

2019

# Eloy Pathway to Economic Prosperity

**City of Eloy Economic Development Strategic Plan  
July 22, 2019**

# Eloy

## Pathway to Economic Prosperity

### Economic Development Building Blocks

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July 22, 2019

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# CITY OF ELOY

## ARIZONA

July 22, 2019

Dear Eloy Residents, Businesses and Investors:

On behalf of the City Council and Eloy staff, I am proud to present this Economic Development Strategic Plan for the City of Eloy. This document is the result of significant time and expertise provided by many Eloy leaders, from both the private and public sectors. Following the Great Recession of the last decade, Eloy simply has not bounced back with regard to attracting new industry and investment—the reasons of which are outlined in the document. However, Eloy exhibits numerous assets that, if utilized properly, can make Eloy an employment center worthy of its location on I-10. Such a robust center would not only benefit our existing residents, but also those who move to our community looking for the opportunity to put down roots, raise a family and retire comfortably. The intent of this plan is to do just that.

Over 30 individual interviews were completed and round table discussions were held with local industry representatives and the real estate community. An Economic Development Advisory Committee was formed, with 15 key folks providing their valued experience and expertise to make the result of this effort aggressive and realistic. They met and discussed all of the elements in this plan, refined concepts presented by the consultant team and contributed greatly to this guidepost for the future.

Also, let me thank City staff and our consultant team from ESI for listening to the community issues and aspirations and turning those into a road map to direct Eloy's economic future. I would especially like to acknowledge the Chamber of Commerce for their active involvement and stepping up to claim responsibility for several of the activities that are necessary for our success.

This Economic Development Strategic Plan belongs to the community. All of our organizations, associations and residents will need to play a visible and ongoing role to achieve collective success. I call on everyone to imagine a successful, vibrant community with a well-educated population and a strong work ethic to make Eloy the very best.

Thank you,

A handwritten signature in black ink that reads 'Joel G. Belloc'. The signature is written in a cursive, flowing style.

Mayor Joel Belloc

## Acknowledgements

This report was prepared in consultation with the City of Eloy including City Council, staff, the Economic Development Advisory Committee, and key community stakeholders.



*This report was sponsored by Arizona Public Service through the Economic Development Department.*

Prepared by ESI Corp in collaboration with Michael Baker International and L.L. Consulting



**Special thanks to the following for their time and invaluable contribution to the creation of this strategic economic development plan.**

<b>Eloy Council Members, City Manager and Staff</b>
Mayor Joel G. Belloc
Vice Mayor Micah Powell
Andrew Rodriguez
Jose Garcia
Georges Reuter
Daniel Snyder
J.W. Tidwell
JoAnne Galindo (former Council Member)
Harvey Krauss, City Manager
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Paul Anchondo, Eloy Community Services Director
Jeff Fairman, Eloy Economic Development Specialist
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Jon Vlaming, Eloy Community Development Director
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**Eloy Economic Development Advisory Committee**

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Evelyn Casuga	Central Arizona College
Jeffrey Fairman	City of Eloy Economic Development
John Gluch	Core Civic/EDGE
Irene Higgs	SCMPO
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Kelly Patton	APS
John Peterson	Eloy AAComm/P&Z
Dan Snyder	Eloy City Council
Ralph Varela	Pinal Hispanic Council
Jon Vlaming	City of Eloy Community Development Department

# Acronyms and Abbreviations

ADOT	Arizona Department of Transportation
APS	Arizona Public Service
ASU	Arizona State University
CAAG	Central Arizona Association of Governments
CAC	Central Arizona College
CAIDD	Central Arizona Irrigation and Drainage District
CAVIT	Central Arizona Valley Institute of Technology
CD	Community Development
CEDS	Comprehensive Economic Development Strategies
CFA	Center for the Future of Arizona
CIP	Capital Improvement Plan
CM	City Manager's Office
C of C	Chamber of Commerce
CS	Community Services
CTE	Career Technical Education
DAC	Downtown Advisory Commission
EDGE	Economic Development Group of Eloy
EHA	Eloy Housing Authority
IMPLAN	Impact Analysis for Planning
NAICS	North American Industrial Classification System
PC	Pinal County
PCFCU	Pinal County Federal Credit Union
ROW	Right of Way
SBDC	Small Business Development Center
SCMPO	Sun Corridor Metropolitan Planning Organization
UA	University of Arizona

## Executive Summary

Over the last 25 years, the City of Eloy has been engaged in economic development and first underwent a *Focused Future* strategic planning process in 1994. During this time, the City has participated in a variety of economic development organizations including Pinal Alliance for Economic Growth, the successor of Central Arizona Regional Economic Development Foundation (CAREDF); funded the Economic Development Group of Eloy (EDGE); and became a member of the Pinal Partnership. However, economic development success has continually eluded the community. Lack of key infrastructure investment and sluggish resident population growth have contributed to the city's stagnation. Without investment, there are no jobs, and without jobs, little incentive exists for young people and workers to remain in the community.

The state's economy has been on the rebound since coming out of the Great Recession, and there is economic development momentum within Pinal County. To capitalize on this momentum, the City of Eloy desires more active engagement in economic development and is making significant investments in downtown that include the construction of the new Eloy City Hall and redevelopment of the Police Department into a public safety facility. The City is also in the midst of implementing the Main Street façade improvement program. They also recently hired a full time economic development manager.

This economic development strategic plan provides the community with a sharpened focus that is more than just creating or retaining jobs and expanding the tax base. It's also about creating a climate that's attractive for investors and businesses and a place where workers and their families can flourish. To attract and retain investment, a community must have cultural amenities, modern infrastructure, quality schools, broadband and a trained workforce with skills that match business needs. This strategic plan offers the framework to improve the social and economic prosperity of Eloy residents, workers and visitors.

### Planning Process Overview

The planning process included extensive input from Eloy council members and staff, key economic development partners, and business stakeholders and is depicted in Figure 1. A total of 33 one-on-one interviews were conducted. In addition, an Economic Development Advisory Committee (EDAC) of 13 members was constituted to provide direction on Eloy's opportunities, industry targets, and overarching goals and strategies. Two roundtable discussions were also held with area employers and real estate brokers/developers to solicit their insight on Eloy as a business destination. Independent research was also undertaken to assess Eloy's strengths to support and sustain economic development, and identify any challenges that may need to be overcome. The culmination of this inclusive process was the creation of this strategic plan.

Figure 1 – Planning Process



## The Challenge

According to the U.S. Census Bureau, the population of Eloy has grown 69 percent since the 2000 Census. However, nearly half of this growth has occurred within the institutionalized prison population. The ability to attract or grow local business is highly dependent on population, household and workforce growth.

This lack of resident population growth is compounded by a deficiency in new housing developments that are not targeted to those 55 years of age and older. Lack of available housing leads to economic instability, places the city in a competitive disadvantage and stymies spending and employment in the surrounding economy. People will not move to a community if they can't find a decent house or property to live in.

The K-12 schools that serve Eloy lag in their overall performance in preparing students to succeed and compete in a global economy. Education has the power to change lives by increasing productivity, creativity and the standard of living of residents. It also promotes entrepreneurship and plays a critical role in securing economic and social progress, and improving lifelong earning potential. Education is a fundamental factor for achieving economic development success. Enhancing school performance will require an objective review and a commitment to making necessary changes.

Communities successful in economic development understand the necessity of “shovel ready” sites. Due to competitive economic forces and customer product delivery demands, companies make market decisions faster than ever before. Shovel ready sites take much of the time, expense, unpredictability and risk out of the development. Shovel-ready sites simplify the development process and greatly reduce risk by eliminating most of the unknowns from the site selection decision, and increasing the predictability of getting the land developed, the building constructed and the business up and running. In order for Eloy to be competitive, it will need to deliver to the market place shovel ready sites.

Quality of life and community amenities are key factors that attract new residents and business. Quality of life includes a multifaceted balance of indicators from jobs and education to healthcare and housing. It also includes arts and culture and infrastructure. In order to strengthen Eloy's economy, community leaders will need to make sure all of these pieces are in place and working in harmony with one another.

### The Opportunity

Pinal County population grew 145 percent since the 2000 census. Employment projections from the State demographer's office indicate that Pinal County is expected to add 13,000 jobs by the year 2026. Eloy is situated in the path of growth and city leaders would like to build an adequate tax base and capture a greater share of jobs through a strategic focus of business retention, expansion and attraction, infrastructure improvements, housing development, image enhancement and downtown revitalization.

Today, downtowns are the focus of many small communities who leverage this asset to rebuild their economies. Downtown Eloy used to be a commerce center surrounded by vibrant neighborhoods. Today, there is very little business located downtown and the surrounding neighborhoods have aged and, in some cases, suffer from neglect. Maintaining the places and institutions that make a community special contributes to a sense of place and neighborhood identity, which help retain existing residents and could attract new residents and businesses. The City of Eloy recognizes downtown as an asset and has laid out goals in their updated Economic Development Element (2019 Major General Plan Amendment) to encourage new development, promote preservation and rehabilitation, stabilize and reinvest in downtown neighborhoods and make significant public investments to foster private investment and job creation.

Housing availability and affordability is important to attracting new business. When the local workforce can't find adequate housing, the entire community suffers. It has been well-established in past research that having access to affordable and stable housing in good neighborhoods is associated with positive health, education and economic outcomes for individuals and families. But having a sufficient supply of housing affordable to households within the full income spectrum is also critical to supporting vibrant and sustainable local economies. Eloy has the opportunity to support and facilitate the development of housing.

Deploying a strategic focus on key industry targets is an important element of this plan. Communities across the country desire to pinpoint the industries that have the highest probability of expanding or locating in their region or community. Consequently, targeting industry sectors is a vital step to an overall economic development strategy and implementation plan. Industry targeting will help Eloy focus its efforts to ensure that the city is leveraging the strengths of its market and utilizing its limited resources in the most effective manner possible.

### Mission and Vision

The mission of economic development for the City of Eloy is to enhance the economic, political, and social prosperity of Eloy residents, workers and visitors. During the planning process an economic development vision, in which the strategic priorities are embedded, was established. The vision is as follows:

***Eloy has achieved a vibrant economy and thriving downtown through the provision of quality housing, job creation, adequate infrastructure and supportive amenities.***

### The Strategy

This strategic plan was developed in collaboration with Eloy policy makers, city staff, and economic development stakeholders. It provides the framework to improve social and economic prosperity for Eloy residents, workers and visitors. This plan recognizes the opportunities and constraints that exist for Eloy and lays out the mission of economic development, the vision for the future and the fundamental building blocks necessary to prepare the City to achieve its desired economic prosperity.

The economic development strategy is designed around four key building blocks which are anchored with overarching goals, as noted in Table 1. These major initiatives are not independent of one another and will require achieving progress within each initiative in order to achieve momentum.

***Table 1 – Economic Development Strategic Plan Building Block and Goals***

Building Block	Goals
<b>DOWNTOWN</b>	Main Street exudes a hip vibe of restaurants, shops and activities supported by quality neighborhoods that offer housing choice.
<b>INFRASTRUCTURE AND HOUSING</b>	Eloy has adequate infrastructure, utilities, community amenities, and housing that attracts businesses and residents.
<b>JOBS</b>	New jobs are available in Eloy by quality employers with a focus on diversity and multiple salary levels.
<b>IMAGE</b>	Eloy brands itself as a prime regional location for business, community growth and capital investment.

The City of Eloy is in a position to change the economic trajectory of the community by leveraging its location, investing in infrastructure, paving the way for new housing development, revitalizing downtown, and rebranding the image of the community. Strategically aligning City resources to create/attract jobs that pay a wide spectrum of wages is a focus of this strategic plan. There are six industry clusters that have been identified as suitable for Eloy. Within these six clusters are 44 industries that are immediate targets and 10 future targets as noted in the following Table 2. A list of industries is represented in Table 14, and the complete cluster analysis and summary table are included in Appendix D.

*Table 2 – Eloy Industry Clusters*

	Number of Industries	
	Immediate	Future
Agribusiness	6	
Arts, Entertainment, Recreation & Visitor Industries	5	
Business & Financial Services	2	
Manufacturing	27	10
Personal & Commercial Services	1	
Transportation & Logistics	3	
Total	<b>44</b>	<b>10</b>

Achieving the goals of the strategic plan requires an equal focus on job growth, product improvement and marketing and promotion. Each building block is anchored with a goal followed by strategies and a series of tactics for implementation. Identification of short term (1-3 years) versus mid-term strategies (4+ years) will determine the timing for achieving desired outcomes. Performance metrics are established to track progress in incremental achievement of desired outcomes. Performance measures have also been identified for each initiative, along with the lead and supporting organizations taking responsibility for implementation.

## Plan Execution and Oversight

The success of this ambitious strategy requires the continued alignment of goals and funding priorities among City departments and organizations who have a role to play in the City’s economic success. This strategic plan necessitates reliable multi-year operating support for the key initiatives, including work that supports job growth, capital improvements that foster economic development, and marketing and promotion that propels the community forward. Without adequate resources this economic development plan will not be successful.

The City will collaborate with public and private sector partners throughout the community and region to carry out the actions recommended by the strategic plan. The Economic Development Manager will manage oversight of the implementation strategy. He should meet quarterly with the Community Development Director and City Manager to review the plan, discuss progress that has been made towards implementation, establish priorities, and provide accountability for meeting the objectives of the strategy. The Economic Development Manager will also provide timely updates to City Council, Eloy Planning and Zoning Commission, and Downtown Advisory Commission. As necessary, the plan should be modified to reflect new partners, changes in market conditions, new opportunities, and the like.

## Economic Landscape

An analysis of the existing local economy of the City was prepared to understand of population and employment gains, socio-economic characteristics and workforce migration patterns. Data provided within this chapter originates from a variety of sources including the decennial U.S. Census, the American Community Survey (ACS), Arizona Department of Administration, and Esri.

It is important to point out that data from all sources include the incarcerated population within the figures. Given that this cohort represents nearly 50 percent of Eloy’s population, some of these datasets present a distorted picture of Eloy’s household population. To overcome this problem, an aggregation of Eloy block group data was compiled and analyzed for educational attainment, age by sex, and race-ethnicity. Appendix B provides a map and list of block groups used.

### Population Growth and Demographics

Eloy experienced exponential growth between the years 2000 and 2017 with the addition of 7,162 people, however, nearly half of this growth can be attributed to the institutionalized correctional population, which increased by 7,017 people, compared to resident household population that increased 151. Household population, as a percent of total population, has steadily declined from 86 percent of total population in 2000 to just 52 percent in 2017.

*Table 3 – Eloy Population and Household Population Growth*

	2000	2010	2017	2000-2017 Change
<b>Total Population</b>	<b>10,375</b>	<b>16,631</b>	<b>17,537</b>	<b>7,162</b>
Correctional Institution Population	1,482	7,293	8,499	7,017
Total Household Population	8,887	9,332	9,038	151
Household pop as % of Total	86%	56%	52%	--

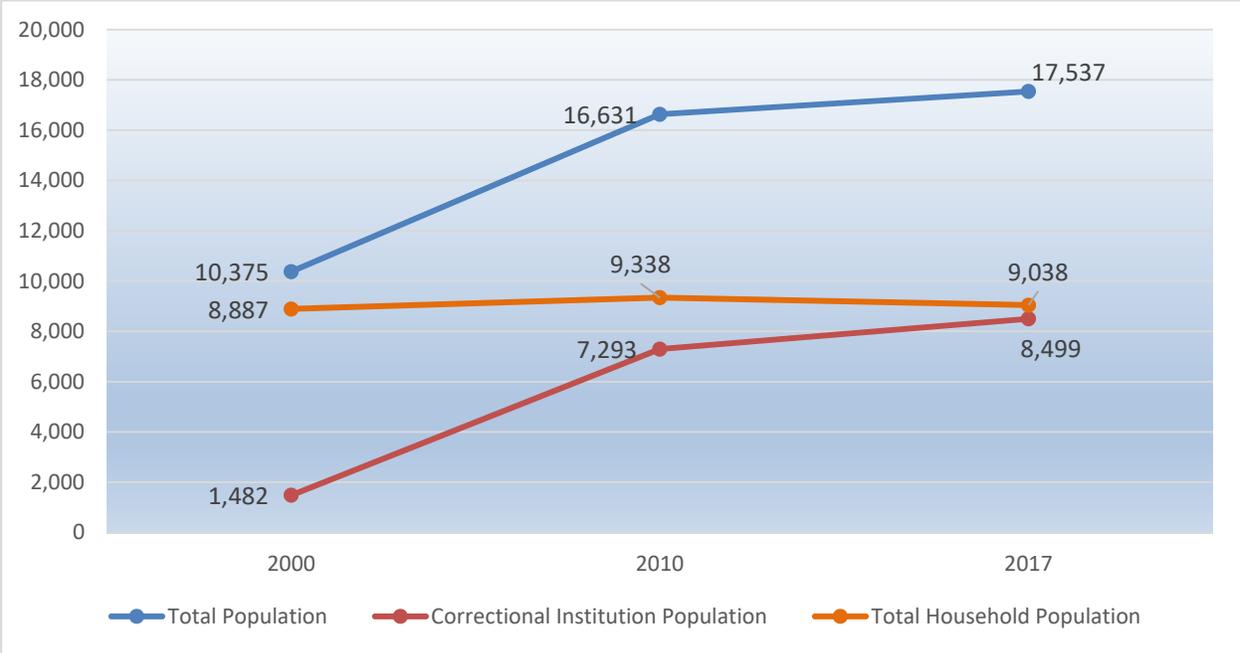
Sources:

U.S. Census Bureau, Census 2000 Summary File 1

U.S. Census Bureau, Census 2010 Summary File 1

U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

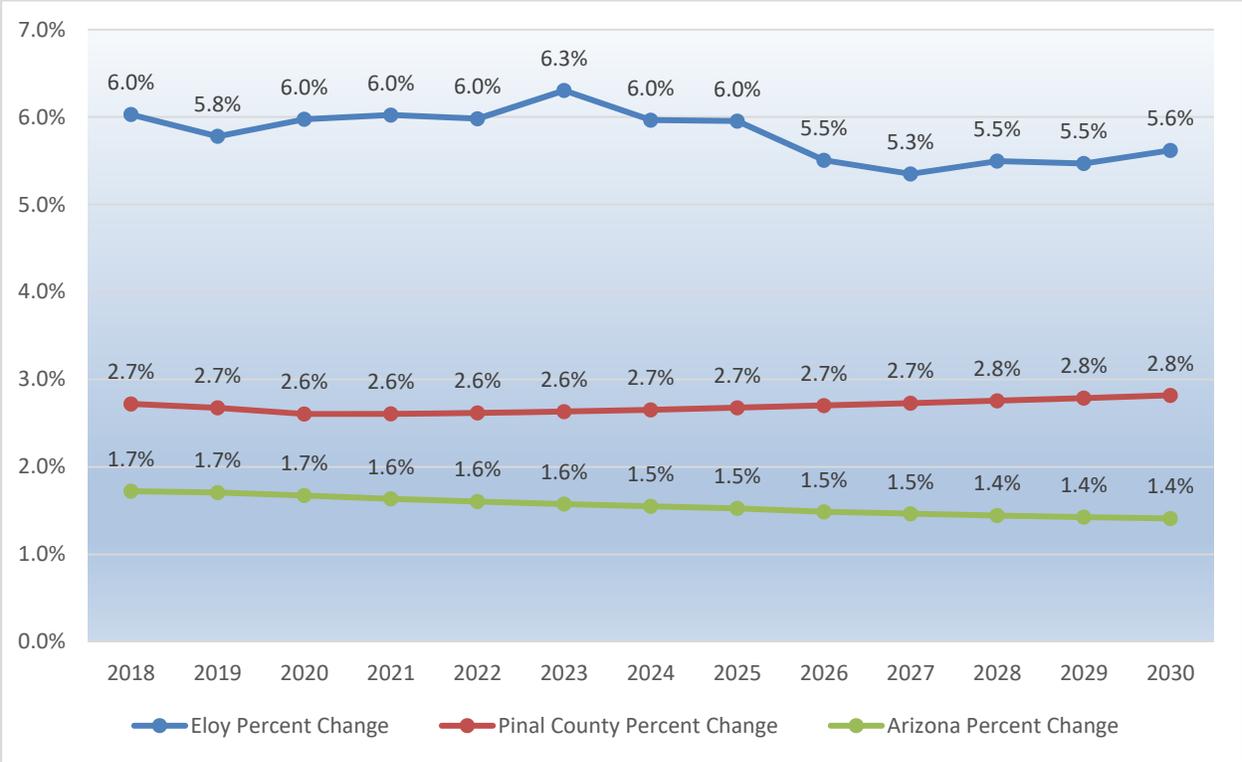
Figure 2 – Eloy Household versus Correctional Population Growth Comparison, 2000-2017



Source: Same as Table 2

Growth projections provided by the Office of Employment and Population Statistics do not distinguish household population projections from the total population, so it is impossible to isolate the true projected growth of the community through the year 2030. Based on the State’s data presented in Figure 3, Eloy will continue to experience an annualized growth rate between 5 and 6 percent. This rate of growth is faster than Pinal County and Arizona. By the year 2030, Eloy is projected to have a population of 41,824 people.

Figure 3 – Population Growth Projections, 2018-2030



Source: Arizona Department of Administration, Office of Employment & Population Statistics, 12/11/2015

### Housing

The total number of housing units in Eloy increased by 957 units during the years 2000 to 2010, but decreased by 73 units over the years 2010 to 2017 (Table 4). Population within owner-occupied housing units has been stagnant over the 17 year timeframe, while population within renter-occupied units increased 4.4 percent. When the “combined” data in Table 4 is reviewed, occupied housing units increased 17.4 percent, but the number of people living in these units only increased 1.7 percent.

Table 4 – Eloy Housing Units, 2000-2017

	2000	2010	2017	2000-10 Change	2010-17 Change	2000-17 Change
Total housing units	2,734	3,691	3,618	35%	-2.0%	32.3%
Vacant housing units	242	707	693	192%	-2.0%	186.4%
Owner-occupied housing units	1,548	1,829	1,833	18%	0.2%	18.4%
Average HH size of owner-occupied unit	3.62	3.10	3.06	--	--	--
Population in owner-occupied housing	5,604	5,670	5,609	1%	-1.1%	0.1%
Renter-occupied housing units	944	1,155	1,092	22%	-5.5%	15.7%
Average HH size of renter-occupied unit	3.48	3.17	3.14	--	--	--
Population in renter-occupied housing	3,285	3,661	3,429	11%	-6.3%	4.4%
<b>Combined</b>						
Occupied housing units	2,492	2,984	2,925	20%	-2.0%	17.4%
Population in occupied housing	8,889	9,331	9,038	5%	-3.1%	1.7%
Average HH size	3.57	3.13	3.09	--	--	--

Sources:

U.S. Census Bureau, Census 2000 Summary File 1

U.S. Census Bureau, Census 2010 Summary File 1

U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

Housing construction has also slowed considerably since 2010, principally due to the recession. According to the American Community Survey, only 288 housing units have been constructed from 2010 to 2017. This compares to 1,328 over the 19 year timeframe from 1990 to 2009. This data shows an aging housing stock, with the majority of homes built prior to 1970. According the City staff, since 2010 there have been 835 new single family housing units constructed, which is in stark contrast to the Census data. This implies there is some vibrancy in the market, but it’s focused on product for the 55+ age retired demographic. However, having a sufficient supply of housing affordable to households within the full income spectrum is critical to supporting vibrant and sustainable local economies.

Table 5 – Eloy Housing Construction Year

Total Eloy Housing Units	3,618	100.0%
Year Constructed		
2010 and later	288	8.0%
1990-2009	1,328	36.7%
1970-1989	1,139	31.5%
1950-1969	686	19.0%
1940 and earlier	177	4.9%

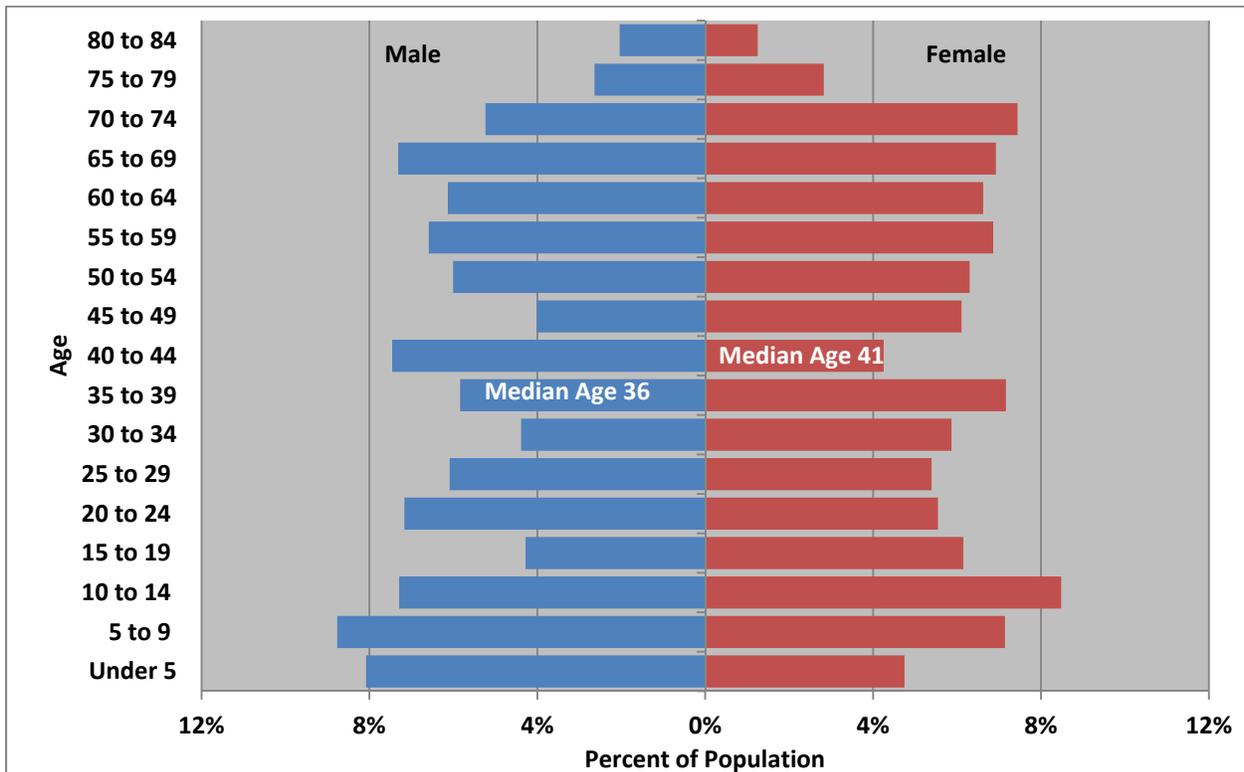
Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

### Age, Race and Ethnicity

The aggregated block group data representing the household population was utilized to understand age, race and ethnicity. When examining the distribution of the household population based on gender and age, there is a 51%-49% split between the males and females (Figure 4), which closely aligns to Pinal County at 52%-48%. The data also shows that 34 percent of the population are within their prime working years between the ages of 25 to 54, which is a measurement of the economic health of the labor market.

The median age for the resident population is 39, which is also equivalent to Pinal County. Overall the resident male population is 36 years of age compared to the resident female at 41 years of age.

Figure 4 –Eloy Aggregated Block Groups, Age and Gender Breakdown



Source: U.S. Census Bureau, 2013-2017 ACS, 5-Year Estimates, Aggregated Block Groups

A comparison of race and ethnic composition of Eloy, the aggregated block groups and Pinal County is presented in Table 6. The percentage of population that identifies itself as Hispanic or Latino of any race is nearly the same. Pinal County overall has a higher percentage of White population and lower percentage of Hispanic. Racial and ethnic diversity adds to the social fabric of a community and can inspire creativity and drive innovation in the workplace.

Table 6 – Eloy Race and Ethnicity

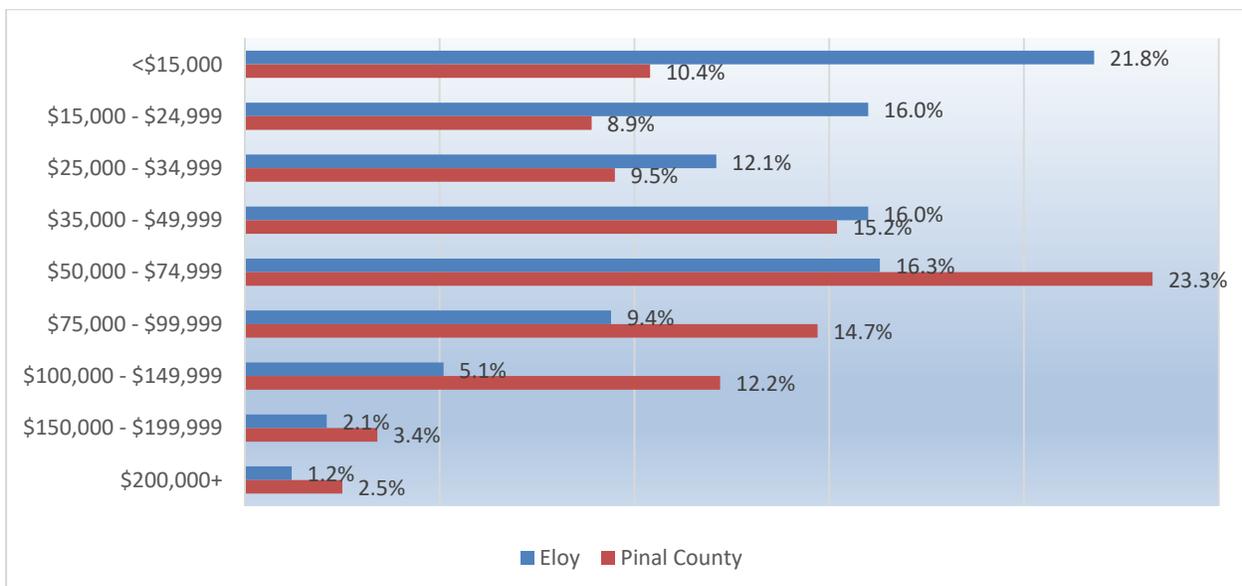
	City of Eloy	Eloy Block Groups	Pinal County
<b>Total Population</b>	<b>17,537</b>	<b>9,448</b>	<b>405,537</b>
<b>Race</b>			
White	71.8%	82.6%	80.4%
Black or African American	9.6%	3.4%	4.5%
American Indian and Alaska Native	2.8%	2.6%	5.0%
Asian	2.3%	0.5%	1.7%
Native Hawaiian and Other Pacific Islander	3.0%	0.0%	0.4%
Some Other Race	8.1%	9.1%	4.4%
Two or More Races	2.5%	1.8%	3.6%
<b>Ethnicity</b>			
Hispanic or Latino	59.7%	58.7%	29.6%

Source: U.S. Census Bureau, 2013-2017 ACS, 5-Year Estimates, City of Eloy, Pinal County and aggregated block groups

### Income

Income is based on households, so this data already reflects Eloy household residents. According to Esri there are 3,437 households in the City of Eloy. The average household income is \$46,627, with 34 percent of the population earning greater than \$50,000. When comparing Eloy to Pinal County, the majority of Pinal County households earning greater than \$50,000 is substantially higher. Households with higher average income have more discretionary spending, which translates into greater sales tax collections.

Figure 5 – Households by Income, 2018

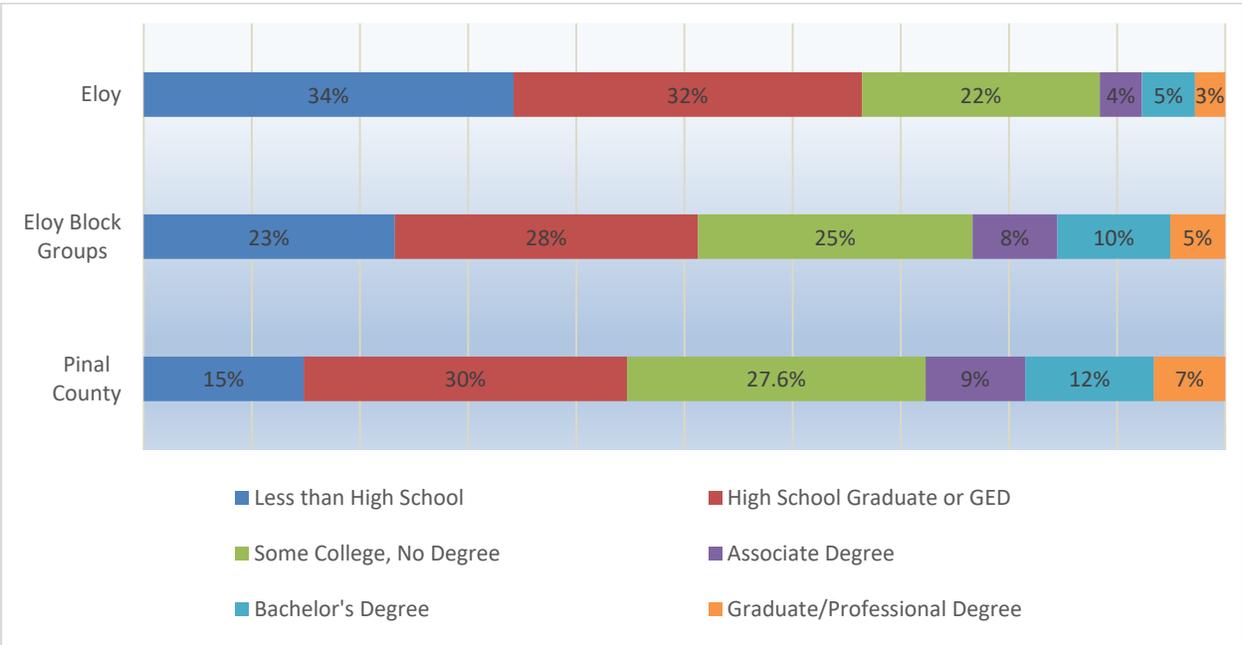


Source: Esri 2018

**Educational Attainment**

The aggregated block group data representing the resident population was utilized to understand educational attainment of the household population. When it comes to education, City of Eloy data shows that only 12 percent of the population have an Associate’s Degree or higher, as compared to the population within the aggregated block group at 23 percent. The resident population, however, still trails behind Pinal County with 28 percent of the population having an Associate’s Degree or higher (Figure 6). Educational attainment is an indicator of the strength and aptitude of the local workforce. Aligning educational attainment with the City’s industry targets can help identify existing training deficiencies that can be corrected with workforce development programs.

*Figure 6 – Eloy Higher Educational Attainment Level, Population 25 Years and Older*



Source: U.S. Census Bureau, ACS 2013-2017, 5-Year Estimates

**Labor Force and Employment**

From 2011 to 2018, Eloy’s labor force increased at an annual rate of 1.4 percent, compared to the County overall at 2.3 percent. In contrast, Eloy had a more rapid decline in the unemployment rate going from 16.8 percent in 2011 to 6.3 percent in 2018. However, the unemployment rate in Eloy is still higher than the County’s as seen in Table 7.

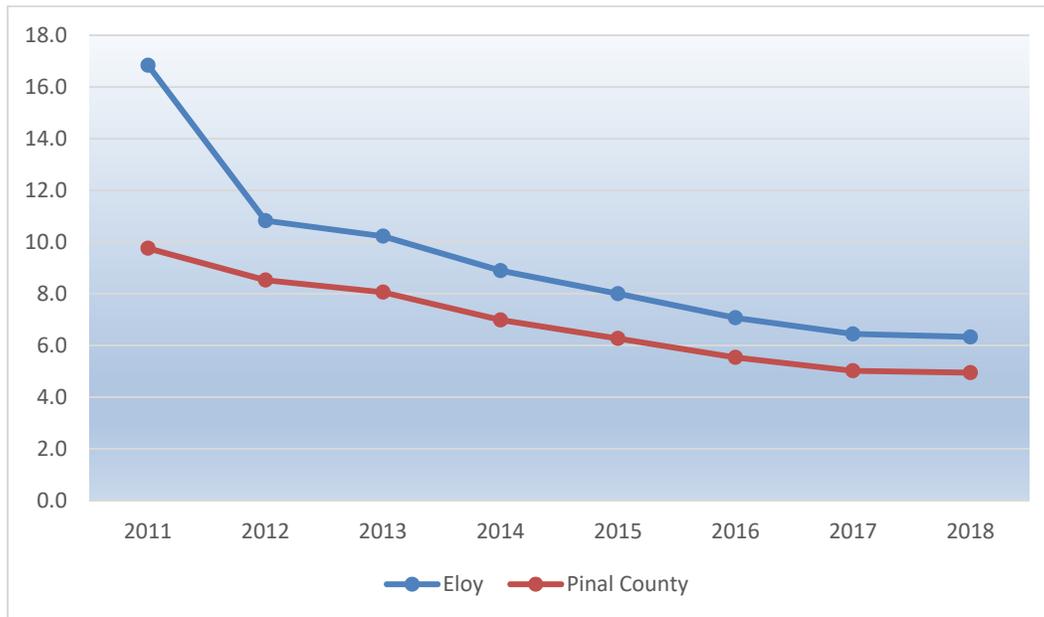
Table 7 – Labor Force, Employment and Unemployment Rate, Eloy and Pinal County

	2011	2015	2018	CAGR*
<b>Labor Force</b>				
Eloy	3,528	3,510	3,885	1.4%
Pinal County	149,658	156,475	173,834	2.3%
<b>Employment</b>				
Eloy	2,934	3,230	3,639	3.4%
Pinal County	135,043	146,677	165,264	3.2%
<b>Unemployment Rate</b>				
Eloy	16.8%	8.0%	6.3%	--
Pinal County	9.8%	6.3%	4.9%	--

Source: Arizona Office of Economic Opportunity, Arizona Labor Statistics

\* Compound Annual Growth Rate (CAGR)

Figure 7 – Unemployment Rates, 2011-2018

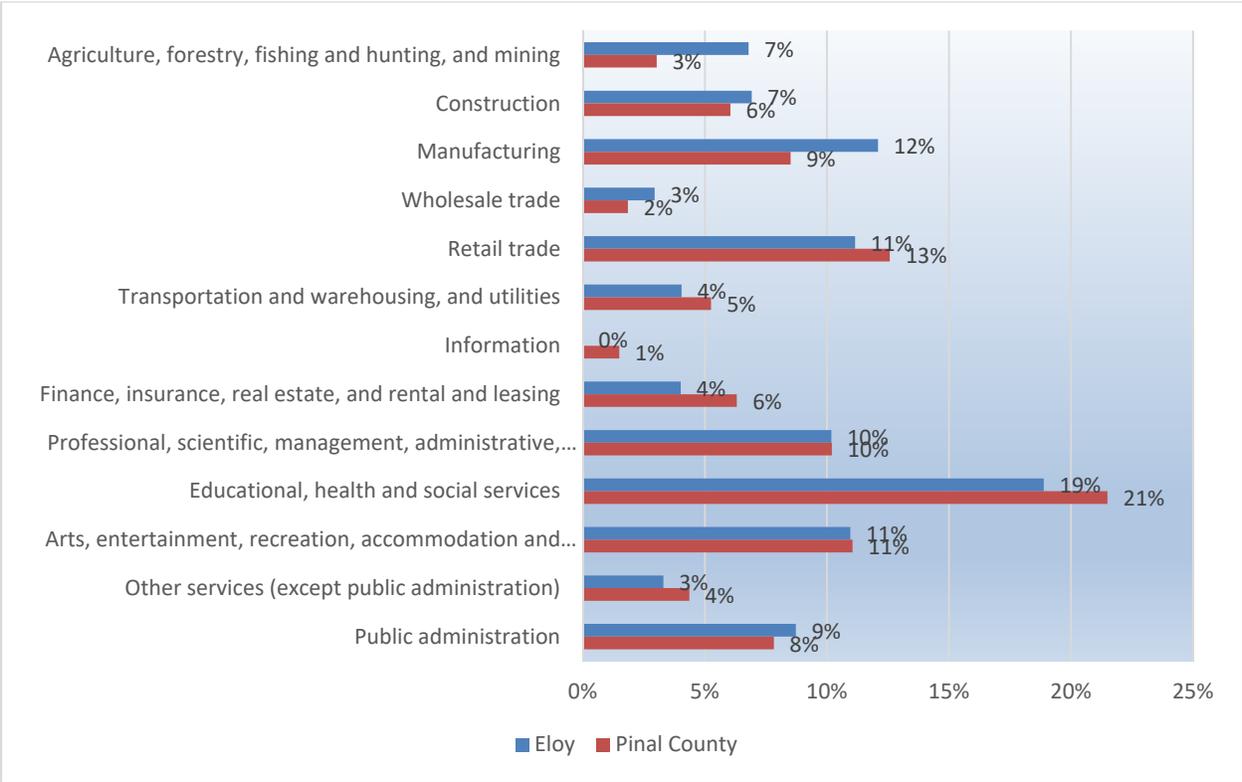


Source: Arizona Office of Economic Opportunity, Arizona Labor Statistics

*Employment by Industry and Occupation*

Eloy employment is highly concentrated in Education and Health Services (19%), Manufacturing (12%), and Retail Trade (11%) as can be seen in Figure 8. When comparing the mix of employment to Pinal County, Eloy has a higher concentration in Manufacturing and Agriculture, with an equivalent percentage in Professional Services (10%), and Arts, and Entertainment (11%).

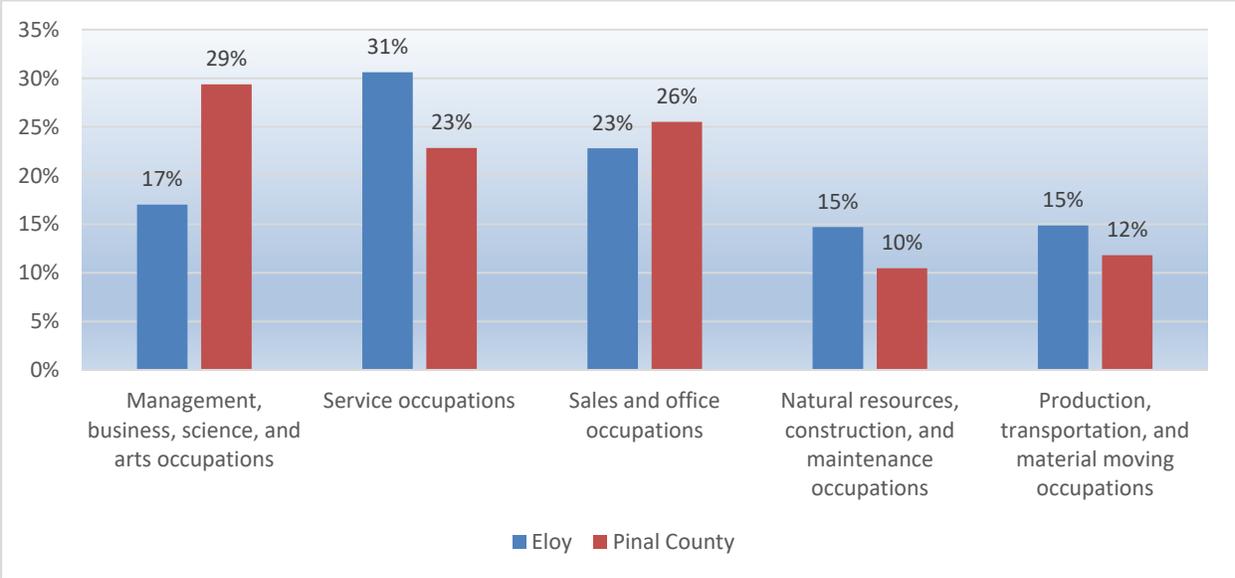
**Figure 8 – Employed Civilian Labor Force by Industry, Eloy and Pinal County, 2017**



Source: U.S. Census Bureau 2013-2017 ACS, 5-Year Estimates

The occupational mix for Eloy shows that Service and Sales occupations dominate with 53 percent of the workforce employed in these occupations, compared to the County at 48 percent (Figure 9). Similar to the employment data noted earlier, Eloy has a higher percentage of occupations in production and transportation jobs than Pinal County.

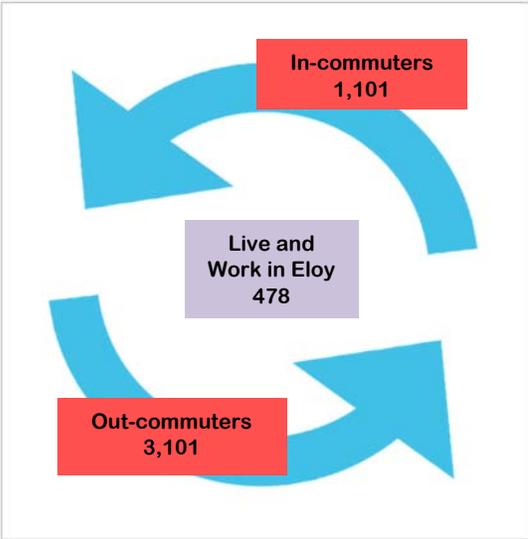
Figure 9 – Occupational Employment, Eloy and Pinal County



Source: U.S. Census Bureau, 2013-2017 ACS, 5-Year Estimates

Commuting Patterns

According to the U.S. Census origin destination data, Eloy has a workforce of 3,579 people,<sup>1</sup> of which 3,101, or nearly 87 percent out-commute to jobs in other cities. At the same time, there are 1,101 people who commute into Eloy to work, while 478 live and work in Eloy.



<sup>1</sup> This figure is provided by the US Census LEHD Origin-Destination Employment Statistics, which will not match the figure provided in the State or US Census Employment by Industry data.

As previously mentioned, 87 percent of Eloy residents out-commute to jobs. Table 8 provides a comparison of characteristics of worker inflow, resident outflow and those that both live and work in Eloy. Twenty percent of outflow residents are employed in goods producing jobs, such as manufacturing. A larger percentage of in-commuters are employed in service related jobs, of which 40 percent earn more than \$3,333 per month, compared to 28 percent of out-commutes earning this monthly amount. Residents that both live and work in Eloy are heavily concentrated in the services sector with 46 percent earning between \$1,251 and \$3,333 monthly.

Eloy has the opportunity to attract more manufacturing operations to retain the manufacturing workforce that out-commutes to manufacturing jobs elsewhere.

*Table 8 – Eloy Workforce Characteristics*

	Resident Outflow	Worker Inflow	Live and Work in Eloy
<b>Total All Jobs</b>	<b>3,101</b>	<b>1,101</b>	<b>478</b>
<b>Jobs by Worker Age</b>			
Age 29 or younger	25%	20%	21%
Age 30 to 54	51%	55%	52%
Age 55 or older	23%	25%	28%
<b>Jobs by Earnings</b>			
\$1,250 per month or less	25%	19%	31%
\$1,251 to \$3,333 per month	48%	41%	46%
More than \$3,333 per month	28%	<b>40%</b>	23%
<b>Jobs by Sector</b>			
"Goods Producing" Industry Class	<b>20%</b>	18%	15%
"Trade, Transportation, & Utilities" Industry Class	20%	17%	10%
"All Other Services" Industry Class	60%	65%	<b>75%</b>

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015).

Destination of employment commuters is presented in Table 9 and shows that Phoenix draws 17 percent of the commuters, with Casa Grande and Eloy attracting the next most commuters with 15 percent and 13 percent, respectively. When evaluating the home origin of workers, 30 percent are Eloy residents, followed by Casa Grande at 21 percent and Phoenix at 6 percent.

*Table 9 – Employment Commuter Destination and Origin*

City	Commuter Destination	Commuter Origin
Phoenix	17%	6%
Casa Grande	15%	21%
Eloy	13%	30%
Florence	5%	1%
Tucson	5%	2%
Mesa	4%	2%
Tempe	3%	0%
All other locations	36%	39%

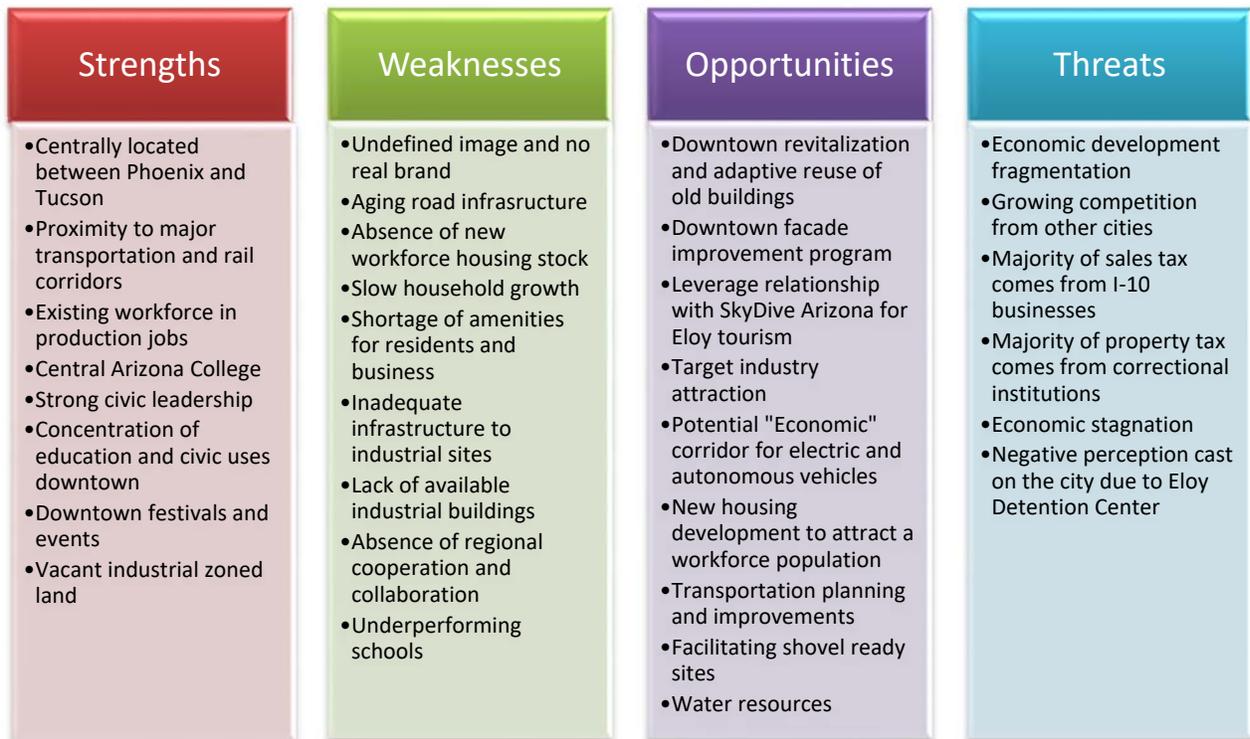
Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015).

# Competitive Assessment

## Community Assessment Findings

To analyze Eloy’s competitiveness, an assessment was conducted utilizing several sources of information, including input from City staff, interviews with City Council members and key community stakeholders, meetings with the Eloy Economic Development Advisory Committee, and examination of other city documents and reports relevant to this strategic planning effort. In addition, a comprehensive analysis was prepared for selected Eloy industrial sites identifying their shovel readiness. The following figure represents a high level summary of the findings, with the comprehensive assessment included as Appendix A.

Figure 10 – Community Assessment Findings



## Benchmarking Eloy

### Surrounding Communities

Understanding how Eloy compares to its surrounding communities within central Pinal County helps determine its uniqueness relative to various factors, including population, business establishments, consumer buying power, age and other metrics. In addition to comparing Eloy to these communities, information on Pinal County was included.

Eloy block group data was used to determine population, household population, median age, and educational attainment. Eloy, as compared to other communities, has the highest group quarters population and the lowest household population. As mentioned earlier, the institutionalized prison population in Eloy is growing at a rate 279 times faster than the household population. Median household income also trails the benchmark cities and county. Higher educational attainment exceeds Coolidge, but is behind Maricopa, Casa Grande and the County as a whole. Last, Eloy household size is the largest with an average of 3.05 and represents the lowest median home value at \$90,965.

**Table 10 – Eloy Compared to Other Pinal County Communities**

	Eloy	Casa Grande	Coolidge	Maricopa	Pinal County
Total Population	17,537	54,054	12,636	51,262	426,864
Group Quarters Population	8,499	265	14	4	24,001
Household Population	9,038	53,789	12,622	51,258	402,863
Median Age	39.0	38.1	32.5	33.0	36.8
Employed Population 16+ years old	3,593	21,633	4,818	24,428	162,633
Business Establishments	227	1,446	300	466	5,709
Number of Employees	2,752	18,558	3,050	4,062	66,700
Median Household Income	\$35,047	\$50,743	\$42,830	\$69,501	\$54,508
Average Household Income	\$46,627	\$63,573	\$54,038	\$80,801	\$67,407
Owner Occupied Housing Units	51.0%	50.6%	50.9%	66.2%	58.7%
Renter Occupied Housing Units	28.9%	26.9%	30.4%	16.5%	19.2%
Vacant	20.1%	22.5%	18.7%	17.3%	22.0%
Average Household Size	3.05	2.73	2.99	3.01	2.80
Median Home Value	\$90,965	\$159,298	\$100,056	\$175,335	\$169,331
Bachelor's Degree	10.4%	11.9%	8.0%	17.9%	12.5%
Graduate/Professional Degree	5.1%	6.4%	3.2%	8.1%	7.0%

Source: Esri 2018; U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

Note: Eloy age and educational attainment based on an aggregation of Eloy block groups.

*Eloy Neighborhoods*

The City of Eloy has three distinct neighborhood areas that include Robson Ranch, Toltec and Downtown. In addition to understanding how Eloy compares to its surrounding communities, it is noteworthy to understand how the three distinct neighborhoods within the City compare to one another. A comparison of the three neighborhoods was conducted examining population, households, income, spending potential, educational attainment and employment.

The Downtown neighborhood has the greatest number of residents with 5,619, followed by Toltec at 3,124 and then Robson Ranch with 1,118. As can be seen in Figure 11, the Robson Ranch neighborhood has the greatest growth projection at 6.5 percent, followed by Toltec at 4.9 percent. The Downtown neighborhood growth projection is meager at 0.4 percent, which is due in large measure to the age of the housing stock and lack of new housing development within Downtown.

**Figure 11 – Population and Population Growth by Neighborhood, 2018-2023**

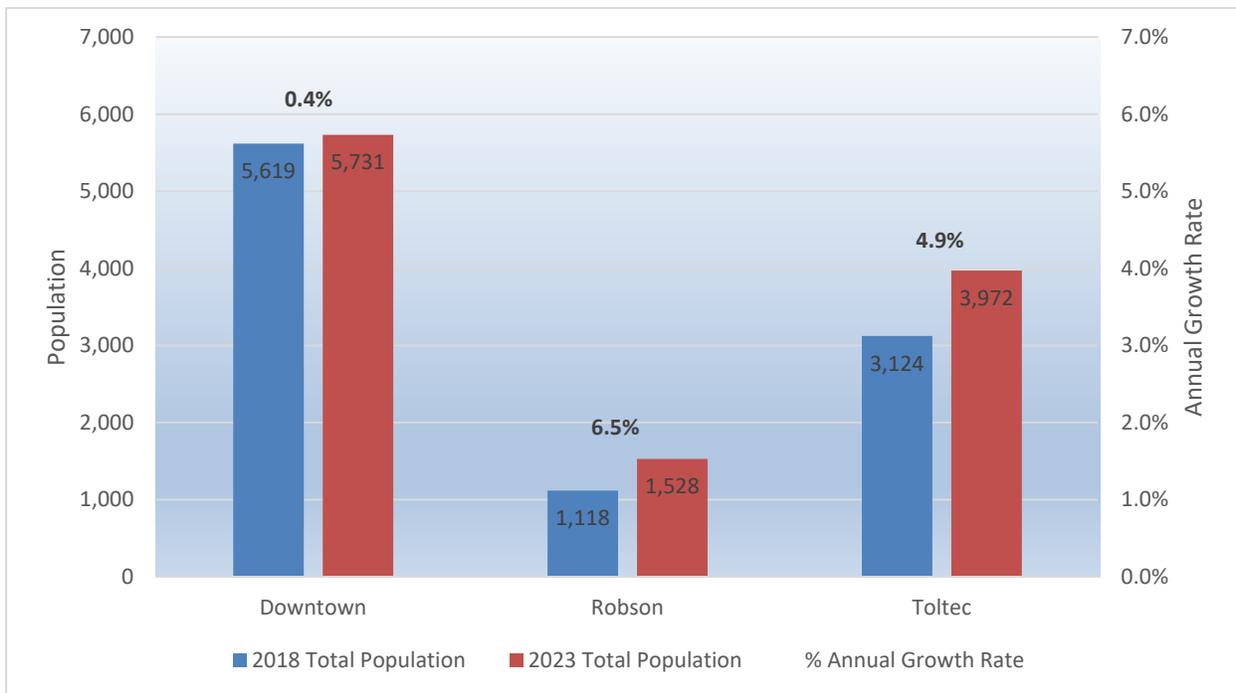


Table 11 provides a side by side comparison of the three neighborhoods. Downtown has the youngest population with a median age of 31.6, and Robson Ranch has the oldest at 42.5 years. Toltec has the largest household size at 3.31, with Robson Ranch having the smallest at 2.07. The median family household income is nearly identical between the Robson Ranch and Toltec neighborhoods at \$41,022 and \$41,182 respectively. The level of educational attainment is an indicator of lifetime earnings. Residents in the Downtown neighborhood, who have the lowest median household income, also have the smallest percentage of those with a Bachelor’s degree or higher at 6.5 percent. Residents in the Robson

Ranch neighborhood lead the way with 26.6 percent having a Bachelor’s Degree or higher, followed by Toltec at 22.5 percent.

Finally, the Downtown neighborhood is an employment center for Eloy, which is anchored with civic and educational uses. When looking at the daytime population, Downtown has the largest number of workers at 1,263 for a total daytime population of 4,947.

*Table 11 – Eloy Neighborhood Comparison*

	Downtown	Robson	Toltec
<b><u>2018 Demographics</u></b>			
Total Population	<b>5,619</b>	<b>1,118</b>	<b>3,124</b>
Households	1,718	539	945
Median Age	31.6	42.5	38.1
Average Household Size	3.27	2.07	3.31
Median Household Income	\$27,128	\$41,022	\$41,182
<b><u>2018 Housing Units</u></b>			
Owner Occupied Housing Units	<b>2,138</b>	<b>717</b>	<b>1,141</b>
Renter Occupied Housing Units	39.5%	63.7%	64.7%
Vacant Housing Units	40.8%	11.4%	18.1%
% Vacancy Attributed to Seasonal Use	19.6%	24.8%	17.2%
2018 Median Home Value	3.8%	43.0%	34.4%
	\$66,636	\$125,000	\$115,323
<b><u>2018 Daytime Population</u></b>			
Workers	<b>4,947</b>	<b>903</b>	<b>2,237</b>
Residents	1,263	130	173
	3,684	773	2,064
<b><u>2018 Higher Educational Attainment</u></b>			
Some College, No Degree	19.2%	27.1%	26.0%
Associate Degree	6.0%	6.2%	9.8%
Bachelor’s Degree	5.2%	18.4%	15.6%
Graduate/Professional Degree	1.3%	8.2%	6.9%

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Economic vitality is often measured by the magnitude of consumer spending. Annual discretionary spending on retail, food and beverage is compared between the neighborhoods in Figure 12. Consumers in the Downtown neighborhood spend \$32.7 million in retail, food and beverage, followed by Toltec at \$22.9 million, and Robson Ranch at \$13.7 million. Given the variance in the number of households by neighborhood, another way to measure economic vitality is spending per household. Using this metric, Robson Ranch spends the most at \$25,428 per household, followed by Toltec at \$24,240 and finally households in the Downtown neighborhood spend \$19,006.

Figure 12 – Potential Retail Household Spending by Neighborhood



## Human Resources

Competitive economies require a workforce that has the necessary educational attainment and technical skills. Availability of a skilled labor force is widely recognized as the top site location criteria, and the key to successful economic development. Building a sustainable economy requires both educating people and ensuring that jobs are available that reward their investment in education. The local labor market and skills development are assessed in terms of workforce skill levels and production of graduates. Measuring these systems includes K-12 preparation, career technical education/skills enhancement and advancement through higher education.

### K-12 Preparation

The State of Arizona adopted the Arizona’s Measurement of Educational Readiness to Inform Teaching (AzMERIT) which tests for knowledge in English Language Proficiency (ELP) and Math. It is a computer based test with the goal of measuring critical thinking skills for college and career readiness. The Arizona’s Instrument to Measure Standards (AIMS) is used to assess Science.

The ELP standards help measure student progress in English language proficiency and provides teachers with goals to help focus instruction. The Arizona ELP Standards help students gain the language knowledge needed to meet the language demands and complexity of math, science, and social studies.

Arizona has a school accountability system, which was adopted in 2011, and schools get a grade A-F. This tool is designed to help schools improve and to identify which schools are in need of support. The system

quantitatively measures student proficiency and annual growth. The letter grade is based on a range of measures including:

- Proficiency in English Language Arts, Math and Science
- Growth in English Language Arts and Math
- Graduation Rate
- Acceleration and Readiness Measures
- College and Career Readiness Indicators

The letter grading is provided annually for each school. The meaning of what each grade means is as follows:

- A – Excellent
- B – Highly Performing
- C – Performing
- D – Minimally Performing
- F – Failing

Table 12 provides a comparison of education achievement scores of schools located in the Eloy region against Pinal County and Arizona. The school district is noted, followed by the school within the district, and the grade level of students that take the test. Eloy students perform at a much lower rate in all knowledge areas. Overall, Toltec Elementary students are performing better in math and science than students in other schools in the region, and this school received a letter grade of “C” for performance. Eloy Elementary and Santa Cruz Valley Union High School both received letter grade of “D” and have lower test scores overall.

**Table 12 – AzMerit and Science AIMS Test Scores, FY2018**

	% Passing ELA	% Passing Math	% Passing Science	School Grade
<b>State Score (All Schools)</b>	<b>41</b>	<b>41</b>	<b>51</b>	n/a
<b>Pinal County Score (All Schools)</b>	<b>33</b>	<b>32</b>	<b>40</b>	n/a
<b>Eloy Elementary School District:</b>				
Eloy Intermediate School (grades 3-5)	17	16	21	D
Eloy Junior High School (grades 6-8)	22	24	32	B
<b>Toltec School District:</b>				
Toltec Elementary School (grades 3-8)	21	25	36	C
<b>Casa Grande Union High School District:</b>				
Casa Grande Union High School (grades 9-11)	27	19	21	C
<b>Santa Cruz Valley Union High School District:</b>				
Santa Cruz Center for Success (grades 9-11)	*	8	*	n/a
Santa Cruz Valley Union High School (grades 9-11)	19	11	18	D

Source: Arizona Department of Education

Table Notes:

The grades noted after each school signify the grade level of students that take the test

ELA stands for English Language Arts

All schools includes district and charter

Science percentage for Pinal County is a weighted average of all test takers

The asterisk signifies not enough test takers to disclose

### *Career Technical Education*

The Central Arizona Valley Institute of Technology (CAVIT) works in partnership with 13 public schools in Pinal County, including Casa Grande Union High School, where 11th and 12th grade students can begin preparing for higher wage jobs while attending high school.

CAVIT offers eight programs, some of which qualify for dual enrollment through CAC, Eastern Arizona College, or Pima Community College. The number of programs offering dual enrollment may change each year depending upon teacher and course approval. The eight CAVIT program areas are listed below, and those programs that offer dual enrollment in 2019 are marked with an asterisk.

- Cosmetology
- Dental Assistant
- Fire Science\*
- Law Enforcement
- Massage Therapy\*
- Medical Assistant\*
- Nursing Assistant
- Veterinary Assistant\*

Career Technical Education (CTE) programs provide students with the ability to earn industry certification, college credit and internship opportunities. Often these programs are supported by business and industry, equipping students with relevant skills and working industry knowledge, propelling them in their future careers and higher learning endeavors.

### *Higher Education*

Central Arizona College (CAC) serves the population in Pinal County. The main campus is in Coolidge, with six satellite campuses located throughout the county. In addition, CAC has a location for workforce development which is also the home to the Small Business Development Center (SBDC). At this location the services offered include computer lab and academic testing.

CAC provides degrees and certificates in a wide variety of programs ranging from accounting to visual and performing arts. There are several certificate programs geared towards manufacturing, logistics and supply chain, and computer programming and computer technology. In addition CAC offers Associate of Applied Science degree in Manufacturing Engineering Technology, Nanofabrication, Business, Diesel Technology, Welding Technology, Computer Programming, and Computer Business Applications.

Transitioning from CAC to a four year university is made possible through credit transfers which are allowed by Arizona's three public universities, as well as several public and private non-profit institutions. Northern Arizona University has a satellite campus at CAC and offers undergraduate degrees in special and elementary education, industrial leadership, public administration and nursing. In addition Arizona State University and the University of Arizona have pathway agreements in place with the community colleges for some programs.

## Infrastructure

### *Water*

The City of Eloy provides domestic water service and fire protection water to approximately 11,000 residential and non-residential customers. The City of Eloy is the water provider for all five (5) priority sites assessed, including two (2) pressure zones with three active wells with a limited network of tanks and booster facilities. There are three (3), 1 MGD storage tanks interconnected with boosters and transmission mains. The city has a suitable supply of water resources on hand (deep groundwater wells supplemented with nominal CAP water).

### *Wastewater*

The City of Eloy is the wastewater operator, including the five (5) priority assessment sites. Due to the large municipal limits of 114 square miles, the city is divided into nine (9) sub basins. Area 1 covers the most developed areas of the city and is the location of the sole wastewater treatment plant (WWTP) facility. The existing WWTP has a design capacity of 2 MGD and is currently experiencing approximately 0.5 MGD flows daily. There are a series of gravity mains, pressure mains and lift stations that comprise the existing wastewater system.

### *Electric*

Arizona Public Service (APS) is the electric provider for the majority of the Eloy municipal limits, including all five (5) priority assessment sites. Generally speaking, APS has suitable infrastructure and capacity to serve Eloy's future growth. Capacity expansions and line extensions will be necessary to accommodate future growth. As proprietary information, APS will not reveal the operational characteristics of its systems, but has noted that they are well positioned to serve Eloy's employment growth areas and each site is assessed on a case by case basis according to its individual electric load needs.

### *Gas*

Southwest Gas is the area provider of natural gas utilities. Similar to APS, proprietary system infrastructure location and performance metrics are unavailable, but generally speaking, Southwest Gas' infrastructure in the Eloy is well-positioned to accommodate Eloy's future growth.

### *Fiber*

Century Link and Airebeam LLC are the two fiber providers in the Eloy area. Neither provider offers access to their proprietary infrastructure location or operational characteristics, but both entities currently possess infrastructure in Eloy and have demonstrated a desire and willingness to expand their systems with continued economic development in the area.

### *Transportation*

**Railroad:** Union Pacific's east-west line – traveling the width of the state from Yuma to San Simon – is part of the railroad's Sunset Route, a 760-mile corridor between Los Angeles and El Paso. An important north-south line connects the border crossing at Nogales to the Sunset Route, allowing cross-border traffic to access that major thoroughfare.

Aviation: Eloy has three options for commercial passenger service including Sky Harbor International Airport, which is the major aviation hub of the Phoenix Metro Area is approximately a 50 minute drive to the north from Eloy. The other options are the Tucson International Airport and the Phoenix-Mesa Gateway Airport, which are within approximately a 60 minute drive time. The City of Eloy owns and operates a general aviation airport. The primary runway is 3,901 feet long by 75 feet wide and has a full parallel taxiway. According to ADOT, Eloy Municipal Airport has 17 hangars and 27 tie down spaces with 12 single-engine and 7 multi-engine based aircraft. Aircraft maintenance is available but no aircraft rental.

Transit: Although currently Eloy has no transit service, the Eloy City Council, in April 2019 accepted the Eloy Transit Feasibility Study, which identifies potential future transit routes within the City and connections to other key regional transit originations/destinations. Also in the Spring of 2019, Greyhound Lines, Inc. relocated their regional bus stop from Casa Grande to Eloy (Love's Truck Stop). Greyhound serves this location every day with two stops in each direction. The Central Arizona Regional Transit (CART) system is now evaluating how their bus system can connect with the Greyhound stops to provide the linkage of local and regional transit service.

### Shovel Ready Site Analysis

As part of the Eloy Economic Development Strategic Plan, a thorough suitability assessment of existing industrial sites and infrastructure service potential to those sites was conducted. The process began with a kick off meeting with Eloy staff to preliminarily identify potential parcels of land that represented the strongest likelihood of generating near term economic development opportunities. Sites were identified that have favorable entitlements, transportation access, motivated ownership, and generally perceived as the most "shovel ready" with respect to infrastructure services and minimal physical development challenges.

After further EDAC consideration and additional discussions with Eloy staff, five (5) priority sites were short listed for further infrastructure and site suitability analysis and are identified in Figure 13 and listed in Table 13. Fact sheets which include a more in-depth infrastructure analysis for these five (5) priority sites are included in Appendix C.

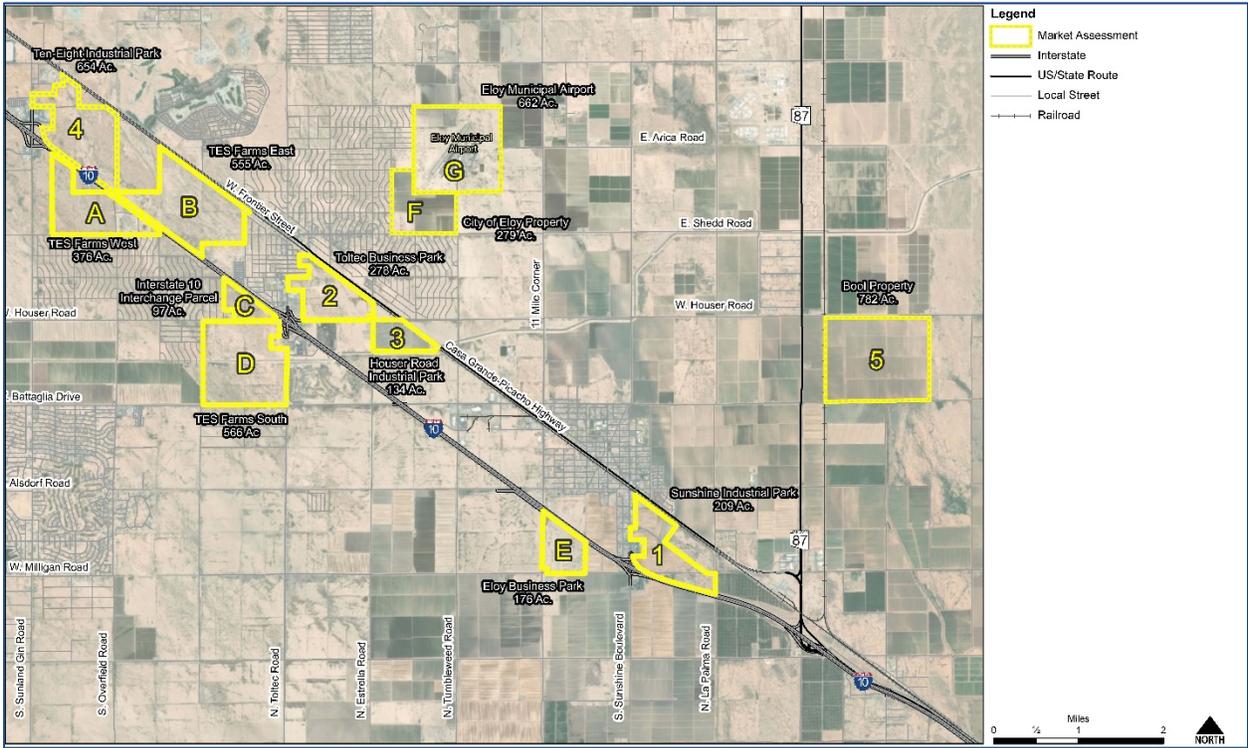
Eloy's existing water and wastewater infrastructure in proximity to the five (5) priority sites has been in place for some time, with very few modifications and/or expansions to these systems in many years. Eloy's fiscally constrained CIP budget is structured to predominately focus on modernization and repairs to the existing aged infrastructure with limited capabilities to fund expansions or extensions to the existing water and wastewater infrastructure.

Subsequent to the evaluation and analysis of existing water and wastewater infrastructure serviceability of each site, a "Cost Grade" was assigned to each site, as noted in Table 13, as a relative measurement and comparison of "shovel readiness" to each other.

- Grade of "A" indicates that existing infrastructure is adjacent to, or within very close proximity to the property, sufficient line and system capacity exists and that there are little to no physical obstacles complicating connection to the existing system.

- Grade of “B” would suggest that the existing infrastructure is in relative proximity to the parcel, but that there are physical obstructions (such as a railroad crossing) and existing line capacity may be sufficient, but that the adjacent line capacity and capacity of a downstream lift station may require additional engineering study and possible upsizing depending on final user demands on the system.
- Grade of “C” would indicate that the existing infrastructure is relatively close to the parcel, but that the infrastructure service either lacks redundancy, is found at a system dead-end and/or the infrastructure in place is inconsistent with the current Eloy utility master plan resulting in the need to upsize infrastructure and/or establish alternate solutions for the property that would be identified through more specific engineering analysis that reflect end user needs and requirements.
- Grade of “D” indicates that there is no existing infrastructure within one mile (or greater) of the parcel. As a result, significant investment in line extensions and/or system storage/capacities would be necessary or that an alternate, unique infrastructure solution tailored to the site’s end user requirements must be developed.

Figure 13 – Eloy Industrial Sites Map



A tailored approach was utilized in the evaluation of determining the “shovel readiness” of each priority site. For those priority sites that require an extension or expansion of water and wastewater infrastructure, the City staff preferred the evaluation of the connected network of existing infrastructure be completed on a case by case basis. However, this evaluation method is beyond the scope of this project. This is largely attributable to the fact that (in some cases), the existing water or wastewater infrastructure in proximity to a priority parcel is not consistent with the City’s water and wastewater master planning. More specifically, the current reliance upon pressure lines and lift stations crossing wastewater sub basin boundaries requires an evaluation of the entire pressure line/lift station network serving the parcel, or establishing an alternate infrastructure approach all-together.

Detailed information on the priority sites is provided in the following Table 13, which includes a “cost grade” and a relative measurement and comparison of “shovel readiness.”

Table 13 – Eloy Priority Sites Summary

<b>Sunshine Industrial Park</b>	<b>Map Area #1</b>
Acres	209
Zoning	I-1 – Light Industrial
Shovel Ready Status	Water: Readily serviceable with existing lines Wastewater: Existing gravity lines appear to be sufficiently sized and have capacity
Infrastructure Improvement Cost Grade:	Water: A Wastewater: A
<b>Toltec Business Park</b>	<b>Map Area #2</b>
Acres	278
Zoning	I-2 – General Industrial
Shovel Ready Status	Water: Readily serviceable with existing lines Wastewater: Extension of pressure line south and oversizing Tohono II lift station, and possible line upsizing
Infrastructure Improvement Cost Grade:	Water: A Wastewater: B
<b>Houser Road Industrial Park</b>	<b>Map Area #3</b>
Acres	134
Zoning	I-2 – General Industrial
Shovel Ready Status	Water: Serviceable with existing lines Wastewater: Pressure line extension south and likely oversizing of Tohono II lift station needed; downstream pressure line capacity analysis and possible line upsizing necessary
Infrastructure Improvement Cost Grade:	Water: A Wastewater: B
<b>Ten-Eight Industrial Park</b>	<b>Map Area #4</b>
Acres	570.2
Zoning	I-1 – Light Industrial (52 acres), and I-2 General Industrial (602 acres)
Shovel Ready Status	Water: Existing line at system dead-end, not sufficiently sized; second redundant source needed Wastewater: Located in different sub basin than existing infrastructure; pressure lines need to be upsized; likely interim pressure line solution and long-term sub basin solution needed
Infrastructure Improvement Cost Grade:	Water: C Wastewater: C
<b>Bool Property</b>	<b>Map Area #5</b>
Acres	782
Zoning	R1-43 – Mixed Use (155 acres), and Medium Density Residential (386 acres) – these are planned General Plan land uses, not existing zoning
Shovel Ready Status	No water services near the property/different pressure zone No wastewater services near the property/different sub basin
Infrastructure Improvement Cost Grade:	Water: D Wastewater: D

## Targeted Sector Analysis

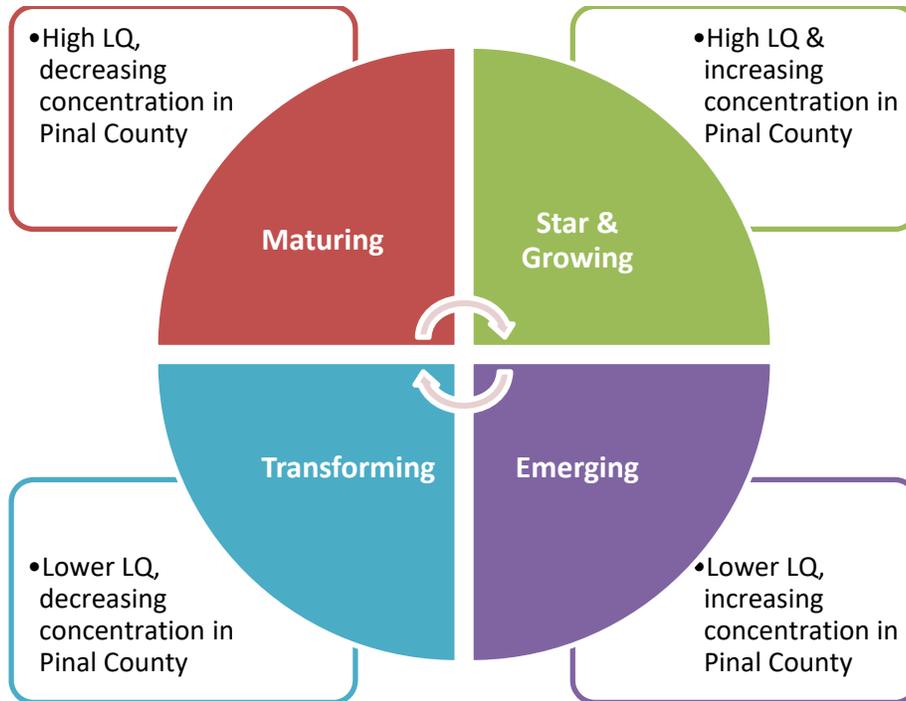
Communities across the country desire to pinpoint the industries that have the highest probability of expanding or locating in their region or community. Consequently, targeting industry sectors is a key component of an overall economic development strategy and implementation plan. This analysis helps focus the efforts of communities to ensure that they are leveraging the strengths of their market and utilizing their limited resources in the most effective manner possible.

The practice of targeting sectors and industry cluster analysis has become common practice as communities witness success in other markets, and companies experience the advantages afforded by continued concentration of industries or clusters. An industry cluster is defined as a group of business and industry, which are connected by shared interests, resources or requirements, such as supply chain, similar infrastructure or technology used in operations, and the need for a similar labor pool.

The targeted sector analysis begins with compiling business and industry IMPLAN (Impact Analysis for Planning) data for Pinal County and Arizona to gain a deeper understanding of the major industry sectors, as well as their growth, regional concentration, and their importance to the area economy. Several factors are utilized when evaluating the various industry sectors, including the relative employment concentration, known as the location quotient (LQ), the number of jobs linked to each industry sector, employment growth, and change in the LQ.

Location quotients are used to identify the relative concentration of local employment within a specific business sector. For the purpose of this analysis, the LQ for Pinal County was examined against Arizona. A total of 503 industries were examined at the six digit North American Industrial Classification System (NAICS) level. An industry with a LQ equal to 1.0 has the same share of total employment as the industry's share of Arizona's employment. If a LQ is greater than 1.0, that signifies that the industry is more concentrated within the economic region than Arizona. Likewise, if a LQ is less than 1.0, that means it is less concentrated than Arizona.

Figure 14 – Industry Sector Classification

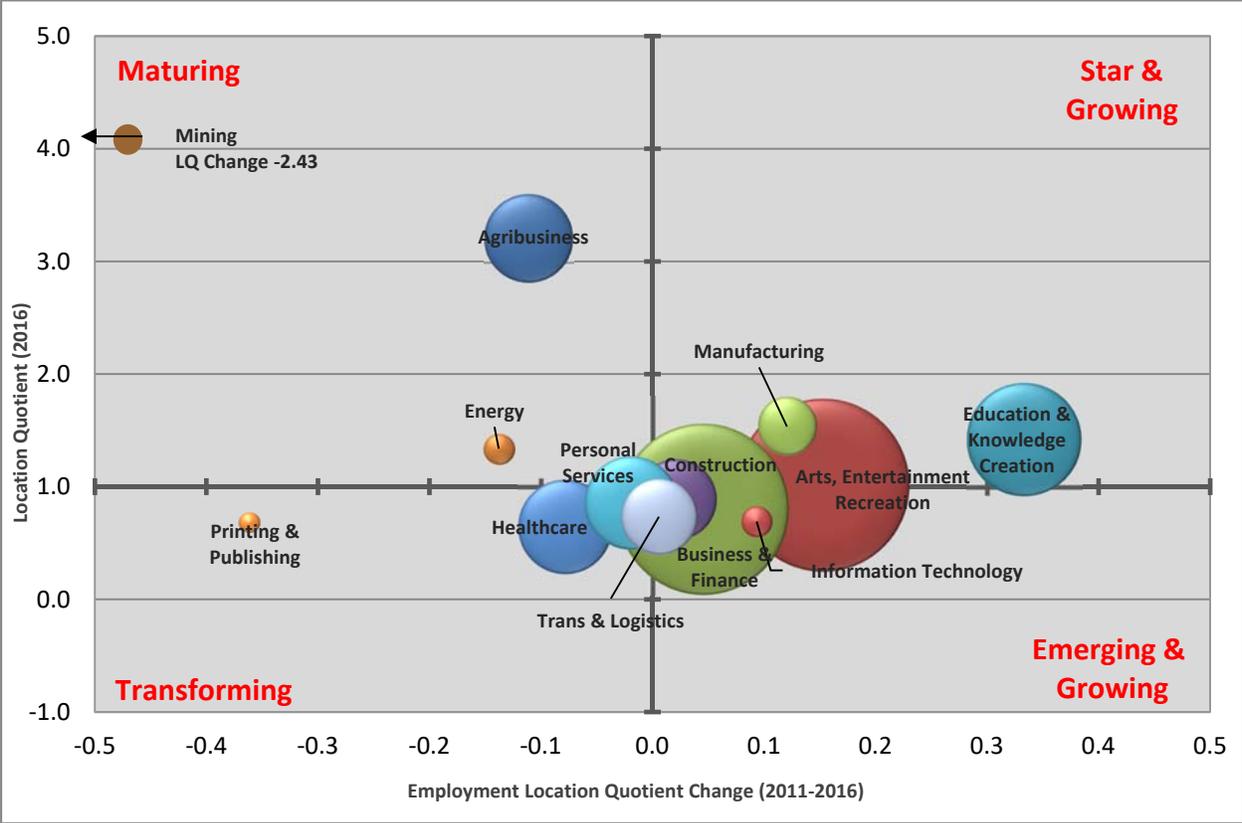


The above graphic explains the meaning of the four quadrants of the LQ, and Figure 15 illustrates the competitive strengths and weaknesses of the various sectors within Pinal County. The size of the bubble represents industry size by number of workers. The vertical axis represents the LQ which shows the relative concentration of that industry to the State as a whole. Anything 1.0 or greater reveals a greater concentration in employment than the State. The horizontal axis represents change in the LQ from 2011-2016. The industry bubbles located to the right of the vertical axis are those sectors driving the County's growth.

Results of the sector analysis described indicate the following findings for Pinal County:

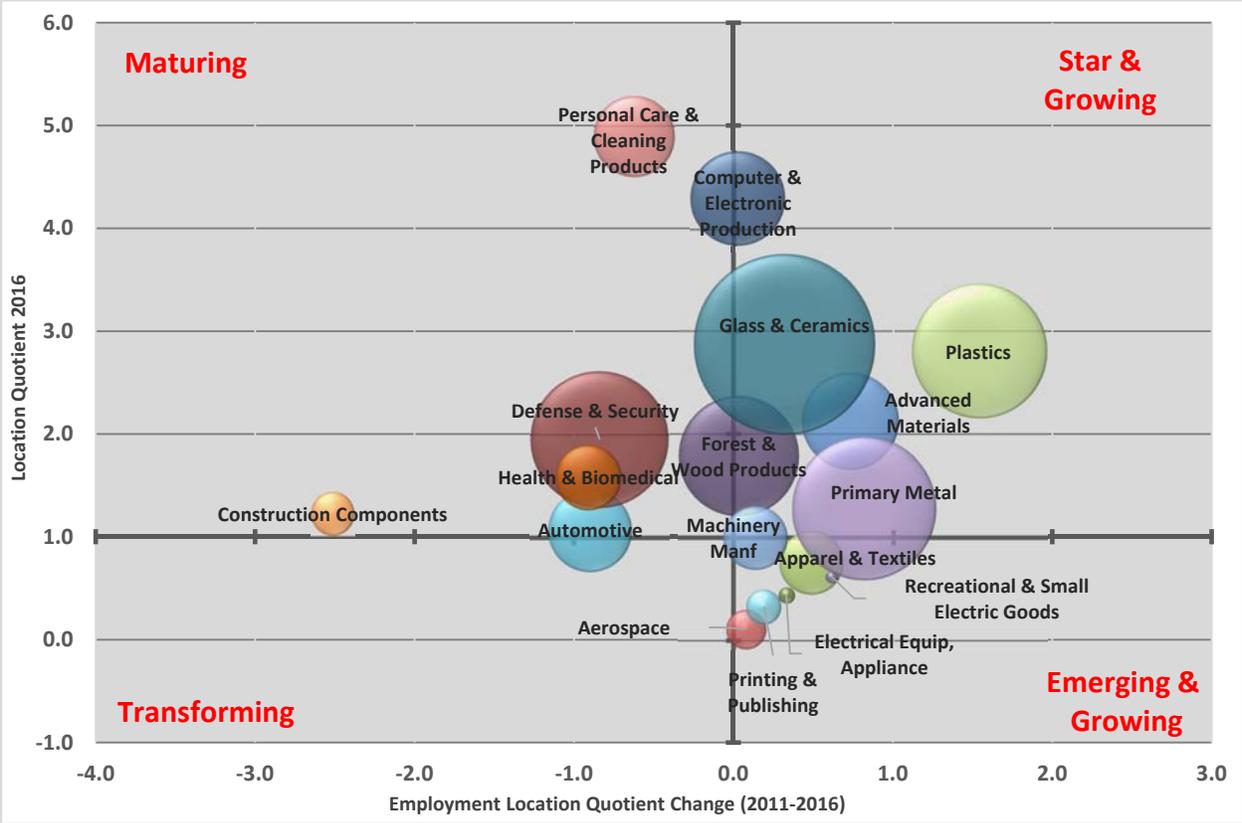
- **Stars (Upper Right Quadrant)** – Manufacturing, Education & Knowledge Creation, Arts, Entertainment, Recreation
- **Mature (Upper Left Quadrant)** – Agribusiness, Energy, and Mining
- **Transforming (Lower Left Quadrant)** – Printing & Publishing, Healthcare, Personal Services
- **Emerging (Lower Right Quadrant)** – Information Technology, Business & Finance, Construction, Transportation, Transportation & Logistics

Figure 15 – Pinal County Industry Concentration and LQ Growth, 2011-2016



Manufacturing employment experienced a 22 percent increase in Pinal County, which outpaced the state which exhibited a 3 percent gain. Further analysis of this sub cluster was prepared to understand the growing industries within the Manufacturing sub cluster. Figure 16 shows that the “stars” in Pinal County are Computer and Electronic Production, Glass and Ceramics, Plastics, Advanced Material, Primary Metals, and Forest and Wood Products.

Figure 16 – Pinal County Manufacturing Sub Cluster



Industry Short List

Utilizing the master list of all industries, a filtering approach was employed to short list industries for Eloy that meet certain criteria. Appendix D contains the master list of industries for the study area categorized within their respective industry cluster.

1. The first step was to calculate the employment growth over a five year time horizon (2011-2016) at the six digit NAICS code and delete any industries that had zero employment.
2. The second step was to calculate the location quotient for each industry against the State of Arizona and eliminate those industries that did not have a LQ greater than 1.0.
3. The last step was to identify desired industry that did not meet the criteria, yet is important to the City’s economic development efforts, and include those industries within the targeted industry list, such as automobile, light truck, and motor vehicle parts manufacturing.

Based on this screening methodology, six out of fourteen industry clusters were identified as suitable for Eloy. Industries within these six clusters were further evaluated for employment growth, wages, market strength and existing presence in Eloy. Based on this additional screening, 44 industries were short listed as potential industry targets, as presented in Table 14. The list of industries selected is based on a

combination of industry growth over five years, wages, market strength in Pinal County and whether the industry currently has a presence in Eloy. An additional 10 industries were classified as “future” targets. These future targets are based on the prospect of Nikola Motors operating a major facility on Eloy’s northeastern boundary, focusing on the auto and truck industry.

*Table 14 – Eloy Clusters and Industry Targets*

Industry Cluster	Industry Target
<b>Agribusiness</b>	<ul style="list-style-type: none"> <li>• Tree nut farming</li> <li>• Greenhouse, nursery, and floriculture production</li> <li>• Other animal food manufacturing</li> <li>• Fluid milk manufacturing</li> <li>• Dry, condensed, and evaporated dairy product manufacturing</li> <li>• Fertilizer, mixing only, manufacturing</li> </ul>
<b>Arts, Enter, Recreation &amp; Visitor Industries</b>	<ul style="list-style-type: none"> <li>• Other amusement and recreation industries</li> <li>• Other accommodations</li> <li>• Full-service restaurants</li> <li>• Limited-service restaurants</li> <li>• All other food and drinking places</li> </ul>
<b>Business &amp; Financial Services</b>	<ul style="list-style-type: none"> <li>• Facilities support services</li> <li>• Waste management and remediation services</li> </ul>
<b>Manufacturing</b>	<ul style="list-style-type: none"> <li>• Paperboard container manufacturing</li> <li>• Synthetic dye and pigment manufacturing</li> <li>• Other basic organic chemical manufacturing</li> <li>• Polish and other sanitation good manufacturing</li> <li>• Plastics packaging materials and un-laminated film and sheet manufacturing</li> <li>• Plastics pipe and pipe fitting manufacturing</li> <li>• Polystyrene foam product manufacturing</li> <li>• Plastics bottle manufacturing</li> <li>• Other plastics product manufacturing</li> <li>• Other pressed and blown glass and glassware manufacturing</li> <li>• Glass product manufacturing made of purchased glass</li> <li>• Cement manufacturing</li> <li>• Ready-mix concrete manufacturing</li> <li>• Nonferrous metal, except copper and aluminum, shaping</li> <li>• Secondary processing of other nonferrous</li> <li>• Fabricated structural metal manufacturing</li> <li>• Sheet metal work manufacturing</li> <li>• Metal tank (heavy gauge) manufacturing</li> <li>• Spring and wire product manufacturing</li> <li>• Electroplating, anodizing, and coloring metal</li> </ul>

*Table 14 – Eloy Clusters and Industry Targets (Continued)*

Industry Cluster	Industry Target
<b>Manufacturing (Continued)</b>	<ul style="list-style-type: none"> <li>• Construction machinery manufacturing</li> <li>• All other industrial machinery manufacturing</li> <li>• Power-driven hand tool manufacturing</li> <li>• Software and other prerecorded and record reproducing</li> <li>• Motor vehicle electrical and electronic equipment manufacturing</li> <li>• Other motor vehicle parts manufacturing</li> <li>• Custom architectural woodwork and millwork</li> </ul>
<b>Personal &amp; Commercial Services</b>	<ul style="list-style-type: none"> <li>• Commercial and industrial machinery and equipment repair and maintenance</li> </ul>
<b>Transportation &amp; Logistics</b>	<ul style="list-style-type: none"> <li>• Warehousing and storage</li> <li>• Rail transportation</li> <li>• Truck transportation</li> </ul>

**Future Industry Target**

<b>Manufacturing - Future Targets</b>	<ul style="list-style-type: none"> <li>• Automobile manufacturing</li> <li>• Light truck and utility vehicle manufacturing</li> <li>• Heavy duty truck manufacturing</li> <li>• Motor vehicle body manufacturing</li> <li>• Truck trailer manufacturing</li> <li>• Motor vehicle gasoline engine and engine parts manufacturing</li> <li>• Motor vehicle steering, suspension component (except spring), &amp; brake systems manufacturing</li> <li>• Motor vehicle transmission and power train parts manufacturing</li> <li>• Motor vehicle seating and interior trim manufacturing</li> <li>• Motor vehicle metal stamping</li> </ul>
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## Occupations

To assist training providers pinpoint the skills and educational requirements required by targeted industry employers, key occupations associated with each industry cluster have been identified. Armed with this information educational providers can better align their curriculum to the needs of the industry target employers.

*Table 15 – Key Occupations by Industry Cluster*

Industry Cluster	Key Occupations	
<b>Agribusiness</b>	<ul style="list-style-type: none"> <li>• General and operations managers</li> <li>• Marketing managers</li> <li>• Sales managers</li> <li>• Industrial production managers</li> <li>• Bookkeepers</li> <li>• Industrial Engineers</li> <li>• Chemists</li> <li>• Sales representatives</li> </ul>	<ul style="list-style-type: none"> <li>• Order fillers</li> <li>• Farm workers and laborers</li> <li>• Packaging and filling machine operators and tenders</li> <li>• Separating, filtering, clarifying, precipitating, and still machine setters</li> <li>• Operators, and tenders</li> </ul>
<b>Arts, Entertainment, Recreation and Visitor Industries</b>	<ul style="list-style-type: none"> <li>• Fitness trainers and aerobics instructors</li> <li>• Amusement and recreation attendants</li> <li>• Landscaping and groundskeeping workers</li> <li>• Waiters and waitresses</li> </ul>	<ul style="list-style-type: none"> <li>• Coaches and scouts</li> <li>• Receptionists and information clerks</li> <li>• Lifeguards and other recreational protective service workers</li> <li>• Recreation workers</li> <li>• Janitors and cleaners</li> </ul>
<b>Business &amp; Financial Services</b>	<ul style="list-style-type: none"> <li>• Janitors and cleaners</li> <li>• Security guards</li> <li>• Laborers and freight, stock and refuse and recyclable material movers</li> <li>• Landscaping and groundskeeping</li> <li>• Correctional officers and jailers</li> </ul>	<ul style="list-style-type: none"> <li>• Customer service representative</li> <li>• Office clerks</li> <li>• Sales representatives</li> <li>• Secretaries and administrative assistants</li> <li>• Heavy and tractor trailer truck drivers</li> </ul>
<b>Manufacturing</b>	<ul style="list-style-type: none"> <li>• Assemblers and fabricators</li> <li>• First-line supervisors of production and operating workers</li> <li>• Inspectors, testers, sorters, samplers and weighers</li> <li>• Laborers and freight, stock, and material movers</li> <li>• Packaging and filling machine operators and tenders</li> </ul>	<ul style="list-style-type: none"> <li>• Welders, cutters, solderers, and brazers</li> <li>• Electrical, electronic and electromechanical assemblers</li> <li>• Sales representatives, wholesale and manufacturing</li> <li>• General and operations managers</li> </ul>
<b>Personal and Commercial Services</b> (commercial and industrial machinery and equipment)	<ul style="list-style-type: none"> <li>• Industrial machinery mechanics</li> <li>• Welders, cutters, solderers, and brazers</li> <li>• Office Clerks</li> <li>• First-line supervisors of mechanics, installers and repairers</li> <li>• Heating, air conditioning, and refrigeration mechanics and installers</li> </ul>	<ul style="list-style-type: none"> <li>• General and operations managers</li> <li>• Mobile heavy equipment mechanics</li> <li>• Machinists</li> <li>• Secretaries and administrative assistants</li> <li>• Maintenance and repair workers</li> </ul>
<b>Transportation &amp; Logistics</b>	<ul style="list-style-type: none"> <li>• Heavy and tractor-trailer truck drivers</li> <li>• Postal service mail carriers</li> <li>• Light truck or delivery services drivers</li> <li>• Industrial truck and tractor operators</li> <li>• Bus drivers, school and special client</li> </ul>	<ul style="list-style-type: none"> <li>• First line supervisors</li> <li>• Stock clerks and order fillers</li> <li>• Flight attendants</li> <li>• Postal service mail sorters, processors, and processing machine operators</li> <li>• Managers of transportation and material moving machine and vehicle operators</li> </ul>

### Site Suitability Analysis

A number of site location factors are taken into consideration by business and industry as they conduct their due diligence when identifying new business locations to meet their expansion plans. The last piece of the puzzle is understanding key site location criteria of the industry clusters to determine Eloy’s ability to accommodate industry requirements.

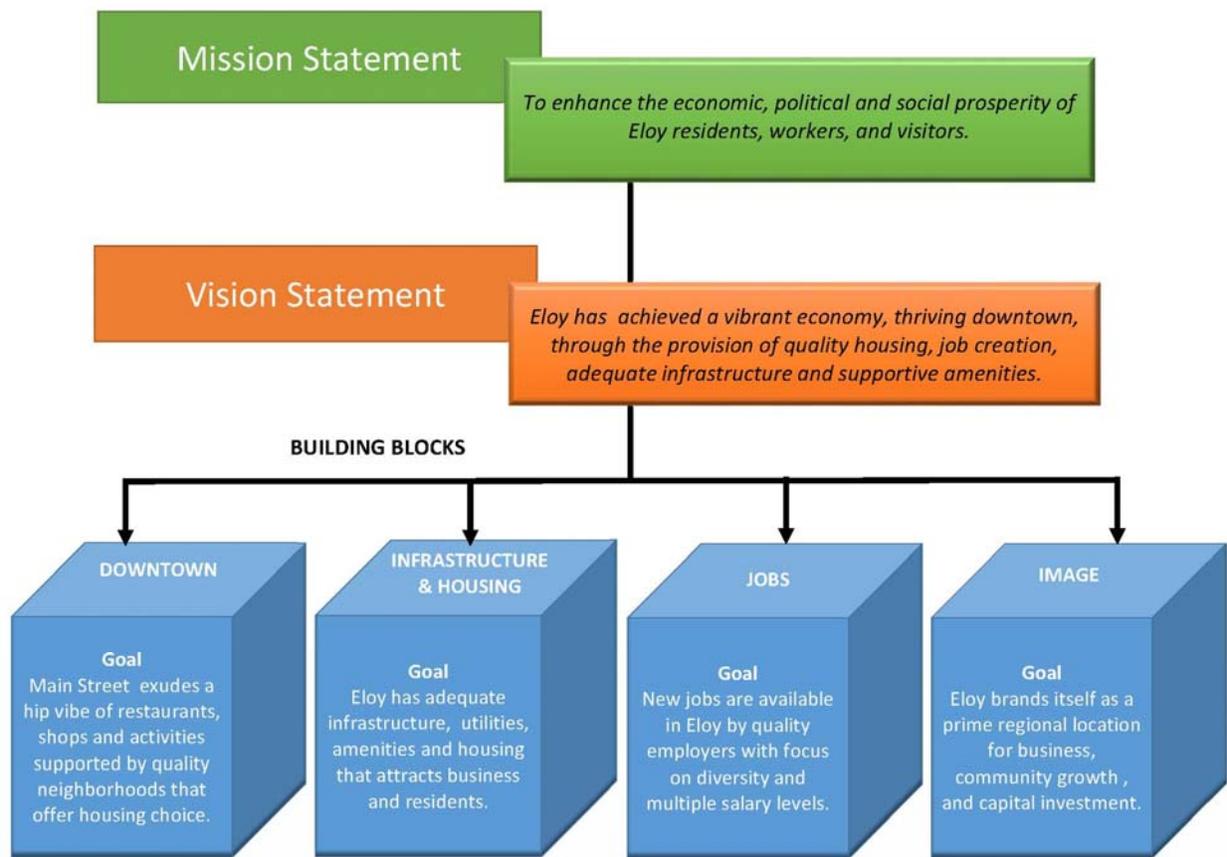
The following Table 16 is a summary of the site suitability analysis for each industry cluster. These site location factors and criteria were compiled from several resources including industry publications, internet research, and ESI Corp’s institutional knowledge from past experience. Findings of the suitability analysis will help the City leverage existing assets and where appropriate, the noted deficiencies addressed in the strategic plan will help overcome the impediments.

*Table 16 – Industry Cluster Site Location Criteria*

Industry Cluster	Key Site Location Drivers
<b>Agribusiness</b>	Proximity to agricultural products and other raw inputs, favorable delivery, cost of materials, favorable wage differentials, availability of water, mature transportation infrastructure, and affordable and available electricity
<b>Arts, Enter, Recreation &amp; Visitor Indus</b>	Population and household growth, median household income, diversity in dining and accommodation options, and labor supply
<b>Business &amp; Financial Services</b>	High speed internet, skilled labor supply, technical labor availability, available buildings, and proximity to business amenities
<b>Manufacturing</b>	Availability of sites and buildings, availability of skilled labor in a variety of production occupations, a flexible and responsive training and education system, competitive labor costs, proximity to transportation networks, proximity to buyers and suppliers, affordable and available electricity, and favorable corporate tax and regulatory environment
<b>Personal and Commercial Services</b>	Availability of technically trained labor, career training programs, customer base, and available sites and buildings
<b>Transportation &amp; Logistics</b>	Proximity to rapidly growing retail and business markets within 200 mile radius, lower operating costs, favorable wage differentials, availability of land and buildings with features such as loading docks, adequate ceiling heights, etc., proximity to highways, rail service, ports and mature multi-modal infrastructure

# Strategic Plan

This strategic plan was developed in collaboration with Eloy policy makers, City staff, and economic development stakeholders. It provides the framework to improve social and economic prosperity for Eloy residents, workers and visitors. This plan recognizes the opportunities and constraints that exist for Eloy and lays out the mission of economic development, the vision for the future, and the fundamental building blocks necessary for preparation of the City to achieve economic prosperity. The plan is anchored with a mission and vision statement and articulates supporting goals under four key economic development building blocks.



## Economic Development Strategy

Over the last 10 years, the City of Eloy has had modest resident population and employment growth. The downtown continues to function as the civic center for government operations and Main Street Park is the center for special events. There are several Eloy advantages that can be leveraged, including:

- Centrally located between Arizona’s two major metropolitan areas of Phoenix and Tucson
- Proximity to California and Mexico markets with overnight delivery capabilities
- Major transportation corridors that include I-10 and I-8 and Union Pacific double track railroad
- Central Arizona College as a partner and workforce provider
- Policy makers, staff and community leaders who are committed to economic development
- Several key industrial sites that could be brought to complete shovel ready status in short term
- Designated Opportunity Zones and Foreign Trade Zone

There are also challenges for the City to overcome and opportunities for the City to seize on. Eloy is in a position to change the economic trajectory of the community by leveraging its location, investing in infrastructure, paving the way for new housing development, revitalizing downtown, and rebranding the image of the community. Strategically aligning City resources to create/attract jobs that pay a wide spectrum of wages is a focus of this strategic plan.

The four building blocks noted below have supporting goals and strategies that comprise the economic development strategic plan. These key initiatives take a relatively broad view of economic development in the sense that they represent a holistic approach to improving the “product” of Eloy that in the long run will enhance job creation efforts.

BUILDING BLOCK	GOALS
<b>DOWNTOWN</b>	Main Street exudes a hip vibe of restaurants, shops and activities supported by quality neighborhoods that offer housing choice.
<b>INFRASTRUCTURE &amp; HOUSING</b>	Eloy has adequate infrastructure, utilities, community amenities, and housing that attracts businesses and residents.
<b>JOBS</b>	New jobs are available in Eloy by quality employers with a focus on diversity and multiple salary levels.
<b>IMAGE</b>	Eloy brands itself as a prime regional location for business, community growth and capital investment.

Each building block is anchored with a goal followed by strategies and a series of tactics for implementation. Performance measures have been identified for each tactic, along with the lead and supporting organizations taking responsibility for implementation. Performance measures are also used to track progress in the achievement of the desired outcome. Identification of short term (less than 3 years) versus mid-term (more than 4 years) strategies will determine the timing for achieving desired outcomes.

To achieve success, the City of Eloy will need to align its goals and funding priorities amongst the various City departments when implementing this strategic plan. In addition, City staff will need to encourage organizations who have a role to play in the City's economic success to also prioritize their goals in alignment of the strategic plan. Finally, City staff will collaborate with its public and private sector partners throughout the region in order to carry out the actions recommended by the strategic plan.

Quarterly meetings should be held by the Economic Development Manager with the Community Development Director and City Manager. The purpose of these quarterly meetings is to review the plan, discuss progress that has been made towards implementation, establish priorities, and provide accountability for meeting the objectives of the strategy. Modifications to the plan should be considered to reflect new partners, changes in market conditions or new opportunities that arise.

The strategic plan will be managed by the Economic Development Manager in consultation with City leadership, and updates to the City Council, Eloy Planning and Zoning Commission and Downtown Advisory Commission should be done in a timely manner.

The Eloy Economic Development Strategic Plan begins on the following page, Table 17.

Table 17 – Eloy Economic Development Strategic Plan

Building Block: Downtown					
Goal - Main street exudes a hip vibe of restaurants, shops and activities supported by quality neighborhoods that offer housing choice.					
Lead and Support Legend: CM, City Manager's office; CD, Community Development; CS, Community Services; Finance, Eloy Finance Department; DAC, Downtown Advisory Commission; CofC, Chamber of Commerce; EHP, Eloy Housing Authority; CAC-SBDC) Central Arizona College-Small Business Development Council); PCFCU-Pinal County Federal Credit Union); PC-Pinal County					
Strategic Action	Tactics	Lead and Support	Timeframe		Performance Metric
			Years 1-3	Year 4 plus	
1. Prepare Downtown Master Plan and Implementation Strategy	Define land use categories and locations	CD, DAC, CoC	•		Plan completed and adopted
	Identify key vehicular access and circulation corridors from I-10 to Main Street	PW,CD	•		Completed detailed circulation plan for downtown with roadway standards, parking regulations and standard cross sections
	Identify key water, sewer, gas, electrical improvements and extensions to enhance shovel readiness/revitalization	PW, CD	•		Completed CIP for Downtown
	Establish workable downtown boundaries	CD	•		Defined area for increased city participation
2. Adopt supportive development regulations	Prepare and adopt Adaptive Reuse Ordinance	CD, DAC		•	Regulations completed and adopted
	Design Guidelines <ul style="list-style-type: none"> <li>• Signage</li> <li>• Landscaping/Outdoor Spaces</li> <li>• Lighting</li> <li>• Materials/Massing</li> </ul>	CD, DAC		•	"
		CD, DAC		•	"
		CD, DAC		•	"
		CD, DAC		•	"
	Prepare and adopt infill Ordinance	CD, DAC		•	"

Strategic Action		Tactics	Lead and Support	Timeframe		Performance Metric	
				Years 1-3	Year 4 plus		
3. Aggressively Market and Manage Assets		Develop a cohesive community brand	CD, DAC	•		Design and adopt new Eloy logo	
		Create one FTE staff position	CD	•		Make strategic hire	
		Increase palette of event offerings	CD, DAC, CS		•		Number of new events
		Revise and administer Facade/Building Maintenance/Enhancement Grant program	CD, DAC		•		Number of buildings enhanced
		Continue to prepare for and conduct Vacant Building Tour	CD, DAC		•		Reduced vacant building rate on Main Street
		Continue to auction surplus City owned properties	CD		•		Number of properties back on the tax rolls and actively being planned/redeveloped
		Confirm direction for Dustbowl Theater/adjacent lot	CD, DAC			•	Implement council directive (renovation or demolition)
		Continue to lease and administer CORR building	CD		•		Maintained and leased for community benefit
		Assess strategic asset acquisition	CD			•	Amount of square feet owned or managed by City in downtown
		Finalize design and construct the approved Arcade Renovation program for Main Street	CD, DAC		•		Number of building facades renovated
		Approve a cohesive design and then implement Landscape Improvements on Main Street	CD			•	Total square feet of new streetscape improvements designed and constructed

Building Block: Downtown					
Strategic Action	Tactics	Lead and Support	Timeframe		Performance Metric
			Years 1-3	Year 4 plus	
4. Revitalize Main Street Park and add public landscaped areas throughout downtown	Enhance functionality and increase drought tolerant plantings	CS, CD, PW		•	Park redesigned, redeveloped and operational
	Increase additional landscaping in public areas with attention paid to drought tolerant native species	CS, CD		•	Number of established landscaped areas along Main Street and Frontier Street
	Leverage overall Eloy investment in new construction, arcade/façade, landscape and park improvements for additional special events	CD,CS, PW		•	Increased number of annual community events

Building Block: Infrastructure and Housing					
Goal - Eloy has adequate infrastructure, utilities, amenities and housing that attracts business and residents.					
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric	
			Years 1-3	Year 4 Plus	
1. Bring top five industrial sites to shovel ready status	Develop a team approach to the development process utilizing resources of the property owner, the City of Eloy and various funding sources to accelerate targeted infrastructure development	CD	•		Increase number of shovel ready sites
	Develop an incentive program to encourage the development of off-site infrastructure	CD, Finance	•		Number of companies interested in participation
	Prepare report on the option of hiring independent grant writers to support design and construction of employment related infrastructure	CD	•		Report completed
	Use freelance grant writers to access any and all grant opportunities suited to Eloy's demographics	CD	•		Number of grants applied for and number of successful applications
	Initiate rezonings on properties with the best chance for commercial development activity	CD	•		Number of rezonings and number of interested parties post rezoning
	Prioritize infrastructure improvement plan to support key growth areas over outward expansion	CD, PW, Finance, CM	•		Total number of commercial/industrial parcels served
	Work with City Council to adopt fees that are the most competitive in Eloy's market area.	CD, Finance, EHA	•		Council adopts lowest fees in Pinal County
2. Prepare and adopt an infrastructure improvements plan and complete a development impact study					

Building Block: Infrastructure and Housing				
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric
			Years 1-3	Year 4 Plus
3. Prepare and adopt a residential attraction plan	Identify key sites best suited for residential development	CD, PW	•	Inventory complete
	Determine necessary incentives and standards necessary to attract affordable and move up housing	CM, CD	•	Increased number of housing proposed and permitted
	Initiate rezonings on properties with the best chance for residential development activity	CD	•	Number of acres immediately available for development

Building Block: Jobs				
Goal - New jobs are available in Eloy by quality employers with focus on diversity and multiple salary levels.				
Strategic Action	Tactics	Lead and Support	Performance Metric	
			Timeframe	
			Years 1-3      Year 4 Plus	
1. Implement an industrial/business recruitment program	Participate in trade shows, forums and other events to showcase and promote Eloy	CD	•	Number of events attended
	Maintain frequent communications with the real estate brokerage community	CD	•	Keep log of interactions and set up calling schedule
	Attract business amenities to support non-service/retail employers	CD	•	Number of new restaurant/service businesses
	Identify and promote realistic incentives to foster quality economic development	CM, CD, Finance	•	Preparation and maintenance of incentive options for general discussion with prospects
	Prepare a cost of doing business comparison of Eloy with key competitors and source cities	CD	•	Comparison complete with schedule for updates
2. Collaborate to retain and expand existing businesses	Continue to implement a business outreach program	CofC, CD	•	Number of businesses visited
	Establish and conduct industry roundtables	CofC, CD	•	Eloy industry roundtable conducted
3. Work collaboratively to create a repository of entrepreneurship information and programs	Understand and promote available micro-loan programs to support home occupations	CAC-SBDC, GWB, PCFCU	•	Inventory and list of human resources completed
	Work with local financial institutions to understand and promote Community Reinvestment Act (CRA) programs	CD, GWB, PCFCU,	•	Number of successful applications and amount of CRA attributable funding
	Investigate other federally-related Economic Development support programs	CD, Finance, USDA, FHA,	•	Inventory of programs and successes and list of human resources completed

Building Block: Jobs					
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric	
			Years 1-3	Year 4 Plus	
4. Work collaboratively to prepare youth for success in school and work	Support the work of Achieve Pinal Committee to create early childhood career pathways in partnership with K-12, business and higher education resources	CD, Achieve Pinal, Arizona@Work, CofC	•	•	Attend meetings and conferences as possible, have working knowledge of programs and resources
	Focus resources on youth engagement, education programs and internships	CD, Achieve Pinal, Arizona@Work, CofC	•	•	Understand local resources and provide local assistance as possible
	Continue to leverage the work led by Arizona at work, Achieve Pinal and other career initiatives	CD, Achieve Pinal, Arizona@Work, CofC	•	•	Inventory of programs and successes and list of human resources completed
5. Promote adult workforce and skill development program	Help training providers to link workforce responding to the needs of local employers	CD, Achieve Pinal, Arizona@Work, CofC	•	•	Number of successful referrals
	Utilize the findings of the Pinal County Occupational Skills survey to promote skills that benefit Eloy employers	CD, Achieve Pinal, Arizona@Work, CofC	•	•	Utilize and reference the report to enhance location opportunities
6. Attract a satellite facility for post-secondary education	Identify potential post-secondary sites	CD	•		Inventory of potential locations
	Determine the type of curriculum most in demand	CD, Arizona@Work, CofC	•		Employer needs identified and documented
	Engage with ASU, UA, CAC and other higher learning institutions to strengthen connections and resources to benefit new and existing businesses	CD		•	Have active list of resources and communicate on a regular basis

Building Block: Jobs				
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric
			Years 1-3	Year 4 Plus
7. In collaboration with Skydive Arizona, support the Eloy Airport as an international skydiving center and future aviation employment center	Support and participate in national and international sky diving competitions and other events at the airport that bring attention to the City of Eloy	CD, CS, CofC	•	Established partnership to attract and promote sky diving competitions and events, number of events held
8. Design and adopt a Municipal Airport Specific Plan	Develop long range plan for the ultimate development of the airport for aviation and aeronautical related industries or industries that rely on airport convenience and services	CD	•	Plan complete and adopted
9. Prepare and adopt an airport business plan	Integrate three primary components, one is the current utilization as a destination sky diving facility, two is the eventual transformation in to a multiple use facility and the third is the final transformation into a full service general aviation airport	CD, PW	•	Plan complete and adopted
10. Develop and implement a plan to encourage and enhance Eloy's potential to attract international employees	Work with international trade organizations such as the Arizona Mexico Commission, ACA, MAG, the Arizona Hispanic Chamber, and other trade related organizations	CD, CofC	•	Active participation in programs encouraging trade with Mexico
11. Market and encourage vacant land purchases	Maintain site inventory of key vacant parcels with site attributes such as FTZ , O-Zones or other value added amenities  Regularly communicate with site selectors and real estate brokerage houses about the benefits of an Eloy location	CD  CD, CBRE, JLL, ALA, NA,	•  •	Inventory and marketing materials complete  Include complete list of active site selectors, land owners and brokers in all mailing lists and social media mailings, present Eloy opportunities to no less than 6 firms per year.

Building Block: Jobs				
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric
			Years 1-3	Year 4 Plus
12. Attract a full service hotel with meeting, conference and food service	Identify potential locations	CD	•	Complete inventory of appropriate sites
	Conduct a market feasibility study	CD		Feasibility analysis complete
	Develop relationships with hotel developers and site selectors	CD		New hotel complex located in Eloy
13. Promote Eloy as a location for shooting film and video production	Prepare and see through adoption of a commercial film ordinance to encourage and support filming in Eloy	CD		• Ordinance adopted, marketed and on file with the Film office at the ACA
	Create film sites photo library	CD		• Inventory complete and on file with the Film office at the ACA
	Annually prepare tour for the ACA film office and film site selectors	CD		• Tour scheduled and completed
	Provide assistance with scouting sites and support industries i.e. construction, catering etc.	CD		• Complete list of supporting industries including incentives or deals provided by Eloy hotels, restaurant, etc.
	Act as liaison to government agencies and individual property owners to coordinate film industry needs	CD		• Successful attraction of at least one film or other media production

Building Block: Jobs					
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric	
			Years 1-3	Year 4 Plus	
14. Encourage a County wide approach to a full service Economic development agency to provide leads and research to Pinal County economic development agencies	Support and participate in discussions to increase competitiveness with areas of the state with existing regional agencies	CM, CD		•	County-wide program adopted providing leads and research services
	Support efforts of the County to provide national marketing services resulting in direct acquisition of leads suited for Pinal County communities	CM, CD, PC		•	"
	Support efforts of the County to provide research necessary to attract and encourage new investment in Pinal County	CM, CD, PC		•	"
15. Position the Eloy Airport as a long-term asset for aviation and aeronautical related employment	Update airport master plan	PW, CD, CM		•	Update complete
	Expand the supply the supply of T-Hangars	PW, CM	•		Number of T-Hangars added
	Pursue grants for key airport expansion projects and improvements	PW, Finance		•	Potential grants identified, application complete and funding secured
	Provide direct collector street connection between DOWNTOWN and Airport	PW, CD,		•	New street designed and constructed

Building Block: Image					
Goal - Eloy brands itself as a prime regional location for business, community growth and capital investment					
Strategic Action	Tactics	Lead and Support	Timeframe		Performance Metric
			Years 1-3	Year 4 Plus	
1. Develop and implement an updated Eloy brand and image	Conduct series of branding exercises to align Eloy with a common vision	CM, CD	•		Branding, image and logo complete and implemented
	Implement a marketing strategy to embed the brand in all market strategies and product development programs	CM, CD	•		All marketing materials updated
2. Develop an ongoing marketing plan that promotes and image and opportunities in Eloy	Adopt new logo and tagline, rebrand all related Eloy City materials	CM, CD	•		All marketing materials updated
	Continually update Eloy economic development marketing brochure	CD	•	•	All marketing materials kept recent applicable in print and electronic format
	Utilize existing 1-10 billboards to tell Eloy story	CM, CD		•	At least two billboards utilized to tell Eloy story to interstate travelers
	Continue and expand the Eloy Opportunity newsletter to a monthly or bi-weekly output	CD, CofC		•	Newsletter monthly with special editions throughout the year to mark location announcements, adoption of new economic
	Establish robust Eloy economic development specific website	CD	•		Eloy economic development website active
	Aggressively integrate social media into Eloy's economic development marketing mix	CD	•		Eloy has a presence on LinkedIn to support economic development efforts

Building Block: Image						
Strategic Action	Tactics	Lead and Support	Timeframe	Performance Metric		
			Years 1-3	Year 4 Plus		
3. Expand the community beautification programs relating to commercial and residential maintenance, clean up, fight blight, recycling etc.	Work with ADOT in visually enhance I-10 overpasses, interchanges and signage	CM, CD, CofC		•	Number of faces of improved interchanges in Eloy	
	Implement ROW streetscape beautification projects	CD, PW, CS		•	Main Street landscape plan implemented	
	Institute neighborhood and commercial beautification awards program	CD, PW, CS		•	Program instituted and awarded annually	
	Continue Eloy "Operation Clean-Up"	CD	•		Number of pounds of material collected and disposed of annually	
	Continue "adopt a street" clean up program	CD, CofC	•		Event held twice annually with continued increase in participation	
	Continue aggressive code compliance program	CD	•		Second code compliance officer hired, number of inquiry's and	
	4. Develop community art program	Encourage public art through creative landscaping, public sculpture, murals etc.	CD, CofC		•	Square feet of public art designed and installed
		Establish public art and community beautification advisory commission	CM, CD, CofC		•	AAC established with adopted goal and mission statements completed
		Implement an active social media program for "bragging stories" highlighting commercial, residential and personal success stories	CM, CD	•		Weekly social media presence, Facebook, LinkedIn etc.
	6. Design and implement wayfinding signage for key city destinations	Include all City signage as part of the rebranding and logo design package	CD	•		Signage standards adopted and new signs installed
Encourage ADOT to include Eloy freeway wayfinding signage		CD		•	Number of wayfinding signs in ADOT right of way	

Appendix A – City of Eloy Community Assessment

## Eloy Community Assessment

### STRENGTHS

#### Assets

- Centrally located between the two metro areas of Phoenix and Tucson
- Proximity to California and Mexico
- Rail and major transportation corridors (I-10 and I-8)
- Direct access off of I-10
- Proximity to Sky Harbor International Airport
- Central Arizona Irrigation and Drainage District (CAIDD), water rights and availability of water
- New City Hall
- Eloy Recreation Center
- Central Park and Veteran's Park
- Eloy Visitor's Center
- Proximity to Central Arizona College
- Weather conditions and airspace conducive for sky diving
- Robson Ranch
- Workforce within a larger labor shed
- Eloy Airport
- Internationally known SkyDive Arizona
- Picacho Mountain and Newman Peak Trail

#### Downtown

- Existing downtown business
- New businesses opening in downtown
  - *Restaurant at Pinal Hispanic Council building*
  - *New restaurant planning to open in old Sonic building*
  - *New doctor office and potential re-use of bank building as Urgent Care center*
  - *Pinal Credit Union opening inside City Hall*
  - *Expansion of Eloy HeadStart*
- Concentration of education and civic uses in downtown
- Ample downtown parking
- Festivals and events in downtown that draw people
- Wide streets, beautiful park and places to sit

#### Culture and History

- Family oriented with deep family cultural roots
- Small town atmosphere – "Everyone knows everyone"
- Known for the Eloy water tower
- Diverse population base

#### Leadership

- Talented and experienced staff
- Council committed to embracing change
- Eloy Downtown Advisory Commission
- City investments
- Pinal County Economic Development marketing efforts

---Continued on Next Page---

## Eloy Community Assessment

### **WEAKNESSES/CHALLENGES**

#### **Workforce and Education**

- Shallow labor pool and lack of a skilled workforce
- Reputation of the education system, which is not performing as high as others
- Lower levels of educational attainment
- High school boundaries divide Casa Grande and Eloy
- Substance abuse and behavioral health
- School children that live in poverty don't have access to the internet so they can't utilize technology outside of the school

#### **Planning and Community Development**

- Infrastructure is limited
- City's ability to pay for infrastructure improvements
- Lack of workforce housing and existing housing is not desirable; poor variety of housing options and price range
- Internet service is poor
- Roads are tired and worn and costly to repair
- Areas along the Santa Cruz River are in the flood zone
- Image of the community and perception that there is a lot of crime

#### **Downtown**

- There is little reason to go downtown – lack of downtown type businesses
- Theater is an eyesore and cost to repair greater than the potential return
- Robson Ranch is not connected to downtown
- Buildings in need of repair, boarded up buildings, and the overall visual appearance
- Lacking public amenities – (trash receptacles, benches, bike racks, etc.)
- Downtown is very linear and doesn't encourage walkability
- Frontier Street, which is the window to downtown, needs improvement
- Getting business on Main street that can survive
- Residential mixed in with business
- Rehab of older buildings is expensive with a lot of regulations

#### **Economic Development**

- Eloy has not been consistent with marketing
- Job opportunities are severely limited, especially for young adults
- Most retail is outside of Eloy
- Limited disposable income and retail potential
- Overall property tax rate is high
- Lack of amenities for business such as hotels, restaurants and services
- Lack of amenities for residents such as theater, roller rink, bowling alley and restaurants
- Absence of smaller 5-10 acre lots for business
- Lack of infrastructure and shovel ready sites
- Land owners are not developers and lack the sophistication to get deals done

#### **Leadership and Collaboration**

- Lack of regional cooperation or collaboration between the cities and county
- Lack of a regional entity to effectively market the region
- Poor working relationship with SkyDive Arizona

#### **Social**

- Community resistant to change and keeping the City from moving forward
- People are leaving and the next generation is not moving to Eloy

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## Eloy Community Assessment

### OPPORTUNITIES

#### Workforce and Education

- Tie skill training to targeted industry
- Work with the schools to develop career pathways that are meaningful to the local economy
- Continue to engage with CAC
- Organize a career day/Job Fair
- Innovative leader as next school superintendent
- Utilization of business mentors and Internship programs between ACA and local business
- Create apprenticeship programs and expand Central Arizona Valley Institute of Technology (CAVIT) programs
- Lack of transportation during the summer for students to access programs
- Creation of a teen center
- Engage high school seniors who can be the future leaders of the community

#### Marketing & Promotion

- Find a niche and create a new image for the community
- Develop a cohesive brand for downtown
- Consistent marketing of downtown's events, activities and business/entrepreneurial opportunities
- Develop a marketing program/outreach aimed at industry targets
- Enhanced website, utilization of social media and leverage Pinal County's marketing outreach
- Greater engagement of residents/neighborhoods
- Targeted industry attraction
- Outreach efforts to educate brokers, developers, consultants on Eloy
- Real estate broker outreach to market portfolio of sites along I-10 and near Nikola
- Signage off of I-10 that says Downtown Eloy
- Co-located Chamber of Commerce and Visitor Center
- Greater promotion of Eloy to visitors with new brochure, website and social media outreach

#### Downtown

- Improve the overall appearance/aesthetics/signage of downtown
- Consistency in tree trimming and removing weeds and trash
- New tenant/use for the old drug store building/property (Teen Center; Mercado)
- Restoration/repurpose of the old Dust Bowl Theater
- Downtown farmers/craft market
- Façade Improvement program
- Eloy Main Street Arcade Renovation Project
- Adaptive reuse of City owned buildings
- Development of vacant buildings and lots
- Need to stimulate more traffic flow to downtown with Main Street better aligned to Sunshine Blvd
- Increase the events, festivals, activities and other programming for downtown
- Engage the private sector and non-profits
- Foster the development/attraction of small shops that can be sustained by the existing population
- Become a destination known for something i.e. arts, antiques, culinary, etc.
- Adapt a vacant building into a food hall and/or merchant mall by creating slots for vendors
- Prepare a downtown master plan

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## Eloy Community Assessment

### **OPPORTUNITIES (CONTINUED)**

#### **Economic Development**

- More dining and entertainment options, such as restaurants and movie theater
- Identify/create incentives aimed at industry targets and small business
- Work with economic partners and identify and attract the electric vehicle supply chain for Nikola and Lucid Motors
- Become the economic corridor for electric and autonomous vehicles (auto, truck and farm equipment)
- Target light manufacturing/assembly; warehousing/distribution; engine maintenance and repair; parachute harnesses, rigging, equipment testing and other aviation business related to the airport; agri-business/value added agriculture
- Need business and job growth off of Sunshine Boulevard and I-10
- Develop a Skydive Hall of Fame
- Attract more freeway related business along I-10
- Develop an incubator or co-working space
- Leverage the FTZ and Opportunity Zone designations
- Tie tourism to extreme sports such as BMX tracks, desert scramble, skydiving, etc. and outdoor recreation such as hiking and biking
- Attract a developer to City owned land
- Attract higher end lodging
- Be proactive and visible with the Governor's Office, ACA, GPEC, Pinal County, and PAEG
- Build and leverage the relationship with SkyDive Arizona
- Agriculture and food development?
- Utilization of SBDC services including one-on-one counseling, workshops and business training
- Collaboration with the Chamber of Commerce on business retention activities

#### **Community and Infrastructure Development**

- Housing development to attract a workforce
- City owned lots that can be sold to developers for housing
- Downtown revitalization and redevelopment
- Leverage the future North-South Corridor to accommodate employment
- Synchronize the strategic actions of the city's planning documents: economic development plan, general plan, and capital improvement plan
- Transit system connecting Eloy to Casa Grande and Coolidge
- Strategically expand water and sewer infrastructure to stimulate industrial/business park development
- Beautify the entrances to Eloy off of I-10 and make them more welcoming
- Reconstruction of the I-10/SR 87 traffic interchange and the proposed land annexation
- Invest in better broadband, which is a driving force behind the economy
- Prioritize and pursue improvements at the airport
- Invest in infrastructure at the FTZ
- Incorporate land in strategic areas like Picacho Mountains and across from Nikola
- Regional park that includes soccer, tennis courts and other ball fields
- Replacement of tie downs lost to taxiway expansion

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## Eloy Community Assessment

### THREATS

#### Physical

- Congestion on I-10
- Vacant and neglected properties
- Continual deterioration in roads and infrastructure

#### Social/Policies

- Underperforming schools
- Legislative policies that drove off Hispanic customers and hurt the economy
- Lack of regional cooperation
- Residents who are resistant to change
- Leaders who allow their personal beliefs to interfere with what is best for the city as a whole
- Ignoring the needs of all citizens from young to old

#### Economic

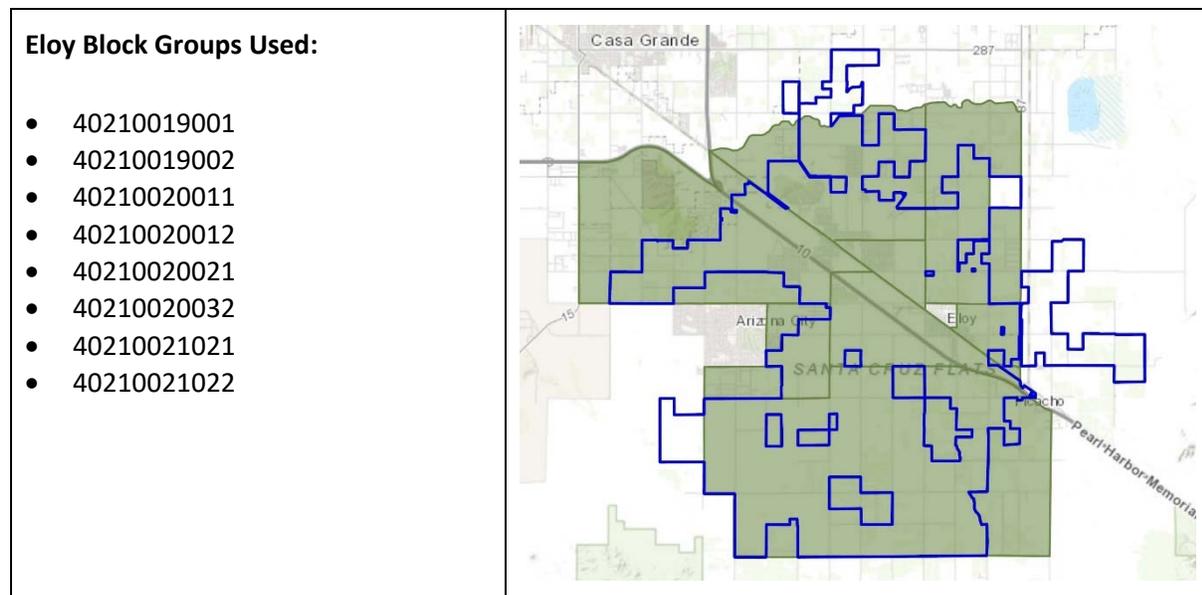
- Growing competition from Downtown Casa Grande's events, promotions and successes
- 70% of retail tax comes from I-10
- 75% of city's budget comes from retail tax and prison property tax
- Proposed I-11 could draw or reduce traffic off of I-10
- Electric vehicles could reduce gas tax collections
- Too much land tied up in too few owners
- Competition locally and regionally for business and labor
- Increase in gas prices
- Economic stagnation
- Negative publicity from the Eloy Detention Center
- Demise of agriculture
- Water scarcity and cost

---End---

Appendix B – Eloy Block Groups

## Aggregated Block Groups

Data from all sources include the incarcerated population within the figures. Given that this cohort represents nearly 50 percent of Eloy’s population, some of these datasets present a distorted picture of Eloy’s household population. To overcome this problem, an aggregation of Eloy block group data was compiled and analyzed for educational attainment, age by sex, and race-ethnicity. The block groups selected are presented below, and depicted in green, with City boundaries overlaid in blue. Some of the block groups extend beyond the city’s boundary while some of the city’s boundary extends outside of the block group boundary. It is the author’s opinion that the block groups selected best represent the City of Eloy’s household population.



Appendix C – Priority Industrial Sites Fact Sheets

# Market Assessment Area #1 – Sunshine Industrial Park

## Site Information

209 Acres

APN:

- 411-100-17B, 411-100-23E, 411-100-23F, 411-100-21C, 411-100-17E, 411-100-21D, 411-100-190, 411-100-180, 411-100-17F, & 411-100-160 – WSI Development Sub LP

Zoning: I-1

General Plan: Light Industrial

## Site Circulation

- Direct property frontage and access to Sunshine Blvd. and Milligan Rd. (675 feet of frontage) with over 4,000 feet of improved Date Street (4 lanes with center turn lane) on-site roadway access to serve internal parcels
- Adjacent to the I-10 and Sunshine Blvd. Interchange with over one mile of I-10 frontage (no vehicular access) and visibility
- Convenient regional access being adjacent to the I-10/Sunshine Rd interchange and approx. 9 miles to the I-8 and I-10 interchange
- Over 3,000 linear feet of frontage to the Union Pacific RR, sufficient for a limited rail spur design if so desired by an end user



## Site Image

## Water, Wastewater, & Utility Considerations

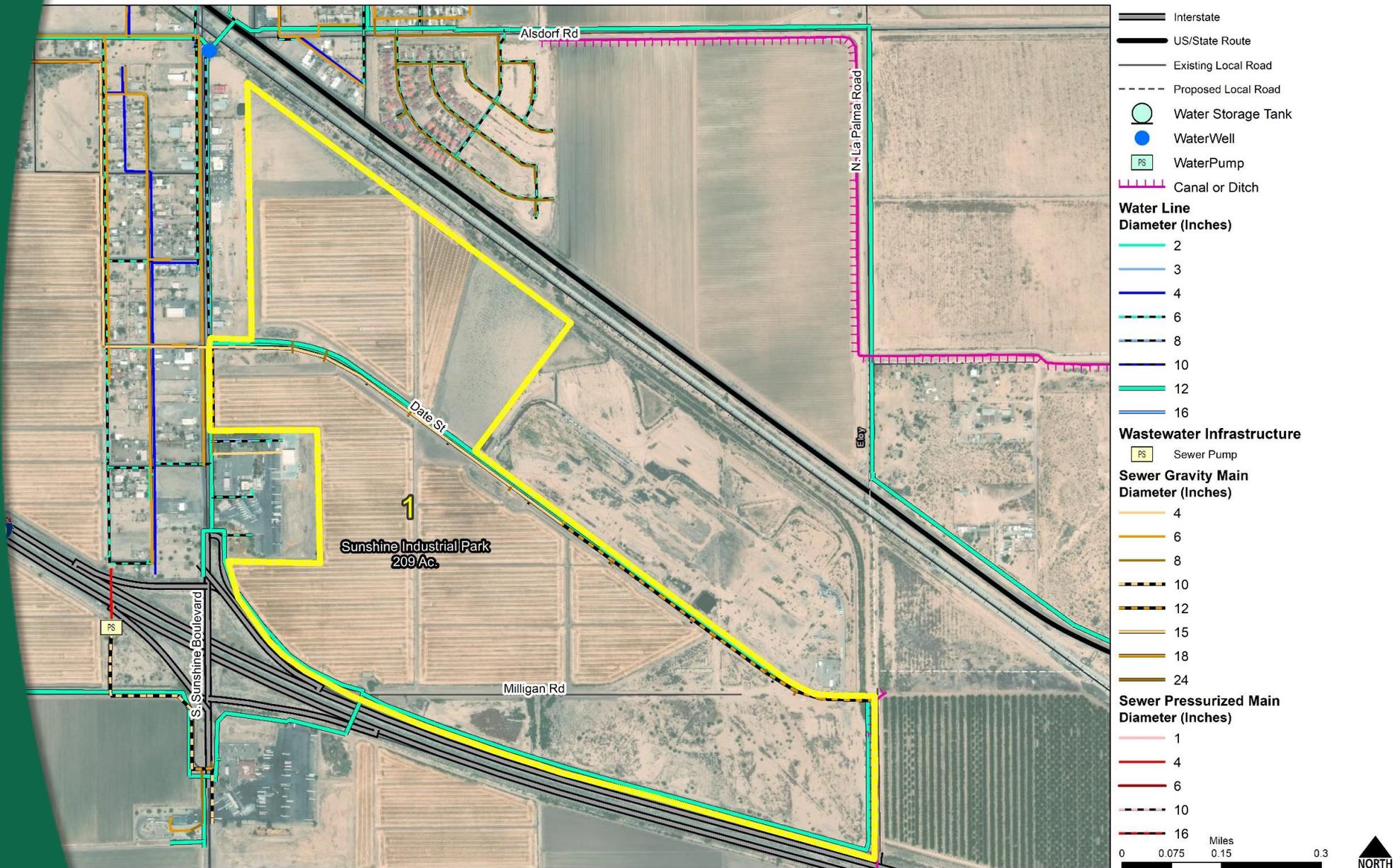
- Water: An existing looped system provided needed redundancy serving the entire property. This includes a 12" line running along the southern boundary, and another 12" line located in Date St., both connecting to existing
- Wastewater: 12" gravity line feeding into a 15" gravity line in Date St. serving entire property. 15" line feeds into 18" gravity line in Sunshine Rd.
- Electric: APS
- Gas: Southwest Gas
- Canal located along the southeast boundary.

## Proximity to Public Facilities Infrastructure Needs Analysis

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Downtown Eloy: 1/2 mile</li><li>• Downtown Casa Grande: 10.5 miles</li><li>• Casa Grande Medical Center: 11.5 miles<ul style="list-style-type: none"><li>• Central Arizona College: 19 miles</li><li>• Picacho Peak State Park: 15 miles</li></ul></li></ul> | <ul style="list-style-type: none"><li>• Ultimate water and wastewater solution TBD with City based on end user system demands. 2008 master plan guidance may or may not be utilized.</li><li>• Average Daily Water Demand: 365,750 gallons</li><li>• Water Infrastructure Needs: Readily serviceable with existing lines. Average and max day (peak) storage and pressure needs to be determined by end user requirements.</li><li>• Average Daily Wastewater Generated: 209,000 gallons</li><li>• Wastewater Infrastructure Needs: Existing series of gravity lines on site appear to be sufficiently sized and have available capacity to serve end users with typical/average use demands.</li></ul> |
|--|---|



# Market Assessment Area #1 – Sunshine Industrial Park



# Market Assessment Area #2 – Toltec Business Park

## Site Information

Acreage: 278 Acres

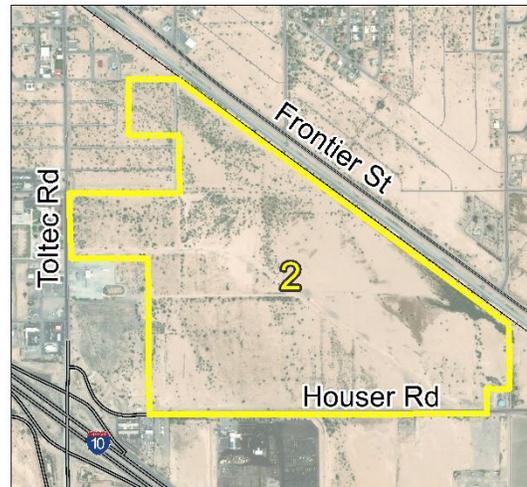
Ownership and APN:

- 404-090-040 – RUC Holding Inc.
- 404-090-23A – RUC Holding Inc.

Zoning: I-2

General Plan: General Industrial

## Site Image



## Site Circulation

- Direct property frontage and access to Toltec Rd. (west) with approximately 800 feet of frontage.
- Direct property frontage and access to Houser Rd. (south) with approximately 4,000 feet of frontage.
- Very convenient access for regional commerce with adjacency to the I-10 and Toltec Rd. Interchange and 4.25 miles to I-8 and I-10 interchange.
- Potential roadway access from Frontier St., but not considered necessary due to expensive grade separated crossing needed of railroad and optimum accessibility from Toltec Rd. and Houser Rd.
- Approximately 4,900 feet of Union Pacific Railroad frontage; sufficient for a rail spur design if desired by end user.

## Existing Water, Wastewater, & Utilities

- Water: 16" line running completely through the property; a 12" line along Toltec Rd. and on the east property line. A water well and pump station located adjacent to the southeast corner of the property
- Wastewater: 16" pressure line located approximately 300' away, along the north side of Frontier St.
- Electric: APS
- Gas: Southwest Gas
- CAP Canal approximately 150 feet south of the property

## Proximity to Public Facilities

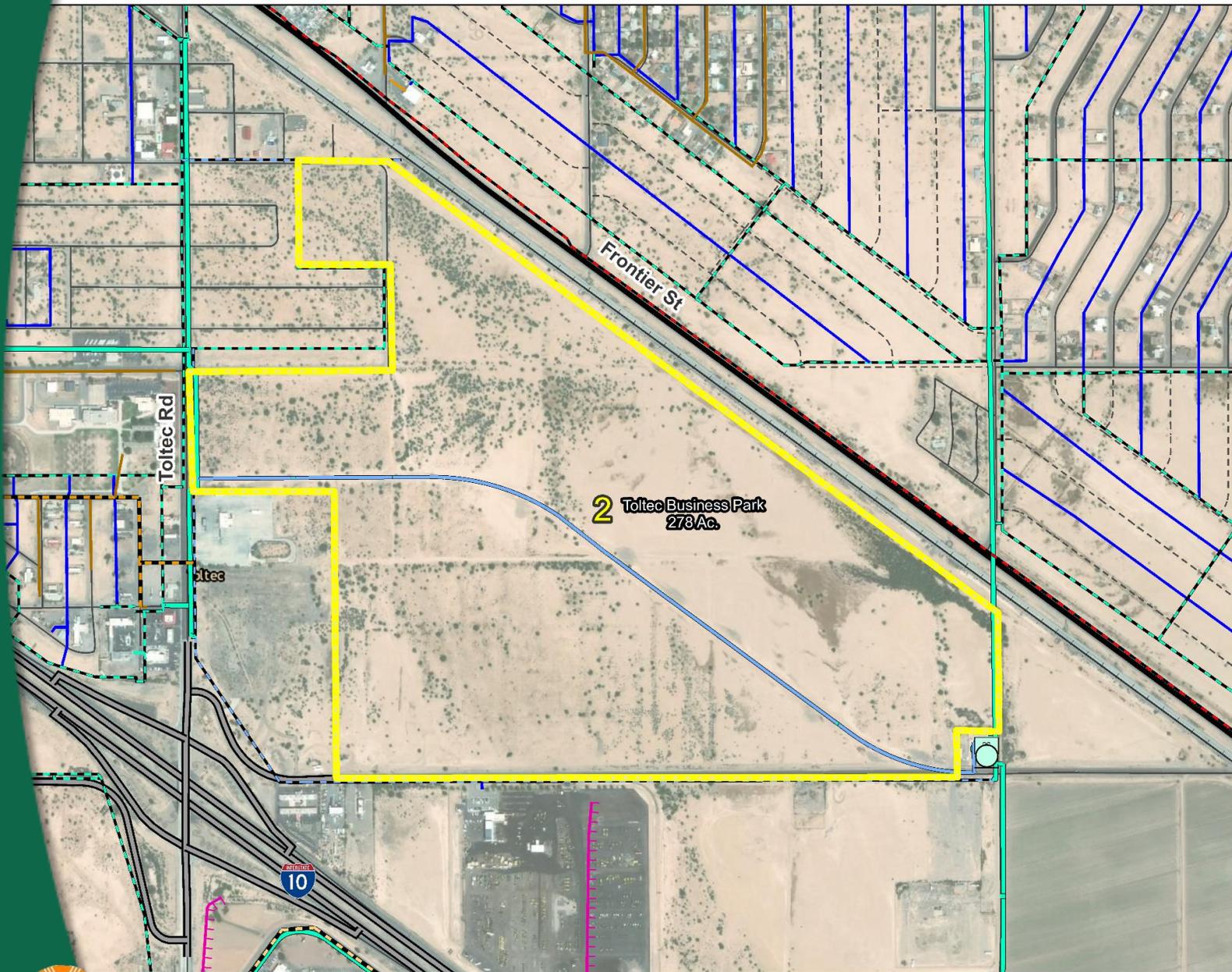
- Downtown Eloy: 4 miles
- Downtown Casa Grande 9.5 miles
- Casa Grande Medical Center: 10.5 miles
- Central Arizona College: 18 miles
- Picacho Peak State Park: 15 miles

## Infrastructure Needs Analysis

- Ultimate water and wastewater solution TBD with City based on end user system demands. 2008 master plan guidance may or may not be utilized.
- Average Daily Water Demand: 486,000 gallons
- Water Infrastructure Needs: Readily serviceable with existing lines. Average and max day (peak) storage and pressure needs to be determined by end user requirements.
- Average Daily Wastewater Generated: 278,000 gallons
- Wastewater Infrastructure Needs: Pressure line extension south and likely oversizing of Tohono II lift station needed. Downstream pressure line capacity analysis and possible line upsizing necessary.



# Market Assessment Area #2 – Toltec Business Park



- Interstate
- US/State Route
- Existing Local Road
- Proposed Local Road
- Water Storage Tank
- Water Well
- Water Pump
- Canal or Ditch

**Water Line Diameter (Inches)**

- 2
- 3
- 4
- 6
- 8
- 10
- 12
- 16

**Wastewater Infrastructure**

- Sewer Pump

**Sewer Gravity Main Diameter (Inches)**

- 4
- 6
- 8
- 10
- 12
- 15
- 18
- 24

**Sewer Pressurized Main Diameter (Inches)**

- 1
- 4
- 6
- 10
- 16

0 0.075 0.15 Miles 0.3

NORTH



# Market Assessment Area #3 – Houser Road Industrial Park

## Site Information

134 Acres

APN:

- 404-230-02C - Cotton City Industrial Park LLC

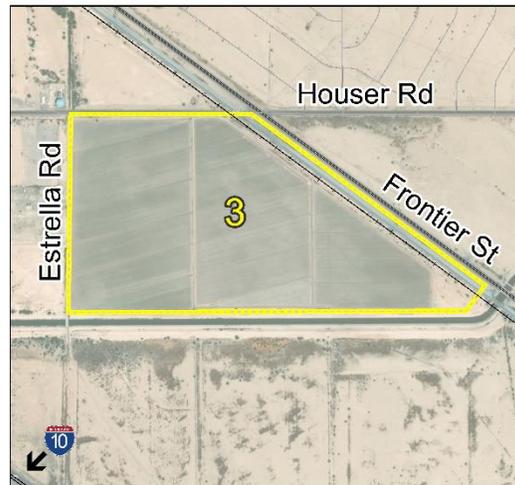
Zoning: I-2

General Plan: General Industrial

## Site Circulation

- Direct property frontage and access to Houser Rd. with approximately 1,600 feet of frontage. At grade RR crossing allows access to Frontier St.
- Estrella Rd. (or Curry Rd.) contiguous to the west property line (approx. 1,900 feet of frontage) is planned as a Minor Arterial Roadway. No roadway exists today.
- Convenient regional accessibility being 1.25 miles to the I-10 and Toltec Rd. Interchange And 5.75 miles to I-8 and I-10 interchange.
- Approx. 2,775 feet of Union Pacific RR frontage which is suitable in size and alignment to establish a rail spur if desired by end user.

## Site Image



## Existing Water, Wastewater, & Utilities

- Water: Existing 12" line running adjacent to the property along the Estrella Rd. alignment. A 16" line, water well, storage reservoir and pump station located adjacent to the northwest corner of the property.
- Wastewater: 16" pressure line located approximately 300' away, along the north side of Frontier Street. to the north. Additional 4" pressure line and a 12" gravity line located south of the property, but access obstructed by CAP canal.
- Electric: APS
- Gas: Southwest Gas
- CAP Canal just south of the property

## Proximity to Public Facilities

- Downtown Eloy: 3 miles
- Downtown Casa Grande: 10.5 miles
  - Casa Grande Medical Center: 11.5 miles
  - Central Arizona College: 19 miles
    - Picacho Peak State Park: 14 miles

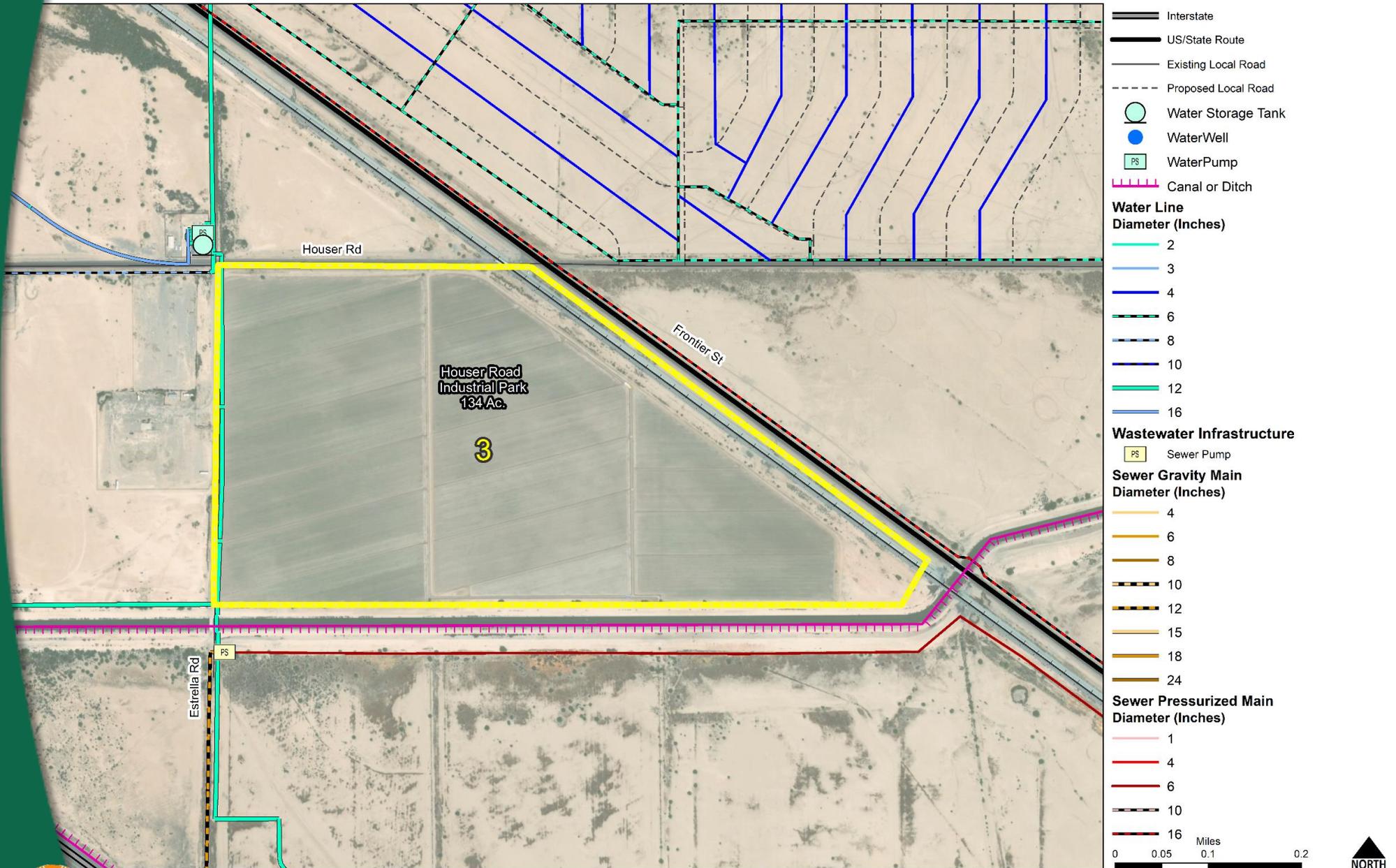
## Infrastructure Needs Analysis

- Ultimate water and wastewater solution TBD with City based on end user system demands. 2008 master plan guidance may or may not be utilized.
- Average Daily Water Demand: 234,500 gallons
- Water Infrastructure Needs: Serviceable with existing lines. Average and max day (peak) storage and pressure needs to be determined by end user requirements.
- Average Daily Wastewater Generated: 134,000 gallons

Wastewater Infrastructure Needs: Pressure line extension south and likely oversizing of Tohono II lift station needed. Downstream pressure line capacity analysis and possible line upsizing necessary.



# Market Assessment Area #3 – Houser Road Industrial Park



Houser Road Industrial Park  
134 Ac.  
3

Houser Rd

Frontier St

Estrella Rd



# Market Assessment Area #4 – Interstate 10-8 Business Park

## Site Information

**Acreage:** 570 Acres\*

**Ownership and APN:**

- 402-150-37d, 402-150-37b, 402-150-37k Sutton Kenneth & Cynthia
- 402-150-37m, 402-150-37j, 402-150-37q, 402-150-37t, 402-150-37u - Carroll Ned & Betty Family Trust
- 402-150-32b - Performance Capital LLC 401(K) Profit sharing Plan
- 402-150-37p, 402-150-37g, 402-150-34c, 402-150-34b, 402-150-33c, 402-150-41b, 403-020-12a, 402-150-420, 402-150-430, , 402-140-04a, 403-020-04a, 403-020-04b - Peterson Arizona Land LLC
- 403-020-130 - TES Farms

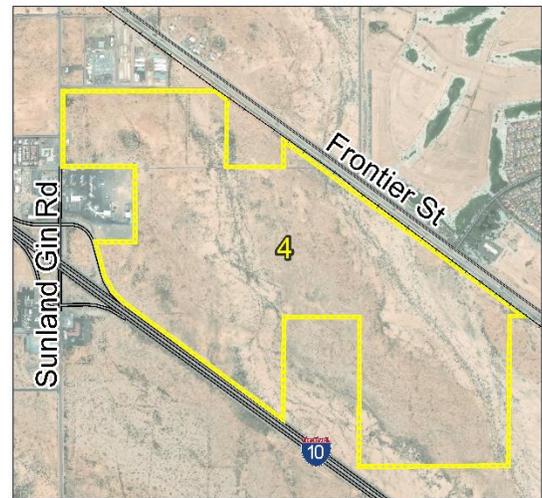
**Zoning:** I-1 (52 acres), I-2 (476 acres)

**General Plan:** CB-2 (13 acres), C1-2 (29 Acres), General Industrial (263 Acres) Light Industrial (307 acres)

## Site Circulation

- Over one mile of I-10 frontage/visibility; no direct vehicular access.
- Newly acquired parcels provide direct property frontage and access to Sunland Gin Rd.
- Convenient access for regional commerce with less than ¼ mile to I-10/Sunland Gin interchange and only 1.5 miles to I-8/ I-10 interchange.
- Adjacent to the Union Pacific Railroad, but noncontiguous frontage limiting for rail spur access.

## Site Image



## Existing Water, Wastewater, & Utilities

- Water: 6" line along the southern property line; located near system terminus and lack of redundancy
- Wastewater: Located in Eloy sub-basin #4, existing infrastructure served from sub-basin #1. 10" pressure line at running through the property; located upstream in a system of downstream pressure lines and lift stations.
- Electric: APS
- Gas: Southwest Gas

## Proximity to Public Facilities

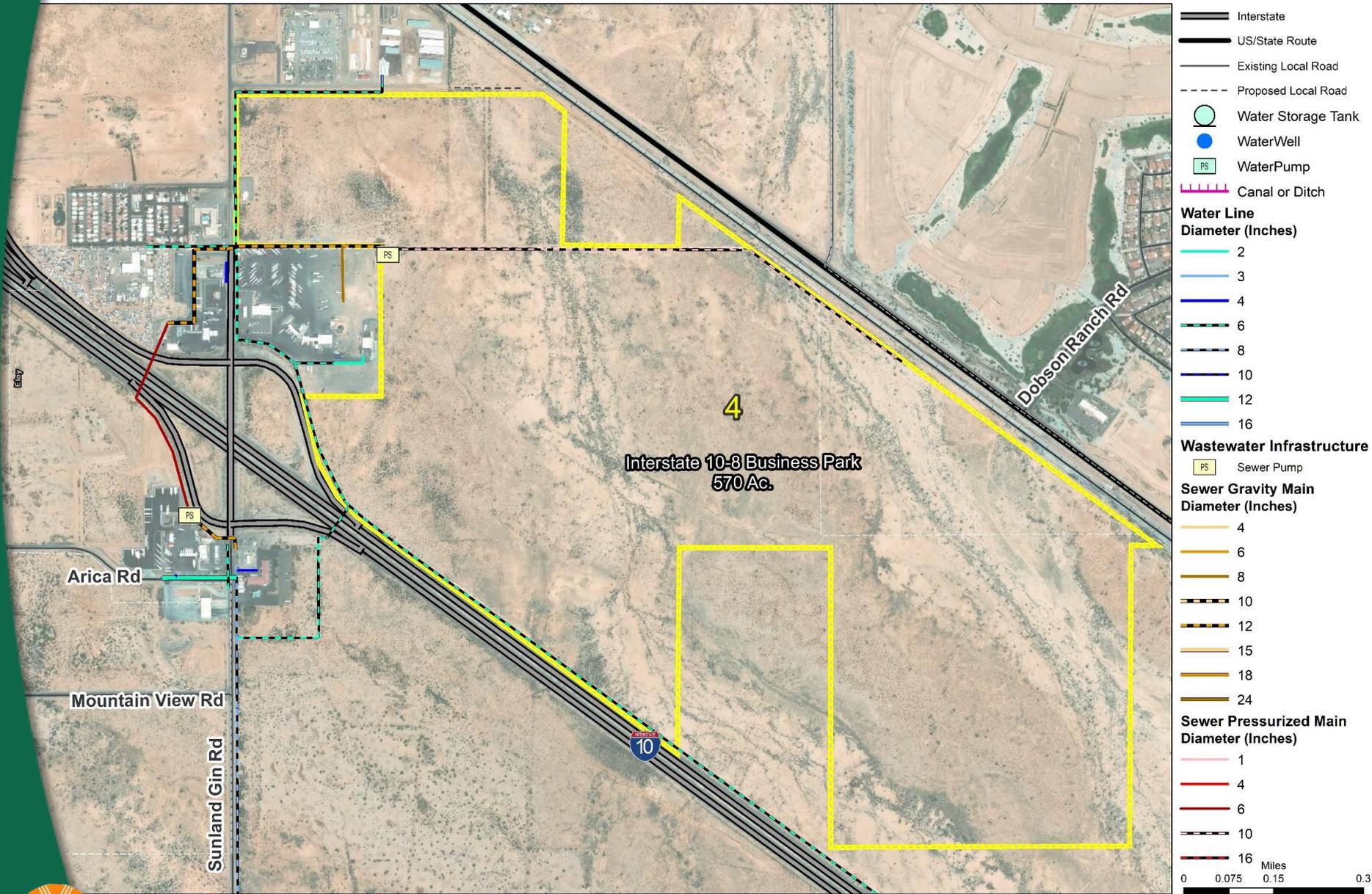
- Downtown Eloy: 10 miles
- Downtown Casa Grande 8 miles
- Casa Grande Medical Center: 7 miles
- Central Arizona College: 15 miles
- Picacho Peak State Park: 20 miles

## Infrastructure Needs Analysis

- Ultimate water and wastewater solution TBD with City based on end user system demands. 2008 master plan guidance may or may not be utilized.
- Average Daily Water Demand: 654,000 gallons
- Water Infrastructure Needs: 6', dead-end line likely not sufficient for end user needs and city specifications; also lacking the redundancy of a second source. On site booster, storage and possible well necessary. Average and max day (peak) storage and pressure needs to be determined by end user requirements.
- Average Daily Wastewater Generated: 2 gallons
- Wastewater Infrastructure Needs: Likely incremental phasing of upsized line capacity and lift station capacity for near term solution. Ultimate end user demands may require alternative approach in the sub basin. Interim solution of upsizing downstream pressure lines ad lift stations is likely. Further analysis needed specific to end user system demands.



# Market Assessment Area #4 – Interstate 10-8 Business Park



# Market Assessment Area #5 – Bool Property

## Site Information

782 Acres

**APN:**

- 401-540-02C, 401-540-01B, 401-540-01A, 401-550-02A & 401-550-03A – Bool Properties LP

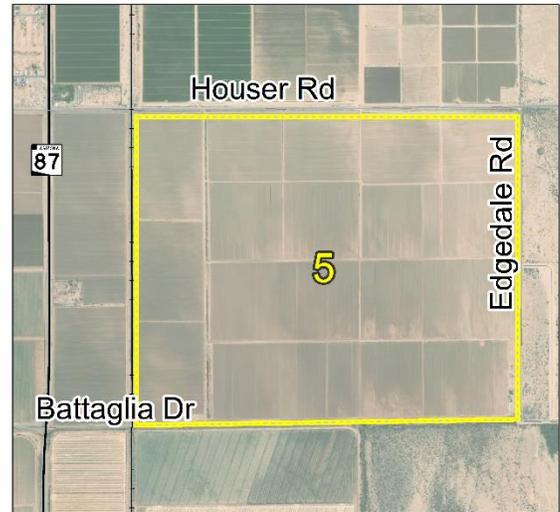
**Zoning:** R1-43

**General Plan:** Mixed Use (155 acres), Medium Density Residential (386 acres)

## Site Circulation

- Approximately 1.25 miles of direct property frontage to Houser Rd (north)
- Located approximately ¼ mile from SR-87 with no frontage or access.
- Located approximately 3.5 miles to I-10 and SR-87 interchange undergoing ADOT modernization.
- Approximately one mile of Union Pacific Railroad frontage along the west property line; sufficient for a rail spur design if desired by end user.
- Multiple irrigation district service canals adjacent and upon property.

## Site Image



## Water, Wastewater, & Utility Considerations

- Water: No existing infrastructure near property.
- Wastewater: No existing infrastructure near property. Property located in sub basin 9 per adopted City Master Plan. Proposed WWTP located approx. ¾ mile due north of property.
- Gas: Southwest Gas Electric: APS
- CAP Canal within the property and directly adjacent to the property on the north, east and southern property lines.

## Proximity to Public Facilities

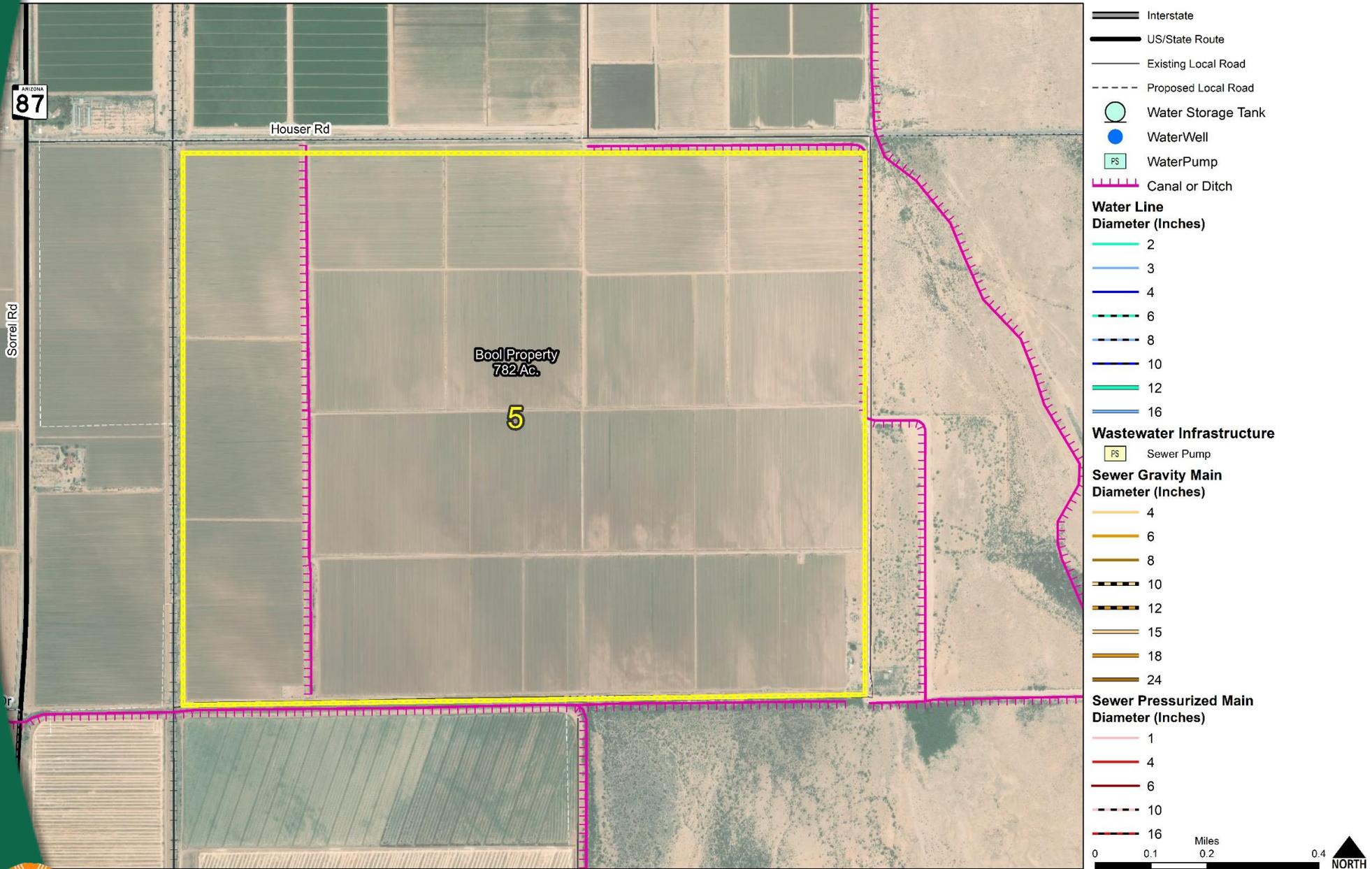
- Downtown Eloy: 3 miles
- Downtown Casa Grande: 16.5 miles
- Casa Grande Medical Center: 18 miles
  - Central Arizona College: 19 miles
  - Picacho Peak State Park: 13 miles

## Infrastructure Needs Analysis

- Ultimate water and wastewater solution TBD with City based on end user system demands. 2008 master plan guidance may or may not be utilized.
- Average Daily Water Demand: 1,368,500 gallons
- Water Infrastructure Needs: Existing 12" line located approximately 2.3 miles west of property on Battaglia Dr. Parcel located outside of City water master plan limits and likely different pressure zone/service characteristics. Additional analysis of water service to this parcel is needed. Average and max day (peak) storage and pressure needs to be determined by end user requirements.
- Average Daily Wastewater Generated: 782,000 gallons
- Wastewater Infrastructure Needs: No immediate wastewater services near the property. Parcel located in different sub basin (9) than majority of existing city infrastructure (sub basin 1). Individual analysis to consider viable extension of off-site infrastructure to sub basin 1 infrastructure vs. infrastructure needed in sub basin 9 is needed. Consider Battaglia Dr. as likely alignment for future extension of sub basin 1 infrastructure and consider possible development activity to the north to complement sub basin 9 infrastructure opportunities.



# Market Assessment Area #5 – Bool Property



Appendix D – Industry Cluster Analysis

Exhibit A - Eloy Industry Targets

NAICS Code	INDUSTRY NAME	Employment Growth	Average Wage	Location Quotient	Industry Growth	Wages	Market Strength	Presence in Eloy	Industry Target
	<b>Agribusiness</b>			<b>1.00</b>					
	<b>Total Across All Sectors</b>	<b>20.9%</b>	<b>\$41,913</b>	<b>1.00</b>					
11113-6, 11119	Grain farming	-18.5%	\$66,546	4.32	Declining	High	Strong	None	
1112	Vegetable and melon farming	39.1%	\$50,775	2.78	Moderate	High	Strong	None	
111331-2, 111331	Fruit farming	215.7%	\$25,385	2.50	Very Strong	Low	Strong	None	
111335, 111336*	Tree nut farming	497.0%	\$102,637	1.61	Very Strong	High	Moderately Strong	None	Yes
1114, 1125*	Greenhouse, nursery, and floriculture production	427.7%	\$60,948	4.86	Very Strong	High	Strong	None	Yes
11192	Cotton farming	-39.1%	\$97,645	13.65	Declining	High	Very Strong	None	
11194, 111992, 11	All other crop farming	81.9%	\$34,942	4.47	Moderate	Low	Strong	None	
11211, 11213	Beef cattle ranching & farming, including feedlots & dual-purpose ranching & farmin	-16.0%	\$162,871	2.18	Declining	High	Strong	None	
11212	Dairy cattle and milk production	5.6%	\$112,913	11.58	Moderate	High	Very Strong	None	
1133	Commercial logging	New	\$4,616	1.18	Emerging	Low	Moderately Strong	Low	
1142	Commercial hunting and trapping	3.6%	\$56,652	1.96	Moderate	High	Moderately Strong	Low	
115	Support activities for agriculture and forestry	28.4%	\$49,111	1.30	Moderate	High	Moderately Strong	Strong	Yes
311119	Other animal food manufacturing	16.8%	\$76,850	20.79	Moderate	High	Very Strong	Low	Yes
311511	Fluid milk manufacturing	182.3%	\$74,800	3.91	Strong	High	Strong	None	Yes
311514	Dry, condensed, and evaporated dairy product manufacturing	-53.1%	\$88,729	20.50	Declining	High	Very Strong	None	
311611	Animal, except poultry, slaughtering	-37.5%	\$40,086	1.32	Declining	Average	Moderately Strong	Low	
311612	Meat processed from carcasses	New	\$14,298	7.05	Emerging	Low	Very Strong	Low	
311811-2	Bread and bakery product, except frozen, manufacturing	-6.8%	\$22,916	0.96	Declining	Low	Moderately Strong	Low	
311813	Frozen cakes and other pastries manufacturing	23.0%	\$29,934	1.17	Moderate	Low	Moderately Strong	Low	
31183	Tortilla manufacturing	New	\$4,779	2.35	Emerging	Low	Strong	None	
311919	Other snack food manufacturing	-16.1%	\$61,707	9.88	Declining	High	Very Strong	None	
31213	Wineries	New	\$13,602	5.19	Emerging	Low	Very Strong	Low	
325311	Nitrogenous fertilizer manufacturing	13.5%	\$70,088	6.32	Moderate	High	Very Strong	Low	
325314	Fertilizer, mixing only, manufacturing	66.5%	\$43,914	25.43	Moderate	Average	Very Strong	None	Yes
	<b>Arts, Enter, Recreation &amp; Visitor Indus</b>								
441	Motor vehicle and parts dealers	68.2%	\$41,968	0.85	Moderate	Average	Moderately Strong	Low	
444	Building material and garden equipment and supplies stores	65.8%	\$34,532	1.10	Moderate	Low	Moderately Strong	Low	
445	Food and beverage stores	22.2%	\$28,722	0.99	Moderate	Low	Moderately Strong	Moderate	
446	Health and personal care stores	20.0%	\$30,279	1.08	Moderate	Low	Moderately Strong	None	
447	Gasoline stores	44.6%	\$23,454	1.93	Moderate	Low	Moderately Strong	Very Strong	
448	Clothing and clothing accessories stores	45.4%	\$15,443	1.30	Moderate	Low	Moderately Strong	None	
452	General merchandise stores	24.0%	\$32,139	1.69	Moderate	Low	Moderately Strong	Moderate	
453	Miscellaneous store retailers	177.5%	\$9,336	1.23	Strong	Low	Moderately Strong	None	
454	Nonstore retailers	259.4%	\$2,422	1.21	Very Strong	Low	Moderately Strong	Strong	
487, 488	Scenic and sightseeing transportation and support activities for transportation	-7.2%	\$60,031	1.18	Declining	High	Moderately Strong	None	
5122	Sound recording industries	-22.6%	\$1,019	1.77	Declining	Low	Moderately Strong	Low	
7113-4	Promoters of performing arts and sports and agents for public figures	71.6%	\$14,355	1.89	Moderate	Low	Moderately Strong	None	
7115	Independent artists, writers, and performers	83.1%	\$11,956	1.82	Moderate	Low	Moderately Strong	None	
712	Museums, historical sites, zoos, and parks	63.4%	\$21,476	0.22	Moderate	Low	Moderately Strong	None	
7132	Gambling industries (except casino hotels)	-28.4%	\$19,330	0.53	Declining	Low	Moderately Strong	Low	
71391-3, 71399	Other amusement and recreation industries	34.7%	\$20,273	1.42	Moderate	Low	Moderately Strong	Strong	Yes
72119, 7212-3	Other accommodations	38.1%	\$17,451	2.68	Moderate	Low	Strong	None	Yes
722511	Full-service restaurants	32.8%	\$19,544	0.70	Moderate	Low	Moderately Strong	Strong	Yes
722513	Limited-service restaurants	45.2%	\$16,804	1.03	Moderate	Low	Moderately Strong	Strong	Yes
7223-4, 722514-5	All other food and drinking places	9.7%	\$33,094	0.76	Moderate	Low	Moderately Strong	None	Yes

Exhibit A - Eloy Industry Targets

NAICS Code	INDUSTRY NAME	Employment Growth	Average Wage	Location Quotient	Industry Growth	Wages	Market Strength	Presence in Eloy	Industry Target
	<b>Business &amp; Financial Services</b>								
5242	Insurance agencies, brokerages, and related activities	11.2%	\$39,330	0.71	Moderate	Average	Moderately Strong	None	
525	Funds, trusts, and other financial vehicles	143.3%	\$27,666	1.36	Strong	Low	Moderately Strong	Moderate	
531	Real estate	9.3%	\$11,611	0.96	Moderate	Low	Moderately Strong	Moderate	
533	Lessors of nonfinancial intangible assets	68.3%	\$11,610	1.08	Moderate	Low	Moderately Strong	None	
54162-9	Environmental and other technical consulting services	83.2%	\$30,731	1.19	Moderate	Low	Moderately Strong	None	
54192	Photographic services	198.4%	\$12,723	1.56	Strong	Low	Moderately Strong	None	
54191, 54193, 54194	Marketing research & all other misc. professional, scientific, & technical services	113.9%	\$13,438	1.71	Strong	Low	Moderately Strong	None	
5611	Office administrative services	262.9%	\$22,012	0.61	Very Strong	Low	Moderately Strong	Low	
5612	Facilities support services	4.9%	\$56,200	22.42	Moderate	High	Very Strong	Very Strong	Yes
56171-2, 56174-9	Services to buildings	41.3%	\$11,329	1.09	Moderate	Low	Moderately Strong	Low	
56173	Landscape and horticultural services	9.4%	\$17,147	1.35	Moderate	Low	Moderately Strong	None	
5619	Other support services	11.6%	\$11,570	1.00	Moderate	Low	Moderately Strong	None	
562	Waste management and remediation services	145.7%	\$47,342	1.46	Strong	High	Moderately Strong	Low	Yes
	<b>Construction</b>								
23*	Power and communication structures	24.4%	\$64,759	1.06	Moderate	High	Moderately Strong	Low	
23*	Other residential structures	46.4%	\$73,164	1.60	Moderate	High	Moderately Strong	Moderate	
	<b>Education</b>								
6111	Elementary and secondary schools	128.6%	\$36,931	1.20	Strong	Average	Moderately Strong	None	
6114-7	Other educational services	8.1%	\$16,425	0.99	Moderate	Low	Moderately Strong	Strong	
0	Employment and payroll of state govt, education	New	\$52,122	0.61	Emerging	High	Moderately Strong	Moderate	
0	Employment and payroll of local govt, education	44.9%	\$53,403	1.78	Moderate	High	Moderately Strong	Very Strong	
	<b>Energy</b>								
211111	Natural gas & crude petroleum	85.7%	\$377	1.64	Moderate	Low	Moderately Strong	Low	
213111	Drilling oil and gas wells	71.3%	\$66,005	4.32	Moderate	High	Strong	None	
213113, 213115	Other nonmetallic minerals services	-14.6%	\$90,286	2.86	Declining	High	Strong	None	
2212	Natural gas distribution	82.0%	\$64,759	1.06	Moderate	High	Moderately Strong	None	
2213	Water, sewage and other systems	-23.0%	\$63,516	2.59	Declining	High	Strong	None	
486	Pipeline transportation	40.3%	\$85,394	1.23	Moderate	High	Moderately Strong	None	
	<b>Healthcare</b>								
6213	Offices of other health practitioners	35.8%	\$28,115	1.25	Moderate	Low	Moderately Strong	None	
	<b>Info Technology</b>								
5182	Data processing, hosting, and related services	116.9%	\$22,789	1.01	Strong	Low	Moderately Strong	Moderate	
	<b>Manufacturing</b>								
31321	Broadwoven fabric mills	New	\$15	1.67	Emerging	Low	Moderately Strong	Low	
314999	Other textile product mills	708.7%	\$14,941	1.40	Very Strong	Low	Moderately Strong	Low	
31521	Cut and sew apparel contractors	0.0%	-\$22,677	1.42	Declining	Low	Moderately Strong	None	
321114	Wood preservation	-92.8%	\$34,563	24.95	Declining	Low	Very Strong	Low	
321918	Other millwork, including flooring	New	\$25,453	2.91	Emerging	Low	Strong	Low	
321999	All other miscellaneous wood product manufacturing	378.0%	\$29,729	5.37	Very Strong	Low	Very Strong	None	
32221	Paperboard container manufacturing	New	\$460,965	0.06	Emerging	High	Moderately Strong	Low	Yes
32513	Synthetic dye and pigment manufacturing	216.8%	\$169,054	22.88	Very Strong	High	Very Strong	Low	Yes
32519	Other basic organic chemical manufacturing	212.9%	\$40,182	8.82	Very Strong	Average	Very Strong	None	Yes
325412	Pharmaceutical preparation manufacturing	-4.7%	\$35,600	1.58	Declining	Average	Moderately Strong	Low	
325612	Polish and other sanitation good manufacturing	113.7%	\$44,869	13.35	Strong	Average	Very Strong	Low	Yes
32562	Toilet preparation manufacturing	-35.5%	\$21,063	2.98	Declining	Low	Strong	Low	
32611	Plastics packaging materials and unlaminated film and sheet manufacturing	New	\$48,544	10.73	Emerging	High	Very Strong	Low	Yes
326122	Plastics pipe and pipe fitting manufacturing	251.5%	\$56,832	4.88	Very Strong	High	Strong	None	Yes

Exhibit A - Eloy Industry Targets

NAICS Code	INDUSTRY NAME	Employment Growth	Average Wage	Location Quotient	Industry Growth	Wages	Market Strength	Presence in Eloy	Industry Target
	<b>Manufacturing</b>								
326140	Polystyrene foam product manufacturing	47.9%	\$38,588	5.00	Moderate	Average	Strong	Strong	Yes
326160	Plastics bottle manufacturing	130.2%	\$60,162	4.90	Strong	High	Strong	None	Yes
326190	Other plastics product manufacturing	88.4%	\$48,953	0.92	Moderate	High	Moderately Strong	Moderate	Yes
327212	Other pressed and blown glass and glassware manufacturing	New	\$41,343	2.15	Emerging	Average	Strong	None	Yes
327215	Glass product manufacturing made of purchased glass	240.7%	\$63,601	7.28	Very Strong	High	Very Strong	Low	Yes
32731	Cement manufacturing	New	\$60,936	2.35	Emerging	High	Strong	None	Yes
32732	Ready-mix concrete manufacturing	60.0%	\$57,094	3.16	Moderate	High	Strong	Low	Yes
327331	Concrete block and brick manufacturing	0.0%	\$53,747	1.78	Declining	High	Moderately Strong	Moderate	
32739	Other concrete product manufacturing	-66.6%	\$48,185	4.94	Declining	High	Strong	None	
327993	Mineral wool manufacturing	-42.0%	\$23,915	4.55	Declining	Low	Strong	None	
33111	Iron and steel mills and ferroalloy manufacturing	-59.3%	\$39,567	1.29	Declining	Average	Moderately Strong	None	
331491	Nonferrous metal, except copper and aluminum, shaping	New	\$43,591	21.58	Emerging	Average	Very Strong	None	Yes
331492	Secondary processing of other nonferrous	23.5%	\$70,569	12.82	Moderate	High	Very Strong	Low	Yes
33151	Ferrous metal foundries	31.4%	-\$19,729	0.36	Moderate	Low	Moderately Strong	None	
33152	Nonferrous metal foundries	-85.3%	\$44,891	1.21	Declining	Average	Moderately Strong	None	
332312	Fabricated structural metal manufacturing	1890.3%	\$51,911	2.67	Very Strong	High	Strong	None	Yes
332322	Sheet metal work manufacturing	181.3%	\$52,281	1.55	Strong	High	Moderately Strong	Low	Yes
33242	Metal tank (heavy gauge) manufacturing	525.2%	\$62,016	4.28	Very Strong	High	Strong	None	Yes
3326	Spring and wire product manufacturing	New	\$35,050	2.41	Emerging	Average	Strong	None	Yes
332813	Electroplating, anodizing, and coloring metal	New	\$35,422	1.38	Emerging	Average	Moderately Strong	Low	Yes
333111	Farm machinery and equipment manufacturing	0.1%	\$79,055	1.96	Declining	High	Moderately Strong	Low	Maybe
33312	Construction machinery manufacturing	New	\$2,837	1.19	Very Strong	High	Moderately Strong	Low	Yes
333131	Mining machinery and equipment manufacturing	-33.2%	\$20,305	4.93	Declining	Low	Strong	Low	
333249	All other industrial machinery manufacturing	New	\$43,573	1.67	Emerging	Average	Moderately Strong	Low	Yes
333991	Power-driven handtool manufacturing	New	\$46,211	38.99	Emerging	High	Very Strong	None	Yes
334511	Search, detection, and navigation instruments manufacturing	-48.5%	\$96,884	1.95	Declining	High	Moderately Strong	Moderate	
334512	Automatic environmental control manufacturing	-2.7%	\$68,407	4.20	Declining	High	Strong	Low	Maybe
334519	Watch, clock, and other measuring and controlling device manufacturing	-25.1%	\$37,364	3.22	Declining	Average	Strong	Low	
334614	Software and other prerecorded and record reproducing	New	\$76,825	11.52	Emerging	High	Very Strong	Low	Yes
336111	Automobile manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
336112	Light truck and utility vehicle manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
33612	Heavy duty truck manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
336211	Motor vehicle body manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
336212	Truck trailer manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
33631	Motor vehicle gasoline engine and engine parts manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
33632	Motor vehicle electrical and electronic equipment manufacturing	New	\$38,231	11.59	Emerging	Average	Very Strong	None	Yes
33633-4	Motor vehicle steering, suspension component (except spring), & brake systems ma	0.0%	\$0	0.00	-	-	-	None	Future
33635	Motor vehicle transmission and power train parts manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
33636	Motor vehicle seating and interior trim manufacturing	0.0%	\$0	0.00	-	-	-	None	Future
33637	Motor vehicle metal stamping	0.0%	\$0	0.00	-	-	-	None	Future
33639	Other motor vehicle parts manufacturing	New	\$53,073	0.39	Emerging	High	Moderately Strong	None	Yes
337121	Upholstered household furniture manufacturing	New	\$32,029	5.30	Emerging	Low	Very Strong	None	
337122	Nonupholstered wood household furniture manufacturing	New	\$30,196	1.14	Emerging	Low	Moderately Strong	None	
337212	Custom architectural woodwork and millwork	262.3%	\$55,143	4.92	Very Strong	High	Strong	None	Yes
	<b>Mining</b>								
212234	Copper ores	-26.1%	\$76,044	4.70	Declining	High	Strong	None	
21231	Stone mining and quarrying	21.3%	\$54,044	2.09	Moderate	High	Strong	None	
212399	Other nonmetallic minerals	174.0%	\$38,463	2.29	Strong	Average	Strong	None	

**Exhibit A - Eloy Industry Targets**

NAICS Code	INDUSTRY NAME	Employment Growth	Average Wage	Location Quotient	Industry Growth	Wages	Market Strength	Presence in Eloy	Industry Target
	<b>Personal and Commercial Services</b>								
6244	Child day care services	-15.7%	\$15,126	1.67	Declining	Low	Moderately Strong	Moderate	
811192	Car washes	10.5%	\$35,029	1.34	Moderate	Average	Moderately Strong	Strong	
8113	Commercial and industrial machinery and equipment repair and maintenance	251.3%	\$94,430	1.30	Very Strong	High	Moderately Strong	Moderate	Yes
8114	Personal and household goods repair and maintenance	12.9%	\$59,108	0.89	Moderate	High	Moderately Strong	None	
8122	Death care services	132.3%	\$30,687	1.53	Strong	Low	Moderately Strong	None	
8132-3	Grantmaking, giving, and social advocacy organizations	561.6%	\$28,294	1.12	Very Strong	Low	Moderately Strong	None	
8134, 81393-9	Labor and civic organizations	84.8%	\$22,486	1.78	Moderate	Low	Moderately Strong	None	
	<b>Printing</b>								
51111	Newspaper publishers	-28.3%	\$23,476	2.21	Declining	Low	Strong	Low	
	<b>Transportation &amp; Logistics</b>								
493	Warehousing and storage	7.5%	\$52,775	0.97	Moderate	High	Moderate	Low	Yes
482	Rail transportation	12.1%	\$95,405	1.09	Moderate	High	Moderately Strong	Low	Yes
483	Water transportation	44.9%	\$58,549	38.99	Moderate	High	Very Strong	Low	
484	Truck transportation	8.1%	\$78,014	0.95	Moderate	High	Moderately Strong	Moderate	Yes
485	Transit and ground passenger transportation	147.4%	\$20,702	1.27	Strong	Low	Moderately Strong	None	

Source: IMPLAN

**Industry Growth:**

- > 2% Very Strong
- 1%-1.99% Strong
- .0.1%--.99 Moderate
- <0.1% Declining

**Wages:**

- >\$45,000 High
- \$35,000-\$44,999 Average
- <\$35,000 Low

**Market Strength**

- >5.0 LQ Very Strong
  - 2.00-4.99 LQ Strong
  - <1.99 Moderately Strong
- Industries with LQ less than 1.0 were removed with the exception of Warehousing and Storage, and Automobile

**Presence in Eloy**

- 0=none
- <16 low
- <50 Moderate
- <300 Strong
- >300 Very Strong

**Exhibit B - Eloy-Pinal County Industry Cluster Analysis**

NAICS Code	INDUSTRY NAME	Pinal County					Eloy (Zip Code 85131)		
		Employment Change			Average Wage	Pinal LQ to AZ	Employment		Eloy Average Wage
		2011	2016	% Growth			2016	% of Pinal County	
	<b>Total Across All Sectors</b>	<b>76,266</b>	<b>92,241</b>	<b>20.9%</b>	<b>\$41,913</b>	<b>1.00</b>	<b>4,877</b>	<b>5.3%</b>	<b>\$48,226</b>
	<b>Agribusiness</b>								
11113-6, 11111	Grain farming	56	46	-18.5%	\$66,546	4.32	0	0.0%	\$0
1112	Vegetable and melon farming	376	522	39.1%	\$50,775	2.78	0	0.0%	\$0
111331-2, 111	Fruit farming	30	95	215.7%	\$25,385	2.50	0	0.0%	\$0
111335, 11133	Tree nut farming	6	33	497.0%	\$102,637	1.61	0	0.0%	\$0
1114, 1125*	Greenhouse, nursery, and floriculture production	87	457	427.7%	\$60,948	4.86	0	0.0%	\$0
11192	Cotton farming	418	254	-39.1%	\$97,645	13.65	0	0.0%	\$0
11194, 11199	All other crop farming	617	1122	81.9%	\$34,942	4.47	0	0.0%	\$0
11211, 11213	Beef cattle ranching & farming, including feedlots & dual-purpose ranching & farming	352	296	-16.0%	\$162,871	2.18	0	0.0%	\$0
11212	Dairy cattle and milk production	509	538	5.6%	\$112,913	11.58	0	0.0%	\$0
1133	Commercial logging	0	10	New	\$4,616	1.18	1	7.4%	\$4,616
1142	Commercial hunting and trapping	21	22	3.6%	\$56,652	1.96	2	7.4%	\$56,652
115	Support activities for agriculture and forestry	399	512	28.4%	\$49,111	1.30	241	47.1%	\$49,111
311119	Other animal food manufacturing	73	85	16.8%	\$76,850	20.79	10	12.0%	\$76,850
311511	Fluid milk manufacturing	80	225	182.3%	\$74,800	3.91	0	0.0%	\$0
311514	Dry, condensed, and evaporated dairy product manufacturing	412	193	-53.1%	\$88,729	20.50	0	0.0%	\$0
311611	Animal, except poultry, slaughtering	90	56	-37.5%	\$40,086	1.32	4	7.8%	\$40,086
311612	Meat processed from carcasses	0	15	New	\$14,298	7.05	1	7.8%	\$14,298
311811-2	Bread and bakery product, except frozen, manufacturing	206	192	-6.8%	\$22,916	0.96	15	7.8%	\$22,916
311813	Frozen cakes and other pastries manufacturing	5	7	23.0%	\$29,934	1.17	1	7.8%	\$29,934
31183	Tortilla manufacturing	0	44	New	\$4,779	2.35	0	0.0%	\$0
311919	Other snack food manufacturing	316	265	-16.1%	\$61,707	9.88	0	0.0%	\$0
31213	Wineries	0	35	New	\$13,602	5.19	3	7.8%	\$13,602
325311	Nitrogenous fertilizer manufacturing	34	39	13.5%	\$70,088	6.32	3	7.8%	\$70,088
325314	Fertilizer, mixing only, manufacturing	105	175	66.5%	\$43,914	25.43	0	0.0%	\$0
	<b>Arts, Enter, Recreation &amp; Visitor Indus</b>								
441	Motor vehicle and parts dealers	419	705	68.2%	\$41,968	0.85	11	1.6%	\$41,968
444	Building material and garden equipment and supplies stores	444	735	65.8%	\$34,532	1.10	2	0.3%	\$34,532
445	Food and beverage stores	1106	1352	22.2%	\$28,722	0.99	23	1.7%	\$28,722
446	Health and personal care stores	557	668	20.0%	\$30,279	1.08	0	0.0%	\$0
447	Gasoline stores	630	911	44.6%	\$23,454	1.93	357	39.1%	\$23,454
448	Clothing and clothing accessories stores	625	909	45.4%	\$15,443	1.30	0	0.0%	\$0
452	General merchandise stores	2247	2787	24.0%	\$32,139	1.69	18	0.6%	\$32,139
453	Miscellaneous store retailers	422	1170	177.5%	\$9,336	1.23	0	0.0%	\$0
454	Nonstore retailers	429	1540	259.4%	\$2,422	1.21	67	4.4%	\$2,422
487, 488	Scenic and sightseeing transportation and support activities for transportation	464	430	-7.2%	\$60,031	1.18	0	0.0%	\$0
5122	Sound recording industries	26	20	-22.6%	\$1,019	1.77	1	6.3%	\$1,019
7113-4	Promoters of performing arts and sports and agents for public figures	161	276	71.6%	\$14,355	1.89	0	0.0%	\$0
7115	Independent artists, writers, and performers	477	874	83.1%	\$11,956	1.82	0	0.0%	\$0
712	Museums, historical sites, zoos, and parks	9	14	63.4%	\$21,476	0.22	0	0.0%	\$0
7132	Gambling industries (except casino hotels)	173	124	-28.4%	\$19,330	0.53	8	6.3%	\$19,330
71391-3, 7139	Other amusement and recreation industries	395	532	34.7%	\$20,273	1.42	51	9.6%	\$20,273
72119, 7212-3	Other accommodations	120	166	38.1%	\$17,451	2.68	0	0.0%	\$0
722511	Full-service restaurants	1406	1867	32.8%	\$19,544	0.70	60	3.2%	\$19,544
722513	Limited-service restaurants	1915	2780	45.2%	\$16,804	1.03	145	5.2%	\$16,804
7223-4, 72251	All other food and drinking places	870	955	9.7%	\$33,094	0.76	0	0.0%	\$0

Exhibit B - Eloy-Pinal County Industry Cluster Analysis

NAICS Code	INDUSTRY NAME	Pinal County					Eloy (Zip Code 85131)		
		Employment Change		Average Wage	Pinal LQ to AZ	Employment		Eloy Average Wage	
		2011	2016			% Growth	2016		% of Pinal County
	<b>Business &amp; Financial Services</b>								
5242	Insurance agencies, brokerages, and related activities	600	667	11.2%	\$39,330	0.71	0	0.0%	\$0
525	Funds, trusts, and other financial vehicles	189	459	143.3%	\$27,666	1.36	29	6.3%	\$27,666
531	Real estate	4150	4536	9.3%	\$11,611	0.96	50	1.1%	\$11,611
533	Lessors of nonfinancial intangible assets	42	72	68.3%	\$11,610	1.08	0	0.0%	\$0
54162-9	Environmental and other technical consulting services	92	169	83.2%	\$30,731	1.19	0	0.0%	\$0
54192	Photographic services	60	180	198.4%	\$12,723	1.56	0	0.0%	\$0
54191, 54193	Marketing research & all other misc. professional, scientific, & technical services	557	1191	113.9%	\$13,438	1.71	0	0.0%	\$0
5611	Office administrative services	110	398	262.9%	\$22,012	0.61	15	3.6%	\$22,012
5612	Facilities support services	2891	3031	4.9%	\$56,200	22.42	1524	50.3%	\$56,200
56171-2, 5617	Services to buildings	1015	1434	41.3%	\$11,329	1.09	11	0.8%	\$11,329
56173	Landscape and horticultural services	887	970	9.4%	\$17,147	1.35	0	0.0%	\$0
5619	Other support services	168	188	11.6%	\$11,570	1.00	0	0.0%	\$0
562	Waste management and remediation services	94	231	145.7%	\$47,342	1.46	4	1.9%	\$47,342
	<b>Construction</b>								
23*	Power and communication structures	343	427	24.4%	\$64,759	1.06	15	3.4%	\$64,759
23*	Other residential structures	489	716	46.4%	\$73,164	1.60	33	4.7%	\$73,164
	<b>Education</b>								
6111	Elementary and secondary schools	343	784	128.6%	\$36,931	1.20	0	0.0%	\$0
6114-7	Other educational services	748	808	8.1%	\$16,425	0.99	109	13.4%	\$16,425
0	Employment and payroll of state govt, education	0	611	New	\$52,122	0.61	29	4.7%	\$52,122
0	Employment and payroll of local govt, education	4476	6484	44.9%	\$53,403	1.78	303	4.7%	\$53,403
	<b>Energy</b>								
211111	Natural gas & crude petroleum	110	203	85.7%	\$377	1.64	15	7.4%	\$377
213111	Drilling oil and gas wells	67	115	71.3%	\$66,005	4.32	0	0.0%	\$0
213113, 2131	Other nonmetallic minerals services	13	11	-14.6%	\$90,286	2.86	0	0.0%	\$0
2212	Natural gas distribution	18	33	82.0%	\$64,759	1.06	0	0.0%	\$0
2213	Water, sewage and other systems	204	157	-23.0%	\$63,516	2.59	0	0.0%	\$0
486	Pipeline transportation	9	12	40.3%	\$85,394	1.23	0	0.0%	\$0
	<b>Healthcare</b>								
6213	Offices of other health practitioners	590	801	35.8%	\$28,115	1.25	0	0.0%	\$0
	<b>Info Technology</b>								
5182	Data processing, hosting, and related services	143	311	116.9%	\$22,789	1.01	20	6.3%	\$22,789
	<b>Manufacturing</b>								
31321	Broadwoven fabric mills	0	3	New	\$15	1.67	0	7.8%	\$15
314999	Other textile product mills	2	17	708.7%	\$14,941	1.40	1	7.8%	\$14,941
31521	Cut and sew apparel contractors	0	25	0.0%	-\$22,677	1.42	0	0.0%	\$0
321114	Wood preservation	159	11	-92.8%	\$34,563	24.95	1	7.8%	\$34,563
321918	Other millwork, including flooring	0	31	New	\$25,453	2.91	2	7.8%	\$25,453
321999	All other miscellaneous wood product manufacturing	12	59	378.0%	\$29,729	5.37	0	0.0%	\$0
32221	Paperboard container manufacturing	0	1	New	\$460,965	0.06	0	7.8%	\$31,583
32513	Synthetic dye and pigment manufacturing	10	32	216.8%	\$169,054	22.88	2	7.8%	\$169,054
32519	Other basic organic chemical manufacturing	31	97	212.9%	\$40,182	8.82	0	0.0%	\$0
325412	Pharmaceutical preparation manufacturing	68	64	-4.7%	\$35,600	1.58	5	7.8%	\$35,600
325612	Polish and other sanitation good manufacturing	23	49	113.7%	\$44,869	13.35	4	7.8%	\$44,869
32562	Toilet preparation manufacturing	74	48	-35.5%	\$21,063	2.98	4	7.8%	\$21,063
32611	Plastics packaging materials and unlaminated film and sheet manufacturing	0	77	New	\$48,544	10.73	6	7.8%	\$48,544
326122	Plastics pipe and pipe fitting manufacturing	10	34	251.5%	\$56,832	4.88	0	0.0%	\$0
326140	Polystyrene foam product manufacturing	37	55	47.9%	\$38,588	5.00	55	100.0%	\$38,588
326160	Plastics bottle manufacturing	22	51	130.2%	\$60,162	4.90	0	0.0%	\$0
326190	Other plastics product manufacturing	31	58	88.4%	\$48,953	0.92	39	68.3%	\$48,953

Exhibit B - Eloy-Pinal County Industry Cluster Analysis

NAICS Code	INDUSTRY NAME	Pinal County				Eloy (Zip Code 85131)			
		Employment Change		Average Wage	Pinal LQ to AZ	Employment		Eloy Average Wage	
		2011	2016			% Growth	2016		% of Pinal County
	<b>Manufacturing (Continued)</b>								
327212	Other pressed and blown glass and glassware manufacturing	0	16	New	\$41,343	2.15	1	7.8%	\$41,343
327215	Glass product manufacturing made of purchased glass	35	120	240.7%	\$63,601	7.28	0	0.0%	\$0
32731	Cement manufacturing	0	24	New	\$60,936	2.35	2	7.8%	\$60,936
32732	Ready-mix concrete manufacturing	130	207	60.0%	\$57,094	3.16	30	14.4%	\$57,094
327331	Concrete block and brick manufacturing	0	35	0.0%	\$53,747	1.78	0	0.0%	\$0
32739	Other concrete product manufacturing	163	55	-66.6%	\$48,185	4.94	0	0.0%	\$0
327993	Mineral wool manufacturing	31	18	-42.0%	\$23,915	4.55	0	0.0%	\$0
33111	Iron and steel mills and ferroalloy manufacturing	20	8	-59.3%	\$39,567	1.29	1	7.8%	\$39,567
331491	Nonferrous metal, except copper and aluminum, shaping	0	16	New	\$43,591	21.58	0	0.0%	\$0
331492	Secondary processing of other nonferrous	27	34	23.5%	\$70,569	12.82	3	7.8%	\$70,569
33151	Ferrous metal foundries	3	4	31.4%	-\$19,729	0.36	0	0.0%	\$0
33152	Nonferrous metal foundries	160	24	-85.3%	\$44,891	1.21	0	0.0%	\$0
332312	Fabricated structural metal manufacturing	5	95	1890.3%	\$51,911	2.67	0	0.0%	\$0
332322	Sheet metal work manufacturing	38	108	181.3%	\$52,281	1.55	8	7.8%	\$52,281
33242	Metal tank (heavy gauge) manufacturing	2	13	525.2%	\$62,016	4.28	0	0.0%	\$0
3326	Spring and wire product manufacturing	0	21	New	\$35,050	2.41	0	0.0%	\$0
332813	Electroplating, anodizing, and coloring metal	0	23	New	\$35,422	1.38	2	7.8%	\$35,422
333111	Farm machinery and equipment manufacturing	11	11	0.1%	\$79,055	1.96	1	7.8%	\$79,055
33312	Construction machinery manufacturing	0	14	New	\$52,837	1.19	1	7.8%	\$52,837
333131	Mining machinery and equipment manufacturing	23	15	-33.2%	\$20,305	4.93	15	100.0%	\$20,305
333249	All other industrial machinery manufacturing	0	9	New	\$43,573	1.67	1	7.8%	\$43,573
333991	Power-driven handtool manufacturing	0	3	New	\$46,211	38.99	0	0.0%	\$0
334511	Search, detection, and navigation instruments manufacturing	547	282	-48.5%	\$96,884	1.95	22	7.8%	\$96,884
334512	Automatic environmental control manufacturing	97	94	-2.7%	\$68,407	4.20	7	7.8%	\$68,407
334519	Watch, clock, and other measuring and controlling device manufacturing	29	22	-25.1%	\$37,364	3.22	2	7.8%	\$37,364
334614	Software and other prerecorded and record reproducing	0	15	New	\$76,825	11.52	1	7.8%	\$76,825
336111	Automobile manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
336112	Light truck and utility vehicle manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33612	Heavy duty truck manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
336211	Motor vehicle body manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
336212	Truck trailer manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33631	Motor vehicle gasoline engine and engine parts manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33632	Motor vehicle electrical and electronic equipment manufacturing	0	65	New	\$38,231	11.59	0	0.0%	\$0
33633-4	Motor vehicle steering, suspension component (except spring), & brake systems manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33635	Motor vehicle transmission and power train parts manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33636	Motor vehicle seating and interior trim manufacturing	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33637	Motor vehicle metal stamping	0	0	0.0%	\$0	0.00	0	0.0%	\$0
33639	Other motor vehicle parts manufacturing	0	11	New	\$53,073	0.39	0	0.0%	\$0
337121	Upholstered household furniture manufacturing	0	18	New	\$32,029	5.30	0	0.0%	\$0
337122	Nonupholstered wood household furniture manufacturing	0	37	New	\$30,196	1.14	0	0.0%	\$0
337212	Custom architectural woodwork and millwork	16	57	262.3%	\$55,143	4.92	0	0.0%	\$0
	<b>Mining</b>								
212234	Copper ores	1525	1128	-26.1%	\$76,044	4.70	0	0.0%	\$0
21231	Stone mining and quarrying	39	47	21.3%	\$54,044	2.09	0	0.0%	\$0
212399	Other nonmetallic minerals	4	10	174.0%	\$38,463	2.29	0	0.0%	\$0

Exhibit B - Eloy-Pinal County Industry Cluster Analysis

NAICS Code	INDUSTRY NAME	Pinal County						Eloy (Zip Code 85131)		
		Employment Change			Average Wage	Pinal LQ to AZ	Employment		Eloy Average Wage	
		2011	2016	% Growth			2016	% of Pinal County		
	<b>Personal and Commercial Services</b>									
6244	Child day care services	1082	912	-15.7%	\$15,126	1.67	39	4.3%	\$15,126	
811192	Car washes	230	254	10.5%	\$35,029	1.34	155	60.9%	\$35,029	
8113	Commercial and industrial machinery and equipment repair and maintenance	59	206	251.3%	\$94,430	1.30	30	14.6%	\$94,430	
8114	Personal and household goods repair and maintenance	262	295	12.9%	\$59,108	0.89	0	0.0%	\$0	
8122	Death care services	27	62	132.3%	\$30,687	1.53	0	0.0%	\$0	
8132-3	Grantmaking, giving, and social advocacy organizations	30	201	561.6%	\$28,294	1.12	0	0.0%	\$0	
8134, 81393-9	Labor and civic organizations	216	399	84.8%	\$22,486	1.78	0	0.0%	\$0	
	<b>Printing</b>									
51111	Newspaper publishers	257	184	-28.3%	\$23,476	2.21	4	2.0%	\$23,476	
	<b>Transportation &amp; Logistics</b>									
493	Warehousing and storage	142	153	7.5%	\$56,728	0.77	5	3.3%	\$34,410	
482	Rail transportation	70	79	12.1%	\$95,405	1.09	3	3.2%	\$95,405	
483	Water transportation	30	44	44.9%	\$58,549	38.99	3	6.3%	\$58,549	
484	Truck transportation	698	755	8.1%	\$78,014	0.95	26	3.4%	\$78,014	
485	Transit and ground passenger transportation	250	619	147.4%	\$20,702	1.27	0	0.0%	\$0	

Source: IMPLAN

Table Note

Industries with LQ less than 1.0 have been removed, with a few exceptions