homes and embrace environmental code enforcement
- Technology upgrade: small cells, 5G, fiberoptic availability

Goals for the Future

THE GOAL

Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.

DISCUSSION

- To have an established workforce pipeline through customized trainings with the community colleges and high schools with area industry needs
- We bring a diverse group of youth to ICC and CCC and keep them and pair programs and students with industry
- Improve telling our story/stories communicate better
- Promote what you do have that works while working on new ventures
- The talent turnaround has created excitement to return home to work, stay here, plus a strong young workforce is created
- More knowledge by youth of what's available in their community
- Youth more informed about various careers available in life
- Job training and advertising more opportunities for our high school/ junior college
- Continue KS Redesign plus expand this program county-wide, better utilizing career pathways and developing mentorships/internships with youth
- Retention of youth. Utilize business owners, landowners, to mentor youth through 4-H, FFA, leadership class, FBLA. Need to do a better job through school, looking for those kids in the middle who are being overlooked – No mentor, counselor, teacher spending time on them
- Build relationships between local business and industry and youth. Prove to the youth there are jobs for them at home.
- Retention of youth. Expansion of entrepreneurship. Caney and Cherryvale will always be a “small” segment of the county objective but can provide opportunity.
- Utilization of resources available. i.e. Apprenticeships
- Engage students in city government to get them involved with local issues
- Younger generation taking on more roles in community leadership
- More information for entrepreneurs about available assistance
- Expand the Fab Lab to other communities
- Develop a stronger entrepreneurial program county-wide that utilizes assets like the Fab Lab – new incubators, shared workspaces
- Make the Fab Lab an asset, not a social club for business/entrepreneurs

Goals for the Future

THE GOAL

Ensure that Montgomery County is optimally business development ready.

DISCUSSION

- To have an established workforce pipeline through customized trainings with the community colleges and high schools with area industry needs
- More aggressive clean up of all areas, especially along main traffic corridors first. First impressions.
- Instead of a large incentive package for a single project, a focus on growing 10-15 local industries with strong local ties. Local first commitment
- We have at least one certified site in each community and an RFP preparedness document for each community
- Bringing poultry to Montgomery County and aligning this growth as a county and addresses housing, education, and quality of life as a prep for this project
- Reach out to our existing businesses and industries and partner with them or recruiting a complimentary business or supplier
- Technology upgrade: small cells, 5G, fiberoptic availability
- More competitive with cost – taxes
- Decrease the taxes in the county and incentivize building. (Some has been done).
- Develop a stronger entrepreneurial program county-wide that utilizes assets like the Fab Lab – new incubators, shared workspaces
- Make the Fab Lab an asset, not a social club for business/entrepreneurs
- Expand the Fab Lab to other communities

Goals for the Future

THE GOAL

Promote Montgomery County as a place of choice for both businesses and talent to locate.

DISCUSSION

- Move forward with attracting opportunities across the board. Not just the Tyson project
- Improve telling our story/stories communicate better
- Positivity
- Promote what you do have that works while working on new ventures
- Reach out to our existing businesses and industries and partner with them or recruiting a complimentary business or supplier
- Talent Recruitment – look to you neighbors in Bartlesville – find out why talent lives/invests there-vs-opportunities in Montgomery County. Why not Kansas?
- Younger generation coming back to raise families and live, work, and play in Montgomery County
- Bringing poultry to Montgomery County and aligning this growth as a county and addresses housing, education, and quality of life as a prep for this project
- Instead of a large incentive package for a single project, a focus on growing 10-15 local industries with strong local ties. Local-first commitment

Section 8: Economic Development Strategic Plan

Economic Development Strategic Plan

INTRODUCTION

Within this section are the main strategies for Montgomery County. Strategies are defined as items necessary to fulfill one or more of the strategic goals identified in Section 7. They are more detailed than goals but not as detailed as specific tasks.

As you will see on the following pages, each of the strategies has a specific effect on one or multiple goals; however, the effect the strategy has on the particular goal varies from primary effect to direct effect to indirect effect.

These strategies will be broken down further into specific tactics within each strategy in the implementation map that follows this section.

Also of note, each of the strategies is categorized into three pillars, within which are the areas of focus, outlined below.

Pillar 1: Alignment/Regionalism

Areas of Focus

- **Roles and Responsibilities:** The strategies within this focal area establish roles and responsibilities of specific stakeholders, groups, organizations, etc. that have the capacity and ability to impact outcomes related to Montgomery County's strategic goals. These strategies help to create and build a foundation for subsequent strategies to be successful.
- **Collaboration and Partnership:** This focal area contains strategies that create and enhance the network for economic development. Building and maintaining partnerships will create an important piece of the overall framework to establish a more competitive region. Collaboration and partners will also be essential in implementing many parts of the overall strategic plan.
- **Capacity Building:** These strategies focus on prioritizing tactics to better engage the partnership network and sharing the vision for Montgomery County's economic development future. It also provides a framework to extend the ability of MCAC to implement the strategic plan and focus their efforts in a tailored approach. The plan's depth and breadth of strategies lends itself to needing MCAC to increase the organization's ability to spread staff time and attention, requiring the need to create more robust resources to deploy.

Economic Development Strategic Plan

Pillar 2: Readiness

Areas of Focus

- **Product Readiness:** This focal area aims to ensure a strong and shovel-ready site pipeline for growth, expansion, and attraction of new and existing businesses.
- **Talent Readiness:** This area of focus seeks to curate tailored and mixed initiatives to build a solid workforce for new and existing growth, by cataloguing existing talent initiatives, ensuring they align with employer needs and identifying any gaps where they may exist.
- **Community Readiness:** Strategies within this area of focus establish priorities for creating a better quality of place to live through leveraging population groups, city and other partners.
- **Innovation Readiness:** Finally, innovation readiness attempts to build a culture that supports entrepreneurial growth and innovation within Montgomery County region through better leveraging of existing entrepreneurial resources such as the Fab Lab.

Pillar 3: Marketing/Differentiation

Areas of Focus

- **Messaging:** The focus develops a series of tactics that help to create foundational elements that will provide a stable footing to build a targeted marketing strategy, integrating all components of the plan and optimizing the marketing resources available to use by MCAC.
- **Target Industries:** Uniquely curated tactics that aim to develop relationships and market penetration in select target industry that Montgomery County is competitive and are able to drive growth in their economy.

Economic Development Strategic Plan

KEY PERFORMANCE INDICATORS

Key performance indicators (KPIs) are specific criteria identified that are designed to measure the success or progress of the economic development growth plan. Therefore, these indicators are measurable, based on the goals determined by the Montgomery County Action Council (MCAC), and can be realistically improved upon over time based on specific actions outlined within the strategic plan. KPIs are divided into those over which the Montgomery County Action Council has direct control, and those outcomes in the county that its efforts are intended to ameliorate. The list below provides a broad overview of KPIs. Included in the Implementation Map are specific KPIs informed by each strategy.

Montgomery County Action Council's key performance indicators (measures that MCAC can impact directly) include:

- Number of BRE interviews conducted annually
- Increased reach and engagement, as measured by analytic data, of business attraction marketing tools
- Number of sites/total acreage available for investment and competitive/ready for desired uses
- Number of projects for which MCAC provided project support or oversight (BRE or attraction)
- Number of RFI/RFPs received, fit of projects responded to relative to MCAC's goals, number that result in a site visit, number of project wins
- Number of strategic partnerships created

Success indicators for Montgomery County Action Council (measures that MCAC cannot impact directly) include:

- Number of existing companies, jobs, and/or investment retained and grown in the area
- Alignment among MCAC and partners involved in the area's economic development – degree of coordination, information sharing, clarity of roles, etc.
- Level and percent increase in average wages
- Diversity and growth of target industry sub-sectors
- Employment retention/growth relative to index (i.e., whether Montgomery County is maintaining or growing market share in a sub-sector at a level equal or above the national average)
- Time required and business-friendliness to get through permitting, zoning, and incentives approvals
- Improved ability to recruit employees locally – measured qualitatively from existing employers
- Increased innovation capacity – measured by programming availability in the area
- Number of new start-ups and success rate

Economic Development Strategic Plan

ALIGNMENT/REGIONALISM					
	Goal #1: Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.	Goal #2: Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.	Goal #3: Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.	Goal #4: Ensure that Montgomery County is optimally business development ready.	Goal #5: Promote Montgomery County as a place of choice for both businesses and talent to locate.
Roles and Responsibilities					
Develop a matrix that outlines and clearly defines the role of each partner in the implementation and execution of the strategic plan and responsible for supporting the growth of Montgomery County .	XXX	XX	XX	XX	XX
Develop an understanding of the types of attraction and expansion projects that Montgomery County will prioritize and how these will be incented.	XX		X	XXX	XXX
Establish a clear communication protocol for prospects and businesses.	XX			XX	XXX
Collaboration and Partnership					
Strengthen relationships with your existing industry base and build relationships with its major suppliers.	XX		X	XX	XXX
Maintain and deepen existing partnerships to enhance and cultivate further collaboration.	XXX	X	XX	XX	XX
Foster community goodwill and buy-in to the strategic plan and drive greater alignment towards shared goals.	XXX	X	X	XX	XX
Capacity Building					
Drive greater capacity within MCAC by establishing clear priorities.	XXX	XXX	XXX	XX	XX
Generate greater awareness of all aspects of economic development within the county.	XX	XX	XX	XX	XXX

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategic Plan

READINESS					
	Goal #1: Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.	Goal #2: Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.	Goal #3: Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.	Goal #4: Ensure that Montgomery County is optimally business development ready.	Goal #5: Promote Montgomery County as a place of choice for both businesses and talent to locate.
Product Readiness					
Create and maintain an inventory of all sites and buildings available, working with relevant stakeholders to ensure information is up-to-date.				XXX	X
Prioritize sites and buildings based on priority projects and best business case.				XXX	X
Understand and develop the product pipeline.				XXX	X
Identify and develop key assets needed for targeted industries.			X	XXX	X
Understand infrastructure needs (especially transportation infrastructure) of economic base and advocate for infrastructure improvement where it enhances and supports the growth and expansion of target industries and Montgomery County's competitiveness.	XX	X		XXX	X
Talent Readiness					
Identify existing and planned initiatives from all relevant groups, and facilitate coordination between supply and demand side of talent.	XX		XXX	XX	X
Determine key talent needs and trends from existing employers.	XX		XXX	XX	X
Build a talent strategy around existing and future needs for talent.	XX		XXX	XX	X

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategic Plan

READINESS (CONT'D)					
	Goal #1: Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.	Goal #2: Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.	Goal #3: Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.	Goal #4: Ensure that Montgomery County is optimally business development ready.	Goal #5: Promote Montgomery County as a place of choice for both businesses and talent to locate.
Community Readiness					
Support and facilitate placemaking efforts within the communities.	X	XXX	X	X	XX
Work with the cities and other partners to identify and define current housing stock, as well as determine future housing needs.	X	XXX	X	X	X
Innovation Readiness					
Identify and define current resources available for start-ups, including those provided by the Fab Lab, and address any gaps.	X	X	XXX	X	XX
Create greater awareness around the Fab Lab, as well as other entrepreneurial resources.	X	X	XXX	X	XXX
Support and facilitate innovative touchpoints within the area.	X		XX	X	X

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategic Plan

MARKETING/DIFFERENTIATION					
	Goal #1: Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.	Goal #2: Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.	Goal #3: Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.	Goal #4: Ensure that Montgomery County is optimally business development ready.	Goal #5: Promote Montgomery County as a place of choice for both businesses and talent to locate.
All Audiences					
Review all existing marketing tools, including website and print and digital marketing collaterals, and, as needed, revise them to ensure messaging and positioning resonates with Montgomery County's target audiences.	XX	X	X	XX	XXX
Research, plan and execute relationship marketing strategies with decision makers in each targeted industry.	X	X	X	XX	XXX
Execute lead generation strategy designed to identify and arrange contact with corporate executives of companies with near-term siting projects who would consider locating in Montgomery County.				XX	XXX
Identify metrics of success that can be measured one year after implementation and two years after implementation.	X	X	X	XX	XXX
Agribusiness					
Review all existing marketing tools, including website and print and digital marketing collaterals, and, as needed, revise them to integrate identified positioning messages for agribusiness.	X		X	XXX	XXX
Research, plan and execute relationship marketing strategies with decision makers in agribusiness.	X		X	XXX	XXX
Execute social media engagement strategy targeting executives in each industry and site selectors specializing in agribusiness.	X		X	XXX	XXX

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategic Plan

MARKETING/DIFFERENTIATION (CONT'D)

	Goal #1: Encourage regional collaboration amongst the communities, as well as amongst stakeholders and partners, to achieve greater alignment.	Goal #2: Support efforts to enhance quality of place to foster greater potential for talent retention and talent attraction.	Goal #3: Develop a regional talent strategy approach that strengthens the talent development pipeline and increases awareness of opportunities within Montgomery County.	Goal #4: Ensure that Montgomery County is optimally business development ready.	Goal #5: Promote Montgomery County as a place of choice for both businesses and talent to locate.
Heavy/Light Industrial Manufacturing					
Review all existing marketing tools, including website and print and digital marketing collaterals, and, as needed, revise them to integrate identified positioning messages for heavy/light industrial manufacturing.	X		X	XXX	XXX
Research, plan and execute relationship marketing strategies with decision makers in heavy/light industrial manufacturing.	X		X	XXX	XXX
Execute social media engagement strategy targeting executives in each industry and site selectors specializing in heavy/light industrial manufacturing.	X		X	XXX	XXX
Supply Chain Support					
Review all existing marketing tools, including website and print and digital marketing collaterals, and, as needed, revise them to integrate identified positioning messages for supply chain support.	X		X	XXX	XXX
Research, plan and execute relationship marketing strategies with decision makers in supply chain support.	X		X	XXX	XXX
Execute social media engagement strategy targeting executives in each industry and site selectors specializing in supply chain support.	X		X	XXX	XXX
(Aspirational) Professional, Scientific and Technical Services					
Develop an increased understanding of the specific needs of the professional, scientific and technical services industry, and work towards removing existing barriers to this aspirational industry in Montgomery County.	X		X	XXX	XXX

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategic Plan

IMPLEMENTATION MAP

The implementation map builds off of the same strategies found on the previous pages by including additional tasks identified to accomplish each strategy. Again, these strategies are key to achieving Montgomery County Action Council's goals. The strategies from the previous section are highlighted in gray in each of the tables, and then broken down further into actionable tactics.

Through various discussions and experience, we have articulated the following for each task:

- Responsible party
- Priority
- Timeline
- Budget Estimate
- Key Performance Indicators

These criteria will help determine which of these tasks should be accomplished first and who should be responsible for the completion of each.

Economic Development Ecosystems are built on strong and collaborative partnerships. A strong foundation in economic development partners creates greater alignment and tends to foster better readiness and regional thinking, culminating in stronger points of differentiation. For the implementation of the Montgomery County economic development strategic plan, the following partners have been identified, but should not be limited only to those mentioned:

- Montgomery County Action Council
- Coffeyville Community College
- Independence Community College
- Area Businesses
- PK – 12
- Coffeyville Reawakening
- Regional Higher Education Institutions
- Kansas Department of Commerce
- KansasWorks
- Kansas Department of Labor
- Ady Advantage

Economic Development Strategic Plan

IMPLEMENTATION MAP

The following is a sample of the implementation map. The full implementation map, which includes all of the strategies and tactics, is provided as a separate document. The map can be edited and customized to tailor Montgomery County's priorities for each strategy. The implementation map provides a mechanism for tracking progress as well as guidance prioritization, timing, budget impact, and accountable groups.

ALIGNMENT/REGIONALISM					
Roles and Responsibilities	Responsible Party	Priority	Timeline	Budget	Key Performance Indicators
Develop a matrix that outlines and clearly defines the role of each partner in the implementation and execution of the strategic plan and responsible for supporting the growth of Montgomery County.					
Inventory all partners that will be needed to implement or support the economic development strategic plan. Complete this inventory internally before bringing in stakeholders or other related partners.	Montgomery County Action Council (MCAC)	High	Q3 2019	Staff Time	Completion of roles matrix All sign-offs completed Accuracy of Matrix Regularity with which the matrix is updated All partners are represented on the matrix
Define the role that each organization or group will have in the support and implementation of the plan. Start by identifying the roles the partners currently have in supporting economic development and whether their role is direct or indirect. Next, determine if the direct groups will actively implement/support or passively impact the plan. Finally, determine if there are any gaps in the mapped responsibilities and match the most relevant group(s) that can best complete these gaps.	MCAC	High	Q3 2019	Staff Time	
Prioritize those partnerships that are most essential to the successful implementation of the plan. Focus on maintaining those partnerships that are already in place. Develop and build those partnerships that have not yet been built.	MCAC	High	Q3 2019	Staff Time	
Update and refresh the matrix as needed. The document should be kept simple and easy to read to ensure outside stakeholders can clearly understand their role in the plan's implementation.	MCAC	Medium	Ongoing	Staff Time	
Gather buy-in from identified groups and organizations by soliciting "sign-offs" on the final accountability matrix.	MCAC	High	Q3 2019	Staff Time	



Appendix: Roundtable Reporting & SWOT Meeting Notes

Appendix: Roundtable Reporting & SWOT Meeting Notes

INTRODUCTION

Full discussion notes and interviews responses from the roundtables in Caney, Cherryvale, Coffeyville and Independence can be found in the following appendix section. All responses were aggregated and synthesized with other on-site inputs collected to develop the key themes found in Section 3 of this report.

Also included are the SWOT meeting notes from Caney, Cherryvale, Coffeyville and Independence, conducted in early 2017 which were open to the public in each of the four larger communities. These SWOT meeting notes helped inform our key themes analysis of Montgomery County.

Appendix: Roundtable Reporting

CANEY ROUNDTABLE REPORTING

Challenges? Barriers to success?

- Low wages
- No opportunity for professional, educated workers. Degrees are worthless here.
- Teachers were hurt by state and government actions, Kansas self-inflicted this.
- Housing challenges. Only Independence has any housing availability.
- Community is not supportive. People shop/live elsewhere because of the taxes. There is not support of local business. Grocery store went out of business.
- There is a mass exodus of people outflow who live here but work in Tulsa, teachers and hospital workers because they get better wages there.
- There is a medical provider in town still, but it is underserved.
- No opportunities or activities for young people. There is a pool and a park, but nothing else.
- Transportation options are lacking. People who can't drive/don't have a car have no options.
- No senior housing.
- Caney has not kept up its infrastructure over time. Water/sewer needs improvement.
- The County has gotten more and more rural over time.
- Utilities are comparable to other communities, but they feel high because people have lower income here.
- US 75 is not likely to get funding for improvements this legislative cycle. There is a 2-lane stretch through this part of the area, it's dangerous.

Regionalism/Alignment?

- There is not a great deal of it. People don't work together well and there is not a lot of cooperation. There is a north-south conflict. This is slowly changing however, out of necessity.
- MCAC has been trying hard to break this, and has been making some headwinds.
- Leadership Coffeyville and Leadership Independence have been working together more. Cherryvale and Caney need to be participating in this more.

Appendix: Roundtable Reporting

CANEY ROUNDTABLE REPORTING

Opportunity for growth? Assets of the community?

- Fab Lab is a great asset for entrepreneurship. It helps keep young kids in the area.
- Laura Kelly winning governorship is very good for school districts across the state.
- Alumni Weekend and Mayfest are used to try to retain/recruit talent.
- There are Pathways that are CTE funded – the goal is to get all kids to declare a Pathway, get 70% of seniors to spend their time in career fields.
- Skilled trade jobs here pay a lot, more than other jobs do.
- Cessna is working with the schools on an aviation Pathway.
- The zoo is a big economic asset – it can drive traffic into the community from outside, spurs tourism and economic opportunities for retail and other businesses.
- Other assets – Historical Society, Museum, Race Track.
- Assets like the zoo and other features of the community need to be marketed better, there needs to be more awareness created. High school kids could be leveraged to do marketing and get career experience.

Tyson Project?

- The County has done a good job working together for this particular project. There will be indirect benefits to Caney if it goes through.
- There will be benefit from secondary jobs.
- Infrastructure will need to be improved for this.
- Kansas has made legislative changes already to facilitate this project.
- There are supply chain and value-added opportunities – hatchery, packaging, label printing, trade skills (electricians, PLC, manufacturing processes, hydraulics). It would spur retail, housing and grocery growth.
- Landing Tyson would slow outmigration of people, create positive momentum.
- The County must be careful not to put all their eggs in one basket however.

Appendix: Roundtable Reporting

CHERRYVALE ROUNDTABLE REPORTING

Adjectives for Cherryvale?

- Depressed, dull, boring, stuck, treading water, not going anywhere, complacent, going backward, motivated but still resistant, lack of pride, lack of vision, don't know where to start or don't want to start, good enough for us good enough for them mentality

Adjectives outsiders would use to describe Coffeyville?

- Welcoming, safe, caring, friendly

Opportunity for growth? Assets of the community?

- More of a bedroom community.
- Opportunity for self-employed, and students if they go this route.
- Lots of trades opportunity, not much on 4-year. Lots of demand for trades focused work. Schools are linked to the success in providing this pipeline.
- CRA dollars are provided to some programs in Independence.
- Everyone knows everyone (good and bad), community stands to benefit if it works together.
- Marketing Plan – what makes Cherryvale stand out?
- Cost of living and quality of life is good.
- Close to other communities that are larger.
- Good partners – maybe there is something to learn from other communities?

Appendix: Roundtable Reporting

CHERRYVALE ROUNDTABLE REPORTING

Challenges? Barriers to success?

- Generational poverty is holding us back.
- People don't want to help. People aren't supporting local business.
- Leadership at the Chamber is not easy to work with. There was a strong following, but the Chamber doesn't actively recruit new members.
- Aging infrastructure and population.
- School enrollment is staying steady but declined before.
- Lack of motivation in the younger generation.
- There is a housing blight.
- Stubborn and backward thinking in older population.
- Taxes are a challenge.
- There is no need for two community colleges, we can't afford to support both.
- County sends out list of how they can help – but its at a cost.
- MCAC tends to focus on Independence/Coffeyville. There is some cooperation but its loose.
- Community college can pull people together and create some discussion.
- There isn't a “pull factor” in one place.
- Challenges with lack of worth ethic.

Growth/Success for Cherryvale

- Building school
- Local industry
- Jobs in the community
- Graduates in Cherryvale will have the opportunity to be successful and have the drive to do something with themselves.
- School system creating education and awareness among parents and educators of other opportunities.
- Everyone should be at the table – school board, business leaders, Chamber, City leaders, clergy, landlords, etc. Bring in folks with different mindsets to break the mold.
- Resource providers that can help entrepreneurs.
- The failed bond was a huge blow to young people in Cherryvale, it crushes motivation.
- Without school there won't be a viable community.

Appendix: Roundtable Reporting

COFFEYVILLE ROUNDTABLE REPORTING

Adjectives for Coffeyville?

- Hard-working, multi-tasker, friendly, proud, blue-collar, always having to prove something, complacent

Adjectives outsiders would use to describe Coffeyville?

- Supportive, dedicated, historic, dirty, charming, progressive (programs)

Opportunity for growth? Assets of the community?

- Central location. Good highways that are improving. Close to larger cities.
- Good community college. K-12 is outstanding.
- Good hospital
- Age to age is great. Boys & Girls Club.
- School district is better in line now with finding opportunities for kids to stay.
- Short commutes. Good quality of life. Connectivity here is better than in cities.
- Getting people who left to come back and raise families.

Appendix: Roundtable Reporting

COFFEYVILLE ROUNDTABLE REPORTING

Challenges? Barriers to success?

- Changing the perspective that there isn't anything in Coffeyville. It has gone through bad periods.
- Stock of new homes. Workforce housing. Plenty of starter homes but not step-up housing.
- A lot of workers are coming from out of town, only work here don't live.
- Quality of life is not where it needs to be, there is a lack of amenities (dining, shopping, etc.)
- Created tons of jobs in the '90s and then they all left.
- High property taxes.
- Communication between communities.
- Oil flood that happened – the state sent money to the area, most resources were applied to LMI housing. Working on a solution to promote building.

MCAC

- MCAC chose to spread itself too thin.
- It should focus efforts on bigger opportunities, especially more focused on BRE. This could lead to more opportunity and growth.
- Alignment and leadership is a challenge. Some of those have resentment. People would rather die than go to Coffeyville and vice versa to Independence.
- Commission in Coffeyville shot down ideas to buy on a county-wide scale.

Appendix: Roundtable Reporting

INDEPENDENCE ROUNDTABLE REPORTING

Adjectives for Independence?

- Friendly, proud, unique, supportive, clean, hard-working, slightly insulated (geographically), generous

Adjectives outsiders would use to describe Independence?

- Same as above, fortunate, great place, quiet, community events/involvement, park and zoo, affordable housing, boring, quaint

Opportunity for growth? Assets of the community?

- ARCO building
- Distribution center not far away
- Workforce training
- Good leaders, good figureheads, people in the community push for it
- Independence is more affluent, people are civically engaged and create more to do
- We realize if we don't make it happen, no one will
- Becoming known as an artistic community, reinventing itself
- Willingness to invest own time and money. Other communities have a non-growth/non-change attitude
- Vibrant downtown as a result of people investing. Further enhancements can be made. Movie theater is good.

Appendix: Roundtable Reporting

INDEPENDENCE ROUNDTABLE REPORTING

Housing

- Housing stock is older and more rundown.
- Growing communities have housing built in each time period.
- If the focus is on bringing in higher paying jobs, we are close to another community that has newer housing so we'll lose out.
- There is a perceived tax advantage to living in Oklahoma.
- The market for houses for sale is at a reasonable price, but the rent prices are too high. \$800-\$900 a month, that is too high.
- The first impression on housing is not good, it's a problem for anybody coming into the area from the outside.
- The city is putting an effort into building new houses and tackling the housing blight.
- The city spent \$100k on a demo home.
- Many people who work in Coffeyville live in Independence housing.

Growth/Success for Independence

- Growth should be steady and sustainable
- Cessna doesn't employ anything like what it used to. Amazon has left.
- There is risk to become enamored with highly cyclical industries. We need a diversified economic base, rather have 50 businesses that employ smaller amounts of people than one large employer. Need small to mid-size businesses here.
- ARCO needs some concentration. It could be a call center but where are those people coming from?
- There were several grocery stores but not anymore.
- We don't have money or infrastructure to support too large of an employer coming in.

Appendix: Roundtable Reporting

INDEPENDENCE ROUNDTABLE REPORTING

Challenges? Barriers to success?

- There are no jobs or opportunities for younger folks. There is no nightlife for them.
- People don't always appreciate the benefit of a small town.
- We need young people to fill the shoes of those that are retiring.
- There is not a lot of land for those people that want to "live off the land".
- Bad marketing is a big barrier.
- We have challenges in committing to something, especially when there is disagreement if it can be done. It's paralyzing.

Regionalism/Alignment?

- There is not a regional thinking, every community is very independent. There is not unity.
- People think driving back and forth 14 miles between communities is crazy.
- People are staying in their own communities.
- Everyone agrees that having two community colleges is unsustainable. But nobody wants to give their community college up.
- The hospital closing in Independence was not easy to get people on board with.
- Courthouses in Coffeyville and Independence.
- 06-07 sample ballot – voters said they wanted one
- We make small improvements but then fall back into old patterns.
- There has been a regional effort on Cessna.
- MCAC is one of the few unifying features.
- All commissioners supported wanting to work together.
- People believe that if we lose our school, we lose our community.
- It gets to a point of crisis to change something, that may be true here too.

Appendix: Roundtable Reporting

INDEPENDENCE ROUNDTABLE REPORTING

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Appendix: SWOT Meeting Notes

CANEY SWOT MEETING NOTES

Strengths

- Good city manager
- Work hard
- Good school system/facilities
- Two (2) US highways with increased traffic flow
- Adaptive
- Grain elevator
- Take care of each other
- Beautiful scenery
- Farmers' market
- New city library
- New city rec center
- Nice city parks
- Safari zoo
- Short commutes

Weaknesses

- No grocery store
- Empty downtown buildings
- Very little to keep grads in the area
- Lack of jobs
- Lack of housing
- Lack of infrastructure (water, sewer, streets, electricity, etc.)
- High taxes
- Highways moved from the downtown area decades ago
- No county-wide housing program
- Current medical clinic insufficient to handle patient load of area
- Lack of mental health care
- Nursing home closing

Opportunities

- Graduates with good education
- Highways
- Eye-popping website (MCAC needs one; current one is crap!)
- Centrally located
- Access to port, rails and short rails
- Youth
- Entrepreneurial opportunities (check out Fab Lab ICC)

Threats

- Highways
- Taxes
- Poverty
- High unemployment
- High disabled population
- Lack of community involvement/volunteerism
- Lack of support for local businesses
- Lack of entertainment venues and events
- Substance abuse
- Lack of trust in MCAC, city officials; how residents know what's going on when they can't see behind the scenes

Appendix: SWOT Meeting Notes

CHERRYVALE SWOT MEETING NOTES

Strengths

- People
- Strong Fire and EMS services / good fire rating
- Strong schools/education system
- Two excellent medical clinics
- Two excellent veterinary clinics
- A bed and breakfast
- Plenty of land for expansion
- City government easy to work with
- Water supply from Big Hill Lake (once judged “Best Tasting Water in America”)
- Excellent hardware store
- 10 dine-in restaurants; 10 carry-out restaurants
- Strong Chamber of Commerce
- Two financial institutions
- Two community colleges in the county w/career-specific training
- Airport access
- “Easy on, easy off” access for truck drivers
- Low crime rate and excellent law enforcement; Safe community
- Fishing and hunting opportunities; Hunting lodge
- Recent inclusion in Kansas state rail plan

Weaknesses

- Limited human resources/volunteers
- Declining population
- Lack of specific workforce training; No dedicated vocational school in area
- Citizens don’t see “big picture”/lack of future thinking and vision
- High property, sales and income taxes
- Prevalent illegal drug use
- Downtown lacks visual appeal (empty storefronts and lots); Lack of property maintenance

Opportunities

- Truck stop with a motel; annex highway front property
- 169 corridor
- Intermodal transport opportunities
- Port of Catoosa access
- Rich history/tourism opportunities (celebrity ties; architectural tours)
- Education system
- Technical education program
- More health care partnerships (i.e., EMS inter-local agreement)

Threats

- NOT taking advantage of opportunities (i.e., 169 corridor)
- Someone “sweeping in” and commercializing opportunities (like history) with no benefit to the community
- Health care outmigration to Oklahoma

Appendix: SWOT Meeting Notes

COFFEYVILLE SWOT MEETING NOTES

Strengths

- Inexpensive housing
- Small community
- Great people
- Excellent schools (PreK – CCC/technical campus)
- Hospital
- Youth programs
- Spanish speaking resources
- Aquatic center
- Local utilities
- Police
- Longevity of existing industries
- Location in SEK means access to port, rail, airports, etc.
- Museums
- Golf courses
- Friendly, open rural lifestyle
- Nursing program
- Shopping opportunities
- Available jobs
- Workforce
- Stable base of employers
- Cost of living
- Cheap petroleum products at the pump
- Infrastructure is in great shape
- Water system
- Long-term planning (financial)
- Internet utility
- Family owned local businesses
- History and tourism
- Working class people
- Strong supplier base to support major industries
- Two grocery stores plus Walmart
- Community supportive of sales taxes for schools and hospitals

Weaknesses

- Drugs
- New housing starts
- Walmart is only big national retail chain in town
- Labor shortage
- Unhealthy population
- No interstate highway
- Community aesthetics
- Poverty, low income population
- Divided socioeconomically
- Blighted housing
- Image as a dirty, smelly town
- Abandoned appearance on east side
- So close to Bartlesville and Owasso that people go there to shop
- Negative image of school system
- Lack of youth retention
- High property tax and state income taxes
- Empty downtown buildings
- Flooding potential
- Significant number of unskilled/low skilled laborers
- Insufficient low income housing options

Appendix: SWOT Meeting Notes

COFFEYVILLE SWOT MEETING NOTES

Opportunities

- Utilize power plant as it is a cheap resource
- Partnering with existing industries
- Unity of organizations to work together for common interests
- Lots of cheap, vacant land on east side and two large vacant buildings
- Capitalize on access to highway, rail, air and port systems
- Large skilled blue collar workforce but need to draw more white collar jobs
- Four strong, quality communities in the county work together using one's strength to help another overcome its weakness
- Work/market housing and retention of youth/return of former residents
- Recruit suppliers for local businesses
- Help grow existing industries
- Solid administration county-wide and support for economic development (all communities working together)
- College and training potential / vocational training
- People come from several neighboring counties and states to shop at Coffeyville's Walmart

Threats

- Lose a large employer
- Poverty cycle
- Declining population resulting in inability to provide adequate workforce
- Shrinking tax base
- Flooding
- Natural and environmental calamities
- No money or support for growth of state highways
- Isolationist thinking
- State debt
- Competition from other communities and states
- Rail is only real claim to fame in transportation (UP employees headquartering out of Coffeyville earn a good wage and spend lots of money in town)
- Lack of individuals interested in running for public office (people want to complain but don't want to get involved)
- Opportunities for rural area are limited

Appendix: SWOT Meeting Notes

INDEPENDENCE SWOT MEETING NOTES

Strengths

- Small town
- Thriving retail
- Good city planning with regard to layout of town
- Regional location
- Schools, PK – College, quality as to facilities and education
- Highways
- Zoo/parks/outdoor recreation
- Weather
- Real estate values
- Festivals
- Friendly people
- Great library
- Great movie theater
- Vibrant downtown compared to other towns
- Statues downtown
- Neewollah
- ICC provides theater, sports and arts
- Memorial Hall
- Amazing house – inexpensive
- Low cost of living
- Safe community to raise family
- Civic involvement
- Large employers
- Variety of medical options
- Thriving downtown
- Big city feel in small town
- Rich history
- Architecture
- Invests in itself
- Number of your professionals
- Proximity to major cities

Weaknesses

- No full service hospital
- No men's clothing store
- Infrastructure challenges
- Ash pool – poor hours of operation, maintenance issues
- Not enough tax base to support everything
- Declining population
- Very divided (north vs. south Independence)
- Glory days behind us
- Lack of PR
- Drugs
- Homelessness, hunger, basic needs
- Basic life skills missing
- Crime
- Family connection breakdown
- Lack of housing
- High property taxes
- Technological infrastructure
- Turf wars and rivalries
- Empty buildings
- Water treatment plant
- Vocal minority causing divisiveness
- Negative perception does not make it a reality

Appendix: SWOT Meeting Notes

INDEPENDENCE SWOT MEETING NOTES

Opportunities

- Location
- Legacy families
- Tourism/outdoor recreation
- Quality of life
- Infrastructure/buildings, room to grow
- Community of citizens pulling together
- Work through crises
- Pride in community
- Tradition and history
- 2 industrial parks
- Regional outlook
- Airport has best aviation tax incentives in country and offerings that peer communities don't have
- Need restaurant at airport and to host events there (fly-in, etc.)
- Business district, especially restaurants, need to be open on Sunday
- Numerous Coffeyville residents relocated to Independence after 2007 flood
- Booth Theater to be restored and put back in use
- Host events; need to get brochure together about availability to do this
- Opportunity to work from home
- Neewollah; need to find ways to take advantage of crowds it draws to highlight other assets in community
- Collaborate with others in county
- Colleges need to work together to maximize the strengths of each and eliminate weaknesses
- Job training availability
- Community cleanup days; need more

Threats

- People leaving
- Drugs
- Not opening up youth to potentials available to them to remain in the community or return after getting education; they don't get a good picture of what's really available in the community at an early enough age to interest or encourage them to stay/come back
- Too easy to travel which encourages people to shop outside community
- Rivalry within the city and among cities in the county
- Lack/loss of funding for infrastructure improvements
- High state taxes
- Not involving public
- Failure to instill self-worth in individuals
- Loss of industry
- Water supply
- Lack of succession planning by our businesses
- Local businesses bought by outside entities, assets stripped and then closed.
- Legislative action that is outside control to mitigate negative impact
- Poverty, poverty, poverty
- Eroding, decaying family values
- Ourselves
- Fear of investing in self

Thank You!