



SOUTHERN COLORADO RAILYARD

WORKFORCE ANALYSIS



**Southern Colorado Railyard
Workforce Analysis
Fountain, CO
(35 Mile Radius from Ray Nixon Power Plant)**

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Introduction

The Colorado Springs Chamber of Commerce & EDC, the City of Fountain, the City of Colorado Springs, El Paso County and many other community partners have been in discussions for over 10 years regarding the demand for a rail-served business park in the county.



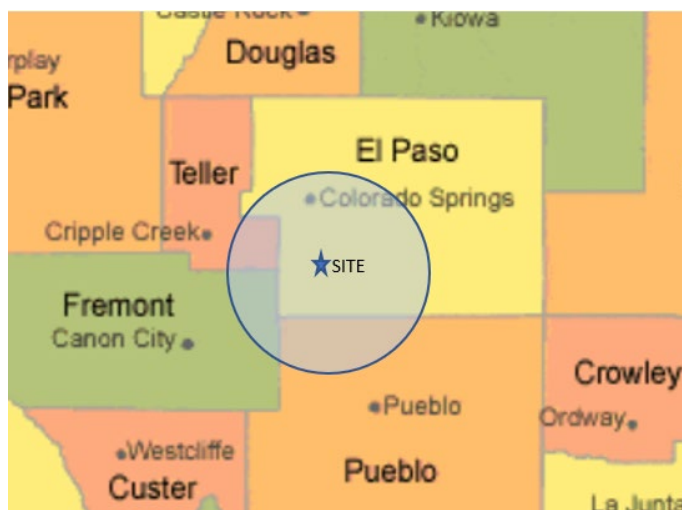
In 2007, the City of Fountain identified the area for industrial development within its Strategic Plan and broached the concept with regional partners. Subsequently in 2013, El Paso County funded a feasibility study into the viability of a dual-served rail business park that could have multiple benefits to the region and southern Colorado. As a light to heavy industrial user park, it would serve a significant void in site selection of the manufacturing industry. It could also stimulate this growing sector of the economy and diversify the industry fluctuations over the last 10 years within the region and regain the high economic multiplier effect of this sector.

The uniquely positioned site of the project (west of the Ray Nixon Power Plant; east of Fort Carson military base) has the potential to be served by both Burlington Northern Santa Fe and Union Pacific Railroads. Access to the rail interchange owned by Colorado Springs Utilities, as well as the topography of the site, were explored during the study which was designed to identify any initial fatal flaws of the concept.

The following report is for the rail-served business park project destined to be located in Fountain, Colorado. Information is based on the Colorado Springs MSA (which includes El Paso and Teller Counties), Pueblo and Fremont Counties, and/or 35 miles from 6598 Ray Nixon Road, Fountain, CO.

Region

El Paso, Pueblo, Teller, and Fremont Counties have over 359,000 employed, making up approximately 13.5% of Colorado's jobs, not including active duty military.

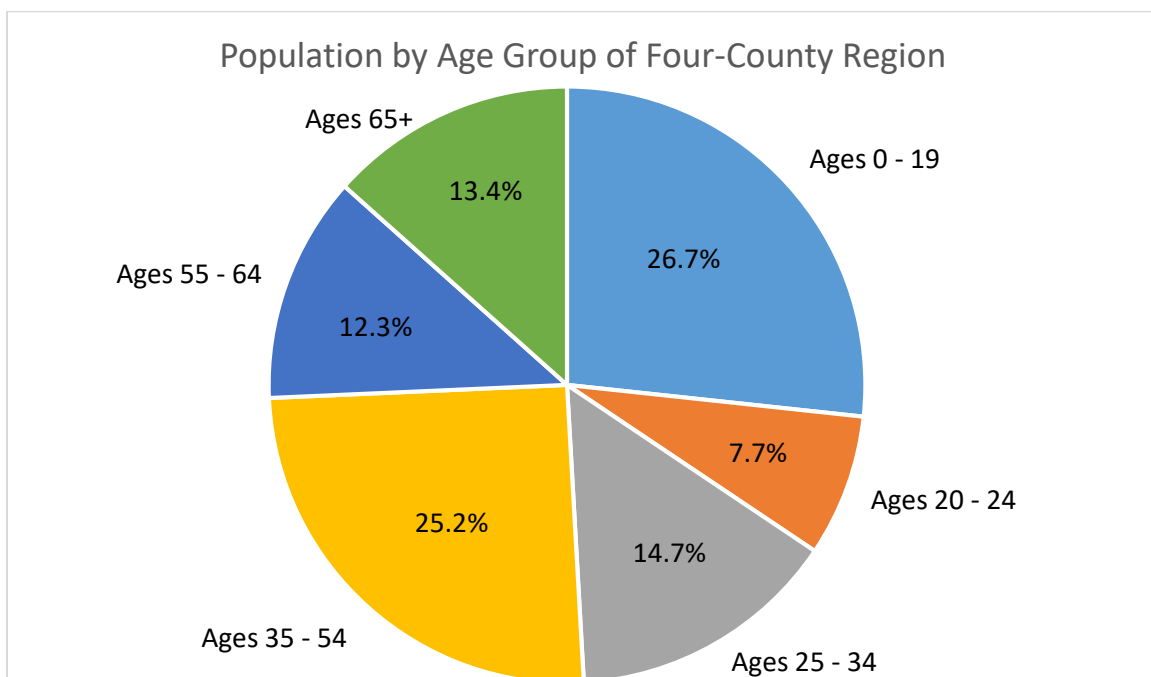


Population

The Colorado Springs MSA has a population of 725,908. The four-county region has a total population of 939,403.

El Paso County: 701,283
Fremont County: 47,521
Pueblo County: 165,974
Teller County: 24,625

Population by Age Group



Source: U.S. Census Bureau, American Factfinder, 2013-2017 American Community 5-Year Estimates

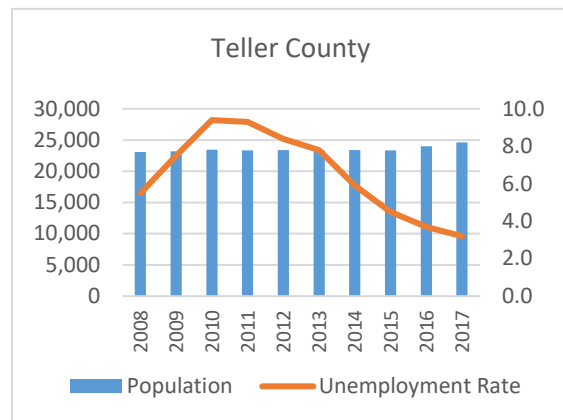
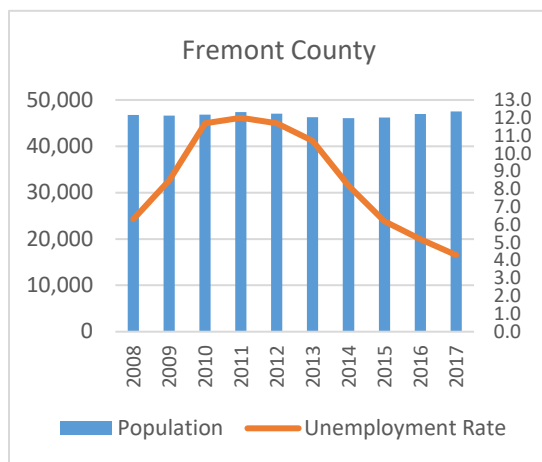
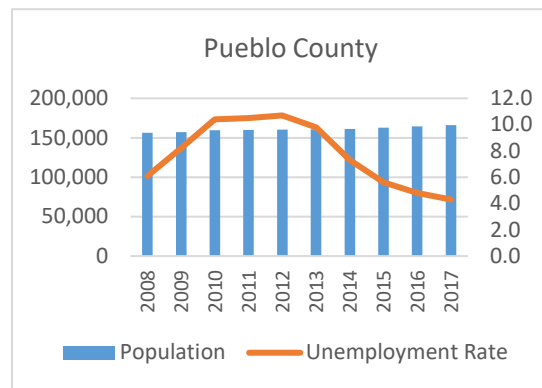
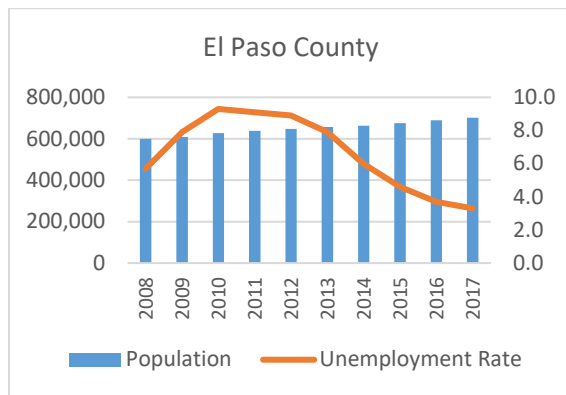
Population Estimates

According to the Colorado State Demographer, El Paso County is expected to become the state's largest county by 2050, with 13.1% of the total population of Colorado.

| | 2015 Estimates | 2050 Estimates | Estimated Annual / Overall Growth |
|----------------|----------------|----------------|-----------------------------------|
| El Paso County | 674,993 | 1,075,535 | 1.7% / 59.3% |
| Fremont County | 46,245 | 53,846 | 0.5% / 16.4% |
| Pueblo County | 162,664 | 223,412 | 1.1% / 37.3% |
| Teller County | 23,351 | 30,997 | 0.9% / 32.7% |

Source: Colorado Department of Local Affairs

2008 - 2018 Population vs Unemployment by Counties



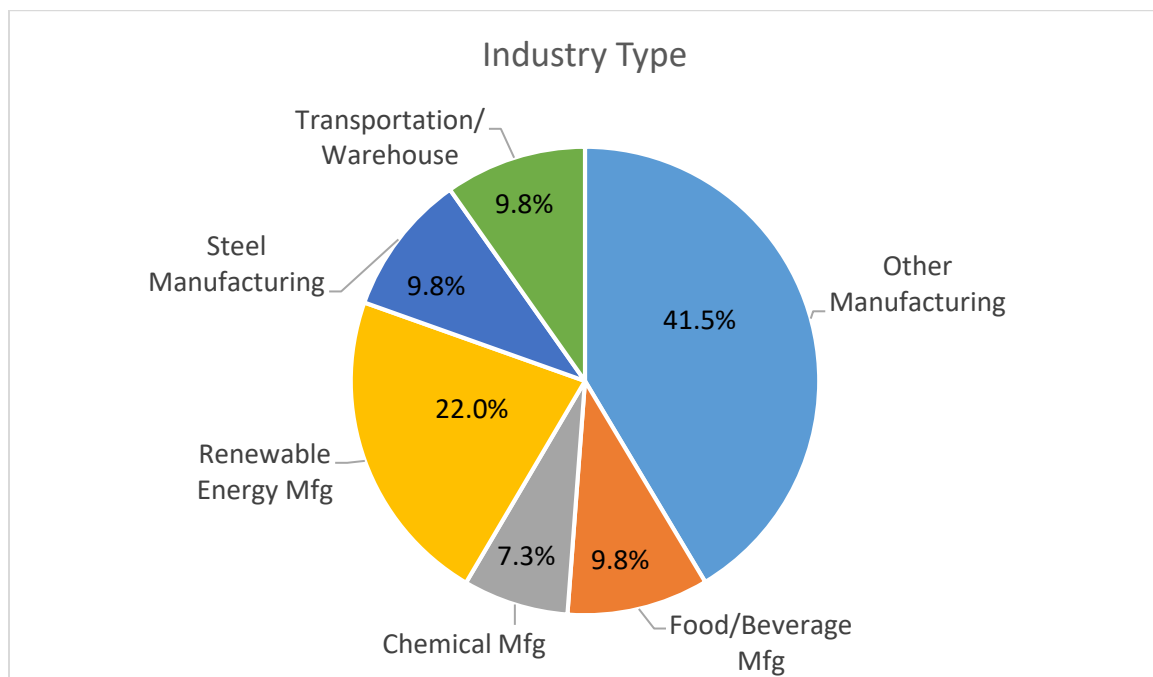
Source: Colorado Department of Labor & Employment and Department of Local Affairs

Historical & Active Projects

Over the last 10 years, the Chamber & EDC has had 41 projects requiring some form of rail (served, access or near), to include:

| Companies | Requirements |
|-----------|-----------------------------|
| 10 | 10,000 – 49,999 square feet |
| 8 | 50,000 – 99,999 square feet |
| 11 | 100,000+ square feet |
| 8 | 1 - 24 acres to build |
| 6 | 25 - 49 acres to build |
| 6 | 50 acres to build |

Industry breakout:



Lost Project Examples:

Food Processing Manufacturer:

- Initial contact: August 2016
- Food manufacturing
- 40 acres, 200,000 square feet
- Shovel-ready, rail served site
- 500 new jobs
- \$200,000,000 capital investment
- Competition: 6 western states including Colorado and Wyoming
- January 2017, company selected Longmont, CO

Renewable Energy Manufacturing:

- Initial contact: November 2008
- Wind energy manufacturing
- 40 acres, 245,000 square feet
- Connected to railroad and highways
- 300 new jobs
- \$30,000,000- \$37,000,000 capital investment
- May 2012, company chose a location in Wyoming

For a full listing of lost projects, please see document: [Rail Project Opportunities.pdf](#)

Active Project Examples:

Project Meow:

- Initial contact: September 2018
- Consumer goods manufacturer
- 2-3 acres, 40,000 – 50,000 square feet
- Need to be close to rail
- 25 new jobs
- Capital investment – To be determined
- February 2019, company currently pursuing various opportunities

Project Circular:

- Initial contact: January 2019
- Recycled containerboard mill
- 50 acres
- Need access to rail
- 230 new jobs
- Capital investment – To be determined
- February 2019, company reviewing RFQ respondent information

Available Workforce

Colorado has one of the most educated, technically savvy workforces in the country. Colorado Springs is home to top-notch higher education institutions that continually produce a steadfast, growing workforce. With 38 percent of the population holding a bachelor's degree or higher, and some of the nation's top veterans transitioning into the workforce, the region's talent raises the bar. This mid-sized city is less than a one-hour drive from Pueblo, Teller and Fremont counties, allowing employers access to a diverse pool of qualified professionals. And with the unbeatable quality of life to sweeten the deal, it's easy for businesses to retain and recruit talent.



According to the Pikes Peak Workforce Center, there were 24,866 people looking for work within the 4 counties included in this analysis. The following is a listing of available workforce within the 4 counties for manufacturing, warehouse, distribution and office support:

| | El Paso | Teller | Pueblo | Fremont | Total |
|------------------------------------|---------|--------|--------|---------|-------|
| Accountants | 96 | 2 | 20 | 11 | 129 |
| Accounting Clerk | 1 | 0 | 0 | 0 | 1 |
| Administrative Assistant | 73 | 3 | 23 | 9 | 108 |
| Aerospace Engineers | 26 | 0 | 0 | 1 | 27 |
| Assemblers & Fabricators | 86 | 2 | 40 | 16 | 144 |
| Avionics Technicians | 10 | 0 | 0 | 1 | 11 |
| Billing & Posting Clerk | 64 | 11 | 40 | 6 | 121 |
| Bookkeeping & Accounting | 98 | 1 | 50 | 31 | 180 |
| Business Operations | 91 | 3 | 25 | 6 | 125 |
| Cement Masons | 36 | 1 | 23 | 13 | 73 |
| Chief Executives | 42 | 0 | 8 | 0 | 50 |
| Civil Engineers | 15 | 2 | 1 | 0 | 18 |
| Construction Laborer | 363 | 16 | 291 | 128 | 798 |
| Construction Managers | 34 | 1 | 14 | 4 | 53 |
| Cutting, Punching & Trimmers | 8 | 0 | 9 | 1 | 18 |
| Electrical & Electronics Engineers | 68 | 1 | 23 | 6 | 98 |
| Electrical Drafters | 0 | 0 | 1 | 0 | 1 |
| Electrical Engineers | 17 | 0 | 5 | 3 | 25 |
| Electricians | 82 | 3 | 25 | 10 | 120 |
| Electronics Engineer | 22 | 2 | 4 | 2 | 30 |
| Electronics Mechanic | 5 | 4 | 0 | 0 | 9 |



Available Workforce (continued)

| | El Paso | Teller | Pueblo | Fremont | Total |
|----------------------------|---------|--------|--------|---------|-------|
| Engineering Managers | 6 | 0 | 0 | 0 | 6 |
| Engineering Technician | 8 | 0 | 1 | 1 | 10 |
| Engineers, All Other | 21 | 1 | 2 | 0 | 24 |
| Helpers - Brick Masons | 4 | 0 | 2 | 0 | 6 |
| Helpers - Carpenters | 8 | 0 | 16 | 7 | 31 |
| Helpers - Electrician | 11 | 0 | 9 | 8 | 28 |
| Helpers - Extraction | 2 | 0 | 0 | 1 | 3 |
| Helpers - Installation | 18 | 0 | 0 | 9 | 27 |
| Helpers - Painters | 7 | 0 | 0 | 2 | 9 |
| Helpers - Pipelayers | 8 | 0 | 8 | 3 | 19 |
| Helpers - Production | 30 | 3 | 61 | 31 | 125 |
| Human Resources Assistant | 75 | 1 | 16 | 7 | 99 |
| Human Resources Manager | 65 | 1 | 16 | 5 | 87 |
| Human Resources Specialist | 43 | 1 | 16 | 2 | 62 |
| Industrial Engineers | 24 | 1 | 7 | 0 | 32 |
| Industrial Machinery | 13 | 0 | 4 | 2 | 19 |
| Industrial Production | 10 | 2 | 2 | 2 | 16 |
| Industrial Safety Analyst | 6 | 0 | 2 | 0 | 8 |
| Laborers & Freight | 93 | 1 | 45 | 11 | 150 |
| Lathe & Turning Machine | 2 | 0 | 2 | 0 | 4 |
| Light Truck or Delivery | 54 | 1 | 37 | 14 | 106 |
| Loading Machine Operator | 1 | 0 | 3 | 1 | 5 |
| Logisticians | 21 | 0 | 2 | 1 | 24 |
| Logistics Analysts | 10 | 0 | 1 | 0 | 11 |
| Logistics Managers | 30 | 0 | 2 | 1 | 33 |
| Machinists | 31 | | 20 | 3 | 54 |
| Maintenance Workers | 4 | 1 | 10 | 2 | 17 |
| Managers, All Other | 185 | 7 | 49 | 17 | 258 |
| Manufacturing Engineer | 18 | 0 | 3 | 0 | 21 |
| Manufacturing Production | 3 | 0 | 0 | 1 | 4 |
| Material Handler | 1 | 0 | 0 | 0 | 1 |
| Material Moving Work | 54 | 0 | 21 | 5 | 80 |
| Materials Engineers | 2 | 0 | 0 | 0 | 2 |
| Materials Scientists | 1 | 0 | 0 | 0 | 1 |
| Mechanical Drafters | 4 | 0 | 0 | 0 | 4 |
| Mechanical Engineers | 23 | 3 | 7 | 3 | 36 |
| Metal Workers | 2 | 0 | 5 | 2 | 9 |
| Millwrights | 3 | 0 | 4 | 0 | 7 |
| Molding & Casting | 1 | 0 | 1 | 0 | 2 |
| Molding, Coremaking | 2 | 0 | 0 | 1 | 3 |
| Operating Engineers | 28 | 4 | 43 | 29 | 104 |

Available Workforce (continued)

| | El Paso | Teller | Pueblo | Fremont | Total |
|----------------------------|----------------|---------------|---------------|----------------|--------------|
| Order Clerks | 12 | 0 | 2 | 3 | 17 |
| Order Fillers | 9 | 0 | 3 | 0 | 12 |
| Packers & Packager | 44 | 0 | 17 | 2 | 63 |
| Pipe Fitters | 8 | 0 | 3 | 3 | 14 |
| Pipelayers | 9 | 1 | 11 | 6 | 27 |
| Production Laborers | 6 | 0 | 2 | 3 | 11 |
| Production Workers | 97 | 3 | 42 | 12 | 154 |
| Production, Planning | 13 | 0 | 4 | 0 | 17 |
| Purchasing Agents | 14 | 0 | 5 | 2 | 21 |
| Purchasing Managers | 15 | 0 | 2 | 3 | 20 |
| Quality Control Analyst | 1 | 0 | 0 | 1 | 2 |
| Quality Control Systems | 13 | 1 | 2 | 0 | 16 |
| Rail Transportation | 1 | 0 | 4 | 0 | 5 |
| Shipping & Receiving Clerk | 32 | 0 | 14 | 7 | 53 |
| Truck Drivers, Light | 33 | 1 | 9 | 8 | 51 |
| Truck Drivers, Heavy | 38 | 1 | 13 | 15 | 67 |
| TOTAL | 2,514 | 86 | 1,152 | 484 | 4,236 |

Source: Pikes Peak Workforce Center, June 18, 2019

Pikes Peak Workforce Center

The Pikes Peak Workforce Center (PPWFC) is the American Job Center serving El Paso and Teller counties. The PPWFC connects vital businesses with work-ready job seekers and employer-driven services.

Their clients range from entry-level to professional, including youth, adults, people returning to the workforce, and those with barriers to employment. PPWFC provides job search and training opportunities, including 20 different job seeker workshops—ranging from basic computer use and resume preparation to LinkedIn, branding/networking and more—and always at no cost. As well, PPWFC hosts the largest job fairs in Southern Colorado as well as weekly hiring events.

PPWFC also assists employers with exploring alternative resources for their workforce needs, including justice-involved citizens, people with different abilities, and those who are on public assistance. As well, they are able to provide employers with training and information regarding skills-and competency-based hiring, salary data, and labor market data.

In support of regional employers, the PPWFC hosts recruitment events, pre-employment assessments, provide a database of searchable candidate profiles, and more.

Military Workforce

El Paso County is home to five military installations which enhance the local workforce. There are approximately 87,000 military retirees and dependents in the area, and an average of 300 military separations per month. The presence of the military also attracts civilian contractors and suppliers, as well as adds a diversity of skill sets to the region's workforce.



**Approx. 300
military**

retire or separate from service
to the civilian workforce
monthly in the region

The five military installations are located around the city.



Military Workforce (continued)

The second largest employer in the state of Colorado, Fort Carson has over 30,030 employees and is home to the 4th Infantry Division Headquarters.

| | | |
|--|--|---|
| Fort Carson 250 Approximate outplacements per month 30 - 40% stay in Colorado Springs 85% are technically trained | | Spouses/Retirees/DOD Civilians: 75% participate in the region's workforce |
| Peterson Air Force Base, Schriever, NORAD 30-50 Approximate outplacements per month 94% stay in Colorado Springs 92% are technically trained 74% have degrees 62% have masters degrees | | Spouses: 79% participate in the region's workforce 45% have 4-year degrees |
| Air Force Academy 20 Approximate outplacements per month 45% stay in Colorado Springs 30 - 40% technically trained 50% have degrees 30% have masters degrees | Spouses: 35% participate in the region's workforce | |

Those who have been stationed in Colorado Springs often return to the area to begin a second career after retirement; they represent a workforce that is skilled, disciplined, and stable, with a strong work ethic. The military provides strong ties to the workforce through the provision of well-educated and trained veterans with relevant skills to the 21st century needs. Examples of these unique skills sets would include: trade & transportation logistics; specialized manufacturing; mechanical skills; welding; management; cybersecurity / information technology; and construction related skills.

Military Workforce (continued)

Transitioning Military and the Pikes Peak Workforce Center

The Pikes Peak Workforce Center (PPWFC) works very closely with the five military installations and their Transition Assistance Programs to aid separating and retiring military members join the regions' workforce.

Most of the service members have at least two years of college, many have technical skills they acquired while serving on active duty, and all have work experience that most employers value.

All transitioning service members go through a week-long class at their military base where they learn how to develop a civilian resume, how to interview for civilian positions, how to use professional web sites to build networks, and how to leverage their military experience and skills to the benefit of civilian employers. While going through their transition period and after discharge, service members and veterans may access all the resources at the PPWFC to include receiving priority in job referrals, priority in training scholarships, Work-Based learning opportunities, individualized career counseling with Workforce Development Specialists or Veteran Employment Representatives as well as access to PPWFC employer specific customized hiring events and job fairs.

The PPWFC also provides workforce and job seeking services to military spouses, and partners with many military and veteran's serving organizations in our community to help connect employers with potential employees.

Higher Education Facilities - Technical



Pikes Peak Community College's (PPCC) manufacturing programs and coursework were developed in collaboration with industry partners in the Pikes Peak region. Instructors are leaders in their career fields. Hands-on, experiential learning environments allow students to master machine basics and technical skills while internships prepare them to join the

workforce seamlessly. Certification programs were developed to meet the growing employment demands of the advanced manufacturing industry. PPCC students learn advanced technologies and current processes, work with state-of-the art equipment, and excel in working collaboratively, as well as medal regionally and nationally in the secondary and post-secondary competitions at Skills USA.

PPCC offers the following technical programs:

Associates of Arts (AA) / Applied Science (AAS)

Architectural Engineer Technician (AAS)
Building & Technology Construction (AAS)
Computer Aided Drafting & Design (AAS)
Diesel Technology (AAS)
Electronics Technology (AAS)
Heating, Air Conditioning & Refrigeration Technology (AAS)
Machining Technology (AAS)
Pre-Engineering (AA)
Robotics & Automation Systems Technology (AAS)
Welding (AAS)

Certificates

Construction Professional
Computer Aided Drafting & Design
Diesel Technology
Heating, Air Conditioning &
Refrigeration Technology
Machining
Robotics & Automation
Systems Technology
Welding

High School Students: Pikes Peak Community College works with high-school students enrolled in career-technical courses at their high schools who may be eligible for college credit. PPCC also partners with schools which support home school students who are interested in concurrent enrollment.



IntelliTec College - Colorado Springs Campus offers an Associate of Occupational Studies Degree in Refrigeration & HVAC Technician. This program is designed to develop the skills and knowledge for entry-level employment as a Refrigeration/Air Conditioning-Heating Systems Repair Technician in the commercial, residential, or industrial refrigeration and heating industry.



Located 30 miles south of the proposed rail site, **Pueblo Community College (PCC)** offers associate degrees and certificates in advanced manufacturing. PCC also offers classes in Fremont County. Careers in Machining Technology build a strong foundation in machining by learning to use various tools, such as hand tools, manual machines and grinding tools.

PCC offers the following technical programs at the Pueblo Campus:

Associates of Arts (AA) / Applied Science (AAS)

Electromechanical Technology (AAS)
Industrial Technology Maintenance (AAS)
Machining (AAS)
Radiologic Technology (AAS)
Welding (AAS)

Certificates

Electromechanical Technology
Industrial Technology Maintenance
Welding

PCC offers the following technical programs at the Fremont County Campus:

Associates of Arts (AA) / Applied Science (AAS)

Welding (AAS)

Certificates

Welding

High School Students: Pueblo Community College works with high school students in undergraduate courses, creating pathways from high school into higher education.

As well, Pueblo Corporate College, a division of Pueblo Community College, delivers workforce training to organizations through innovative, state-of-the-art training facilities. The Mobile Learning Labs feature portable classrooms transported to the office, warehouse, manufacturing facility with professional-grade trainers and instruction stations. Sponsored through the U.S. Department of Labor, these customized training tools provide a wide range of skill development from fundamentals to advanced trouble-shooting.

Programs offered through Pueblo Corporate College include:

Electrical Systems
Mechanical Systems
HAAS Toolroom CNC Mill
Welding



Colorado Technical University - Colorado Springs Campus offers more than 100 undergraduate and graduate degree programs and concentrations tailored to interests, experience, and preferred learning format.

Associates of Arts (AA) / Bachelor's Degrees (BD) / Master's Degrees (MD)

Business Administration (BD) / (MD)
Computer Science (BD) / (MD)
Electrical Engineering (BD) / (MD)
Electronics Technology (AA)
Information Technology (AA) / (BD) / (MD)
Management (AA) / (BD) / (MD)
Project Manager (BD)

Higher Education Facilities - Business



The **University of Colorado Colorado Springs (UCCS)**, with a 2018 student enrollment of 12,572, has been identified as the growth campus within the University of Colorado system. UCCS offers more than 100 options within 45 undergraduate, 23 graduate and five doctoral degrees within the Colleges of Nursing, Business, Education, Engineering & Applied Science, Letters, Arts & Sciences and Public Affairs.

UCCS also offers the world's only Bachelor of Innovation™ (BI) Program, a degree with a family of related majors. The BI degree has a common core in innovation and entrepreneurship which comprises a unique long-term, multi-disciplinary team experience. The BI program integrates four major components of innovation: Technology, Entrepreneurship, Creative Communications and Globalization. This bold new degree is aimed toward students who appreciate an innovative challenge, those who are destined to change their world and add value to society.



Colorado College is a private liberal arts college located near downtown Colorado Springs. The college enrolls approximately 2,000 undergraduate students and consistently ranks as one of the top private colleges in the nation offering 42 majors and 23 minors.

Many majors allow special concentrations within broad disciplinary study. In addition to the regular English literature track, for example, the English major also offers a creative writing track and a film track. Colorado College has several combined or distributed majors for students whose interests require concentrated work in more than one department.

Colorado College also offers The Block Plan (eight 3-1/2 week sessions, equivalent to four semester hours each). Students take only one course per block and professors teach only one course per block.



Colorado State University-Pueblo (CSU-Pueblo) is part of the Colorado State University (CSU) System, which has three campuses, each with distinct roles and missions. The CSU campuses educate nearly 60,000 students annually, with almost 9,000 graduates per year.

CSU-Pueblo is a regional, comprehensive, federally designated Hispanic-Serving Institution, serving approximately 4,000 students – 47 percent of whom identify as a minority, including more than 25 percent Hispanic, and 31 percent first-generation. Diverse, intimate, and supportive, the Pueblo campus serves the Southern Colorado area offering both undergraduate and graduate degrees in business, education, engineering, nursing, and the humanities. CSU-Pueblo delivers unique programs in mechatronics, railroad engineering, and automotive industry management.

CSU-Pueblo offers a breadth of opportunity with a variety of undergraduate and graduate degree programs.

College and University Enrollment Fall 2018

From liberal arts universities to technical colleges to a national military institution, the Colorado Springs region offers higher education opportunities across a broad range of fields of study, including four universities which are certified by the National Security Agency (NSA).

| Post-Secondary School | Total | Cert/Assoc | UnderGrad | Graduate |
|--|---------------|---------------|---------------|--------------|
| University of Colorado Colorado Springs | 12,572 | n/a | 10,521 | 2,051 |
| Pikes Peak Community College (3 locations) | 18,604 | 18,604 | n/a | n/a |
| Colorado Christian University | 8,421 | n/a | 7,083 | 1,338 |
| Pueblo Community College | 7,281 | 7,281 | n/a | n/a |
| Colorado State University – Pueblo | 4,500 | n/a | 4,500 | n/a |
| United States Air Force Academy | 4,366 | n/a | 4,366 | n/a |
| Colorado College | 2,298 | n/a | 2,257 | 41 |
| Colorado Technical University | 1,536 | n/a | 1,114 | 422 |
| Pima Medical Institute | 900 | 900 | 0 | 0 |
| Nazarene Bible College (online only) | 771 | 364 | 407 | n/a |
| University of Phoenix | 727 | n/a | 531 | 196 |
| National American University | 386 | 172 | 198 | 16 |
| Intellitec College | 300 | 300 | n/a | n/a |
| Embry-Riddle Aeronautical University | 243 | 3 | 199 | 41 |
| Fuller Theological Seminary | 240 | n/a | n/a | 240 |
| Regis University | 196 | n/a | 76 | 120 |
| Webster University | 176 | n/a | n/a | 176 |
| University of Northern Colorado | 63 | n/a | n/a | 63 |
| Totals | 63,580 | 27,624 | 31,252 | 4,704 |

Source: School Offices of Admissions and Records, Fall 2018 Enrollment



WAM!

Workforce development and community development partners joined together to create a Workforce Asset Map (WAM!). This program is a “one stop,” free, online tool that helps job seekers, employers, and students identify and easily access workforce-related resources within the region.

<https://wam.uccs.edu>

Additional K-12 Programs



Careers in Construction (CIC) was launched in 2015 to help young people connect with construction trade education in the Pikes Peak and Southern Colorado regions. CIC was piloted by the Housing & Building Association of Colorado Springs to support vocational education at area high schools and colleges – and to encourage allies in the construction industry to join in creating well-paying career opportunities while helping their industries.

Careers in Construction is largely supported by the construction industry through a funding mechanism called the Building Futures Fund. Hundreds of students in the Pikes Peak region are learning construction career skills through CIC-supported classroom education.

For more information on Careers in Construction, please visit: <https://www.cshba.com/careers-in-construction.html>



Based in Colorado Springs, **The MiLL** (Manufacturing Industry Learning Lab), is working to empower the next generation of industry leaders. The MiLL is located at the Peyton/Widefield Vocational Education Campus near the Colorado Springs Airport. The MiLL is a group effort between school districts, professionals, and industry partners to train high school students, college, military, and industry in lean manufacturing techniques and empowering them to succeed in today's economy.

The MiLL is approximately 6.3 miles from the rail-served business park for apprenticeship opportunities. For more information on The MiLL, please visit: <https://themillco.org/>

Careers in Construction and The MiLL program offer students co-transferability of skillsets to multiple industry sectors.



The **Pikes Peak Business & Education Alliance** (PPBEA) is a workforce development collaboration between 12 (out of 17) school districts in the Pikes Peak region and local businesses. The program facilitates the consolidation of workplace learning and training programs throughout the districts. The school districts worked together to form an

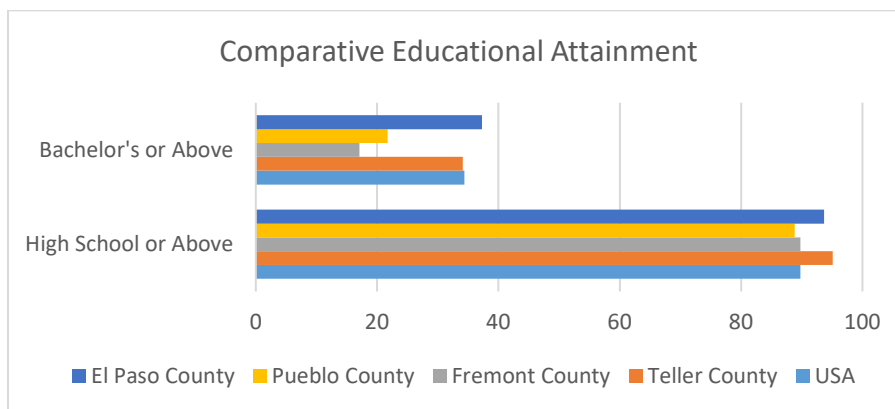
independent organization that provides opportunities for students to participate in job shadowing, internships, field trips, and mentorships, all designed to expose students to varied career fields and opportunities while still in high school. While the local business sector has long been supportive of workplace learning opportunities, working with many different school districts and their varying processes and expectations can be challenging. The initial catalyst in forming the PPBEA was to create a single source with which local business could easily interface in order to help expose high school students to career paths and opportunities and, simultaneously, help businesses invest in growing the local workforce.

Accessibility in the Region

Higher education and workforce training facilities are located throughout the community with easy access for students. Pikes Peak Community College as an example, has three locations in the community – south, north and downtown. Using averages, employees in Colorado Springs have a shorter commute time (20.2 minutes) than the normal US worker (25.3 minutes). I-25 provides north south accessibility on the west side of the community; Powers Boulevard provides north south accessibility on the east side of the city.

Mountain Metropolitan Transit is the primary source of clean, safe, and economical public transportation services in the Pikes Peak region providing over 11,000 one-way trips per day. In addition to bus routes within the City of Colorado Springs, Mountain Metro Transit provides service into Manitou Springs and south into the Widefield area.

High Quality Labor Force



Companies coming to or expanding in the Colorado Springs region tap into a **skilled, technologically-savvy workforce** whose **education** attainment is well above the national average.

Source: U.S. Census Bureau

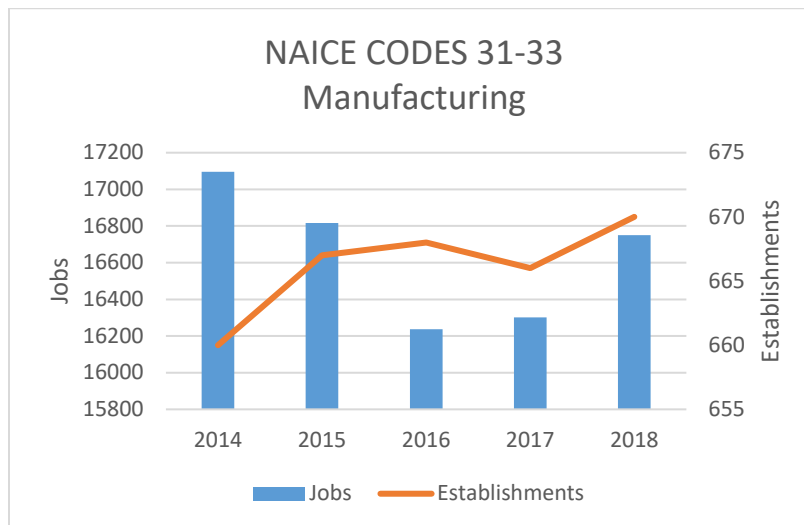
Bilingual Capabilities

The Colorado Springs region has significant advantages in a global economy. The table show the bilingual capability of the region's labor force, also vital in a global economy. Numbers on the table are adjusted for fluency in English and the second language, working age, and regional labor force participation.

Source: U.S. Census Bureau

| Bilingual Capabilities, Working Age Population | |
|--|--------|
| Language | Number |
| Spanish | 46,519 |
| Other Indo-European | 10,800 |
| Asian/Pacific Islander | 9,692 |
| Other | 2,671 |

Historical Trends (El Paso, Pueblo, Teller & Fremont Counties): MANUFACTURING



Source: Colorado Department of Labor & Employment

Individual County Breakout for Manufacturing Jobs

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|---------------|---------------|---------------|---------------|---------------|--------------|
| El Paso | 11,854 | 11,678 | 11,480 | 11,480 | 11,691 | -1.4% |
| Pueblo | 4,626 | 4,498 | 4,094 | 4,167 | 4,359 | -6.1% |
| Teller | 83 | 91 | 96 | 107 | 120 | 30.8% |
| Fremont | 533 | 549 | 567 | 547 | 580 | 8.1% |
| TOTAL | 17,096 | 16,816 | 16,237 | 16,301 | 16,750 | -2.1% |

Source: Colorado Department of Labor & Employment

Individual County Breakout for Manufacturing Establishments

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|------------|------------|------------|------------|------------|------------|
| El Paso | 503 | 509 | 511 | 509 | 513 | 1.9% |
| Pueblo | 103 | 105 | 104 | 104 | 102 | -1.0% |
| Teller | 14 | 15 | 15 | 16 | 17 | 17.6% |
| Fremont | 40 | 38 | 38 | 37 | 38 | -5.3% |
| TOTAL | 660 | 667 | 668 | 666 | 670 | 1.5 |

Source: Colorado Department of Labor & Employment

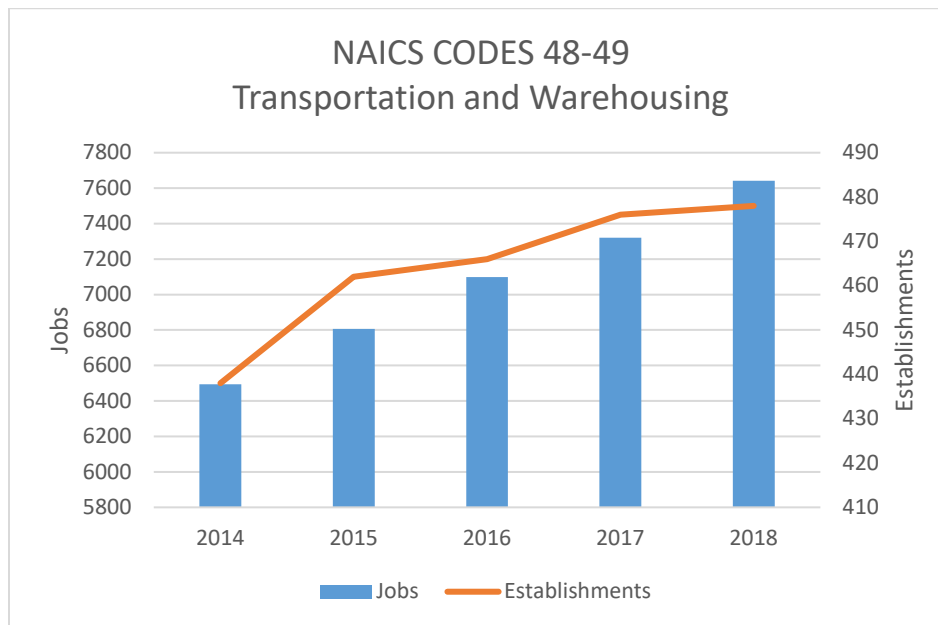
In the five-year period between 2014 and 2018, employment in the manufacturing sector declined by 2.1%, losing 346 jobs.

According to the 2019 Manufacturing Industry Outlook* by Deloitte LLP, the manufacturing industry is dealing with tight labor markets, exacerbated by high job-opening levels and historic low unemployment rates.

The historical trends of the four-county region are trending with the national with the tight labor market and high job-openings, however the unemployment rates remain one of the highest in the state of Colorado.

*www2.deloitte.com/content/dam/Deloitte/us/Documents/energy-resources/us-energy-resources/industrial-manufacturing-outlook-2019.pdf

Historical Trends (El Paso, Pueblo, Teller & Fremont Counties): TRANSPORTATION AND WAREHOUSING



In the five-year period between 2014 and 2018, employment in these sectors increased by 15.0%, adding just over 1,148 jobs.

Source: Colorado Department of Labor & Employment

Individual County Breakout for Transportation & Warehousing Jobs

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| El Paso | 4,827 | 5,041 | 5,234 | 5,392 | 5,625 | 14.2% |
| Pueblo | 1,251 | 1,337 | 1,432 | 1,491 | 1,564 | 20.0% |
| Teller | 98 | 86 | 84 | 86 | 83 | -18.1% |
| Fremont | 318 | 343 | 349 | 352 | 370 | 14.1% |
| TOTAL | 6,494 | 6,807 | 7,099 | 7,321 | 7,642 | 15.0% |

Source: Colorado Department of Labor & Employment

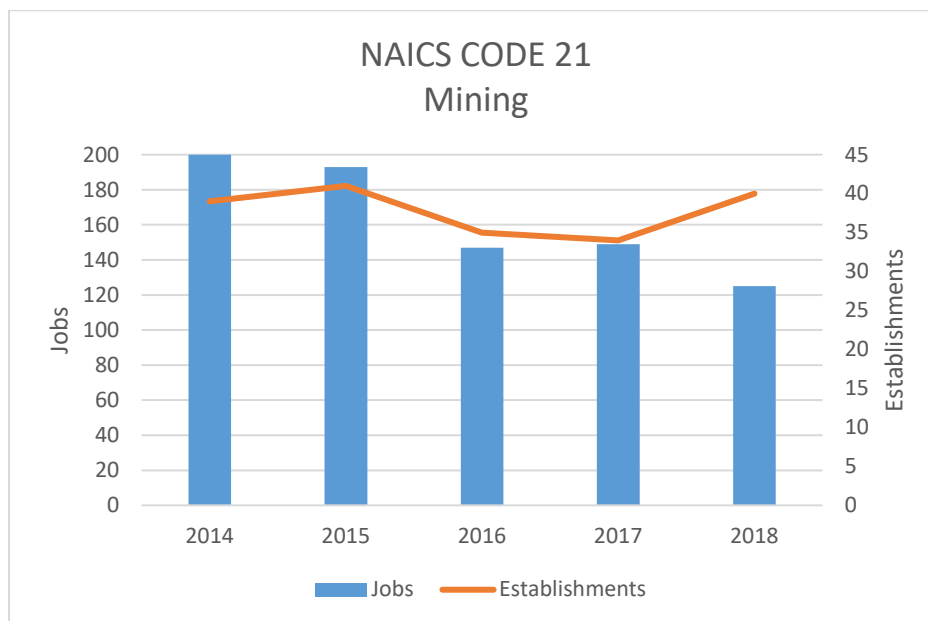
Individual County Breakout for Transportation & Warehousing Establishments

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|------------|------------|------------|------------|------------|-------------|
| El Paso | 311 | 338 | 339 | 346 | 354 | 12.1% |
| Pueblo | 70 | 68 | 73 | 80 | 77 | 9.1% |
| Teller | 17 | 15 | 15 | 16 | 18 | 5.6% |
| Fremont | 40 | 41 | 39 | 34 | 29 | -37.9% |
| TOTAL | 438 | 462 | 466 | 476 | 478 | 8.4% |

Source: Colorado Department of Labor & Employment

Transportation and warehousing have seen the strongest growth in the region for the industry sectors focused on in this analysis.

Historical Trends (El Paso, Pueblo, Teller & Fremont Counties): MINING



In the five-year period between 2014 and 2018, employment in these sectors declined by 60.0%, losing 75 jobs. However, Teller County does not report the employment in their mining industry, resulting in a less accurate depiction of this sector for the overall region.

Source: Colorado Department of Labor & Employment

Individual County Breakout for Mining Jobs

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|------------|------------|------------|------------|------------|---------------|
| El Paso | 96 | 92 | 65 | 70 | 57 | -68.4% |
| Pueblo | 24 | 20 | 0 | 0 | 0 | -100.0% |
| Teller | * | * | * | * | * | * |
| Fremont | 80 | 81 | 82 | 79 | 68 | -17.6% |
| TOTAL | 200 | 193 | 147 | 149 | 125 | -60.0% |

Source: Colorado Department of Labor & Employment

Individual County Breakout for Mining Establishments

| County | 2014 | 2015 | 2016 | 2017 | 2018 | % Change |
|--------------|-----------|-----------|-----------|-----------|-----------|-------------|
| El Paso | 26 | 30 | 26 | 24 | 21 | -23.8% |
| Pueblo | 5 | 4 | 2 | 2 | 2 | -150.0% |
| Teller | * | * | * | * | 8 | * |
| Fremont | 8 | 7 | 7 | 8 | 9 | 11.1% |
| TOTAL | 39 | 41 | 35 | 34 | 40 | 2.5% |

Source: Colorado Department of Labor & Employment

*The State of Colorado does not report information on Teller County mining operations, due to one major contributor to this sector. Newmont Mining Corporation has a significant multi-surface and underground operation in Teller County, employing over 500 workers.

2017 - 2018 Year Over Year Job Growth

| SOC | Description | Employed in Industry Group (2017) | Employed in Industry Group (2018) | Change / % Change (2017 - 2018) | % of Total Jobs in Industry Group (2018) | Median Hourly Earnings |
|---------|--|--|---|--|---|------------------------------|
| 11-2000 | Advertising, Marketing, Promotions, Public Relations, and Sales Managers | 64 | 66 | 2 / 3% | 0.4% | \$60.68 |
| 11-3000 | Operations Specialties Managers | 244 | 249 | 5 / 2% | 1.5% | \$61.36 |
| 11-9000 | Other Management Occupations | 147 | 150 | 3 / 2% | 0.9% | \$44.34 |
| 11-1000 | Top Executives | 364 | 366 | 2 / 1% | 2.2% | \$46.76 |
| 13-1000 | Business Operations Specialists | 779 | 782 | 3 / 0% | 4.6% | \$33.21 |
| 13-2000 | Financial Specialists | 242 | 243 | 1 / 0% | 1.4% | \$33.75 |
| 15-1100 | Computer Occupations | 678 | 686 | 8 / 1% | 4.1% | \$44.34 |
| 17-2000 | Engineers | 997 | 1,017 | 20 / 2% | 6.0% | \$46.97 |
| 17-3000 | Drafters, Engineering Technicians, and Mapping Technicians | 362 | 367 | 5 / 1% | 2.2% | \$23.13 |
| 19-2000 | Physical Scientists | 38 | 39 | 1 / 3% | 0.2% | \$38.74 |
| 19-4000 | Life, Physical, and Social Science Technicians | 27 | 28 | 1 / 4% | 0.2% | \$21.92 |
| 27-1000 | Art and Design Workers | 71 | 70 | (1) / -1% | 0.4% | \$17.86 |
| 27-3000 | Media and Communication Workers | 30 | 30 | 0 / 0% | 0.2% | \$25.17 |
| 33-9000 | Other Protective Service Workers | 44 | 44 | 0 / 0% | 0.3% | \$12.60 |
| 37-2000 | Building Cleaning and Pest Control Workers | 61 | 62 | 1 / 2% | 0.4% | \$11.16 |
| 41-1000 | Supervisors of Sales Workers | 25 | 25 | 0 / 0% | 0.2% | \$19.66 |
| 41-2000 | Retail Sales Workers | 74 | 75 | 1 / 1% | 0.4% | \$11.13 |
| 41-3000 | Sales Representatives, Services | 65 | 65 | 0 / 0% | 0.4% | \$24.76 |
| 41-4000 | Sales Representatives, Wholesale and Manufacturing | 430 | 430 | 0 / 0% | 2.6% | \$28.41 |
| 41-9000 | Other Sales and Related Workers | 51 | 52 | 1 / 2% | 0.3% | \$15.39 |
| 43-1000 | Supervisors of Office and Administrative Support Workers | 106 | 107 | 1 / 1% | 0.6% | \$25.71 |
| 43-3000 | Financial Clerks | 210 | 209 | (1) / 0% | 1.2% | \$16.62 |
| 43-4000 | Information and Record Clerks | 569 | 570 | 1 / 0% | 3.4% | \$14.37 |
| 43-5000 | Material Recording, Scheduling, Dispatching, and Distributing Workers | 748 | 751 | 3 / 0% | 4.5% | \$15.39 |
| 43-6000 | Secretaries and Administrative Assistants | 260 | 256 | (4) / -2% | 1.5% | \$17.37 |
| 43-9000 | Other Office and Administrative Support Workers | 281 | 278 | (2) / -1% | 1.6% | \$16.91 |
| 45-2000 | Agricultural Workers | 53 | 54 | 1 / 2% | 0.3% | \$14.23 |

2017 - 2018 Year Over Year Job Growth (continued)

| SOC | Description | Employed in Industry Group (2017) | Employed in Industry Group (2018) | Change / % Change (2017 - 2018) | % of Total Jobs in Industry Group (2018) | Median Hourly Earnings |
|------------------------|--|--|---|--|---|------------------------------|
| 47-1000 | Supervisors of Construction and Extraction Workers | 36 | 36 | 0 / 0% | 0.2% | \$28.81 |
| 47-2000 | Construction Trades Workers | 257 | 256 | (1) / 0% | 1.5% | \$19.38 |
| 47-5000 | Extraction Workers | 105 | 103 | (2) / -2% | 0.6% | \$26.55 |
| 49-1000 | Supervisors of Installation, Maintenance, and Repair Workers | 78 | 79 | 1 / 1% | 0.5% | \$30.19 |
| 49-2000 | Electrical and Electronic Equipment Mechanics, Installers, and Repairers | 67 | 68 | 1 / 1% | 0.4% | \$26.84 |
| 49-3000 | Vehicle and Mobile Equipment Mechanics, Installers, and Repairers | 326 | 330 | 4 / 1% | 2.0% | \$23.45 |
| 49-9000 | Other Installation, Maintenance, and Repair Occupations | 473 | 479 | 6 / 1% | 2.8% | \$18.54 |
| 51-1000 | Supervisors of Production Workers | 364 | 367 | 3 / 1% | 2.2% | \$31.26 |
| 51-2000 | Assemblers and Fabricators | 932 | 928 | (4) / 0% | 5.5% | \$16.32 |
| 51-3000 | Food Processing Workers | 104 | 108 | 4 / 4% | 0.6% | \$13.04 |
| 51-4000 | Metal Workers and Plastic Workers | 1,266 | 1,272 | 6 / 0% | 7.5% | \$18.08 |
| 51-5100 | Printing Workers | 210 | 203 | (7) / -3% | 1.2% | \$16.18 |
| 51-6000 | Textile, Apparel, and Furnishings Workers | 121 | 119 | (2) / -2% | 0.7% | \$10.67 |
| 51-7000 | Woodworkers | 188 | 189 | 1 / 1% | 1.1% | \$16.21 |
| 51-8000 | Plant and System Operators | 31 | 31 | 0 / 0% | 0.2% | \$26.37 |
| 51-9000 | Other Production Occupations | 1,403 | 1,417 | 14 / 1% | 8.4% | \$15.42 |
| 53-1000 | Supervisors of Transportation and Material Moving Workers | 186 | 187 | 1 / 1% | 1.1% | \$24.05 |
| 53-2000 | Air Transportation Workers | 67 | 69 | 2 / 3% | 0.4% | \$65.71 |
| 53-3000 | Motor Vehicle Operators | 1,997 | 2,027 | 30 / 2% | 12.0% | \$14.17 |
| 53-4000 | Rail Transportation Workers | 79 | 85 | 6 / 8% | 0.5% | \$28.19 |
| 53-6000 | Other Transportation Workers | 67 | 69 | 2 / 3% | 0.4% | \$13.02 |
| 53-7000 | Material Moving Workers | 1,181 | 1,193 | 12 / 1% | 7.1% | \$13.38 |
| TOTAL / AVERAGE | | 16,558 | 16,686 | 129 / 1% | 2.02% | \$25.26 |

Source: EMSI

Colorado Springs Projected Job Growth 2019 – 2021

The table below shows the short-term employment projections for multiple occupations in Colorado Springs MSA for the 2019-2021 projection period.

| Occupation | Occupation Code | 2019 Estimated Employment | 2021 Projected Employment | Total 2019-2021 Employment Change | Annual Percent Change |
|---|-----------------|---------------------------|---------------------------|-----------------------------------|-----------------------|
| Building and Grounds Cleaning and Maintenance | 370000 | 11,195 | 11,596 | 401 | 1.78% |
| Business and Financial Operations | 130000 | 20,829 | 21,691 | 862 | 2.05% |
| Construction and Extraction | 470000 | 16,155 | 17,253 | 1,098 | 3.34% |
| Installation, Maintenance, and Repair | 490000 | 10,573 | 10,950 | 377 | 1.77% |
| Management | 110000 | 14,763 | 15,404 | 641 | 2.15% |
| Office and Administrative Support | 430000 | 43,926 | 44,905 | 979 | 1.11% |
| Production | 510000 | 9,229 | 9,310 | 81 | 0.44% |
| Transportation and Material Moving | 530000 | 12,831 | 13,294 | 463 | 1.79% |
| Total All | 000000 | 310,968 | 322,576 | 11,608 | 1.85% |

Source: Colorado Labor Market Information, Occupational Employment Projections Unit

Colorado Springs Projected Job Growth 2017 – 2027

The table below shows the long-term employment projections for multiple occupations in Colorado Springs MSA for the 2017-2027 projection period.

| Occupation | Occupation Code | 2017 Estimated Employment | 2027 Projected Employment | Total 2017-2027 Employment Change | 2017-2027 Annual Avg. Percent Change | Total Percent Change |
|---|-----------------|---------------------------|---------------------------|-----------------------------------|--------------------------------------|----------------------|
| Building and Grounds Cleaning and Maintenance | 370000 | 11,681 | 13,765 | 2,084 | 1.66% | 17.84% |
| Business and Financial Operations | 130000 | 20,251 | 24,067 | 3,816 | 1.74% | 18.84% |
| Construction and Extraction | 470000 | 15,662 | 20,469 | 4,807 | 2.71% | 30.69% |
| Installation, Maintenance, and Repair | 490000 | 10,451 | 12,136 | 1,685 | 1.51% | 16.12% |
| Management | 110000 | 14,351 | 17,286 | 2,935 | 1.88% | 20.45% |
| Office and Administrative Support | 430000 | 43,157 | 48,236 | 5,079 | 1.12% | 11.77% |
| Production | 510000 | 9,105 | 9,255 | 150 | 0.16% | 1.65% |
| Transportation and Material Moving | 530000 | 12,475 | 14,283 | 1,808 | 1.36% | 14.49% |
| Total All | 000000 | 305,478 | 365,134 | 59,656 | 1.80% | 19.53% |

Source: Colorado Labor Market Information, Occupational Employment Projections Unit

ATTACHMENT: Rail Project Opportunities

The following information is a listing of projects received by the Colorado Springs Chamber & EDC since 2008, where rail was required or highly desirable.

RAIL PROJECT OPPORTUNITIES 2008-2019

| PROSPECT # | TYPE | SITE/FACILITY | INVESTMENT | JOBS | AVG WAGE | LEAD | RAIL NOTE | OUTCOME | YEAR |
|------------|--------------------------|------------------------|--------------|---------|----------|------------|---------------------|-------------------|------|
| #8561 | Bottled Water Mfg | 70,000-80,000 SF | Unknown | 250 | unknown | Direct | Near rail | unknown | 2008 |
| #9099 | Renewable Energy Mfr | 80,000-200,000 SF | Unknown | 300 | unknown | Consultant | Rail served | Eliminated | 2009 |
| #9038 | Powder Coating Mfg | 25,000-35,000 SF | Unknown | 120 | \$80,000 | Direct | Rail a plus | Cancelled | 2009 |
| #9033 | Manufacturing | 20,000-80,000 SF | Unknown | 35 | \$55,000 | Direct | Active rail spur | project cancelled | 2009 |
| #9084 | Manufacturing | 10 acres/144,240 SF | \$49,700,000 | 152 | unknown | OEDIT | Rail preferred | Selected Phoenix | 2009 |
| #8689 | Manufacturing | Site | Unknown | 400 | unknown | Consultant | Rail access | unknown | 2009 |
| #8861 | PV Manufacturing | 200,000-225,000 SF | Unknown | 150 | unknown | OEDIT | Rail preferred | Colo eliminated | 2009 |
| #8909 | Manufacturing | 15 acres | Unknown | 50 | unknown | OEDIT | Rail served | unknown | 2009 |
| #8948 | Food Products | 70,000 SF | Unknown | 100 | unknown | Direct | Rail a bonus | unknown | 2010 |
| #9027 | Manufacturing | 40-50 acres | Unknown | 460 | \$45,650 | OEDIT | Rail service a plus | unknown | 2010 |
| #8938 | Steel Manufacturing | 50-75 acres/150,000 SF | Unknown | 200 | unknown | OEDIT | Rail served | unknown | 2010 |
| #8957 | Building Products Mfg | 3 acres / 30,000 SF | Unknown | 150 | \$60,000 | OEDIT | Rail access | unknown | 2010 |
| #9058 | Energy Industry Mfg | 30 acres/170,000 SF | Unknown | Unknown | unknown | OEDIT | Rail access | unknown | 2010 |
| #9073 | Renewable Energy Mfr | 50 acres | Unknown | 200 | unknown | OEDIT | Near rail | unknown | 2010 |
| #9106 | Renewable Energy Mfr | 10-25 acres | Unknown | 55 | \$53,225 | OEDIT | Rail served | unknown | 2010 |
| #9085 | Manufacturing/Distrib | 150,000-300,000 SF | Unknown | 100 | unknown | OEDIT | Rail access | Colo eliminated | 2010 |
| #9142 | Wind Turbine Mfg | 50,000-100,000 SF | Unknown | 160 | unknown | OEDIT | Rail a plus | Colo eliminated | 2010 |
| #9289 | Biodiesel Mfg | 20 acres | Unknown | Unknown | unknown | Direct | Rail served | unknown | 2011 |
| #9189 | Aircraft Mfg | 20 acres/220,000 SF | Unknown | Unknown | unknown | OEDIT | Rail access | Colo eliminated | 2011 |
| #9192 | Mfg/Storage/Distrib | 1-2.5 acres/35,000 SF | \$10,000,000 | 35 | unknown | OEDIT | Rail access | Cancelled | 2011 |
| #9293 | Oil related | 100,00-400,000 SF | Unknown | Unknown | unknown | OEDIT | Rail served | unknown | 2012 |
| #9280 | Toy Manufacturing | 125,000-150,000 SF | Unknown | 50-100 | unknown | Direct | Rail a plus | unknown | 2011 |
| #9194 | Wind Turbine Mfg | 75,000 SF | Unknown | Unknown | unknown | OEDIT | Rail access | unknown | 2012 |
| #8961 | Wind Energy Mfg | 40 acres | \$35,000,000 | 300 | | OEDIT | Rail access | Selected Wyoming | 2012 |
| #9371 | Steel Products | 60,000-120,000 SF | Unknown | Unknown | unknown | OEDIT | Rail served | unknown | 2013 |
| #9272 | Equipment Mfg | 23,000 SF | Unknown | 60 | \$35,000 | OEDIT | Rail access | unknown | 2013 |
| #9282 | Transportation Logistics | 40,000 SF | Unknown | 150 | unknown | Direct | Rail preferred | Cancelled | 2013 |
| #9352 | Mfg/Assembly/Distrib | 50-100 acres | Unknown | 500 | unknown | OEDIT | Rail a plus | Colo eliminated | 2013 |
| #9231 | Steel Mfg Start-Up | 10,000 SF | Unknown | 50 | unknown | Direct | Rail access | Cancelled | 2014 |
| #9493 | Chemical Mfg | 7,500-10,000 SF | Unknown | 50 | unknown | OEDIT | Rail served | unknown | 2014 |
| #9438 | Steel Processer | 15 acres/100,000 SF | Unknown | Unknown | unknown | OEDIT | Rail preferred | unknown | 2015 |

| PROSPECT # | TYPE | SITE/FACILITY | INVESTMENT | JOBS | AVG WAGE | LEAD | RAIL NOTE | OUTCOME | YEAR |
|------------|----------------------------|-------------------------|---------------|---------|----------|------------|----------------|-----------------------|------|
| #9456 | Natural Gas Processer | 10 acres | Unknown | 50 | unknown | OEDIT | Rail access | unknown | 2015 |
| #9500 | Chemical Processing | Site | Unknown | 20 | \$80,000 | OEDIT | Rail preferred | unknown | 2015 |
| #9503 | Manufacturing | 50,000-75,000 SF | Unknown | 450 | \$38,204 | OEDIT | Rail preferred | unknown | 2015 |
| #9533 | Manufacturing | 3 acres / 35,000 SF | \$2,600,000 | 30 | unknown | Consultant | Rail access | unknown | 2016 |
| #9589 | Consumer Product Mfg | 200 acres | Unknown | 350 | unknown | Direct | Rail served | unknown | 2016 |
| #9580 | Food Manufacturing | 40 acres/200,000 SF | \$340,000,000 | 500 | \$50,000 | OEDIT | Rail served | Selected Longmont, CO | 2017 |
| #9678 | Food Manufacturing | 50-100 acres/100,000 SF | Unknown | Unknown | unknown | OEDIT | Rail a plus | Dead | 2018 |
| #9694 | Manufacturing | 30,000-50,000 SF | \$2,500,000 | 25 | \$75,000 | OEDIT | Rail served | Dead | 2018 |
| #9698 | Manufacturing - Pet Prod. | 2-3 acres / 50,000 SF | Unknown | 25 | unknown | Direct | Rail access | unknown | 2018 |
| #9717 | Manufacturing - Board Mill | 50 acres | Unknown | 230 | Unknown | OEDIT | Rail access | ongoing | 2019 |

| | |
|----------------------|-------------|
| \$439,800,000 | 5707 |
|----------------------|-------------|

ATTACHMENT: Rail Sample Information Request

The following detail outlines a recent Request for Information from a consultant representing a company looking for a site with direct rail access.

Project Description

Project is a confidential client carrying out a preliminary site selection for the installation of a new recycled containerboard mill in the Western United States.

Job Creation

- Estimated 230 full time jobs initially; long term growth projections are unknown at this time
- Average annual wages not known at this time

Key Decision Making Factors

The following factors have been identified as key drivers for this project. In addition to broker's brochures for available sites, communities should also submit information that addresses the following:

- Workforce
 - Average local salaries for advanced manufacturing/assembly/construction/logistics workers
 - Size of local available workforce for the positions mentioned above
- Incentives
 - Types of local incentives that could be offered to support the project
- Logistics data
 - Distance to major airports
 - Access to major highways
 - General accessibility to and from the site (will large trucks be accommodated/welcome - 17,000 metric tons/80 trucks coming in per day)
 - Prefer greenfield sites, but brownfield could be okay if key specifications are met
- Population of city and proximity to other large cities
 - The company wants to be within a 90 minute drive of the Metro Denver area

Project Specifics

Product: Recycled Containerboard
Capacity: 500,000 st/yr
Work days: 358/yr

Raw Material Requirements

OCC/Mixed Papers: 570,000 st/yr

Site Requirements

Size: 50 acres (20 ha)

Access:

- Good connections with short distance access to roads/highways
- Direct rail access
- Commercial airport

Other Requirements:

- Close to cities, but preferably without side by side neighbors
- Skilled labor accessibility: 230 of which 30 professional/management
- Industrial, developable land
- Possibility to develop 40% covered area
- Low flooding and seismic risks
- Water availability and effluent discharge capacities as per data in the following table

Other Infrastructure:

- HV power line, above 110 kv
- Natural gas pipeline: 75/360 psi (without/with Combined Heat and Power Plant)
- Broadband connections

Environmental Conditions:

- Capability to accept air and water emissions, etc. as per environmental standards
- Restrictions related to discharge loadings (volume, pollutants, etc.)
- Airshed quality and capacity to accept pollutants (NO_x, CO, PM, etc.)

Energy Requirements

st steam/st paper: 1.82

st steam/yr: 910,000

Electricity Consumption

kWh/st paper: 380

kWh/year: 190,000,000

Note: Gas consumption and electricity requirements from the grid could vary according to three potential scenarios for the steam/power plant configuration:

- Case 1: Low pressure boilers to generate the heat demands from process;
- Case 2: High pressure boiler and associated counter pressure steam turbine;
- Case 3: Gas fired combined heat and power plant (CHP).

| | | Case 1: Low pressure package boilers | Case 2: High pressure boilers/ST | Case 3: CHP |
|----------------------------|---------------------|--------------------------------------|----------------------------------|-------------|
| Gas Consumption | | | | |
| Hourly | Thousand cubic feet | 417 | 480 | 632 |
| Daily | Thousand cubic feet | 8,002 | 9,210 | 13,176 |
| Gas pressure required | PSI | 72.5 | 72.5 | 362.5 |
| Electricity summary | | | | |
| Max imports from grid | kW | 27,036 | 27,736 | 27,736 |
| Max imports to grid | kW | 0 | 13,629 | 50,800 |
| On site generation: | | | | |
| Gas turbine | MW | 0 | 0 | 40 |
| Steam turbine | MW | 0 | 15 | 12 |
| Total | MW | 0 | 15 | 52 |

Water and Effluent

| | | | |
|-------------------------------------|-----------|-------------|-------------|
| Water | | | |
| Average consumption per st | US gal/st | 1,585 | 1,717 |
| Average consumption per day | US gal/st | 2,213,715 | 2,398,191 |
| Total yearly consumption | US gal/st | 793,510,000 | 858,552,500 |
| Maximum consumption/day | US gal/st | 2,656,458 | 2,877,830 |
| Water extraction permit | US gal/st | 3,037,955 | 3,170,040 |
| Effluent to be discharged | | | |
| Average discharge per st | US gal/st | 1,321 | 1,453 |
| Average discharge per day | US gal/d | 1,844,763 | 2,029,239 |
| Total yearly discharge | US gal/yr | 660,425,000 | 726,457,500 |
| Maximum discharge per day | US gal/d | 2,213,715 | 2,435,087 |
| Effluent discharge permit | US gal/d | 2,656,458 | 2,773,785 |
| Anticipated effluent quality | | | |
| pH | 7 to 9 | | |
| BOD | 18 ppm | | |
| COD | 240 ppm | | |
| Total suspended solids | 30 ppm | | |
| Total nitrogen | 15 ppm | | |
| Total phosphorus | 1 ppm | | |

| | | | |
|-------|---|--|--|
| Color | Pale, yellow, transparent. A TCU value will have to be generated. | | |
|-------|---|--|--|

Solid Waste Disposal

Anticipated amount: 80,000 st/yr @ 50% dryness

Landfill sites available in the region or potential for agricultural or other beneficial reuse, including energy production.

Project Timeline

The company wants to make a decision on location by February 15, 2019.

CONFIDENTIAL

Site and contact information

| | |
|-------------------------------------|--|
| Site location (town, county, state) | Fountain, El Paso County, Colorado |
| Address / zip code | 116 S. Main Street, 80817 |
| Contact name | Kimberly Bailey |
| Organization | City of Fountain/ Fountain Urban Renewal Authority |
| Telephone | 719-322-2056 |
| Email | kbailey@fountaincolorado.org |

Land and buildings

A - Land

| | |
|--|--|
| Area available | ~1,700 acre site |
| Location (town and county) | Fountain - El Paso County |
| Cost | negotiable |
| Can you provide a site topographic map (2' contour on 50 ft grid)? | Yes |
| Can you provide a copy of the US Geological Survey map for the area? | Pending |
| Can you provide a recent aerial photo of the site? | Yes |
| Current and prior use of site | Mining and Agricultural |
| If brownfield, what is the status: contamination, remediation, etc. | Portions of mining site area are in reclamation phase with conclusion by Summer 2019 and released for business development |

B - Neighborhood

| | |
|---|--|
| General description of industrial base in area | Manufacturing; Transportation & Logistics; Homeland Security; Aerospace & Defense; IT |
| Who are the main neighbors of the site (name and activity)? | Fort Carson "Army" Military Base; Ray Nixon Power Plant (CSU); Pavestone; Schmidt Construction; Trustway; Pikes Peak International Raceway |
| Can one of the neighbors provide the required steam? | Yes |
| Approx. time for emergency response (fire, EMT, etc.) | < 7 mins. |
| Other comments | Fiber Broadband as Utilities Enterprise is under-consideration to support large scale business development |

Utilities

A - Natural gas

| | |
|--|---|
| Is natural gas available on site? | No |
| <i>If yes:</i> | |
| Who is the provider? | |
| Can they provide the required volume? | |
| Delivery pressure, volume (existing infrastructure) | |
| Age of existing gas infrastructure and opinion on status | |
| Typical gas price and structure? | |
| Who pays for meter set and piping to the building? | |
| Are there any incentives / rebates available? | |
| <i>If no:</i> | |
| Is the required gas volume available in the area? | Yes |
| Who would be the provider? | Black Hills Energy |
| Who would pay for infrastructure costs? | Private/Public Partnership Infrastructure |

B - Electricity

| | |
|--|--|
| Is there an existing infrastructure on the site? | Yes to support Mining Operations |
| <i>If yes:</i> | |
| Who is the provider? | Fountain Utilities |
| Capacity of existing transformers | TBD |
| Age of existing transformers and opinion on status | TBD |
| Typical electricity price structure | See Matrix |
| Who owns/maintain transformers? | Fountain Utilities |
| Are there any incentives / rebates available? | TBD |
| <i>If no:</i> | |
| Is enough electricity available in the area? | Utilities substation to begin construction August 2019 to support business development |
| Who would be the provider? | Fountain Utilities |
| Who would pay for infrastructure costs? | Public Infrastructure |

C - Potable Water

| | |
|--|--|
| Is the site connected to the municipal potable water system? | Yes |
| <i>If yes:</i> | |
| Capacity of the system (main size, rate, pressure, etc.) | Current capacities support Mining operation; site service to be upgraded with large scale business development |
| Opinion on status of system, including backflow preventer | |
| Fees associated with use (\$/USG) | |
| <i>If no:</i> | |
| Who would pay for the connection infrastructure? | Public/ Private Infrastructure |

D - Process Water

| | |
|---|--|
| What would be the source of process water? | Fountain Utilities |
| <i>If River:</i> | |
| Name of river from which water would be drawn | |
| River flow | |
| River water quality (temperature, hardness, pH, solids, etc.) | |
| <i>If Groundwater:</i> | |
| Well capacity (USGPM) | |
| Well water quality (temperature, hardness, pH, solids, etc.) | |
| <i>If Municipal water system:</i> | |
| Capacity of the system (main size, rate, pressure, etc.) | TBD |
| Age of existing system and opinion on status | New Infrastructure for on site development |
| Fees associated with use (\$/USG) | TBD |

E - Process Effluent

| | |
|---|--|
| Where the waste water will be discharged? | |
| <i>If River:</i> | |
| Total maximum daily load (TMDL) status of river | |
| Effluent quality required (primary/secondary treatment, BOD, SS, COD, etc.) | |
| <i>If Municipal Sewer System:</i> | |
| Tipping fee formula (BOD/TSS/flow) | |
| Restrictions in place (concentration, seasonal issues, etc.) | |
| <i>If Other Options</i> | |
| What are they? | Fountain Sanitation District Authority |
| What would be effluent quality required? | Pending |

F - Storm water

| | |
|-----------------|--|
| Discharge point | N/A |
| Restrictions? | At be assessed at time of business development |

G - Solid Waste

| | |
|--|--|
| Landfill site location | 3 locations: Fountain; Midway; Waste Connections |
| Distance from site | within <40 mile radius of site |
| Tipping Fee | TBD |
| Is there potential for waste repurposing in the region (reuse, use, etc.)? | Yes |

Transportation and logistics**A - Roads and trucking**

| | |
|---|---|
| Major access to site | Yes: I-25 and Charter Oak Ranch |
| Major interstate and distance from it | I-25 ; ~2.5 miles |
| Road network capacity | Heavy freight |
| Any restrictions (number of trucks allowed/d, size restrictions, doubles) | N/A |
| Traffic characterization in the area | Industrial Freight; Military Armory Freight |
| Who pays to construct roads? | City; County; PPACG: Private Development |
| Special road maintenance? (i.e. snow plowing, repairs) | TBD |

B - Rail

| | |
|--|---|
| Is there an existing access to site? | Ray Nixon Power Plant and Fort Carson Service |
| Who is the carrier providing service to the region? | Dual Service via BNSF and UPRR |
| How many railroad switches per week? | TBD |
| What are typical rates? | Variable |
| Reliability (age of rail, condition of railroad ties) | Front-Range Primary Service Lines; Hearty Maintenance Program |
| New construction arrangements needed? (Who pays for what and to where) | Public/ Private Infrastructure |

C - Sea port

| | |
|----------|-----|
| Location | N/A |
| Distance | N/A |

D - Airports

| | |
|---------------------------------|---|
| Major airport location | 2 Airports |
| Major airport distance to site | Denver International Airport 97.4 miles |
| Regional airport location | 7770 Milton E. Proby Parkway, 80916 |
| Major Regional distance to site | Colorado Springs Airport 11.7 miles |

E - Logistics

| | |
|--|--|
| Presence of a carrier close to site | Multiple Service Providers within Region |
| Capacity for intermodal transportation | Within Front-Range Accessibility |

Employment and labor**A - Unemployment**

| | |
|----------------------------|------|
| State unemployment rate | 3.4% |
| Regional unemployment rate | 3.9% |

B- Manufacturing

| | |
|---------------------------------------|---|
| Average manufacturing rate (\$/h) | Machine Operators: \$14.38 Mfg - Machine Operator / Assembler: \$ 13.82 Manufacturing/Plant Manager: \$ 60.00 |
| Manufacturing base | The Pikes Peak region has over 400 manufacturing companies. |
| Experience related to Pulp & Paper? | TBD |
| Trade schools in vicinity | Pikes Peak Community College The MILL National Training Center Pueblo Community College |
| Colleges and universities in vicinity | University of Colorado Colorado Springs Colorado State University - Pueblo |

C- Construction

| | |
|---|---|
| Average construction rate (\$/h) | End Dump Truck: \$22.15 Mechanic - Shop Heavy: \$25.60 Project Manager - Journey: \$41.77 |
| Construction activity in area: current and forecast | Moderate to Strong construction activity in the region |
| Trade flexibility | TBD |
| Trade schools in vicinity | Pikes Peak Community College The MILL National Training Center Pueblo Community College |

Taxes and Incentives

A -State taxes

| | |
|---|---|
| Provide list of possible state taxes (ex. assets, inventory, franchise, etc.) | <p>Colorado State Franchise tax - none</p> <p>Colorado State Inventory tax - none</p> <p>Colorado State Motor fuels tax - Gasoline, gasohol - 22.0 cents per gallon state; 18.4 cents per gallon federal</p> <p>Special fuels (diesel, kerosene) - 20.5 cents per gallon state; 24.4 cents per gallon federal</p> <p>*Federal Fuel tax credit available for non-highway use</p> <p>Colorado State Occupation tax - none</p> <p>Colorado State Severance tax - mining or extraction operations only</p> <p>Colorado State Software property tax - none</p> <p>Colorado State Unitary tax method - requires members of an affiliated group to file a combined return to determine the portion of total income that may be attributable to Colorado.</p> <p>Unemployment tax new employers - 1.70% of first \$13,100 of wages</p> <p>Unemployment tax experienced employers - 0.62% - 8.15% of first \$13,100 of wages (state rates vary by industry)</p> <p>Source: Stockman Kast Ryan & Company, January 2019</p> |
| Applicable rate and conditions | <p>Colorado Income Tax: 4.63%</p> <p>Colorado State Sales & Use Tax: 2.90%</p> |
| Tax incentives and other programs available? | Enterprise Zone± (see matrix) |

B - Local taxes

| | |
|---|--|
| Provide list of possible local taxes (ex. assets, inventory, franchise, etc.) | <p>Business Personal Property Tax</p> <p>Tax calculation: Market Value x Assessment Level x Mill Levy = Approximate Taxes Due</p> <p>Example: A property with a market value of \$2,000,000 \$2,000,000 x 0.29 x 0.075</p> |
|---|--|

| | |
|--|--|
| | Property tax = \$43,546 |
| Applicable rate and conditions | Sales and Use Tax: State Tax = 2.90% El Paso County Tax = 1.23% City of Fountain Tax = 3.75% Total Tax = 7.88% |
| Tax incentives and other programs available? | Fountain Urban Renewal Authority± (see matrix) |

C - Incentive programs available in region

| | |
|-----------------------------------|------------|
| Incorporation tax credit | Yes |
| Investment tax credit | Yes |
| Job training credit | Yes |
| Procurement tax credits | No |
| Community enhancements grants | Yes |
| Brownfield development incentives | Yes |
| Other incentives | See Matrix |

Permitting and environmental

A -General

| | |
|---|--|
| Is there permitting assistance available? | DRT (City); Fast Track Permitting (County) |
| What is the general structure for permitting, (state, county, city, etc.) | El Paso County |
| License requirements for: | |
| Boiler operators | TBD |
| Wastewater treatment operators | TBD |
| Other operators | TBD |

B - Permits required (when applicable) and expected required time to obtain

| | |
|--|-----------------|
| Air | Pending Details |
| Pre-existence of Title V permit for site (if yes, please provide, if possible, a copy of the permit) | |
| Attainment status of area | |
| Fresh water | Pending Details |
| Pre-existence of water withdrawal permit for site (if yes, please provide, if possible, a copy of the permit) | |
| Effluent | Pending Details |
| Pre-existence of a National Pollutant Discharge Elimination System (NDPES) permit (if yes, please provide, if possible, a copy of the permit) | |

| | |
|--|-----------------|
| Total maximum daily load (TMDL) status of river | |
| Storm water | Pending Details |
| Pre-existence of storm water discharge <i>(if yes, please provide, if possible, a copy of the permit)</i> | |

C - Noise

| | |
|--------------------------------|---|
| Levels permitted from site | Heavy Industrial Boundary ; Fort Carson Base |
| Special considerations at site | Height restrictions may apply with Butts Army Airfield (per proximity of development site) |

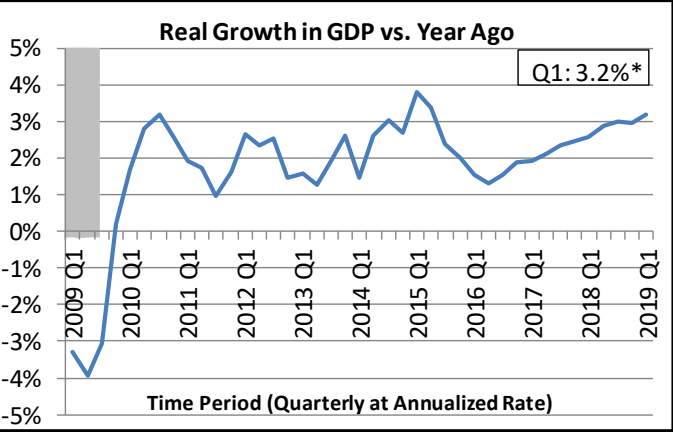
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ATTACHMENT: Dashboard June 2019

The following report is a monthly report created by the University of Colorado Colorado Springs which gives an overview of the Colorado Springs labor force, employment opportunities, wages, military, demographics and more.

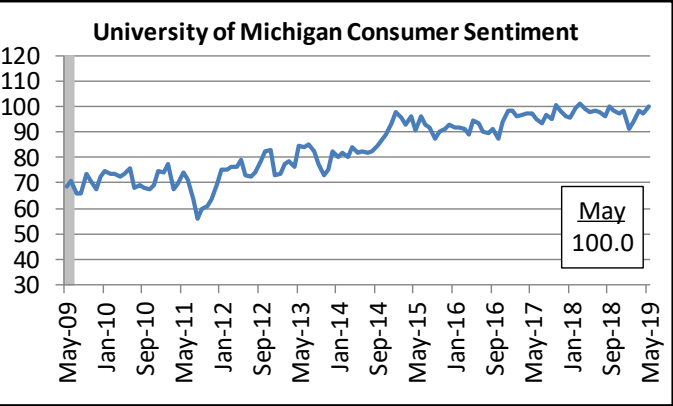
The Big Picture

U.S. Quarterly GDP



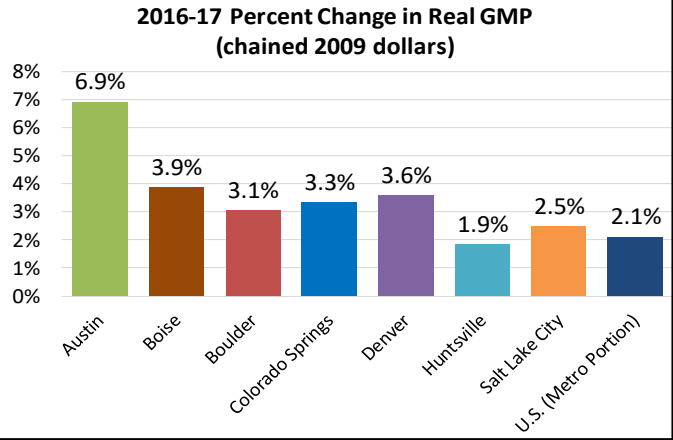
Source: U.S. Bureau of Economic Analysis
*May release of Real GDP Percent Change from Q1 Year Ago, SA

U.S. Consumer Sentiment



Source: University of Michigan

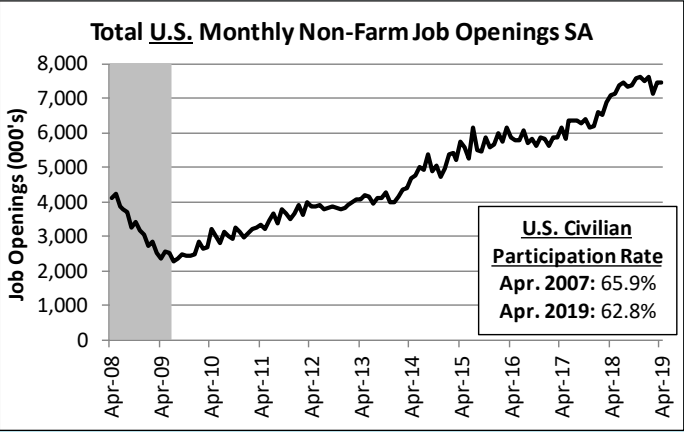
MSA Real GMP



Note: Military data is included in GMP. Real GMP is adjusted for regional price parity (RPP). Percentage change compares 2017 to 2016 real GMP.
Source: U.S. Bureau of Economic Analysis

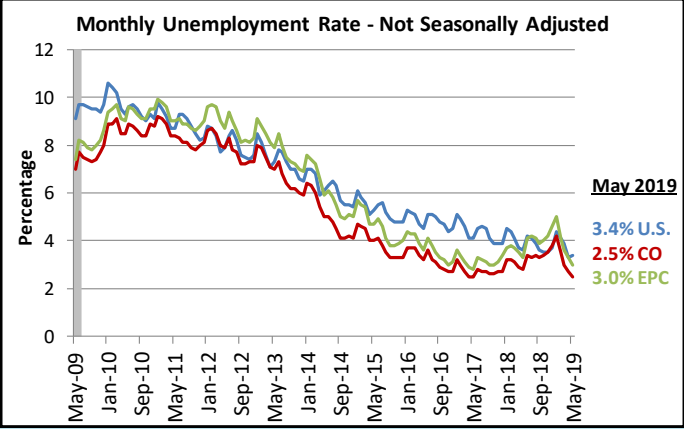
Labor Force/Employment

U.S. Non-Farm Job Openings



Source: U.S. Bureau of Labor Statistics; Job openings data lags.

Unemployment Rate



Sources: U.S. Bureau of Labor Statistics; CO Dept. of Labor & Employment LAUS; Data not seasonally adjusted.

Inflationary Measures

| U.S. Consumer Price Index - May 2019 | | |
|---|-----------|--------------------|
| | All items | Less food & energy |
| Change from April 2019 to May 2019 (SA) | 0.1% | 0.1% |
| Last 12-months (NSA) | 1.8% | 2.0% |

Source: U.S. Bureau of Labor Statistics; data for all urban consumers (CPI-U)



Economic Forum
COLLEGE OF BUSINESS
UNIVERSITY OF COLORADO
COLORADO SPRINGS

updated (06/21/2019)

Local Labor Force/Employment

Colorado Springs MSA Job Openings

May 2019

Average daily job openings: 13,884
Average posting duration: 26 days
Median salary of posted jobs: \$78,650
Colorado median salary: \$74,650

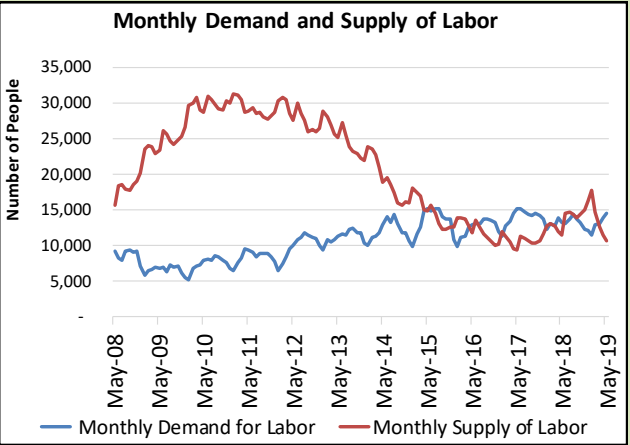
Top Job Titles

Registered Nurse (1,735 jobs)
Software Engineer (948 jobs)
Customer Service Rep (937 jobs)
Systems Engineer (882 jobs)
Systems Administrator (783 jobs)
Administrative Assistant (725 jobs)
Certified Nursing Assistant (704 jobs)
Medical Assistant (702 jobs)
Driver Cdl (684 jobs)
Sales Rep (636 jobs)

| May 2019 | |
|------------------|-----------------|
| Demand for Labor | Supply of Labor |
| 14,489 | 10,566 |

Sources: Pikes Peak Workforce Center—CEB TalentNeuron™; U.S. Bureau of Labor Statistics; CO Dept. of Labor and Employment; UCCS Economic Forum

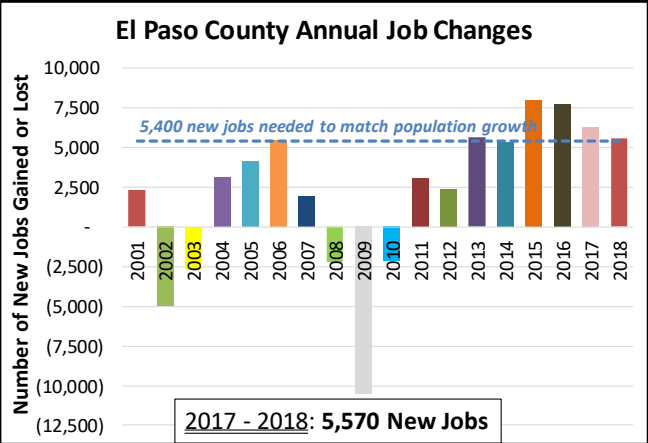
Colorado Springs MSA Labor Force



Sources: Pikes Peak Workforce Center—CEB TalentNeuron™; U.S. Bureau of Labor Statistics; CO Dept. of Labor and Employment; UCCS Economic Forum

Local Employment/Wages

El Paso County New Jobs



Source: Colorado Department of Labor and Employment, Quarterly Census of Employment and Wages (QCEW); UCCS Economic Forum

Actual New jobs in El Paso County
2017 to 2018: 5,570

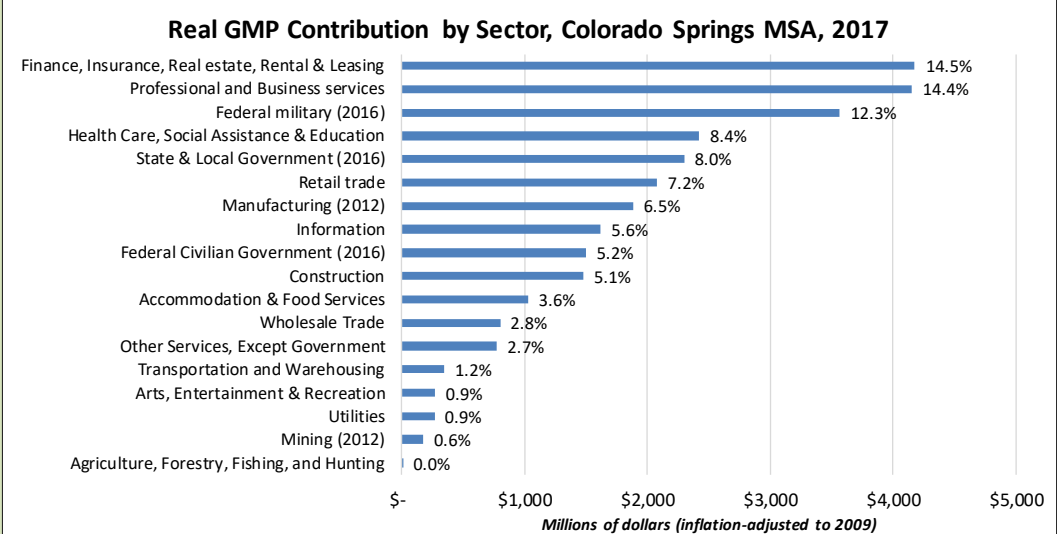
Estimated New Jobs Needed (2015-2020)
5,400 (or 2% growth rate)

Estimated jobs needed based upon population growth and age composition; calculated by the UCCS Economic Forum.

Note: QCEW data lags by up to two quarters and does not include military-related employees.

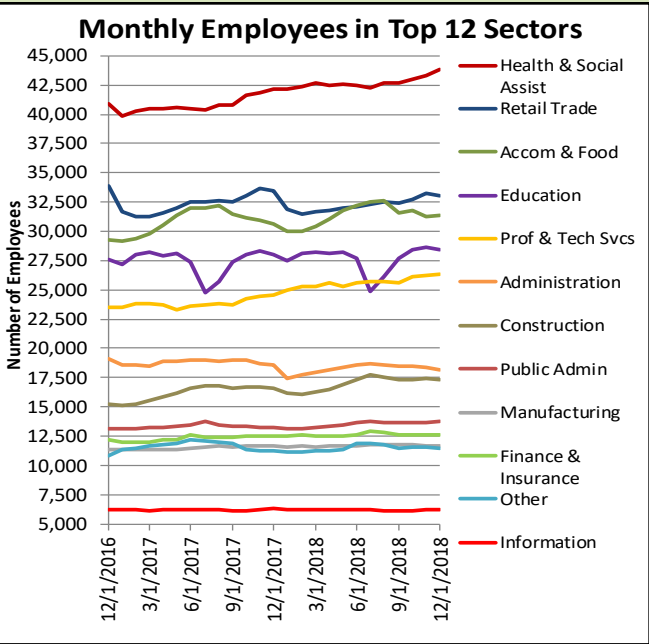
Sources: U.S. Bureau of Labor Statistics and Colorado Department of Labor and Employment, QCEW. See military section for military employment sources.

Colorado Springs MSA GMP by Sector



Manufacturing and Mining data last disclosed in 2012. Government data last disclosed in 2016.
Source: U.S. Bureau of Economic Analysis

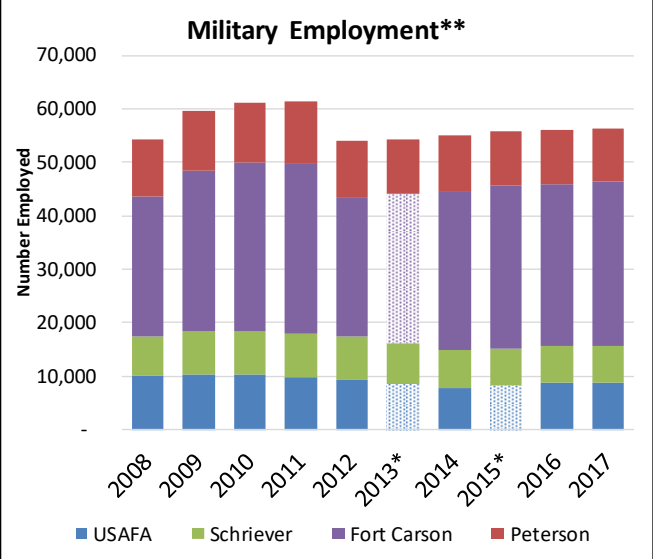
El Paso County Employment in Selected Sectors



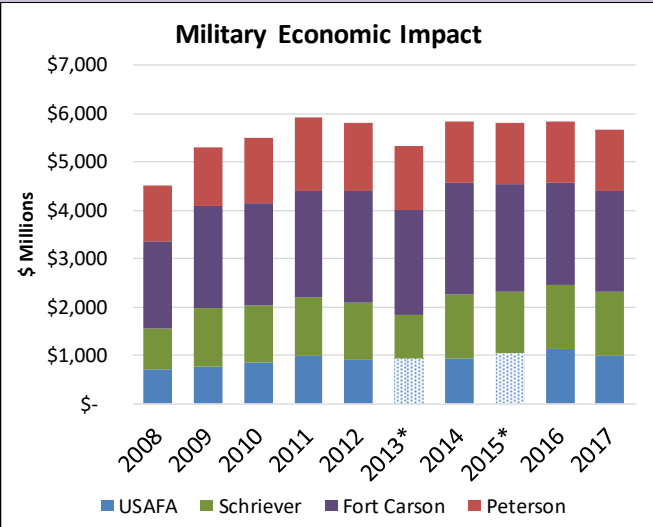
| 2018 Average Annual Wages for All Industries | | | |
|---|----------|----------------|---------------------------------|
| U.S. | Colorado | El Paso County | El Paso County Total Employment |
| \$57,265 | \$58,916 | \$50,492 | 276,351 |
| El Paso County wages are <u>11.8%</u> lower than U.S. wages. | | | |
| El Paso County wages are <u>14.3%</u> lower than CO wages. | | | |
| *Estimated military employment in 2017 (and % of total EPC employees who are military). | | | 56,168 (17.2%) |

Military

El Paso County Employment



Expenditures in El Paso County



*2013 and 2015 data was not available for all locations. Textured bars are an estimate in 2013 and 2015 made by the UCCS Economic Forum .
**The employment numbers for Schriever and Peterson include significant numbers of civilian contractors. The employment numbers for USAFA include cadets and several kinds of contract workers.
Sources: Department of Military and Veteran Affairs; Colorado Springs Chamber of Commerce & EDC; respective military installations

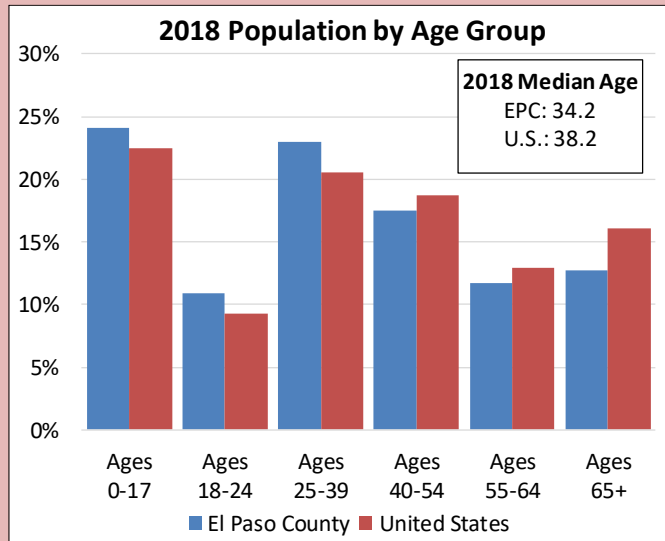
Demographics

2018 Population

| Colorado Springs (city) | El Paso County | Colorado Springs MSA |
|-------------------------|----------------|----------------------|
| 472,688 | 713,856 | 738,939 |

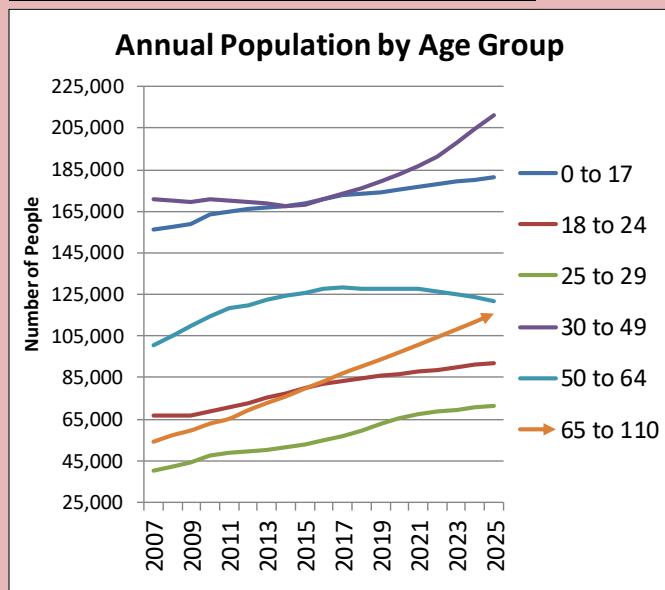
Colorado Springs MSA is made up of El Paso and Teller Counties.
Source: U.S. Census Bureau, Population Division

El Paso County & U.S. Age Groups



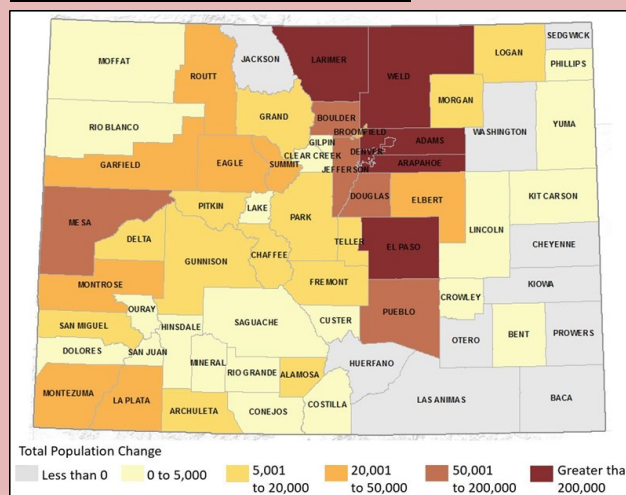
Source: U.S. Census Bureau, Population Division

El Paso County—Population Projections



Source: Colorado Department of Local Affairs, State Demography Office

Population Growth 2015-2050



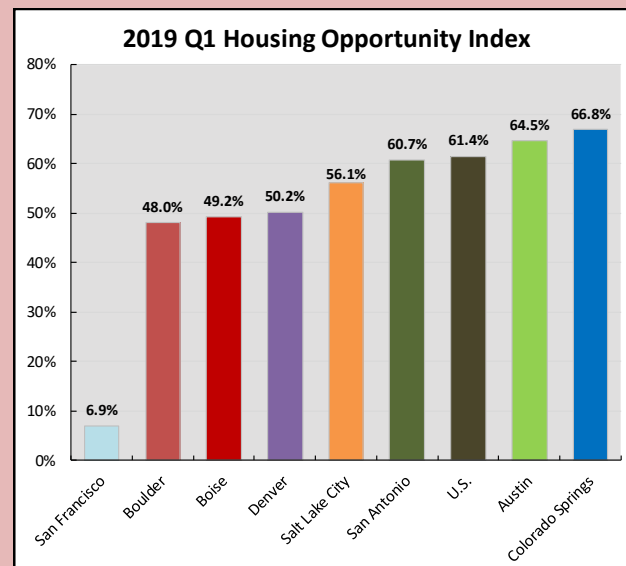
The State Demography Office projects a population increase of **400,308** additional people between 2015-50.
Source: Colorado Department of Local Affairs, State Demography Office

Population Estimates

| | 2015 | 2050 |
|----------------|-----------|-----------|
| El Paso County | 674,933 | 1,075,535 |
| Colorado | 5,444,871 | 8,105,925 |

Source: Colorado Department of Local Affairs, State Demography Office

Cost of Living

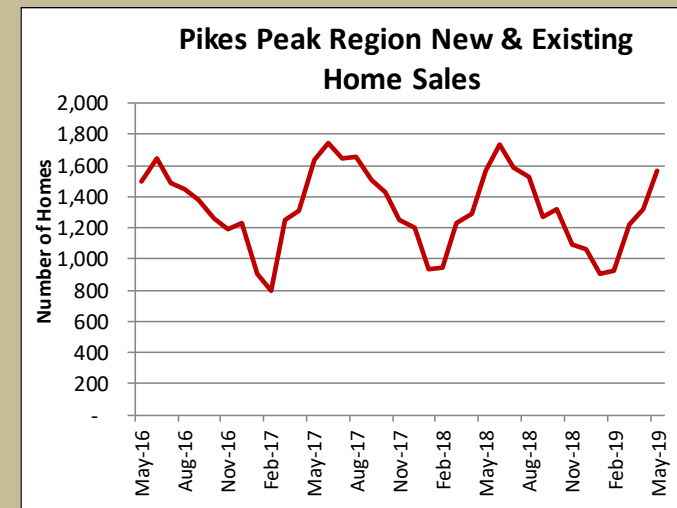


Notes: The Housing Opportunity Index (HOI) is defined as the share of homes sold in that area that are affordable to a family earning the local median income, based on standard mortgage underwriting criteria. It includes new and existing homes.

Sources: National Association of Home Builders; Wells Fargo

Real Estate

Monthly Home Sales

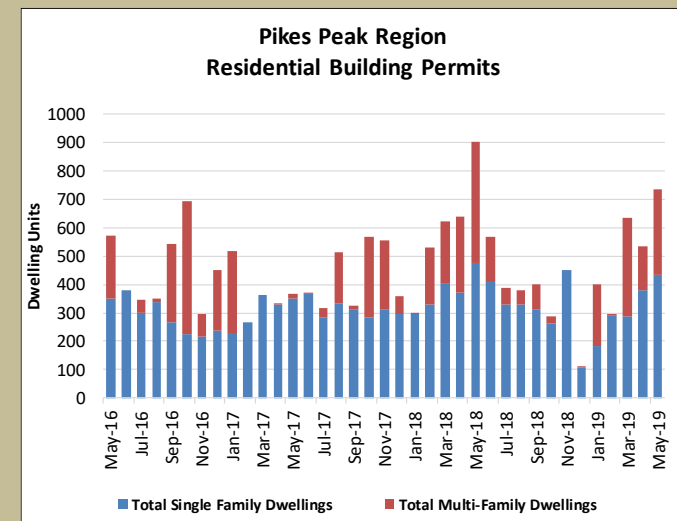


Median Existing Single-Family Home Price 2019 Q1

| Location | Colorado Springs | Denver | Boise | United States |
|-----------------|------------------|---------------|---------------|---------------|
| Price | \$296,400 | \$446,600 | \$269,400 | \$254,800 |
| 1-year % Change | 0.1% decrease | 1.2% increase | 9.5% increase | 3.9% increase |
| MSA Rank | 27 | 11 | 46 | n/a |

Sources: Pikes Peak REALTOR® Services Corp.; National Association of REALTORS® Includes existing homes only.

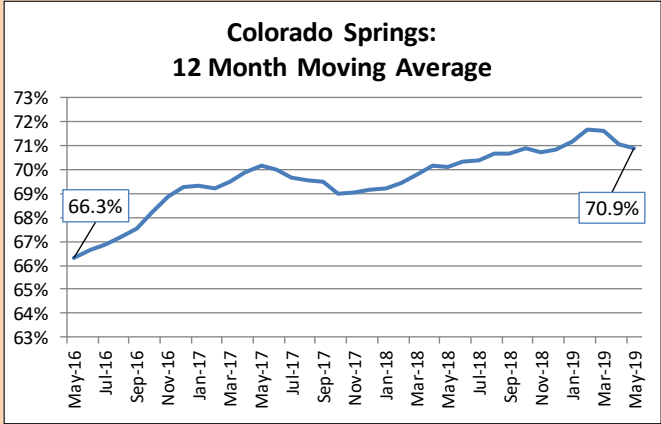
Monthly Building Permits



Source: Pikes Peak Regional Building Department

Tourism

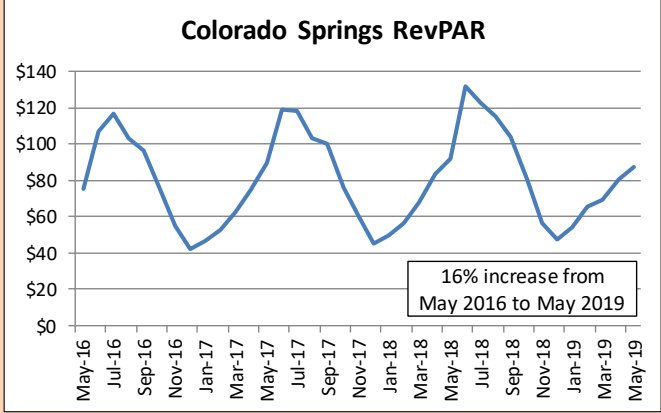
Hotel Occupancy Rate



| Hotel Occupancy Rate May 2019 | | |
|----------------------------------|--------|----------|
| Colorado Springs | Denver | Colorado |
| 73.6% | 77.6% | 69.5% |

Source: Colorado Hotel & Lodging Assoc., Rocky Mountain Lodging Report

Hotel RevPAR

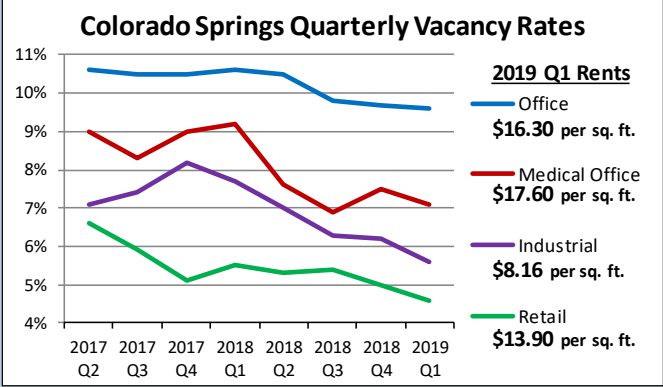


| Hotel RevPAR May 2019 | | |
|--------------------------|----------|----------|
| Colorado Springs | Denver | Colorado |
| \$87.11 | \$112.99 | \$99.29 |

Source: Colorado Hotel & Lodging Assoc., Rocky Mountain Lodging Report

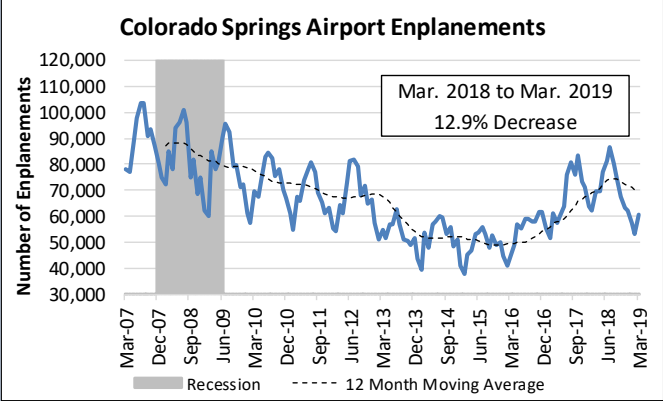
Additional Metrics

Colorado Springs Commercial Real Estate



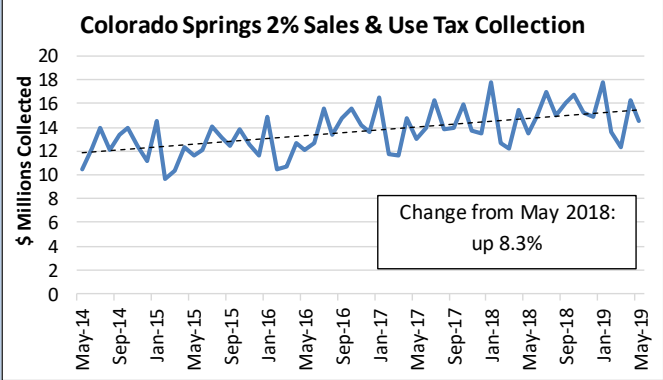
Sources: CoStar Group™; Olive Real Estate Group, Inc.

COS Enplanements



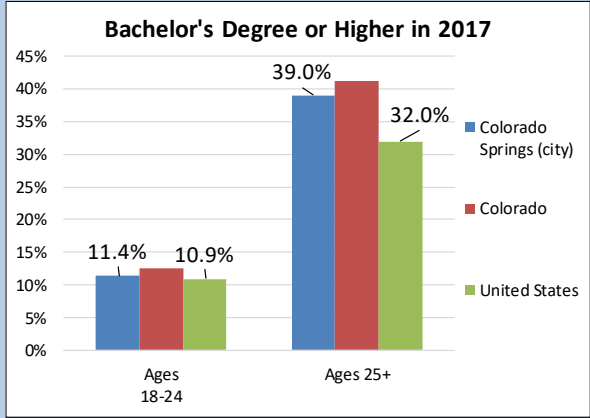
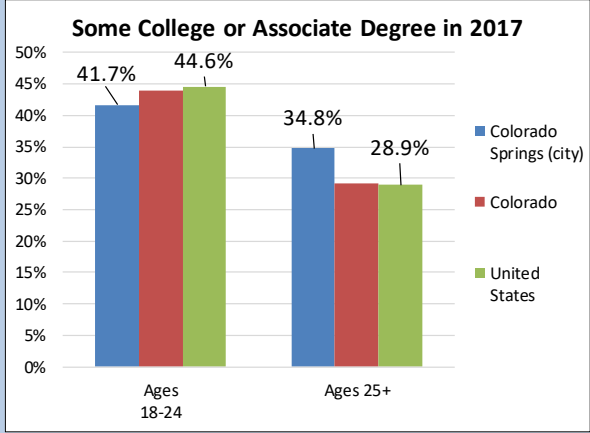
Source: Colorado Springs Airport

Monthly Sales & Use Tax Collection



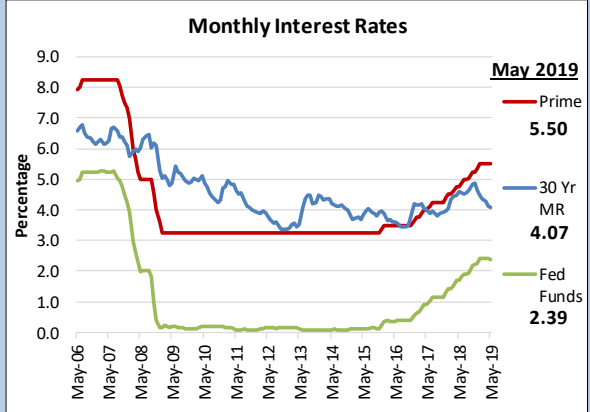
Source: City of Colorado Springs

Educational Attainment



Source: U.S. Census Bureau, American Community Survey

U.S. Interest Rates



Source: Board of Governors of the U.S. Federal Reserve System

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