

WORK SESSION AGENDA

CITY COUNCIL WORK SESSION
TUESDAY
NOVEMBER 28, 2023

COUNCIL CHAMBERS
211 WEST ASPEN AVENUE
3:00 P.M.

All City Council Meetings are live streamed on the city's website
(<https://www.flagstaff.az.gov/1461/Streaming-City-Council-Meetings>)

*****PUBLIC COMMENT*****

Verbal public comments may be given through a virtual public comment platform or in-person

If you want to provide a verbal comment during the Council Meeting, use the link below to join the virtual public comment room.

VIRTUAL PUBLIC COMMENT WAITING ROOM

Written comments may be submitted to publiccomment@flagstaffaz.gov. All comments submitted via email will be considered written comments and will be documented into the record as such.

1. Call to Order

NOTICE OF OPTION TO RECESS INTO EXECUTIVE SESSION

Pursuant to A.R.S. §38-431.02, notice is hereby given to the members of the City Council and to the general public that, at this work session, the City Council may vote to go into executive session, which will not be open to the public, for discussion and consultation with the City's attorneys for legal advice on any item listed on the following agenda, pursuant to A.R.S. §38-431.03(A)(3).

2. Roll Call

NOTE: One or more Councilmembers may be in attendance through other technological means.

MAYOR DAGGETT
VICE MAYOR ASLAN
COUNCILMEMBER HARRIS
COUNCILMEMBER HOUSE

COUNCILMEMBER MATTHEWS
COUNCILMEMBER MCCARTHY
COUNCILMEMBER SWEET

3. Pledge of Allegiance, Mission Statement, and Land Acknowledgement

MISSION STATEMENT

The mission of the City of Flagstaff is to protect and enhance the quality of life for all.

LAND ACKNOWLEDGEMENT

The Flagstaff City Council humbly acknowledges the ancestral homelands of this area’s Indigenous nations and original stewards. These lands, still inhabited by Native descendants, border mountains sacred to Indigenous peoples. We honor them, their legacies, their traditions, and their continued contributions. We celebrate their past, present, and future generations who will forever know this place as home.

4. Public Participation

Public Participation enables the public to address the council about items that are not on the prepared agenda. Public Participation appears on the agenda twice, at the beginning and at the end of the work session. You may speak at one or the other, but not both. Anyone wishing to comment at the meeting is asked to fill out a speaker card and submit it to the recording clerk. When the item comes up on the agenda, your name will be called. You may address the Council up to three times throughout the meeting, including comments made during Public Participation. Please limit your remarks to three minutes per item to allow everyone to have an opportunity to speak. At the discretion of the Chair, ten or more persons present at the meeting and wishing to speak may appoint a representative who may have no more than fifteen minutes to speak.

5. Recognition: Housing Month Sticker Contest Winner

6. Review of Draft Agenda for the December 5, 2023 City Council Meeting

Citizens wishing to speak on agenda items not specifically called out by the City Council may submit a speaker card for their items of interest to the recording clerk.

7. City Manager Report
Information Only

8. ECoNA –An Economic Development Roadmap for Northern Arizona
Presentation and Discussion

9. Public Participation

10. Informational Items To/From Mayor, Council, and City Manager; future agenda item requests

11. Adjournment

CERTIFICATE OF POSTING OF NOTICE

The undersigned hereby certifies that a copy of the foregoing notice was duly posted at Flagstaff City Hall on _____, at _____ a.m./p.m. in accordance with the statement filed by the City Council with the City Clerk.

Dated this _____ day of _____, 2023.

Stacy Saltzburg, MMC, City Clerk

THE CITY OF FLAGSTAFF ENDEAVORS TO MAKE ALL PUBLIC MEETINGS ACCESSIBLE TO PERSONS WITH DISABILITIES. With 48-hour advance notice, reasonable accommodations will be made upon request for persons with disabilities or non-English speaking residents. Please call the City Clerk (928) 213-2076 or email at stacy.saltzburg@flagstaffaz.gov to request an accommodation to participate in this public meeting.

NOTICE TO PARENTS AND LEGAL GUARDIANS: Parents and legal guardians have the right to consent before the City of Flagstaff makes a video or voice recording of a minor child, pursuant to A.R.S. § 1-602(A)(9). The Flagstaff City Council meetings are live-streamed and recorded and may be viewed on the City of Flagstaff's website. If you permit your child to attend/participate in a televised Council meeting, a recording will be made. You may exercise your right not to consent by not allowing your child to attend/participate in the meeting.

**CITY OF FLAGSTAFF
STAFF SUMMARY REPORT**

To: The Honorable Mayor and Council
From: Stacy Saltzburg, City Clerk
Date: 11/22/2023
Meeting Date: 11/28/2023



TITLE:

City Manager Report

DESIRED OUTCOME:

Information Only

EXECUTIVE SUMMARY:

These reports will be included in the City Council packet for regularly scheduled Work Session meetings. The reports are intended to be informational, covering miscellaneous events and topics involving the City organization.

INFORMATION:

Attachments: City Manager Report
PROSE Monthly Report
Economic Vitality Monthly Report

City Manager's Report

Nov 28, 2023

Council and Colleagues, greetings. These reports will be included in the City Council packet for Council Work Sessions. The reports are intended to be informational, covering miscellaneous events and topics involving the city organization. This Report will include, as attachments, updates from Economic Vitality and PROSE.

HR Interim Director Introduction

As referenced in my last report, we recently rolled out an interim arrangement for leadership in HR. Allison Eckert joined us a few weeks ago and has hit the ground running. We are grateful for her leadership. Her interim coverage will cover a few months, with some flexibility, as our timeline here is a bit uncertain at this juncture. Her bio is pasted below:

Allison M. Eckert

With a passion for mentoring and empowering others, Allison brings over 35 years dedicated to public service leadership. In addition to the past 20+ years as a leader in Human Resources, her span of experience includes work in city and county management, higher education, community development, public works, public safety, budget, grants, purchasing, and working with elected officials. Since retiring as the Human Resources Director for Coconino County in 2015, Allison has continued to serve as an HR consultant for a variety of organizations such as fire districts, small organizations and non-profits.

Allison's most recent experience and consulting work includes several interim HR Director roles, including a prior stint with the City of Flagstaff in 2019, and touches all aspects of the field such as leadership coaching, strategic planning, HRMS, recruitment and selection, program and policy development, compliance and risk management, performance management, employee relations, and total compensation.

During Allison's time with the City of Flagstaff, she revamped our recruitment process to decrease the time to fill and recruit for key positions and worked on the RFP to select our vendor for the Class and Comp Study. She also developed excellent relationships with the internal HR team, as well as our leadership team. We're pleased she agreed to return to work with us once again.

Allison and her husband, Eric, have a home in Flagstaff and enjoy camping, off-roading, traveling and exploring new places and spending time with their family – more specifically their two grandchildren!

PROSE

Recognizing that Council will be hearing an update from PROSE, we wanted to nevertheless bring to your attention that the Open Space Commission will be reviewing a Hidden Hollow Road Access consideration through Observatory Mesa Natural Area and revisions to the Greater Observatory Mesa Trail Plan during their Monday, December 11th meeting. The meeting begins at 4 pm and is held at the Aquaplex Community Room.

Fire

- Fire Personnel handed out medals to the 400+ runners at the Girls on the Run event to talk about careers with FFD. Great news.
- Earl Gutierrez was recognized as Firefighter of the Year by the Exchange Club (photo below). Congratulations, Earl!



- Also, congratulations to Sean Connolly on his promotion to Fire Engineer Paramedic, Christopher Denham on his promotion to Fire Captain, and Derek Sausman on his promotion to Fire Engineer!
- Please see flyer announcing the upcoming graduation ceremony from the Greater Flagstaff Region Firefighter Recruit Academy:



PLEASE JOIN US FOR THE GRADUATION OF

Andy Berg, FFD
Clayton Carrillo, HFD
James Collins, SFMD
Kaden Dunlap, HFD
Hannah Duval, FFD
Robert Hanisee, SFMD
McNeil Hodges, SFMD
Zachary Morse, SFMD
Adam Stalvey, SFMD

FROM THE GREATER FLAGSTAFF REGION
FIREFIGHTER RECRUIT ACADEMY

Friday December 1st, 2023
4:00PM

City of Flagstaff
City Hall Council Chambers
211 W. Aspen Ave
Flagstaff, AZ 86001

Police

- Congratulations to Colton Hutchison on his promotion to Sergeant!
- Flagstaff Police Officers assisted with the Flagstaff Marathon and Girls on the Run events.
- Chris Panella was recognized by the Exchange Club as the Flagstaff Police Department Officer of the Year. Nicely done, and well deserved!



Public Works

- Congratulations to Sam Beckett for earning an Arizona Qualifications System Gold Card and is now a credentialed Operations Section Chief! Great achievement, Mr. Beckett!
- The weather allows for great work to continue to be completed for asphalt, concrete, and paint and markings. There has also been good progress on repair streetlight and traffic signal repairs.
- The Hazardous Products Center supported the Sustainability team with the Drop off Event and collect a variety of household hazardous, electronic and universal waste 78 pounds of aerosol cans, 185 CFL bulbs, 5 round fluorescent halo lights, 197 fluorescent tubes, 66 LED bulbs, 1 HID bulb, 852 pounds of dry cell and lithium batteries, 475 pounds of lead-acid batteries, 13 pounds of single-use vapes, 169 pounds of light ballasts, and 24 pounds of printer cartridges.

Hopi Visit

On Monday, Nov. 13th, a group of us traveled to visit with the Hopi Tribal Council to discuss opportunities to collaborate on Indigenous initiatives and provide various updates on city matters involving our Indigenous community. It was a very nice visit, and thanks to Rose Toehe and Shawn Johnson for the coordination.



Above is a photo of the participants, including Chariman Nuvangyaoma, Vice Chairman Craig Andrews, and the city entourage. Below is an excerpt from our White Paper that speaks to the governance of the Tribe and some background information.

Tribal Government

The Hopi people established the Hopi Tribal Council on Dec. 19, 1936, with the adoption of the Hopi Constitution and By-Laws. According to the constitution, the Hopi Tribal Council has the power and authority to represent and speak for the Hopi Tribe in all matters for the welfare of the Tribe, and to negotiate with federal, state, and local governments, and with the councils or governments of other tribes.

Today's current council consists of 22 representatives from the villages of Upper Moenkopi, Bacavi, Kykotsmovi, Sipaulovi, First Mesa Consolidated Villages (Walpi, Sitchumovi and Tewa), and Mishongovi. Currently, the villages of Shungopavi, Oraibi, Hotevilla, and Lower Moenkopi do not have a representative on council. Representatives to the council are selected either by a community election or by an appointment from the village kikumongwi, or leader. Each representative serves a two-year term.

The Hopi Tribal Government is a unicameral government where all the powers are vested in the Tribal Council. While there is an executive branch (tribal chairman and vice chairman) and judicial branch, their powers are limited under the Hopi Constitution.

Etiquete: Always as before taking a picture.

The general email box for Hopi Tribal Council members is hopicouncil@hopi.nsn.us.

Hopi Tribal Council – 2022

Chairman: Timothy L. Nuvangyaoma

Vice Chairman: Craig Andrews

Tribal Secretary: Judith Youvella

Tribal Treasurer: Nada Talayumtewa

Sergeant-at-Arms: Alfonso Sakeva

Navajo Nation Visit

A similar visit with our Tribal neighbors will be occurring on Monday, December 4th, when a group of city representatives will be traveling to Navajo Nation. Stay tuned for details.

Alliance Meeting

Mountain Line hosted the Alliance meeting on Friday, Nov. 17th. The agenda is pasted to the right for reference. It was a good meeting with focus on voting outcomes and a United Way update.

Alliance Meeting Agenda

Friday, November 17, 2023

7:30 – 9:00 AM

**Mountain Line
Training Room
3773 N. Kaspar Dr.
Flagstaff, AZ 86004**

1. Welcome and Introductions (Heather Dalmolin)
2. United Way Presentation by Executive Director, Liz Archuleta (Andy Bertelsen)
3. Community Impact Report (Eric Heiser)
4. 2024 Voter Initiatives – standing item requested (Lucinda Andreani)
5. District 3 Vacancy Discussion (Jen Hammond)
6. Facilities Master Plan (Jen Hammond)
7. Workforce Housing Prospectus (Jen Hammond)
8. Agency Updates
 - a. City of Flagstaff
 - b. Coconino Community College
 - c. Coconino County
 - d. Flagstaff Unified School District
 - e. Mountain Line
 - f. Northern Arizona University
9. Any other information to share.
10. Other Business

UWNA Fundraising Campaign

And speaking of United Way, the city’s campaign for employee donations was quite successful. Special props to Heidi Hansen for her amazing efforts in spearheading this campaign, and Chief Musselman for his involvement as well.

The effort was successful. See below email from Christine Pierce to Heidi Hansen, summarizing the campaign outcomes. We had 102 donors from the city, which is remarkable, and a fundraising total of \$17,774! Thanks to all who participated.

From: Christine Pierce <CPierce@nazunitedway.org>
Sent: Monday, November 20, 2023 7:58 AM
To: Heidi Hansen <HHansen@flagstaffaz.gov>
Subject: UWNA Update.


Thank you for all your hard work on the Campaign! Below is where the City is as of this morning!

CAMPAIGN STATUS

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
City of Flagstaff	Empl	\$17,774.01	\$0.00	766	102	13%	102	13%	\$174.26	\$23.20

Christine Pierce
Campaign and Operations Manager

United Way of Northern Arizona
1515 E. Cedar Ave. Ste. D-1
Flagstaff, AZ 86004
Tel 928.773.9813
www.nazunitedway.org



Budget Retreat

A reminder that we will be having our December Budget Retreat on December 14th, details will be forthcoming. It will be facilitated.

Thanks all for now. Onward and upward ...

PROSE PARKS, RECREATION, OPEN SPACE, AND EVENTS

October 2023

End of Season Celebration

The PROSE crew showed out for the end of season celebration this month. Staff celebrated each others accomplishments from the prior year and partook in team building activities and lunch.

Shout out to Greg Clifton and Shannon Anderson for making a special appearance!



Above: Staff enjoying the end of season celebration



[CLICK HERE TO VOTE](#)

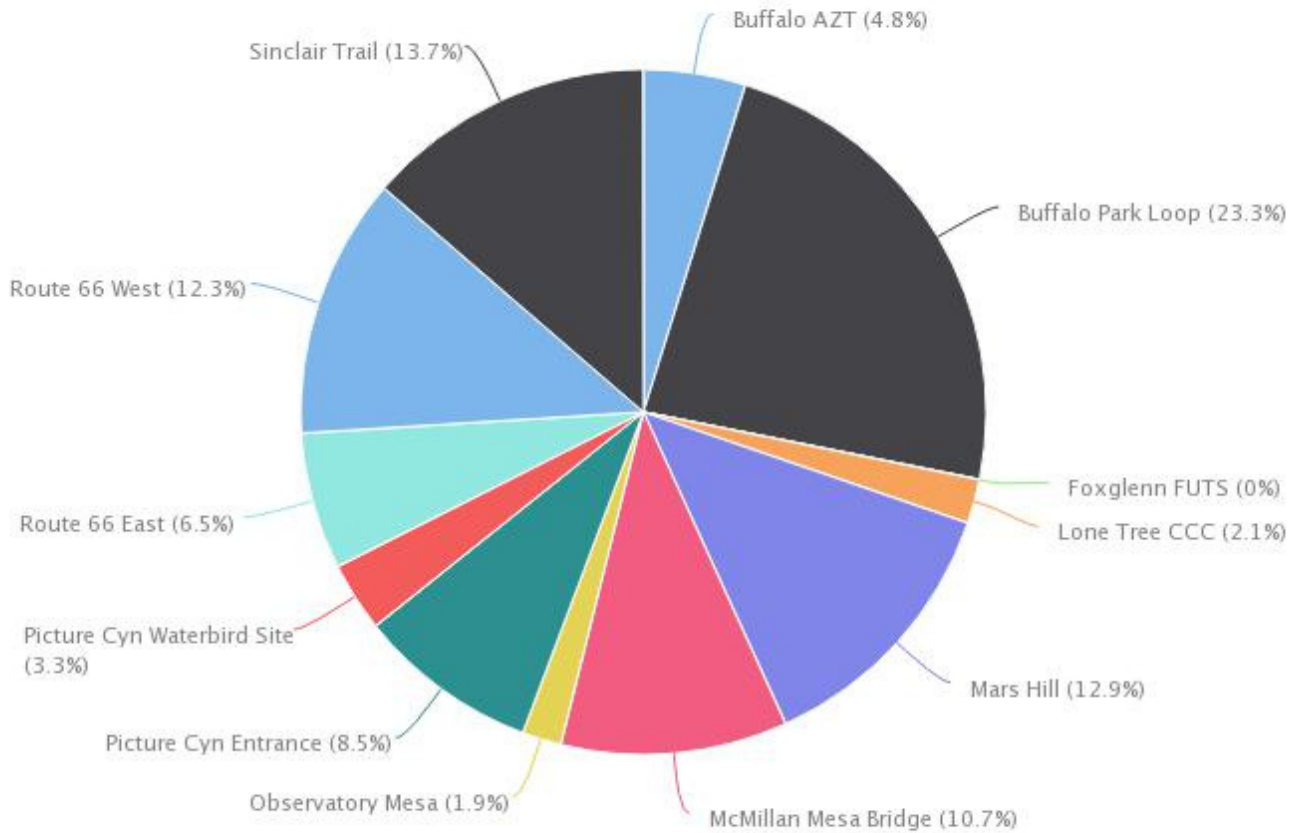
Name that plow!

The community is invited to participate in the PROSE "Name that Plow!" initiative. A survey is available for the public to submit their name recommendations which will be decided on in November.

Throughout the winter we will track how much snow the plows move and keep the public informed.

Compare Sites

2023-09-01 to 2023-09-30



Site Name	Daily Average
Buffalo AZT	82.7 (4.8%)
Buffalo Park Loop	401 (23.3%)
Foxglenn FUTS	0.2 (0.0%)
Lone Tree CCC	35.8 (2.1%)
Mars Hill	222.1 (12.9%)
McMillan Mesa Bridge	183.7 (10.7%)
Observatory Mesa	31.8 (1.9%)
Picture Cyn Entrance	146.7 (8.5%)
Picture Cyn Waterbird Site	56.5 (3.3%)
Route 66 East	110.9 (6.5%)
Route 66 West	211.7 (12.3%)
Sinclair Trail	234.5 (13.7%)

Trail Counts

The month of September experienced a few increases in use by 15% with specific locations such as Sinclair Trail, Mars Hill and Buffalo Park.

A new gate...that's right! Parks has a new automated gate at the Shop which may not immediately reveal as important, but the crew is ecstatic with the improvement. The new gate simplifies the ingress/egress that was a daily struggle. Thank you to Shawn Mullaney for running this project!



Above: The new automated gate.

Halloween festivities took over the Recreation section this month with themed activities taking place at each of the four recreation centers. Hal Jensen Recreation Center has an impressive turn out with attendees participating in crafts, carnival games, and even a cake walk!



Pictures from the Hal Jensen Halloween Party





The Open Space Educator has continued facilitating field trips with Flagstaff High School, teaching students about forest ecology on Observatory Mesa, plant and insect biodiversity on McMillan Mesa, and bird adaptations at Picture Canyon. They have also been working closely with the Boys and Girls Club for some hikes while the weather is permissible.

Left: Boys and Girls Club at Buffalo Park

The STAR School came out to Picture Canyon for their quarterly wellness hike. There were 90 students in attendance and 20 chaperones, teachers, and administrators.



Above: Students exploring Picture Canyon.

Adult Basketball registration is open for 1st session. Gather your team and register before spots are full!

CITY OF FLAGSTAFF


**1ST SESSION
ADULT
BASKETBALL**

WINTER 2023 | **LEAGUE PLAY
BEGINS
DECEMBER 3**

REGISTRATION & LEAGUE INFO

Registration Opens October 18 <ul style="list-style-type: none">Register online using QR Code or in-person at the Flagstaff Aquaplex Closes November 17		5x5 play six person roster
Registration fee <ul style="list-style-type: none">\$325 per team\$400 late fee after 11/17	REGISTER	Manager's Meeting November 15 @ 6:00 PM Hal Jensen Recreation Center

For more information:
LaReina Reyes
928-213-2309
lareina.reyes@flagstaffaz.gov





**Winter
ONDERLAND
and TREE
LIGHTING**

PRESENTED BY THE FLAGSTAFF DOWNTOWN BUSINESS ALLIANCE AND
CITY OF FLAGSTAFF PARKS, RECREATION, OPEN SPACE, AND EVENTS

Saturday December 2nd

STARTING AT 2:00PM | HERITAGE SQUARE



Staff are busy preparing for winter with marketing updates, Winter Wonderland Holiday Tree Lighting, and New Years Eve Pinecone Drop planning.

Upcoming Events in Flagstaff

First Friday Art Walk
November 3
Heritage Square

Winter Wonderland
December 2
Heritage Square

Holiday Light Parade
December 9
Downtown Flagstaff

Noon Years Eve
December 31
Heritage Square

New Years Eve Pinecone Drop
December 31
Downtown Flagstaff



flagstaff.az.gov/prose

Economic Vitality Division

Enhancing Quality of Life 365 Days a Year

AIRPORT • COMMUNITY INVESTMENT

LIBRARY • TOURISM

OCTOBER 2023 Highlights



AIRPORT

AIRPORT RESCUE FIRE FIGHTING (ARFF):

- ARFF and other airport staff assisted the Secret Service and an array of law enforcement officers from multiple agencies throughout the state on October 17th when the Vice President flew into FLG to speak at Northern Arizona University.
- ARFF personnel conducted their annual driver training at Camp Navajo. This training is essential in ensuring the safe operation of emergency response apparatus and ARFF vehicles.



AIRPORT OPERATIONS:

- Airport staff conducted the annual Snow and Ice Control Plan pre-winter meeting.
- During this meeting, staff discussed plans and best practices for snow removal and other winter operations at the airport.
- This discussion ensures the airport is as prepared as possible for inclement weather and maintenance compliance with FAA standards.



AIRPORT MARKETING AND ADVERTISING:

- Airport featured in October issue of Flagstaff Business News - [Improvements, Parking Changes Made at Flagstaff Pulliam Airport](#)

- In terminal advertising remains on hold pending the upcoming Council discussion on City Facility Advertising Policy.
- Ads running in print and digital in Arizona Daily Sun and Flagstaff Business News.



AIR SERVICE ATTRACTION:

Staff attended an airport service conference in Lexington, Kentucky and was able to meet with various airlines. Staff connected with United to discuss the community’s disappointment of disconnecting Denver service last year and was able to secure a meeting with United about the future of United air service at FLG.

PAID PARKING SYSTEM:

Staff continues to work with the equipment vendor in optimizing the system.

PROJECT & GRANT UPDATES:

Terminal Maintenance – Phase I:

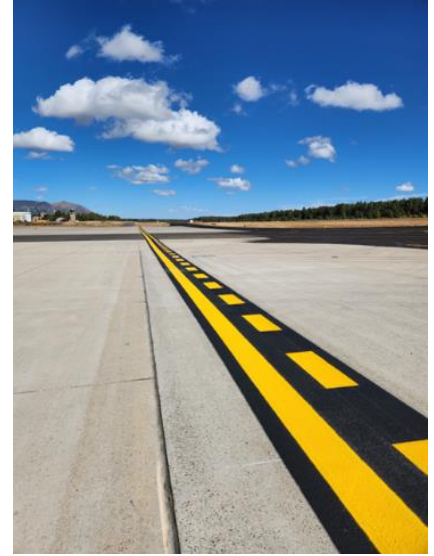
- Terminal roof repairs have started
 - Above the carriers and TSA offices complete
 - Above baggage return nearly complete
 - Above the hold room – To begin during the week of November 13th
- Office carpet replacements
 - United office – complete
 - Directors' office – complete
- Concrete column maintenance – near complete
- Concrete sidewalk replacements – near complete
- Building exit signage – near complete
- Terminal main doorway replacement – Scheduled to begin in the month of December
- Terminal window screening – Scheduled to begin in the month of December



Airfield Maintenance – Phase 4:

General aviation and commercial apron markings refresh – complete
 Staff parking lot:

- Lighting improvements – spring of 2024
- Pedestrian gate – spring of 2024
- Regrading and pothole repairs – spring of 2024
- Oil stabilization of existing pavement – spring of 2024
- Restripe – spring of 2024



Perimeter Fence Maintenance – Phase 1:

- Fence replacement - Ongoing
- Fence top rail replacement - Ongoing
- CMP replacement - Ongoing

Terminal Fire Sprinkler Construction – Phase 1 and 2

In final contract negotiations

Terminal Lighting Replacement

In contract negotiations

Terminal Flooring replacement

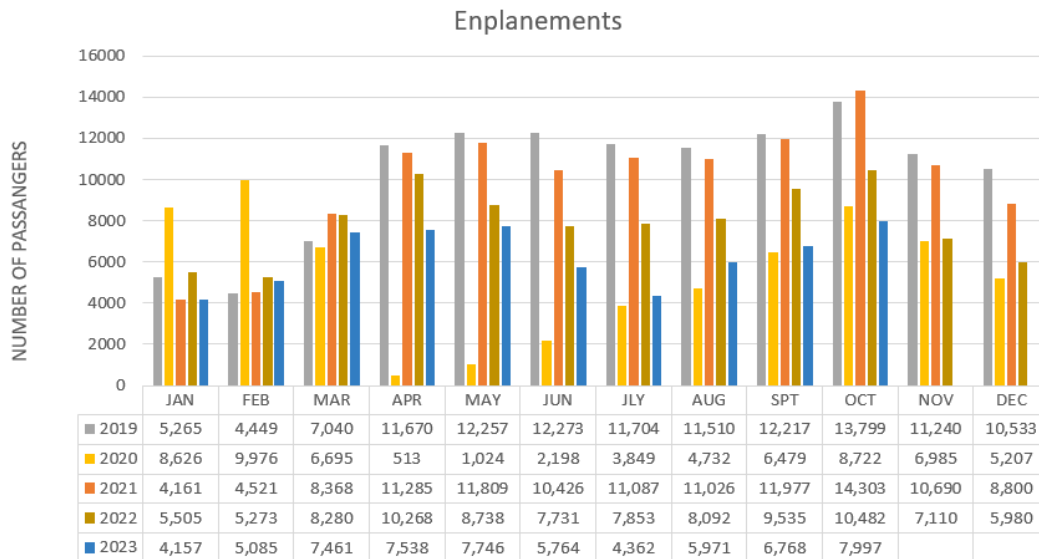
In contract negotiations



CELEBRATING 75 YEARS | 1948-2023

75th ANNIVERSARY CELEBRATION: The Airport will be celebrating the 75th Anniversary with an event on 11/29 for airport partners.

TOTAL ENPLANEMENTS: We're close to 8,000 and higher than September due to American Airlines adding additional flights.





CHOOSE
FLAGSTAFF

COMMUNITY INVESTMENT

BEAUTIFICATION AND ARTS & SCIENCE:

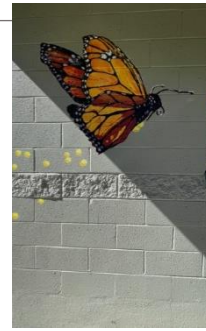
COMPLETED PROJECTS

BIA GRANT, Pollinator Mural at the City of Flagstaff Sustainability Department

Terra BIRDS, a local outdoor education non-profit, partnered with the City of Flagstaff Sustainability Department to produce a mural celebrating local native pollinator species.

Located on the south-facing wall of the

Sustainability building, the artwork by Terra BIRDS illustrator Robert Chambers features nine colorful and richly detailed images of a monarch butterfly, a grey buckeye butterfly, sphinx moth, Mexican bat, rufous hummingbird, three species of bees, and a thick legged hover fly. The mural functions as a backdrop for a future on-site pollinator garden as part of the Sustainability office's ongoing plans to create outdoor education spaces and the City's ongoing commitment to increasing pollinator habitats.



ONGOING PROJECTS



- **Airport Medallions:** Contract ratified, and staff gave vendor notice to proceed to order the Corten steel for the medallion frames. Security bolt location verified, and patina application on completed and approved. Medallion vendor will deliver

medallions to installation vendor in early November. Installation vendor upon receipt will fabricate frames and install at airport circa end of November.

- **Aspen (Niche) Bicycle and Pedestrian Enhancements:** Staff held design sessions with Morning Dew to create renderings for presentation at EUROW in November.
- **British Phone Booth Library:** Final design reviewed and approved with addition of an armrest to the bench. Design will proceed to bidding.
- **Cosmic Ray Tunnel & Sheep Crossing Plaque:** Staff received and reviewed a proposal from Joel Geist to design two plaques, located at each tunnel entrance. Staff reviewed and approved verbiage from Rose Houk for project plaques that highlight the area's Basque shepherding history and Cosmic Ray's legacy.
- **DCC Southside Grove Sculpture:** Staff and artist team reviewed Building Permit requirements. Submission to occur within the next 30 days.

- **Flowers Program:** Staff worked with the CVB/FDBA to determine removal date of the Heritage Square pollinator garden. The garden will be de-installed November 11, prior to the installation of the holiday tree. New signage was installed at the City Hall and Heritage Square pollinator gardens. Hanging baskets were removed by Foxglove Gardening and baskets/basket materials are being prepped for storage. **The Spruce trees arrived** and were planted south of Route 66 on Beaver Street and at the Flagstaff Gateway. Staff approved the fabrication of four double sided brackets which will accommodate eight new hanging baskets on Birch Avenue in 2024. Staff met with the Executive Director of the Sunnyside Neighborhood Association to discuss flower expansion along the Fourth Street Corridor in 2024 as well.



- **Indigenous Representation at County Park:** Scoring sheets received, staff and procurement compiled scoring sheets to determine 5 top proposals and 2 alternates. Staff sent acceptance and rejection notifications to applicants. Staff met with Coconino County to discuss next steps and determine County safety vetting process. Staff sent proposals and licensing agreement draft to Coconino County for review. Staff met with legal and finalized artist contracts.
- **Lone Tree Overpass:** BAS staff met with Capital Projects Manager to review cost sharing. Amount for artist contract agreed upon.
- **Murdoch/Southside Park Art:** All applicants notified of outcome of the first phase of the artist selection. Five finalists are going forward to produce proposals.
- **Photography:** Completed photoshoots for *Sunflowers*, *Kulila*, *Here Comes the Sun*, *Welcome to Sunnyside*, *The Gandy Dancer*, and *Touch home, reach sky* (Library Entry) Staff worked with Parks Manager to ensure weeding and pruning around each artwork was conducted before the photoshoots. Community Engagement Specialist also took photos of library entry for Discover Flagstaff's FY23 Annual Report. Staff selected final 20 images of The Gandy Dancer sculpture, which the photographer will photoshop.



PROGRAMS & OUTREACH

- **Arts & Sciences Innovation & Capacity Grant Program:** Staff participated in selection panel review, which included reviewing and scoring 17 applications.
- **ARTx:** Staff participated in review and scoring of 118 project proposals over three meetings with the selection committee. Project Selection panel approved **30 projects** with \$90,000 total grant funding for the 2024 festival! Very exciting submissions.

- **BPAC:** October meeting held. Discussion items included new projects (Regional Plan Cover and Public Toilet Artwrap), the approval of recommended art proposals for the Indigenous & Multi-Cultural Representation Project, a potential project for BPAC consideration (El Pueblo Navajo Code Talker 3D Artwork), a review of the five finalists to create proposals for the 3D Art & Southside/Murdoch Park, and questions BPAC would like addressed by BIA applicants at the November meeting. BPAC voted to approve the staff conference room for future meetings.
- **Beautification in Action Grants:** Applicants were emailed information for November presentations. Staff finalized the applicant presentation schedule for the November 13 BPAC meeting. Staff met with a Cedar Closet Thrift Shop board member to discuss the grant process and recently completed BIA projects and will present at their November board meeting.
- **Creative Flagstaff:** Staff and Commissioners attended an arts reception co-hosted by Creative Flagstaff and the Arizona Commission on the Arts (ACA). The reception featured members of ACA staff and members of their board of governors listening to ways for the state commission to serve the creative community in Flagstaff.
- **Creative Flagstaff Grantmaking Committee:** Staff attended orientation meeting for non-profit arts & sciences project grants.
- **Gift Proposal for Wheeler Park:** Staff met with Alan Peterson of MNA concerning a Sedona bronze foundry proposal for an elk sculpture for Wheeler Park.
- **Maintenance:** Staff worked with CoF code compliance office to have graffiti removed from the north wing of the Cosmic Ray/Shepherd tunnel's east entrance, across from the newly completed mural.
- **Outreach**
 - o Beautification, Arts & Sciences Program hosted a tabling event in Heritage Square for the First Friday Art Walk.
 - o Student journalists at NAU and ASU recently interviewed staff, a local artist, and our Commission Chair for separate articles on the traffic signal cabinets and BIA grants. ASU one-line: <https://cronkitenews.azpbs.org/2023/10/26/flagstaff-devotes-tax-dollars-urban-beautification-programs/>. NAU Lumberjack: [Flagstaff continues beautified traffic signal cabinets initiative | News | jackcentral.org](https://www.lumberjack.com/news/flagstaff-continues-beautified-traffic-signal-cabinets-initiative)
 - o Staff sent an email to the BAS listserv (400+ subscribers) highlighting the upcoming Public Art in Arizona Forum, which is a workshop for aspiring public artists. Staff registered eight artists for the workshop.

Public Art & Beautification Opportunities

We Need You!



Beautification in Action Grants
Enliven Flagstaff with community led beautification projects!
Pollinator Gardens, Murals & More.



Rotating Art in the Park
Engage community and enhance multicultural communication.
Opening May 2024!
3D Artwork(s) Temporary Exhibition.



Art Wraps
Enrich the banal with color and creativity.
Traffic Signal & Utility Cabinets, plus a Portland Loo.



Roundabouts
Embellish through hardscape and sculpture.
2 locations!

To see more opportunities please visit us here:





BEAUTIFICATION, ARTS & SCIENCES



- **Professional Development:**

- Staff attended CODASummit in San Jose, CA. Agenda: <https://www.codaworx.com/codasummit-2023/agenda/>
- Both staff and two BPAC commissioners attended the Arizona Administrators Meeting in Tucson, which included discussions of inclusion and maintenance issues as well as a public art tour. After, we discussed what to apply to BAS.
- Staff co-curated this opportunity with the Shemer Arts Center in Phoenix. The Shemer exhibits AZ artists and financial support was given by the Phoenix Office of Arts and Culture. Staff presented two workshop sessions and participated in panel discussions at the Public Art in Arizona Forum in at the Shemer Art Center in Phoenix. In attendance, both BAS staff, four BPAC commissioners, and six Flagstaff artists. The education and networking opportunity included:



1) discussions on the state of public art in Arizona by public art leader Greg Esser, 2) upcoming public art projects in Flagstaff, Phoenix, Scottsdale, Tempe, Tucson, and Valley Metro Light Rail, 3) workshop sessions on design team, selection process insights, and how to break into public art, and 4) sessions by leading public art fabricators in the state (steel, terrazzo, lithomosaic, bronze foundry) with whom beginning artists could partner. Staff designed collateral on CoF public art and beautification opportunities that were distributed to all attendees. Final attendance numbers not yet available, but nearly 100 participants registered. Thanks to Commissioner Garcia for the Flagstaff group photo! Staff has received positive feedback from the artists who attended. One local artist began her email with *I wanted to thank you again for inviting me to the forum on Friday. I was so very stoked to be in the presence of all those great minds. The information I learned from top to bottom will be a game changer for me.*



HIGHLIGHTED EVENTS IN OCTOBER BY A NONPROFITS SUPPORTED BY BBB TAX FUNDS

Night Sky Photography Workshop with Stan Honda

Held Saturday, October 7 • 5:30-9 pm

Presented by [Flagstaff Dark Skies Coalition](#)

Participants learned how to photograph the night sky with a master! New York-based Stan Honda was a photojournalist for 34 years and has worked as an artist-in-residence at six national parks. His photography of Chaco Culture National Historical Park in New Mexico and Wupatki National Monument were used in reports that led to them both being designated as International Dark Sky Parks. Honda conducted a three-part workshop introducing basic techniques to capture beautiful night sky photos with modern digital cameras. This session included a short slideshow of Honda's work, learning about



your camera and how to photograph the night sky, and in-the-field instruction and photography.



Adult Workshop: Nature Journaling
Held Saturday, October 14 • 10-11:30 am
Presented by [Willow Bend Environmental Society](#)

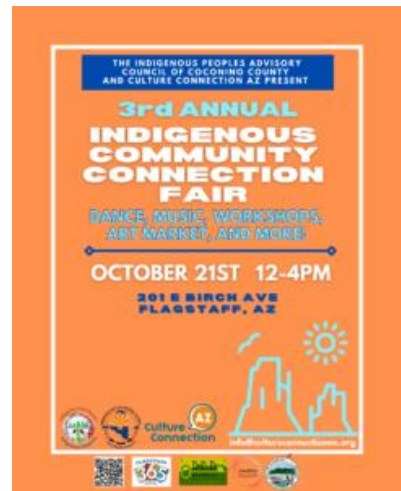
Nature Journaling can help with mindfulness and noticing the world around us. It can be both a relaxing experience and a way to explore. In a world where we spend more and more time in front of screens, it can be helpful to take time away, using physical materials, to notice the seasons, plants, and wildlife around us. This class focused on making a nature journal and using it to practice nature mindfulness throughout the changing seasons. All materials were provided.

Third Annual Indigenous Community Connection Fair
Saturday, October 21, 12-4 pm
Admission was free
Presented by [Culture Connection AZ](#)

Cultural Connection celebrates Indigenous culture! Fair visitors learned about issues important to local Indigenous communities, and enjoyed dance performances, music, art, and more!

Presentation Schedule

- 12-12:45 pm - Derik Yellowhair
- 1-1:45 pm - Hopi Economic Development
- 2-2:45 pm - LivA'ndrea Knoki
- 3- 3:45 - Interactive beading workshop with Luciano Buck



PARKFLAG:

Kiosk Repairs and Graffiti Removal

Efforts to maintain the integrity of our parking infrastructure continue to be a priority. This month, Team members successfully repaired 9 kiosks that were identified with malfunctions and repaired or replaced 4 downed parking signs. Additionally, we have undertaken a comprehensive graffiti removal initiative to enhance the aesthetics of our parking facilities.

Recruitment

We are pleased to announce that we have successfully hired a new Parking Aide, Matthew Garcia. He comes to us with background in fire suppression and customer service. Matthew is enthusiastic about contributing to the efficiency of our parking



program, and will be an invaluable addition to our team, assisting in day-to-day operations and providing support to ensure a positive experience for all patrons.

Annual Parking Conference

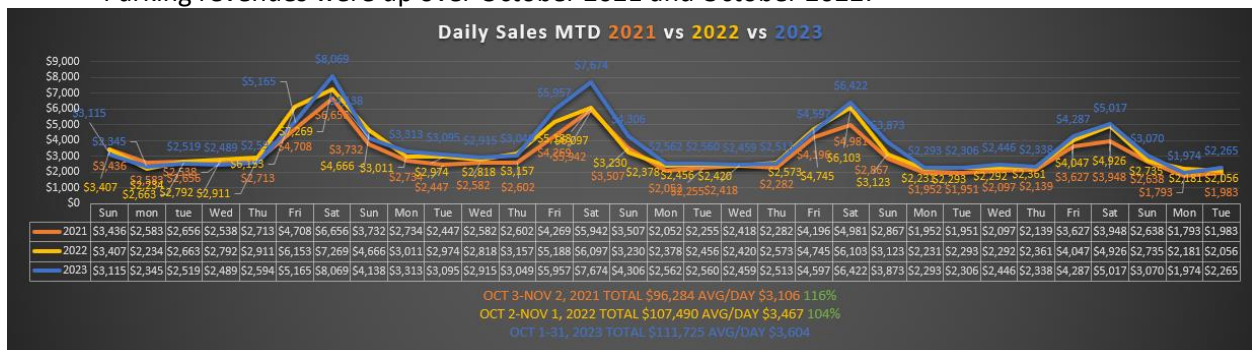
Several members of our parking program team had the opportunity to attend SWPTA, the Southwest Parking and Transportation Association annual conference, held in Las Vegas Nevada. This conference provided valuable insights into the latest trends, technologies, and best practices in parking management. Our staff actively participated in workshops and sessions, bringing back knowledge that will contribute to the continual improvement of our parking services. We are proud to share that during the conference both Gail Brockman, Parking Manager and Heather Frantz, Lead Parking Aide, were invited to speak on municipal panels. Their participation not only highlights the expertise within our team but also allows us to share our experiences and learnings with a broader audience. Topics covered included:

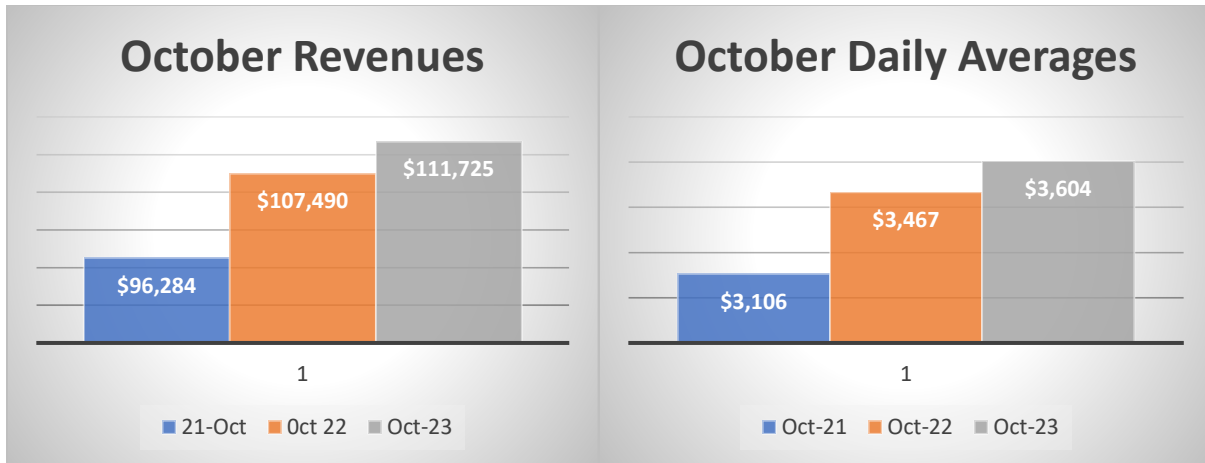


- Challenges Municipal Operations Face
- Politics and Parking
- Pandemic Impacts
- Parking Enforcement and Ambassadorship

Parking Statistics:

- ParkFlag Customers parked a total of 112,843 hours during the month of October with an average of 2.07 hours per parking session.
- Parking revenues were up over October 2021 and October 2022.





BUSINESS ATTRACTION:

Recent Attraction Efforts:

- Staff hosted a site tour for a manufacturing company this month that creates wood/cement products. Their process focuses on taking small diameter timber and adding concrete to produce panels for affordable housing. We are very optimistic that they can find a new home in Flagstaff.
- Staff attended an event hosted by the Arizona Commerce Authority and the European Commerce Delegation. Multiple countries expressed an interest in bringing new business to Flagstaff. Staff plans to host delegations from Germany, France, Italy, and Sweden soon to explore additional economic opportunities in northern Arizona.
- Staff continues to engage with a multitude of retail and hospitality-based businesses that are eager to enter the Flagstaff market. There has been tremendous interest from these sectors recently.

Business One Stop Shop (BOSS):

- The City of Flagstaff recently launched a new comprehensive site to assist new, existing, and expanding businesses in our community. The new website offers a streamlined way to discover and digest important information. The goal of this platform is to provide a straightforward path for businesses to be successful in Flagstaff. The information ranges from planning assistance to studies encapsulating the market viability of our region. Additional features will be added in the coming months. To experience the new site yourself please visit: [Business One Stop Shop | City of Flagstaff Official Website \(az.gov\)](https://www.flagstaffaz.gov/business-one-stop-shop)



Major Projects:

- City Council recently approved a contract with 'Stiletto', a strategic consultant, to assist the City of Flagstaff with their first official five-year economic development strategic plan. Public outreach for this plan is about to begin and staff is looking forward to working with a wide array of community partners to help determine what the future of economic development will be for Flagstaff.

Other Highlights:

- Jack Fitchett’s last day with the City of Flagstaff will be 11/13/23. He has taken a new position with the City of Winslow as their Economic Development Director. We wish all the best to Jack as he starts his next adventure. In the meantime, please reach out to Creag Znetko, Executive Assistant with any inquiries until the position is filled. CZnetko@flagstaffaz.gov
- The newest version of the Development Status Report is officially available. This document illustrates all the current development that is navigating through the city’s planning processes. To view the new report please visit: [DSR-Sept-01-2023 \(az.gov\)](#). A huge thank you to our planning team for updating this incredibly useful document!

BUSINESS RETENTION & EXPANSION:

PROJECT UPDATES

BUSINESS RETENTION AND EXPANSION (BR&E) INCENTIVE: Staff convened a review team of workforce development professionals and the top scoring applicants to develop workforce metrics that will meet the business and community goals. Contracts have been developed and are currently working through the procurement process. The awarded businesses are growing, and one business has already hired ten more employees than originally proposed in their application. The program is having a positive impact on the businesses and on the workforce pipeline.

RESTORATION SOILS: Councilmember Sweet recently requested that staff convene Restoration Soils and Water Services to discuss a potential pilot program in which Restoration Soils makes use of problematic materials from wastewater processing. The discussion that took place was very positive and may enhance operations of both Water Services and Restoration Soils. Should the pilot project occur, the partnership may prove to be a great innovation that enhances industry and community.



ARIZONA ASSOCIATION of ECONOMIC DEVELOPERS (AAED) FALL FORUM: Staff attended the AAED Fall Forum and presented as part of the Workforce Development Panel. Staff provided the first presentation of the day with an overview of the system and various innovative programs to meet area needs. A participant spoke with staff following the presentation who said that he learned more practical information in the one presentation than in a much higher priced course from other economic development organizations.

ECoNA BR&E TEAM – MANUFACTURERS MONTH TOURS: The ECoNA BR&E Team collaborated with FUSD, CCC, and area businesses to invite students from area high schools to tour three different manufacturing facilities. 18 students learned about the various skills that are required in a modern manufacturing facility. Many students indicated that they had no idea that such innovation and

production was occurring in their hometown. One great message that the students heard came from each plant manager on their own and without any prompt at all. They said that automation will take on repetitive tasks while allowing the people to use their talents more completely focusing on higher level work. The message was very encouraging to those who heard it.



LIBRARY | CITY & COUNTY

October Statistics:

		Oct-23	Oct-22	Difference
Circulation	Downtown	23897	22032	8.46%
	East Flagstaff	10097	10565	-4.43%
	TOTAL	33994	32597	4.29%
Value of Loaned Materials	Downtown	\$398,530.57	\$397,319.16	0.30%
	East Flagstaff	\$202,112.08	\$188,584.97	7.17%
	TOTAL	\$600,642.65	\$585,904.13	2.52%
In-House Use	Downtown	18841	18310	2.90%
	East Flagstaff	6528	6458	1.08%
	TOTAL	25369	24768	2.43%
Door Count	Downtown	24045	11630	106.75%
	East Flagstaff	15404	11234	37.12%
	TOTAL	39449	22864	72.54%
Wi-Fi Use	Downtown	4569	2584	76.82%
	East Flagstaff	1914	1097	74.48%
	TOTAL	6483	3681	76.12%
Public Computer Use	Downtown	2637	2489	5.95%
	East Flagstaff	1951	2007	-2.79%
	TOTAL	4588	4496	2.05%
Number of Programs	Downtown	85	53	60.38%
	East Flagstaff	20	18	11.11%
	TOTAL	105	71	47.89%
Program Attendance	Downtown	1797	594	202.53%
	East Flagstaff	471	188	150.53%
	TOTAL	2268	782	190.03%
Reference Help	Downtown	3859	2819	36.89%
	East Flagstaff	2149	1925	11.64%
	TOTAL	6008	4744	26.64%

Branch & Department Updates:

Downtown Departments

Admin:

- Foundation funding awards went out this month!
- We had 5 employees attend the Arizona Library Association Conference in Fort McDowell, AZ.
- We had 1 employee attend the Association of Bookmobile and Outreach Services Conference in Hershey, PA.
- Library Director Linda Tillson visited the Forest Lakes Library.



IT:

Library IT has begun using an endpoint management tool called NinjaOne. This cloud-based system allows IT staff to manage, patch, update, and troubleshoot all computers on all the library networks from anywhere. We've just started, so we're still learning the interface. The goal of implementing this tool is twofold: help IT staff work more efficiently (saving staff hours) while at the same time keep public and staff computer software more up to date.

- IT is working on a lot of purchasing now!
 - Purchasing about 200 desktops and 30 laptop computers to replace all staff and patron computers
 - Security cameras should be ordered
 - RFID equipment should also be ordered
 - Mark is working through Starlink ordering issues for the Grand Canyon
- Working on County website pages, which will be like Flagstaff's website

Reference:

- Staff is almost done shifting all the 900s to the shelves where the travel books were. For them all to fit, we will begin a manual process of checking for non-circulating books that were missed in the report.
- We partnered with Nuestras Raices to do a talk on Ofrendas and the difference between Halloween and Dia de Los Muertos. The presenters discussed the similarities between Day of the Dead and other worldwide death festivals, then created an ofrenda and talked about the meaning of each item on it. Attendance was high.

- Our movie this month, Loving Vincent, had a record breaking 19 attendees! People have requested more indie and art films, and things they wouldn't normally see, as well as discussions after the movie.
- Senior Book Club, Thursday Night Book Club, and Senior Coffee Hour remain popular
- Our funding requests from the Foundation were all fully funded! This includes funds for book clubs, the Arizona collection, the Library of Things, and supplies for arts and crafts programming.
- **Upcoming programs include:**
 - Autumn Wall Art Take & Make Kit (available at the Reference while supplies last.
 - 11/8 Senior Coffee Hour with SeniorCorps. This month the library will present on our services and programs
 - 11/8 Author Talk with J. Eric Smith: Side by Side in Eternity. This is a discussion about side-by-side military graves, and coincides with Veterans Day
 - 11/15 ENCORE! Fiddle with Kate Rose. This is a repeat of a prior program that had an overflowing crowd. Registrations for this occurrence have already filled up.
 - 11/18 AZ Humanities Writing Workshop - Diné Bikéyah, Bee Hózhó (From Beauty is the Land) (Mary)
 - 11/21 Movie Tuesday: Star Wars: Navajo Language Edition
 - 11/30 Paint Night Ornament Decoration. Registration is full, with a waitlist

Youth Services:

- We have hired Jordan Swenson as our new temp. He will begin Nov. 12th.
- Locked in the Library was a success with 29 attendees. Many ghosts were spotted.
- Our Eclipse Viewing party had a huge turn out with 175 people.
- YS programming will end for the Fall semester on 11/17.



East Flagstaff Community Library:

- EFCL completed their Fall Programming Session. They closed out the session with a pumpkin-decorating Crafty Corner on Halloween, plus one last Game Day and Family Storytime for the Fall!
- The final 'Meet us at the Trailhead' program was on Saturday, October 14th at Bismark Lake. 25 patrons drove up specifically to participate in our eclipse viewing hike, but 37 people in total ended up joining. It was an incredible program and attendees were really excited about our next round of hikes.
- October was LGBT+ History Month and EFCL hosted multiple special programs to commemorate the month.
- EFCL hosted a Halloween Scavenger Hunt for the week leading up to Halloween – we gave out treats to over 70 kids who completed the scavenger hunt!



- We received a nice comment card about one of our staff members – the card said staff ***“helped me with problems I was having with the computer. They were knowledgeable, helpful, courteous, pleasant, and professional.”***
- **Upcoming Programs:**
 - 11/13 - LGBT+ Book Club
 - 11/14 - Climate Conversation – Food Sovereignty
 - 11/17 - Pride in Your Community Oral History Project



TOURISM & VISITOR SERVICES

TOURISM METRICS: OCTOBER 2023

For October 2023 the city’s traditional accommodations experienced strong demand – with 5 percentage points above October 2022 RevPAR. This is impressive in part since supply is up YOY, making it even harder to show a gain in overall RevPAR.

Discover Flagstaff is always working into the future as travel plans...well, take planning, and our team is working in a multitude of verticals with different motivators and lead-times. For October it was all about the Leaf-o-meter [Flagstaff LEAFometer \(flagstaffarizona.org\)](http://flagstaffarizona.org), restaurants and breweries, trails passport, Rt. 66, dark skies/astronomy and responsible visitation messaging and the final festivals for our season.

Following is a snapshot of the metrics for October 2023:

October	2022	2023	Diff
OCC	77.5%	79.1%	2.1%
ADR	\$129.67	\$133.38	2.9%
RevPAR	\$100.49	\$105.50	5.0%

MARKETING & MEDIA RELATIONS:

- Website – Fall content and Leaf-ometer’s performance were solid!
- Email campaign – Fall and event content, along with accommodations had the most engagements.
- Trails passport – demand continues demonstrated with a 16% gain in sign-ups. Fall trails have been moved to the top of the trail listing.
- Social media – leveraged a posting trend: the Pumpkin Head trend! We made a video for Instagram Reels and TikTok which garnered a combined 7,414 impressions and 593 engagements.
- Earned media – 1 international and 2 domestic FAMs were hosted in tandem with AOT.



- Highlight coverage included: 2 MSN stories with a readership of 142.8M: Leaf Peeping: 17 US States Perfect for a Colorful Weekend Outdoors, and Where Does US Route 66 Start and End, AZ Midday segment on haunted tours with a reach of 998,363.
- 2 domestic and 1 international media FAMs were hosted with AOT

FILM:

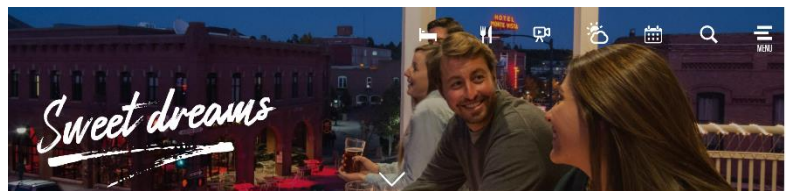
- Missions: Film Flagstaff Staff, along with Vice Mayor Aslan, attended American Film Market to further root Flagstaff as a filming destination and ultimately drive economic development. Most conversations included the recently introduced film tax incentive. Similarly, London Focus will be attended in November.
- Film Commissioner responded to film location inquires and issued **three** permits:
 - Sidney Poitier New American Film School at Arizona State University for the film project “The In-between Senior Capstone Film”
 - Grumpy Dogs Entertainment for the film project “Journey on Route 66”
 - Aspen Productions for a commercial shoot for HOKA running shoes.



WEBSITE:

Comparisons are made YOY to 2022

- Domestic users increased 47% from 76,279 to 112,067. Phoenix increased to 16,926 users, Tempe/Mesa/Vegas and So. CA round out the top 10 cities; with Dallas + add 'l metro-PHX cities, Tucson, Chicago, New York, and Denver in the top 20 positions.
- Good news with Int'l increased sessions, too: Canada had 1,122 sessions. UK had 548 sessions, MX had 541 sessions, and Germany had 461 sessions.
- Top performing landing pages: Plan Your Trip and Leafometer - 69,916 views, webcam had 7,246 views, things to do had 4,087 views, blog for top 7 places for FLG fall foliage had 2,649 views, and a combination of 3 pages with events, fall events and festivals earned 17,418 views, and dining and nightlife/restaurants had 1,890 views.
- There were 4,216 outbound links to partner websites, 178 newsletter opt-in addresses received, and 194 visitor guide requests.
- Booking engine sessions increased 10.5%



Home > Where to Stay
 HOTELS | BED & BREAKFASTS | HOSTELS | CAMPGROUNDS

WHERE TO STAY

EMAIL CAMPAIGN:

- **Discover Flagstaff**

- October's results for Discover Flagstaff subject matter a decreased open rate by -24%, seeing the 2022 email was launched later in the day this will be tested in November to see if a later send time might be best in the Fall/Winter months opposed to the earlier send time that has shown positive results in the past but not currently. Top clicks continued support for intent to visit for upcoming events, Fall happenings and overnight-stays with the most clicked links being Accommodations, the Trails Passport and the Flag365 calendar.

- **Flagstaff Local**

- October's results for Flagstaff Local showed a 2% increase in YoY in open rate, the subject headline was updated to be short-and-sweet but still include multiple content points. Top clicks went to the Stuff the Bus event on the Flagstaff Food Banks website, the Discover Flagstaff website because of sharing results from the Tourism Service Day, and the Pet of the Month bio page supporting adoptions through High Country Humane.



SWEEPSTAKES:

- **Flagstaff Festivals Sweepstakes**

- The festival sweepstakes has concluded with 48% less entries than last year, our benchmark year. Attributing lower entries to a combination of things: privacy changes and people's attitudes toward privacy, the content call-out appearing lower on the homepage this year and being moved up higher halfway through the year, less posting/boosting on social media during the beginning of the campaign as there was a transition in the social media employee position, and a smaller grand prize regarding the \$ value.

TRAILS PASSPORT:

- Month-over-month, there is a 16% increase in trail passport signups. Fall-recommended trails were added, and a post went out on social media as well as included in the DF newsletter to raise awareness. This resulted in a positive increase in opt-ins specifically in October.



SOCIAL MEDIA:

- Top post on Facebook this month garnered 186,453 impressions and 8,539 engagements, which was a post showing Billy Gibbons' visit to AZ Music Pro.
- Did a campaign for October called #HauntedFLG, which highlighted some haunted spots around Flagstaff. This campaign garnered 38,492 impressions and 1,922 engagements.
- Flag Local had the Housing America Campaign this month in tandem with the Housing Authority/Section, which garnered 241 impressions and 3 engagements on Facebook, and 762 impressions and 10 engagements on Instagram. The higher engagements on Insta can be explained by Instagram's algorithm push for videos.
- Big push for UGC on Instagram, highlighting Leaf Peeping and some beautiful shots that our visitors and residents took!
- Hopped on an awesome fall trend this month: the Pumpkin Head trend! We made a video for Instagram Reels and TikTok which garnered a combined 7,414 impressions and 593 engagements.

Top FB posts this month:

Discover Flagstaff
Oct 3 at 10:00 AM

Happy spooky month! 🎃

Did you know Flagstaff is packed full of haunted history?

We will start this #HauntedFLG tour with the Discover Flagstaff's headquarters, the Milligan House! The Milligan House has a resident spirit named Mabel. Mabel has made her presence known through EVP's, moving items around the office, cold spots, and smells of women's perfume from the past. The Milligan House even had the SPI of AZ come out and do an investigation there in 2022!

Check back in with us for the rest of October for more of Flagstaff's Haunted History, as we highlight different haunted buildings in Flagstaff! 🍂

Check out our article on Haunted Flagstaff here 📄
<https://www.flagstaffarizona.org/blog/haunted-flagstaff/>

#DiscoverFlagstaff #StayAndPlayResponsibly #HauntedFLG #Haunted #Paranormal #Ghosts #Halloween



Discover Flagstaff
Oct 27 at 12:00 PM

Rarely do you find yourself casually browsing for your favorite [Arizona Music Pro](#) gear when you stumble upon a music legend like ZZ Top's very own Billy Gibbons! 🤘🤘

You never know who you might find in Flagstaff!

#DiscoverFlagstaff #StayAndPlayResponsibly #ZZTop #BillyGibbons #AZMusicPro



Top Instagram posts for this month:



SALES:

INTERNATIONAL TRAVEL TRADE:

* RTO: Receptive Tour Operator; OTA: Online Travel Agency; FIT: Flexible Independent Traveler

- **TOP FIVE TRADE ACCOUNTS**
 - Hotelbeds – OTA
 - American Tours International (ATI) – RTO
 - Destination America – RTO
 - Go West Tours – RTO
 - WebBeds – RTO
- Hotelbeds September Production Report was a 14% YOY Increase!

Flagstaff Campaign Production September YOY			
Source Market	2022	2023	% over 22
USA	428	474	11%
MEXICO	14	19	36%
UNITED KINGDOM	15	21	40%
CANADA	56	72	29%
Grand Total	513	586	14%

- **Brand USA Travel Week October 16-19, 2023**
 - Discover Flagstaff Global Travel Industry Sales Manager travelled to London in October for Brand USA Travel Week where U.S. exhibitors and U.K. and European buyers unite. This exclusive event offered the opportunity to participate in one-to-one appointments - I had 35 appointments as well as multiple networking opportunities. This is the only tourism event in Europe dedicated to travel in the United States providing a rare opportunity to reach an influential audience.
 - AOT highlighted the event in the Tourism Tuesday newsletter.



- Hosted Arizona Office of Tourism Trade Familiarization (FAM) tour October 30, 2023, from the UK. The results of the FAM will bring bookings to our Flagstaff destination. The group experienced downtown Flagstaff, three site visits (Americana Motor Hotel, High Country Motor Lodge and DoubleTree Hilton), Wupatki National Monument, lunch at Martannes, dinner at Lumberyard and a Freaky Foot Tour. This group of UK tour operator VIPs were treated to a champagne reception upon arrival at check-in at the DoubleTree by Hilton Hotel Flagstaff.

Americana Motor Hotel pictured left to right - Matt (AmeriCan & Worldwide Travel), Hazel (Tropical Sky), Karen (Thornton Bespoke Travel Ltd), Astronaut! Ben (Wexas Travel), Olivia (Liv & Travel) and in front Zach (Americana GM)



MEETINGS/EVENTS/CONFERENCES:

CONFERENCE/ROOMS LEADS/BOOKINGS: 2 Leads were sent in the month of October for a total of 150 room nights and total estimated economic impact of \$44,850. At time of reporting 1 lead had booked in Flagstaff for 150 room nights and total EEI of \$44,850.

MEETINGS/CONFERENCE SERVICES: Staff attended Creative Flagstaff Board/Committee Meetings, EAC Meeting, Planning meetings for CVB/EV Annual Meeting, Tourism Service Day, staff had meetings with 6 partners/planners.

VISITOR SERVICES:

OCTOBER 2023:

October	2022	2023	YoY Change
Walk-ins	14,024	14,210	1%
Retail Sales	\$39,656	\$52,902	33%

Walk-ins were up slightly over October of 2023 and **retail sales** were up by 33%, beating July of this year as the highest sales month ever for the Visitor Center Gift Shop.

Model Train

- The Model Train ran 204 times during the month of October.

Brewery Trail

- Visitor Center gave out 92-pint glasses for Flagstaff Brewery Trail redemptions!

Google Reviews

- Visitor Center received many positive reviews on our Google listing below are a couple examples.

Jessica Comfort
Local Guide · 980 reviews · 1,676 photos
★★★★★ a week ago **NEW**

Friendly, helpful people with great pamphlets on different activities in and around Flagstaff. Great resource.

Reply Like

Gary&Rochelle Taber
Local Guide · 133 reviews · 1,567 photos
★★★★★ 2 weeks ago **NEW**

Cute little place right in the middle of downtown Flagstaff. Staff was very friendly, and the gift store had lots of good Flagstaff branded items along with of course trains. If you're making a tour of old downtown definitely stop by.



Denis Aseltine
Local Guide · 341 reviews · 180 photos
★★★★★ 2 weeks ago **NEW**

Run the train around the room. Quarts machine one corner!

Reply Like

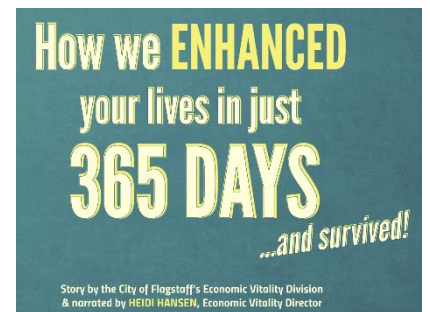
CREATIVE SERVICES:

ANNUAL EVENT:

- **PREZI:** Created Prezi for annual event
- **PLANNING:** Was involved with planning of the event
- **FORMS:** Created an online form for the Sustainability awards
- **POET:** Coordinated a Poet to perform for the Annual event

ADVERTISING:

- **VIDEO:** Worked with Videographer to create a Holidays promotional video
- **VISITOR GUIDE:** Updated the 2024 Visitor Guide Forms
- **PHOTOSHOOT:** Planned photoshoot with Santa, promoting accommodations
- **PHOTOS:** Provided photo assets to Sedona Monthly
- **WEBCAM:** Ordered new Webcam for the Visitor Center
- **DIGITAL ADVERTISING (DRIVE MARKET/OUT-OF-STATE):** Produced ads for November **Datafy**.
- **FY2023 ANNUAL REPORT:** Competed FY 24 Annual Report, ad posters, stakeholder resource takeaways, BBB tax revenue info card and other printed items for the Annual Marketing Event.
- **STAY & PLAY INSERT:** Designed the winter Stay and Play insert for the Arizona Republic
- **AIRPORT 75th ANNIVERSARY MAGAZINE:** Designed the cover, back cover, and two full page ads (Choose Flagstaff and Flagstaff Local/Pledge for the Wild) for the Flagstaff Airport 75th Anniversary Magazine



- **CITIZEN OF THE YEAR AD:** Designed the AZ Daily Sun's Citizen of the Year ad promoting Flagstaff Local **PREZI:** Created Prezi for annual event
- **PLANNING:** Was involved with planning of the event
- **FORMS:** Created an online form for the Sustainability awards
- **POET:** Coordinated a Poet to perform for the Annual event



CITY JOBS:

- **BUSINESS CARDS:** Created multiple business cards for engineering, water services and building safety
- **BEAUTIFICATION:** Created a flyer and Poster for Beautification
- **UNITED WAY:** Assisted with a flyer design for the UNITED WAY campaign
- **CAPITAL IMPROVEMENTS:** Created a percentage graphic for use on presentations



WEBSITE:

- **CONTENT UPDATES:** Updated the leafometer, main mashup, and uploaded new listing photos on discoverflagstaff.com

HOLIDAY MARKETING PREP:



THANK YOU FOR YOUR CONTINUED PARTNERSHIP WITH THE ECONOMIC VITALITY DIVISION FOR THE CITY OF FLAGSTAFF!

**CITY OF FLAGSTAFF
STAFF SUMMARY REPORT**

To: The Honorable Mayor and Council
From: Stacy Saltzburg, City Clerk
Date: 11/21/2023
Meeting Date: 11/28/2023



TITLE:**ECoNA –An Economic Development Roadmap for Northern Arizona****DESIRED OUTCOME:**

Presentation and Discussion

EXECUTIVE SUMMARY:

The Economic Collaborative of Northern Arizona (ECONA) is a regional economic development organization serving northern Arizona. The City of Flagstaff is a member of ECONA alongside other communities in the area. Having a non-profit partner working regionally is beneficial as it allows various economic development efforts to be better coordinated and helps identify the best locations and strategies for prospective business success. Regional prosperity and growth generally have a positive economic impact on the communities in the region. Additionally, having municipalities partner with non-profits allows the benefits of both structures to be complementary as well which leads to better efficiencies and success.

ECONA has recently completed their economic development strategy which seeks to move the region forward. The City had numerous voices participate in the process and provided a financial contribution towards it as well. The City is also currently in the process of doing its own specific strategic plan which will take into account ECONA's plan and strategies and work to guide our specific efforts.

INFORMATION:

Attachments: [Presentation](#)

Presentation to: Flagstaff City Council



ECoNA Economic Development Strategic Plan

November 28, 2023



Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

OUR TEAM



Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

APPROACH

There were several building blocks to our approach to the Strategy:

- Literature Review
- Identifying Stakeholders/Community and Regional Leadership
- Community/Stakeholder Engagement
- Asset Inventory & Current Conditions
- Competitiveness Analysis
- Targeted Sector Analysis
- Housing Analysis
- Labor Shed Analysis
- Program & Resources
- Action Plan with Target Dates & Metrics

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

A SNAPSHOT OF THE REGION'S CURRENT ECONOMICS

Modest historical growth over the last 12 years. Flagstaff has accounted for 84% of Coconino County's growth. Sedona and Winslow reported a slight decline in population.

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

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

Forging the Future: An Economic Development Roadmap for Northern Arizona

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A SNAPSHOT OF THE REGION'S CURRENT ECONOMICS

Troubling growth prospects. Peak population forecasted by 2040 followed by a contraction in population thereafter. Only 12,000 additional residents forecasted to be added to the entire Coconino County area over the next two decades.

Camp Verde and Sedona combined across county lines expected to add nearly 1,100 residents each. Winslow and Williams expected to chronically lose population.

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

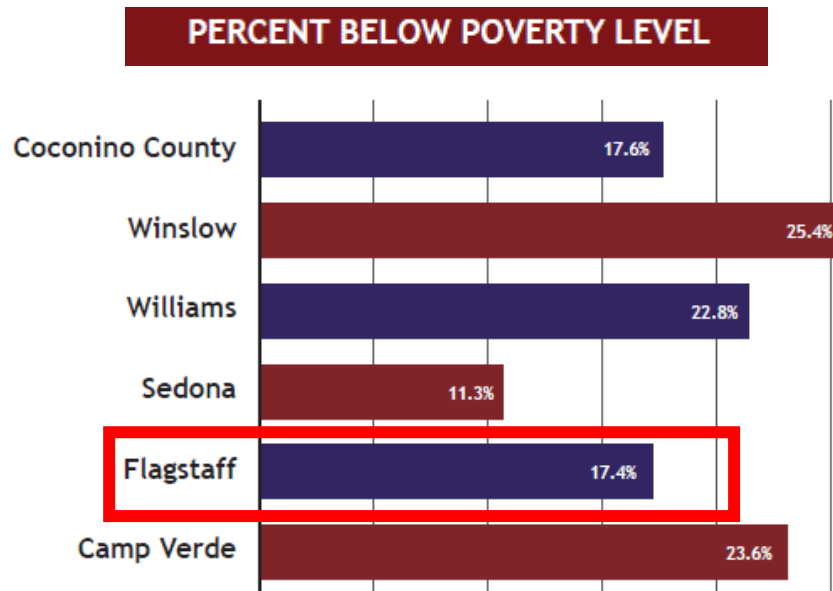
Source: Arizona Office of Economic Opportunity

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A SNAPSHOT OF THE REGION'S CURRENT ECONOMICS

Incomes vary widely across communities. Elevated poverty rates in the communities of Camp Verde, Williams, and Winslow.



Source: ACS 2021 5-year estimates

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

Source: ACS 2021 5-year estimate

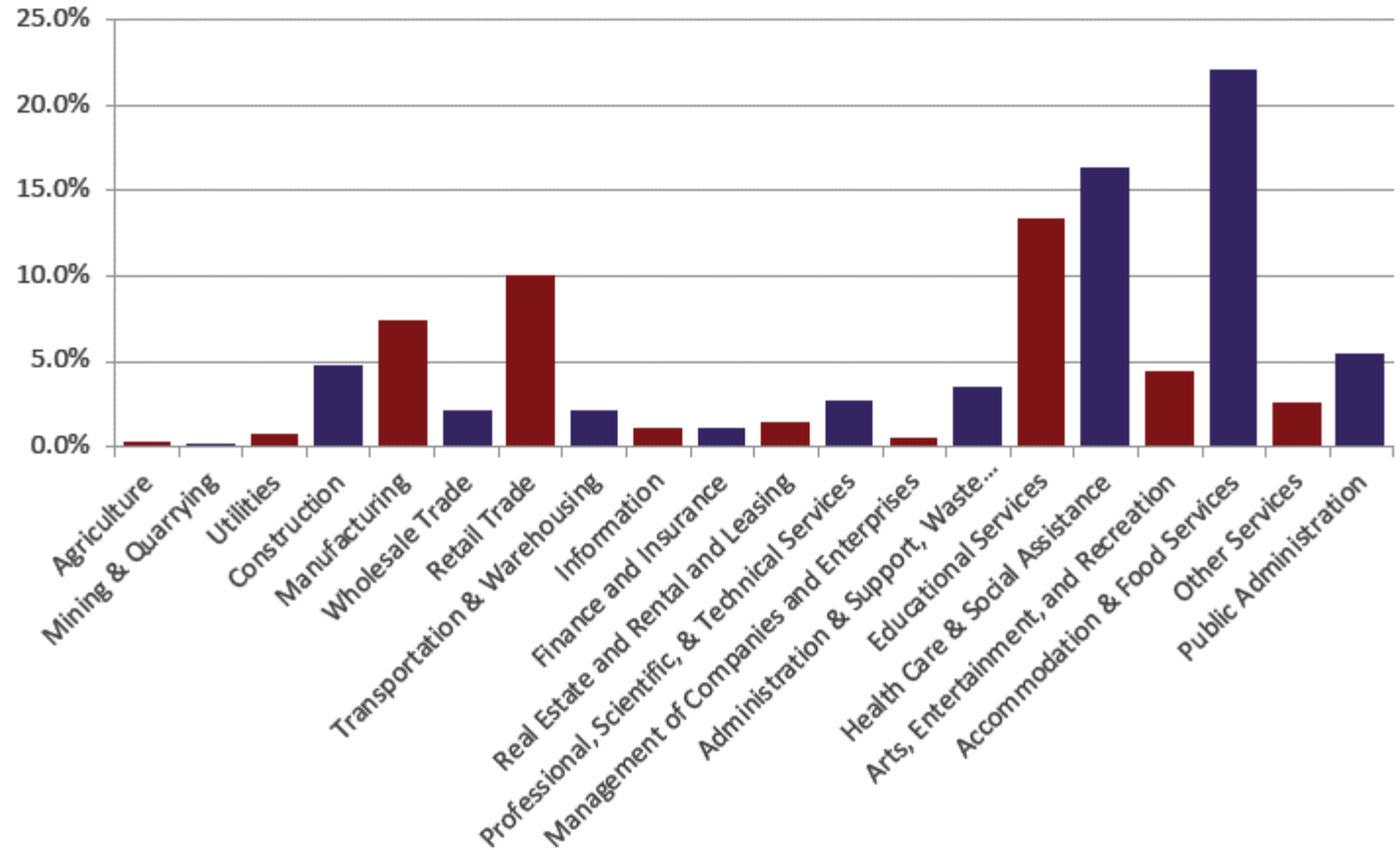
Forging the Future: An Economic Development Roadmap for Northern Arizona

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A SNAPSHOT OF THE REGION'S CURRENT ECONOMICS

Regional Employment – Top 5 industries include Accommodation & Food Services, Health Care, Education, Retail, and Manufacturing.

COCONINO COUNTY EMPLOYMENT BY INDUSTRY - 2020



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

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A SNAPSHOT OF THE REGION'S CURRENT ECONOMICS

The strategy includes data and information drilled down to each specific community and the region as a whole. This will allow each member community to view their specific local dynamics and see how they fit best into the regional strategy.

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

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

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

COMPETITIVENESS ANALYSIS

How does the ECoNA region stack up against competitor markets?

Competitors:

Fort Collins, Colorado

- Home to Colorado State University
- 1 hour from Denver, CO
- Ranked #42 in Best Performing Large Cities

Bozeman, Montana

- Home to Montana State University
- 2 hour from Billings, MT

St. George, Utah

- Home to Dixie Technical College/Utah Tech University
- 1.75 hours from Las Vegas/4 hours from Salt Lake City
- Ranked #2 in Best Performing Small Cities

Forging the Future: An Economic Development Roadmap for Northern Arizona

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COMPETITIVENESS ANALYSIS

How does the ECoNA region stack up against competitor markets?

Analysis Factors:

1. Demographics
2. Workforce/Talent
3. Local Economy
4. Geography & Real Estate
5. Livability/Quality of Life

Forging the Future: An Economic Development Roadmap for Northern Arizona

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COMPETITIVENESS ANALYSIS

Educational attainment is strongest in Sedona and Flagstaff. Taken as a region (Coconino County data), compare favorably to St. George, Utah but lag Fort Collins, CO and Bozeman, MT for post-secondary awards.

Educational Attainment City Comparison								
	Population 25+ years	< 9th Grade	9th-12th, No Diploma	High School Grad (includes equiv)	Some college, No Degree	Assoc. Degree	Bach. Degree	Grad. or Prof. Degree
Camp Verde, AZ	8,518	3.8%	13.7%	26.9%	29.2%	7.0%	11.7%	7.7%
Page, AZ	4,444	0.1%	11.9%	27.6%	30.6%	10.5%	13.4%	5.9%
Sedona, AZ	8,404	2.1%	5.5%	18.1%	18.7%	6.7%	25.1%	23.9%
Williams, AZ	2,118	3.7%	9.7%	24.9%	29.1%	8.7%	19.2%	4.6%
Winslow, AZ	5,759	5.8%	12.0%	36.0%	30.1%	7.9%	4.1%	4.1%
Flagstaff, AZ	39,098	1.6%	2.5%	14.9%	21.6%	8.1%	30.8%	20.6%
Fort Collins, CO	100,788	1.0%	2.0%	14.4%	17.3%	8.6%	32.8%	23.8%
Bozeman, MT	29,768	0.7%	1.1%	11.9%	17.7%	5.0%	38.0%	25.8%
St. George, UT	59,746	2.5%	3.6%	21.9%	27.8%	14.6%	17.9%	11.8%

Source: U.S. Census 2021 American Community Survey 5-Year Estimates

Educational Attainment Regional Comparison								
	Population 25+ years	< 9th Grade	9th-12th, No Diploma	High School Grad (includes equiv)	Some college, No Degree	Assoc. Degree	Bach. Degree	Grad. or Prof. Degree
Coconino County, AZ	86,198	3.3%	5.7%	21.3%	22.8%	8.2%	22.9%	15.8%
Larimer County, CO	236,137	1.3%	2.4%	17.4%	20.4%	9.1%	29.5%	19.8%
Gallatin County, MT	75,145	0.8%	1.7%	18.3%	20.7%	6.2%	33.1%	19.1%
Washington County, UT	115,393	2.3%	4.0%	21.9%	27.6%	13.8%	19.1%	11.4%

Source: U.S. Census 2021 American Community Survey 5-Year Estimates

Forging the Future: An Economic Development Roadmap for Northern Arizona

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COMPETITIVENESS ANALYSIS

At the community level, only Flagstaff reports a competitive percentage of the adult population enrolled in college. Favorable results when presented as a region.

College & Graduate School Enrollment City Comparison				
	Population 18+ years	Percent enrolled in college or graduate school	Population 18-24 years	Percent enrolled in college or graduate school
Camp Verde, AZ	9,344	2.8%	826	5.3%
Page, AZ	5,069	5.1%	625	21.0%
Sedona, AZ	8,741	2.6%	337	15.4%
Williams, AZ	2,400	4.0%	282	17.0%
Winslow, AZ	6,750	4.4%	991	19.9%
Flagstaff, AZ	62,518	36.6%	23,420	82.0%
Fort Collins, CO	137,549	23.6%	36,761	67.3%
Bozeman, MT	44,279	28.9%	14,511	68.9%
St. George, UT	69,416	9.4%	9,670	39.2%

Source: U.S. Census 2021 American Community Survey 5-Year Estimates

College & Graduate School Enrollment Regional Comparison				
	Population 18+ years	Percent enrolled in college or graduate school	Population 18-24 years	Percent enrolled in college or graduate school
Coconino County, AZ	115,391	22.1%	29,193	69.6%
Larimer County, CO	285,743	14.3%	49,606	58.1%
Gallatin County, MT	93,617	17.0%	18,472	61.5%
Washington County, UT	130,921	7.7%	15,528	33.8%

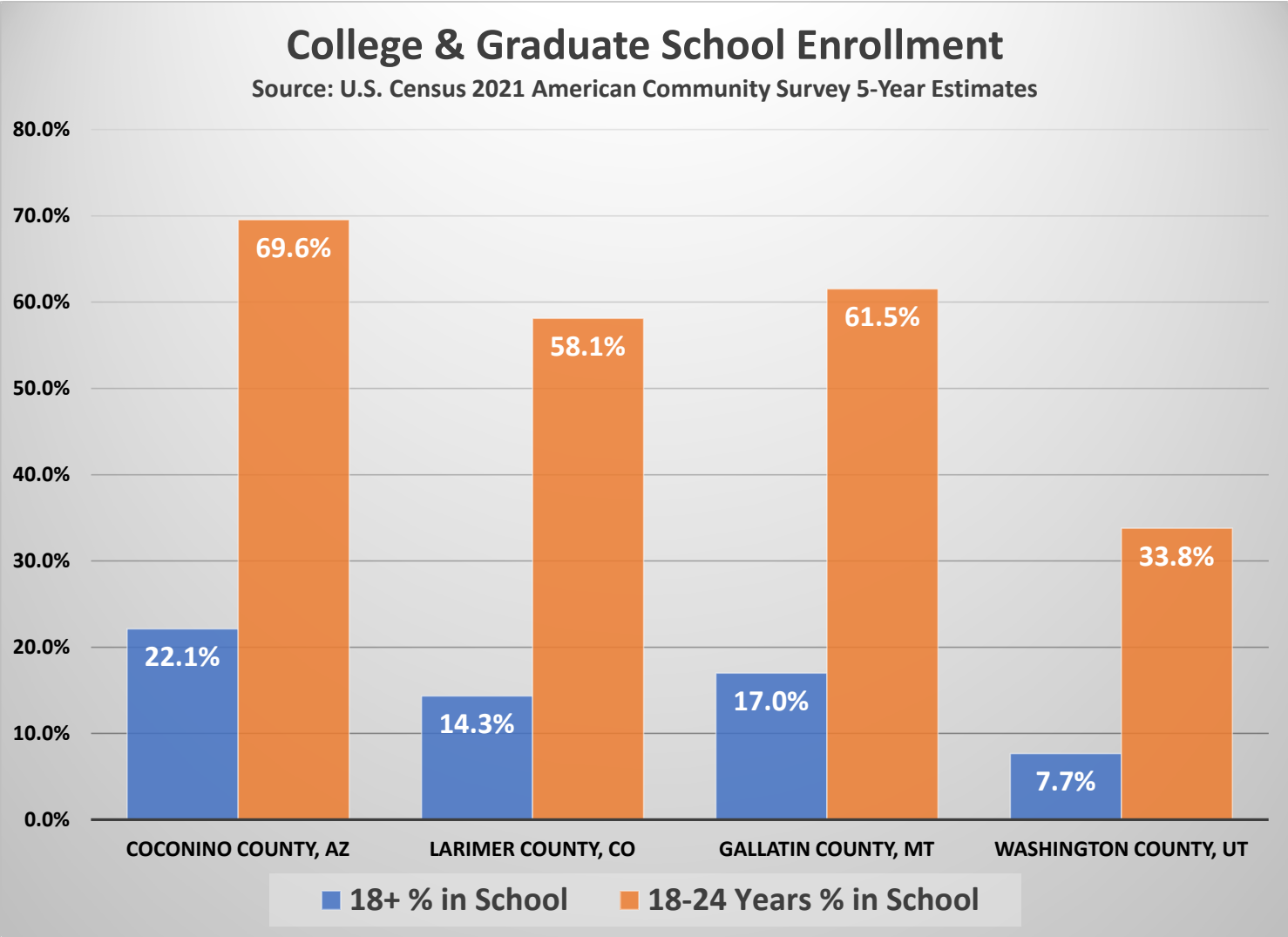
Source: U.S. Census 2021 American Community Survey 5-Year Estimates

Forging the Future: An Economic Development Roadmap for Northern Arizona

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COMPETITIVENESS ANALYSIS

This is a great example of favorable data that should be marketed to employers.



Forging the Future: An Economic Development Roadmap for Northern Arizona

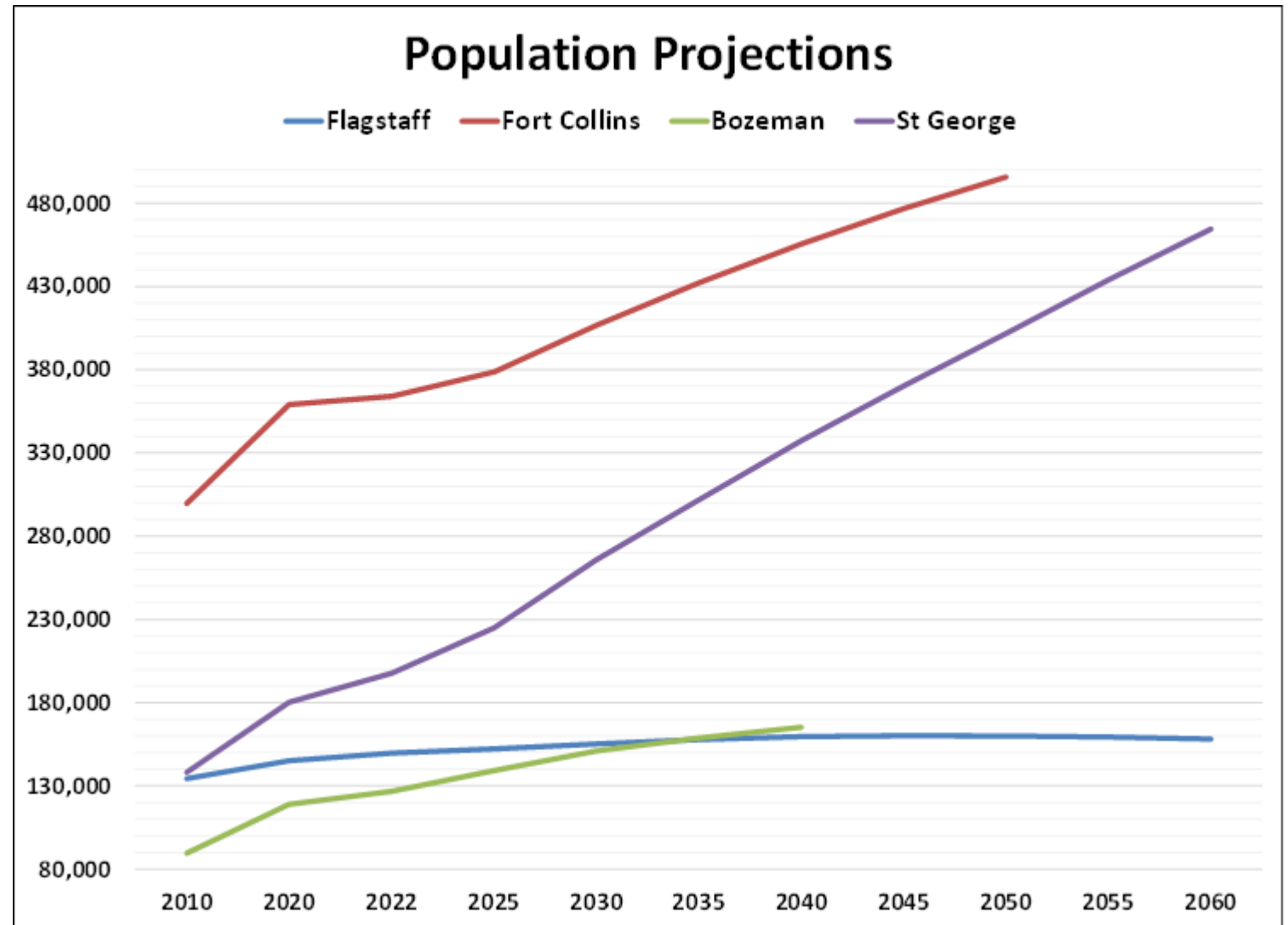
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COMPETITIVENESS ANALYSIS

Growth prospects is the #1 issue for the region for economic development. Availability of labor will continue to be an issue without a growth solution.

Example: the St. George, UT region was the same population as Coconino County in 2010. Over the last 12 years, the St. George region outgrew the Flagstaff MSA by 44,400 residents. The St. George region is projected to grow by 30,000 to 40,000 residents every 5 years for the foreseeable future. Coconino County is essentially showing as nearly built out.

Bozeman, MT is expected to surpass the population of Coconino County by 2035.



Forging the Future: An Economic Development Roadmap for Northern Arizona

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COMPETITIVENESS ANALYSIS

Flagstaff MSA contains no excess vacancies in either office or industrial space - indicates there is likely pent-up demand for additional space, with healthy rent growth in both sectors over the past 12 months.

Lease rates are considered competitive compared to the other metros.

No office space under construction and 82,000 SF of industrial space under construction (72,000 SF is already pre-leased to a single user).

Compared to the other metros, Flagstaff has the smallest office market footprint compared to the competitor markets analyzed. Flagstaff has a larger industrial market than Bozeman, MT but much smaller than St. George, Utah or Fort Collins, Colorado.

Overall, the competitive markets have substantially more commercial space available compared to Northern Arizona.

Commercial Real Estate Factors						
	Lease Rates		Rent Growth		Vacancy	
	Office	Industrial	Office	Industrial	Office	Industrial
Flagstaff Metro	\$25.68	\$12.30	3.6%	5.2%	46,371	12,500
Fort Collins	\$24.75	\$12.05	2.5%	6.3%	673,990	1,212,266
Bozeman	\$24.81	\$13.87	4.0%	-0.1%	98,654	43,810
St. George	\$23.08	\$9.36	3.7%	6.9%	131,408	88,913
	Inventory		12- Mo Absorption		Under Construction	
	Office	Industrial	Office	Industrial	Office	Industrial
Flagstaff Metro	2,095,530	4,343,807	73,400	50,400	0	82,000
Fort Collins	12,109,639	26,045,625	(26,300)	411,000	8,194	4,205,600
Bozeman Metro	3,672,439	3,241,082	(25,600)	(2,100)	39,610	192,800
St. George Metro	3,508,085	7,363,557	5,800	173,000	30,000	148,592

Source: CoStar

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

COMPETITIVENESS ANALYSIS

Camp Verde, Sedona, and Flagstaff report low crime (it is especially low in the City of Flagstaff). Crime rates an issue for Williams and Winslow.

Latest Crime Rates per 1,000 Residents City Comparison			
	2021 Population	Violent Crime Rate	Property Crime Rate
Camp Verde, AZ	11,942	1.84	14.57
Page, AZ	7,466	5.76	31.61
Sedona, AZ	9,723	2.06	13.16
Williams, AZ	3,235	7.42	25.35
Winslow, AZ	8,961	11.94	38.50
Flagstaff, AZ	76,228	0.60	4.63
Fort Collins, CO	166,788	2.69	21.53
Bozeman, MT	51,574	2.77	13.30
St. George, UT	92,875	1.92	14.66

Source: U.S. Census Bureau; FBI 2021, 2020 Uniform Crime Reporting (UCR)

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

Competitiveness Analysis

SUMMARY

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

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

Competitiveness Analysis

SUMMARY

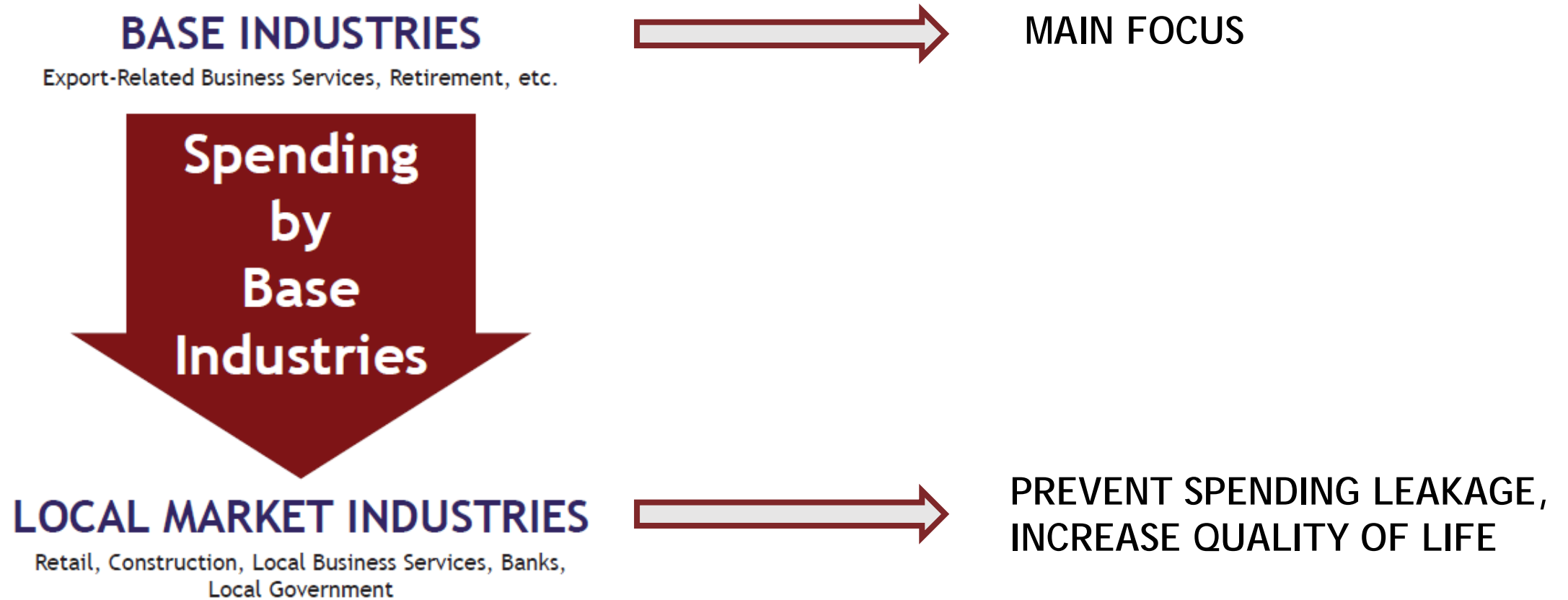
SUMMARY OF ECONOMIC CONDITIONS		
	ECoNA Region / Coconino County	Competitive Advantage (+) Disadvantage (-)
Geography & Real Estate		
Location/Access to Markets	Hwys/Rail	+
Availability of Sites/Space	Limited	-
Office Space/Vacant Space	2,095,530 SF / 46,371 SF	-
Office Space Under Construction (SF)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

Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

IDENTIFYING TARGETED SECTORS

The approach utilizes quantitative and qualitative elements, with a focus primarily on base industries.



Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

IDENTIFYING TARGETED SECTORS

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



Forging the Future: An Economic Development Roadmap for Northern Arizona

Five-Year Economic Development Strategic Plan

IDENTIFYING TARGETED SECTORS



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



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



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



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



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

Forging the Future: An Economic Development Roadmap for Northern Arizona

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IDENTIFYING TARGETED SECTORS

Targeted sector recruitment will have limited success without a workforce housing and population growth strategy.

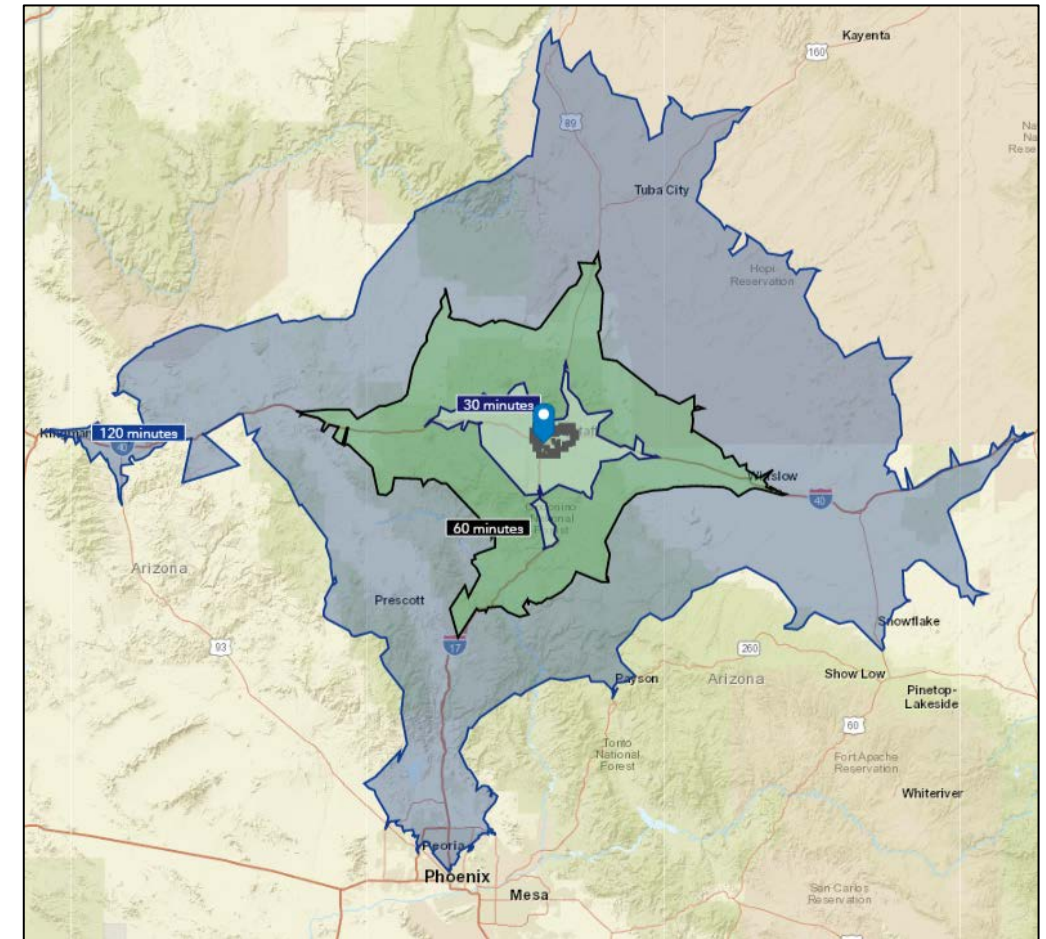
Forging the Future: An Economic Development Roadmap for Northern Arizona

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LABOR SHED ANALYSIS - Community's should be providing prospective employers with complete labor shed data – not community-level data. Workers often commute 1-hour or more for a quality job. This is the true potential pool of workers.

Flagstaff Labor Shed Profile - Employment by Industry						
	30 minutes		60 minutes		90 minutes	
Total	51,344	79,493	79,493	695,642	695,642	695,642
Agriculture/Forestry/Fishing	664 1.3%	1,162 1.5%	1,162 1.5%	3,574 0.5%	3,574 0.5%	3,574 0.5%
Mining/Quarrying/Oil & Gas	53 0.1%	133 0.2%	133 0.2%	1,009 0.1%	1,009 0.1%	1,009 0.1%
Construction	2,787 5.4%	5,201 6.5%	5,201 6.5%	55,593 8.0%	55,593 8.0%	55,593 8.0%
Manufacturing	4,233 8.2%	5,301 6.7%	5,301 6.7%	39,825 5.7%	39,825 5.7%	39,825 5.7%
Wholesale Trade	437 0.9%	895 1.1%	895 1.1%	14,191 2.0%	14,191 2.0%	14,191 2.0%
Retail Trade	5,625 11.0%	9,493 11.9%	9,493 11.9%	83,590 12.0%	83,590 12.0%	83,590 12.0%
Transportation/Warehousing	2,160 4.2%	3,706 4.7%	3,706 4.7%	33,499 4.8%	33,499 4.8%	33,499 4.8%
Utilities	346 0.7%	603 0.8%	603 0.8%	6,039 0.9%	6,039 0.9%	6,039 0.9%
Information	541 1.1%	905 1.1%	905 1.1%	11,284 1.6%	11,284 1.6%	11,284 1.6%
Finance/Insurance	1,432 2.8%	2,021 2.5%	2,021 2.5%	55,851 8.0%	55,851 8.0%	55,851 8.0%
Real Estate/Rental/Leasing	920 1.8%	1,480 1.9%	1,480 1.9%	18,862 2.7%	18,862 2.7%	18,862 2.7%
Professional/Scientific/Tech	2,944 5.7%	4,521 5.7%	4,521 5.7%	52,664 7.6%	52,664 7.6%	52,664 7.6%
Management of Companies	0 0.0%	21 0.0%	21 0.0%	511 0.1%	511 0.1%	511 0.1%
Admin/Support/Waste Management	1,255 2.4%	2,549 3.2%	2,549 3.2%	33,239 4.8%	33,239 4.8%	33,239 4.8%
Educational Services	8,284 16.1%	10,691 13.4%	10,691 13.4%	60,729 8.7%	60,729 8.7%	60,729 8.7%
Health Care/Social Assistance	6,759 13.2%	10,495 13.2%	10,495 13.2%	97,500 14.0%	97,500 14.0%	97,500 14.0%
Arts/Entertainment/Recreation	1,430 2.8%	2,546 3.2%	2,546 3.2%	12,836 1.8%	12,836 1.8%	12,836 1.8%
Accommodation/Food Services	6,401 12.5%	9,455 11.9%	9,455 11.9%	51,497 7.4%	51,497 7.4%	51,497 7.4%
Other Services (Excluding Public)	1,577 3.1%	3,142 4.0%	3,142 4.0%	32,409 4.7%	32,409 4.7%	32,409 4.7%
Public Administration	3,493 6.8%	5,172 6.5%	5,172 6.5%	30,939 4.4%	30,939 4.4%	30,939 4.4%

Source: ESRI Business Analyst, 2023



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HOUSING ANALYSIS

Ownership: Dramatic increases in home prices over the last several years, well above inflation and wage growth. Steep declines in affordability are the result. Substantial price increases have occurred in every community. Winslow still considered extremely affordable. Camp Verde and Williams still somewhat reasonable compared to other markets.

Home availability also a reported issue across most communities.

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

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

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HOUSING ANALYSIS

Apartments: Also experiencing sharp increases in rents. Williams and Winslow very affordable, but lack of available inventory also an issue in every community.

ECoNA REGION APARTMENT INVENTORY & TRENDS								
Community	Properties	Units	Average Rent			Vacancy	Vacant Units	<u>Income Requirement</u>
			2018	2023	% Chg			
Camp Verde	4	135	\$910	\$1,361	49.6%	4.1%	6	\$54,440
Flagstaff	118	6,438	\$1,340	\$1,839	37.2%	4.5%	290	\$73,560
Sedona	19	396	\$1,211	\$1,578	30.3%	2.5%	10	\$63,120
Williams	12	113	\$851	\$922	8.3%	6.6%	7	\$36,880
Winslow	12	239	\$855	\$944	10.4%	12.2%	29	\$37,760

Source: ALN; Apartments.com; Property websites

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HOUSING ANALYSIS

Gap Analysis: Substantial number of households in both ownership and rental housing overburdened by housing costs (paying more than 30% of income toward housing). Additional demand will also come if new jobs are created as forecasted.

RENTER-OCCUPIED HOUSEHOLDS PAYING MORE THAN 30% OF INCOME TOWARDS HOUSING COSTS - BY INCOME RANGE							
	Camp Verde	Flagstaff	Sedona	Williams	Winslow	Coconino County	Arizona
Renter-Occupied Units	938	14,512	1,284	451	1,329	20,474	917,899
Less than \$20,000	240	2,825	229	151	207	3,550	136,344
\$20,000 to \$34,999	170	2,233	185	42	233	2,882	132,127
\$35,000 to \$49,999	2	1,639	177	27	13	1,993	84,454
\$50,000 to \$74,999	27	1,456	138	24	0	1,684	48,871
\$75,000 or more	0	387	44	0	0	387	10,874
Total Cost Burdened	439	8,540	773	244	453	10,496	412,670
Percent Cost Burdened	46.8%	58.8%	60.2%	54.1%	34.1%	51.3%	45.0%

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

AFFORDABLE HOUSING DEMAND FROM EMPLOYMENT GROWTH		
Community	5-Year Demand	Annual Demand
Camp Verde	127	25
Flagstaff	1,296	259
Sedona	444	89
Williams	121	24
Winslow	54	11
Total	2,043	409

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

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HOUSING ANALYSIS

Gap Analysis: The region needs nearly 15,400 affordable housing units to alleviate current demand and an additional 2,000 units over the next 5 years to accommodate new job growth. This far surpasses total expected growth in the region.

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

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

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SWOT ANALYSIS

Stakeholder Perspectives on the ECoNA region's Strengths, Weaknesses, Opportunities, and Threats

From November 2022 through February 2023, our team conducted a SWOT analysis with 80 stakeholders throughout the region. One-on-one interviews from the ECoNA region's public, private and civic communities; educational officials; state and regional leaders, and external business/industry experts. We also conducted six stakeholder roundtables with the direct participation of additional business, arts/culture, education, public officials, major employers and other key leaders including:

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

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

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SWOT ANALYSIS

Stakeholder Perspectives on the ECoNA region's Strengths, Weaknesses, Opportunities, and Threats

6 Main Categories:

1. Locational Assets and Business Climate
2. Governance and Leadership
3. Infrastructure and Growth Capacity
4. Talent Development and Education/Training
5. Civic Community, Culture, and Quality of Life
6. Economic Development Programs and Resources

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SWOT ANALYSIS

TOP 12 STRENGTHS

Top 12 Strengths

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

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SWOT ANALYSIS

TOP 12 WEAKNESSES

Top 12 Weaknesses

- ◆ Insufficient workforce to keep up with the demand for qualified workers; while conversely, there is a higher than state average unemployment rate in the region. Insufficiently diverse career opportunities, including entry level, trades and specialty fields, both to sustain the local communities and to enable young people to remain.
- ◆ Insufficient/inadequate accessible/affordable housing for college graduates, young professionals, workforce and even executive-level business workers; over-conversion of housing stock to seasonal 2nd homes, short-term rentals, and student rentals.
- ◆ Exodus of talent to other communities or entirely different regions where housing is more affordable and/or jobs more plentiful; commuting long distances is a growing concern for employers and employees.
- ◆ Labor force shortages and changing values of today's workforce are making it very difficult to fill jobs.
- ◆ Lack of identifiable shovel-ready sites as well as lack of shovel-ready sites that can accommodate a larger employer that would bring immense value-add to the community (one that is desirable to the local government and community).
- ◆ Underdeveloped entrepreneurship ecosystem; very low rate of venture capital investments.
- ◆ Increasing anti-growth policies and voices both within certain municipalities and among citizenry of the region.
- ◆ Insufficient rail infrastructure, off-ramps and very limited availability of land next to the rail line; high cost and environmental regulations increase difficulty of building out additional rail.
- ◆ Inadequate public transit system, internally both within communities, e.g., Flagstaff and Winslow, as well as inadequate external transit systems between geographically compatible communities to facilitate regional employment, shopping, education, recreation.
- ◆ Cities/towns' lack of capacity to fully function in unusual circumstances, e.g., forest fires and flooding, Covid-19 pandemic, etc., hampers their ability to provide services.
- ◆ Business and economic development organizations are not aligned, and meaningful cooperation/collaboration is lacking.
- ◆ Inability to recruit skilled professional staff for both the public and private sectors and great difficulty in hiring experienced, knowledgeable talent for science, technology, engineering, and math (STEM). and mid-to-upper level managers; this problem is largely due to the lack of available/affordable housing in the region.

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SWOT ANALYSIS

TOP 12 OPPORTUNITIES

Top 12 Opportunities

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

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SWOT ANALYSIS

TOP 12 THREATS

Top 12 Threats

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

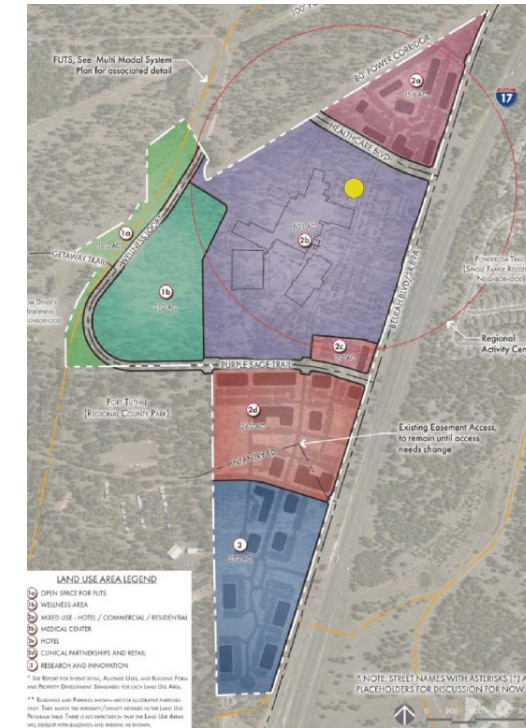
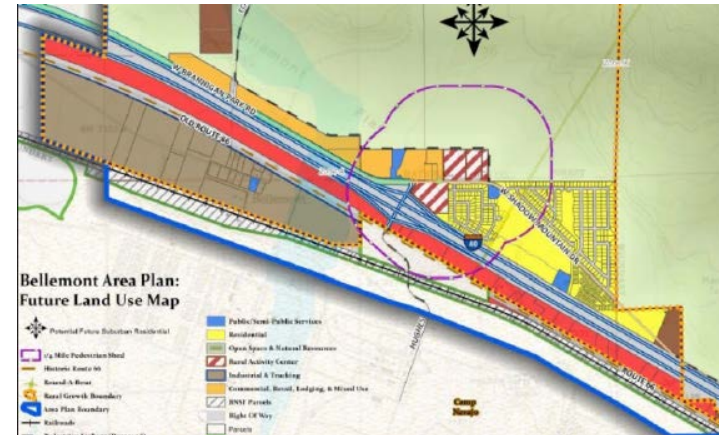
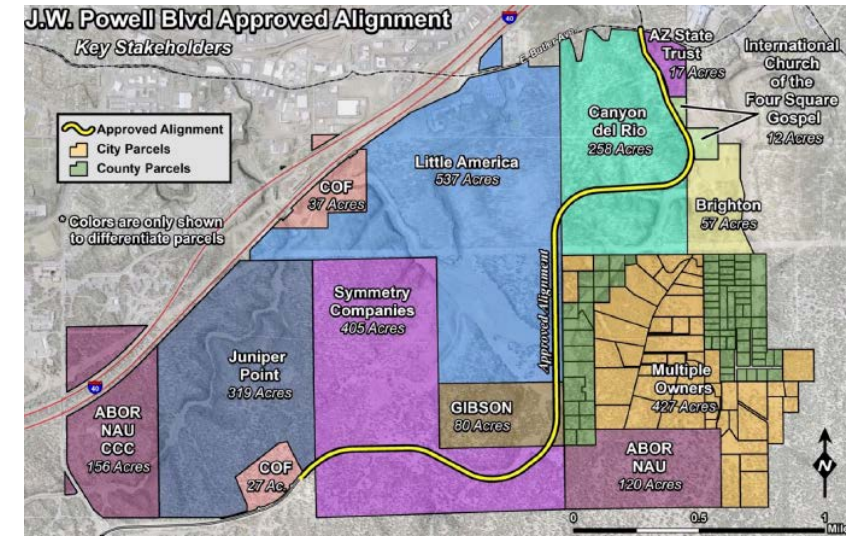
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GROWTH OPPORTUNITIES

FLAGSTAFF

1. **Airport Business Park** – 32 acres. bioscience, technology and research park. 750,000 SF of R&D, manufacturing, and hospitality space.
2. **NAH Wellness Village** –state of the art hospital, outpatient surgery, imaging, rehabilitation & clinic spaces. Also includes new housing, dining, retail, grocery, lodging and open space with trails integrated into Flagstaff's existing trail system. Will also help activate hundreds of acres of developable land for new housing.
3. **Bellemont/Camp Navajo** –Specific area plan recommends campgrounds, RV parks, industry, and manufactured housing south of I-40 and commercial, mixed use, and residential expansion along the north side. North edge of Camp Navajo also identified for manufacturing, transportation, distribution, and logistics.
4. **JW Powell Boulevard Expansion Corridor** – Will service 2,200 acres. Will help activate several master planned communities including housing of various types and density as well as commercial areas.



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GOALS & OBJECTIVES

“A VIBRANT ECONOMY IS THE RESULT OF DELIBERATE CHOICES AND ACTIONS. ALL COMMUNITIES NEED A PERSON OR AN ORGANIZATION THAT WAKES UP EVERY DAY CHARGED WITH IMPROVING THE HEALTH OF THE LOCAL ECONOMY.

THAT’S WHAT ECONOMIC DEVELOPERS AND ECONOMIC DEVELOPMENT ORGANIZATIONS DO.”

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GOALS & OBJECTIVES

6 MAIN GOALS

Goal 1: Strengthen and Improve Locational Assets and Business Climate

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

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

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

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

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

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GOALS & OBJECTIVES

EACH GOAL CONTAINS SEVERAL OBJECTIVES, METRICS, & MILESTONES

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GOALS & OBJECTIVES

IMPLEMENTATION TIMETABLE EXAMPLE

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

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QUESTIONS?





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