



2015 UPDATED COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

**NORTH CENTRAL NEW MEXICO
ECONOMIC DEVELOPMENT DISTRICT
UPDATED MAY 2015**

**NORTH CENTRAL
ECONOMIC**



DISTRICT

**NEW MEXICO
DEVELOPMENT**

**2015 UPDATED COMPREHEHNSIVE ECONOMIC
DEVELOPMENT STRATEGY (CEDS)**

MAY, 2015

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Chapter I. Executive Summary--Description of the District and CEDS Process

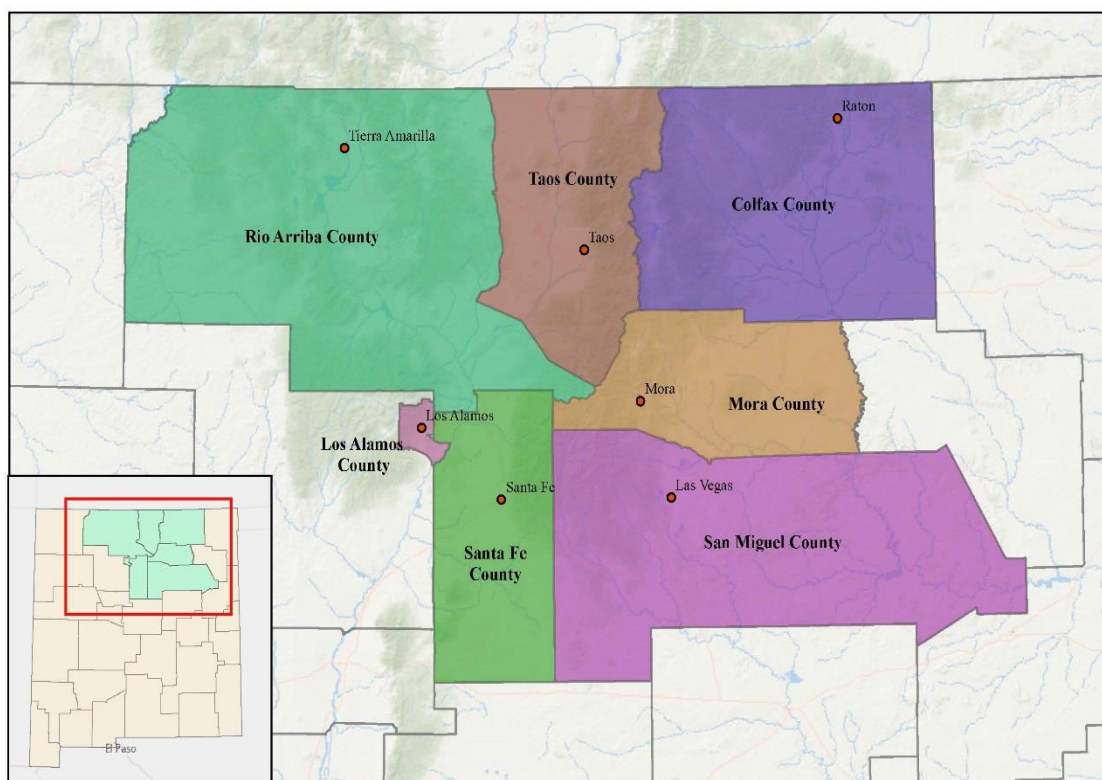
Legal Structure of the North Central New Mexico Economic Development District

The North Central New Mexico Economic Development District (NCNMEDD or “District”) was created in 1967, by statutory authority of the Joint Powers Agreement Act, Section 4-22-1 to 4-22-7, New Mexico Statutes Annotated. NCNMEDD was created for the purpose of assisting units of local government in the development of a regional economic development program and aiding in its implementation. The CEDS (Comprehensive Economic Development Strategy) is a prerequisite for designation by the Economic Development Agency (EDA) as an economic development district.

Area Included in the CEDS

The area included in this CEDS is the seven counties of Colfax, Los Alamos, Mora, Rio Arriba, San Miguel, Santa Fe, and Taos, and the Native American communities within those counties. (See Appendix A for more District Maps)

North Central New Mexico Economic Development District Boundaries



Disclaimer: The information on this map is from a digital database accessed using the REDI Net Geographic Information System (GIS). REDI Net cannot guarantee the accuracy of the information contained on this map. Each user of this map is responsible for determining its suitability for his or her intended use or purpose.



0 15 30 60 90 Miles

CEDS Process

To support the primary purpose of coordinating regional development efforts, the Executive Committee of the District also serves as its Economic Development Strategy Committee to oversee the development and maintenance of the CEDS process. The Executive Committee is broadly representative of the District and includes:

- ❖ representatives of all seven Counties and several Tribal communities;
- ❖ representatives of the two main employers – State government and LANL;
- ❖ small business representatives; and
- ❖ persons with extensive knowledge of economic development in the District.

In preparing the District CEDS, staff spent significant effort on integration with concurrent statewide efforts as well as with local efforts in the counties, municipalities, and tribal governments that make up the District. At the State level, these include:

- ❖ the N.M. Legislature's Interim Jobs Council,
- ❖ the Statewide CEDS being prepared by the New Mexico Association of Regional Councils,
- ❖ the Five-Year Strategic Plan prepared by the N.M. Economic Development Department, and
- ❖ the State Long Range Plan for the New Mexico Department of Transportation



Local efforts included continuation of the Regional Economic Development Initiative (REDI), a process managed, in collaboration with NCNMEDD, by the Regional Development Corporation in Los Alamos, Rio Arriba, Santa Fe, and Taos Counties; and the collaborative work of NCNMEDD with the NorthEast Economic Development Corporation (NEEDO) planning process that includes Colfax, Mora and San Miguel Counties. The CEDS efforts are designed to complement and support local activities. Some of the local governments within the District have adopted land use and growth management plans and the CEDS seeks to align common initiatives. Integration with other regional planning activities is provided, such as the Regional Water Plan updates led by the New Mexico Interstate Stream Commission which plays an important role in shaping strategies for resiliency. Other regional local involvement include the active facilitation of the regional transportation planning organizations (RTPO) which addresses multiple rural transportation related issues. Coordination with the North Central Regional Transit District further enhances mutual transit-oriented planning processes.

The District conducted two well-attended public meetings on economic development needs for the CEDS in 2013 – one focusing on the four counties west of the central mountains and the other attended by the three counties east of the mountains. After drafting the CEDS, the District held two similar meetings in 2014 to gather input on the implementation strategy that was developed. After inclusion of the public input from those meetings the final CEDS document was approved by the District Executive Committee acting as the Economic Development Strategy Committee.

Primary Vision

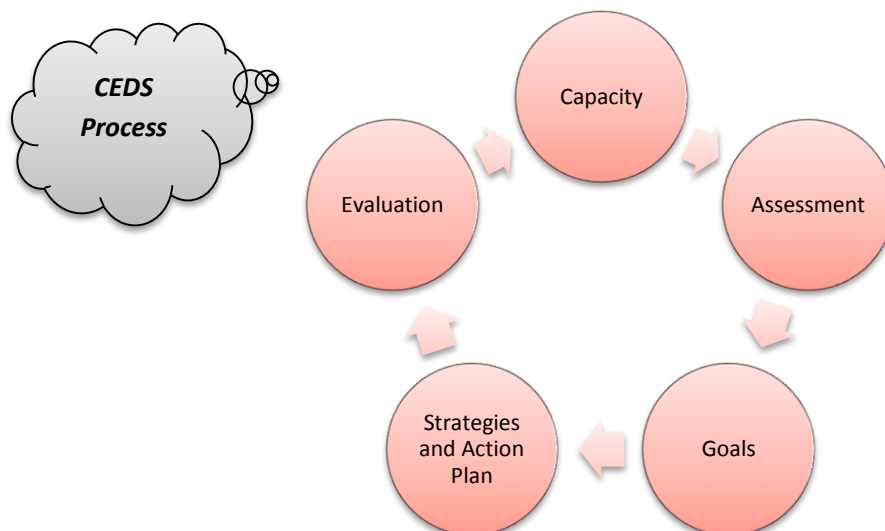
The District envisions a vibrant sustainable community that fosters opportunities for economic vitality while preserving and supporting the rich inherent cultural, historic assets of its environment and community members.

Main Goals

Due to recent occurrences of regional natural disasters and the impact of national economic and financial downturn since 2008, the region needs to infuse a better approach to achieve economic **resiliency and to support appropriate development and sustain resources to build wealth and equity**. Towards this end, the work forward as outlined in the CEDS, supports

- ❖ the identification of *assets and vulnerabilities*;
 - Primary Goal: develop a coordinated regional inventory of assets and assess vulnerabilities in systems and infrastructure
- ❖ the *strategies for post-disruption to the base economy as collaborations* among stakeholders;
 - Primary Goal: identify and establish common policies, investment, shared resources and expertise to mitigate, prevent and respond to disruptions.
- ❖ advancing *asset management to preserve and develop limited resources*; and
 - Primary Goal: promote ongoing innovation and sustainable practices in planning, development, and measuring performance.
- ❖ the enhancement of *economic diversification*.
 - Primary Goal: improve effective investment, job creation/retention and development of cluster industries such as health care, tourism, high technology, agriculture and media/film

The primary function of the District serves to improve continuing, cooperative, and comprehensive planning, research and responses. The District will also strive to maintain a dynamic process with the CEDS by incorporating the development of web-based tools and applications to update relevant data, project monitoring and to better support and track resource and asset development in the region. To adequately address the main purpose of actualizing economic resiliency, the goals and objectives to be implemented must be specific, measurable, achievable, relevant and time-bound.



Main Strategies:

The strategy and corresponding action plan contained within the CEDS aims to answer the questions “Where do we want to go?” and “How are we going to get there?” by leveraging the analysis undertaken in the SWOT analysis. The strategy and action plan flow from the critical internal and external factors that speak to the region’s assets and limitations and its role in capacity building. The strategy stems from prioritized goals and measurable objectives. Towards this end, the District, with the input of region’s stakeholders, formulated the following categories of strategies that will further be developed into the action plan:

- Infrastructure
 - Water
 - Transportation
 - Broadband
 - Energy
 - Social infrastructure—e.g. housing, social services
 - Green infrastructure—land use and natural environmental elements
- Innovation and Sustainability
 - Support Systems
 - Research and Development,
 - Technology Transfer
- Business Climate and Competitiveness
 - Legislative
 - Access to Capital
 - Civic Leadership and Governance
- Workforce Development and Expanded Opportunities
 - Collaboration with existing programs
 - Support investment in and development of policy and programs to further coordination with higher education institutions
 - Develop, attract, retain and support job training for youth, and engage millennials in career development.

○

Evaluation

The evaluation framework serves as an apparatus to measure progress on the implementation of the overall CEDS while providing information for the CEDS Annual Performance Report, as required by EDA. These regular updates keep the strategy and action plan outlined in the CEDS current and the plan as a whole relevant. The evaluation framework is an important element of the ongoing planning process and seeks to answer the questions “How are we doing?” and “What can we do better?”

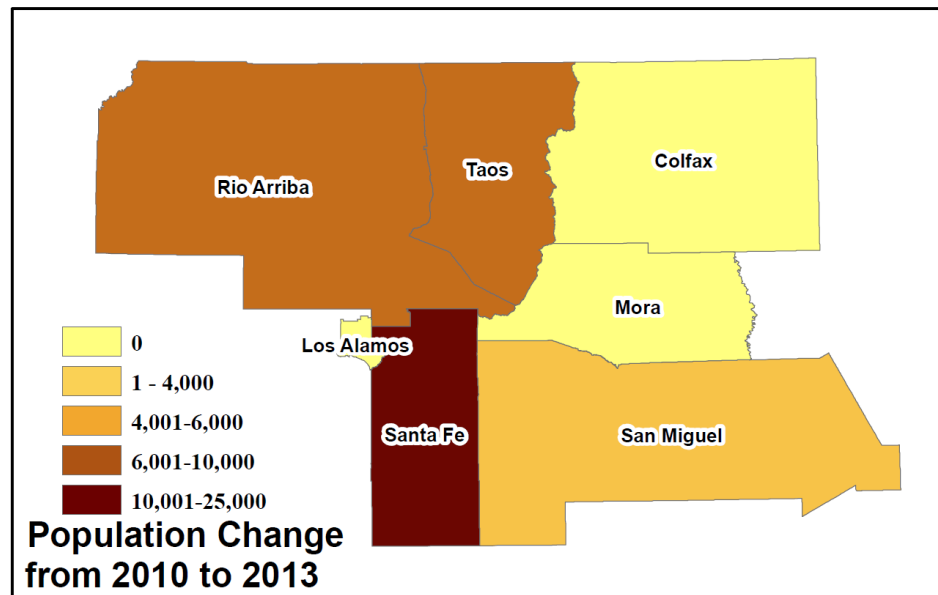
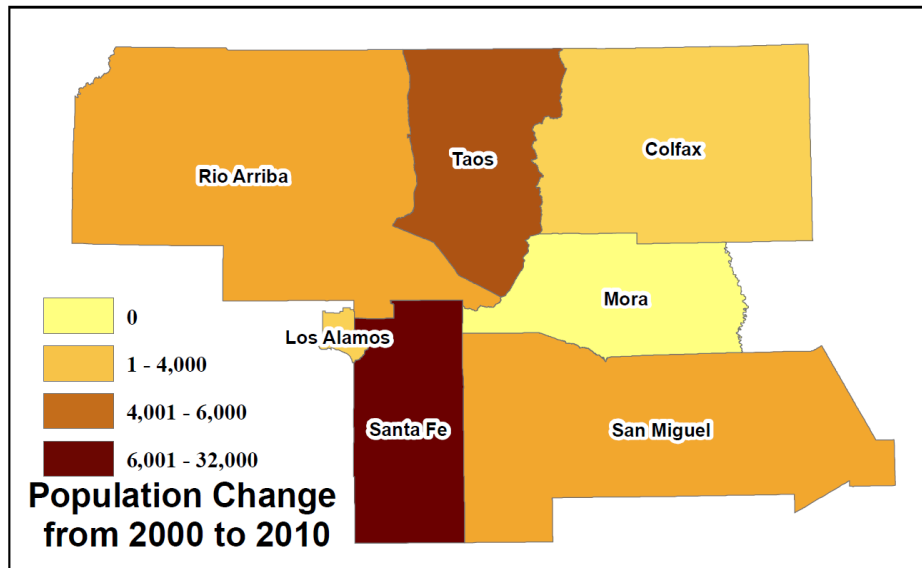
The evaluation criteria are formed around the strategy which supports the means to achieve goals for actualizing economic resiliency and related intent. For some factors, the number can be direct, such as job creation and retention. However, job creation should be balanced with other elements of successful economic development such as broadband adoption, quality of place, established entrepreneur networks, supply of skilled workers, ability to attract investment, and a climate of innovation. In other situations the criteria may be more symptomatic, such as how the percent of annual precipitation or the length of the skiing season reflect water supply conditions. Yet other criteria may be indirect – i.e. that the change in the number of communities creating Main Street or Cultural Districts leads to making rural communities more vibrant and acting to retain the workforce, as well as other quality of life factors, in those regions. Given these factors, the District will integrate performance measures that are quantitative, qualitative, data driven and that support effective asset management.

Chapter II. Summary Background

Population

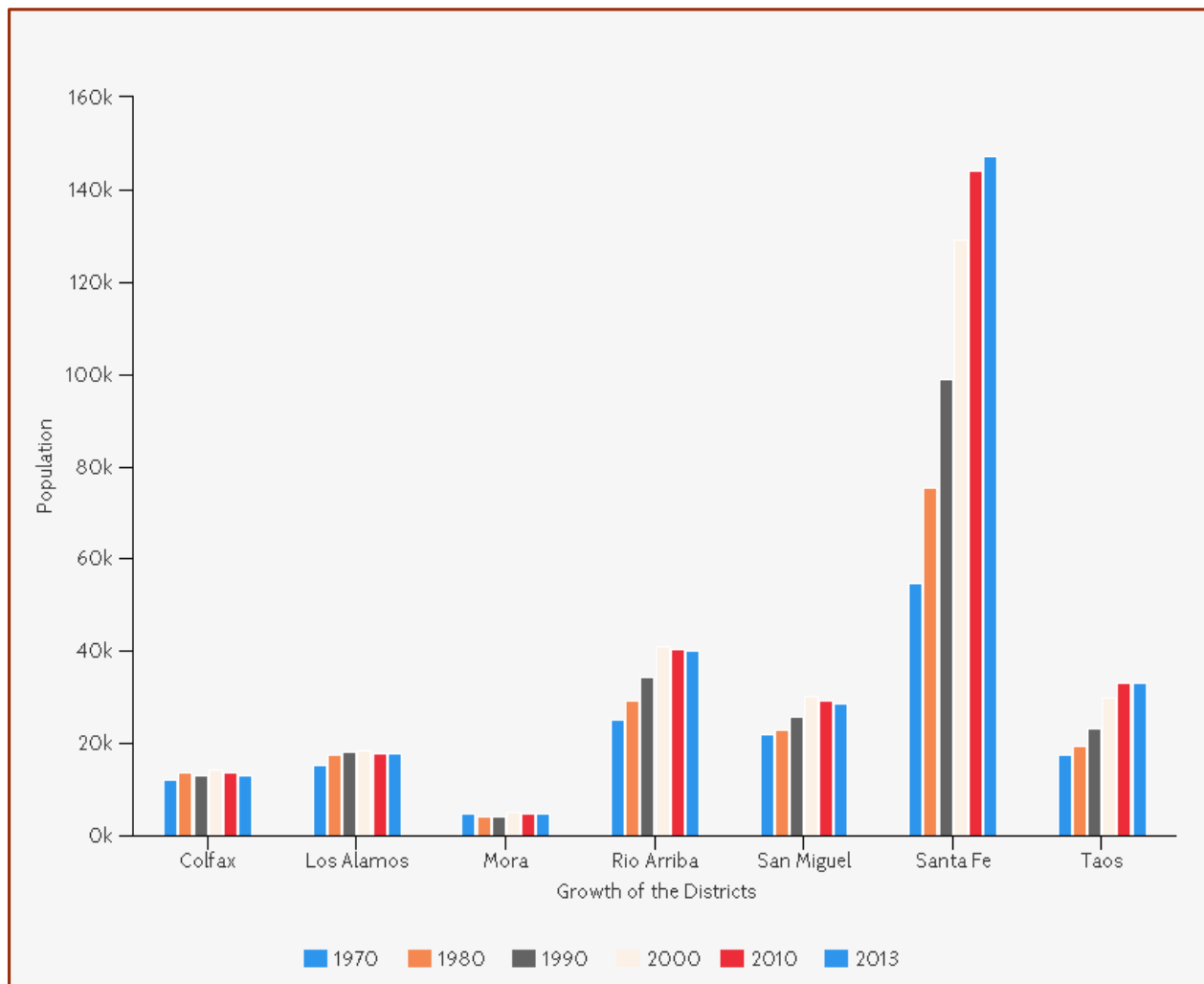
Since the District was created in 1965, the total population has grown continuously, somewhat in parallel with New Mexico and U.S. population growth, as has the population of each of the seven counties. However, since the 2000 Census count only Santa Fe and Taos counties have continued to grow gradually, while the population of Colfax, Los Alamos, Mora, Rio Arriba, and San Miguel Counties has declined slightly.

County Population Change



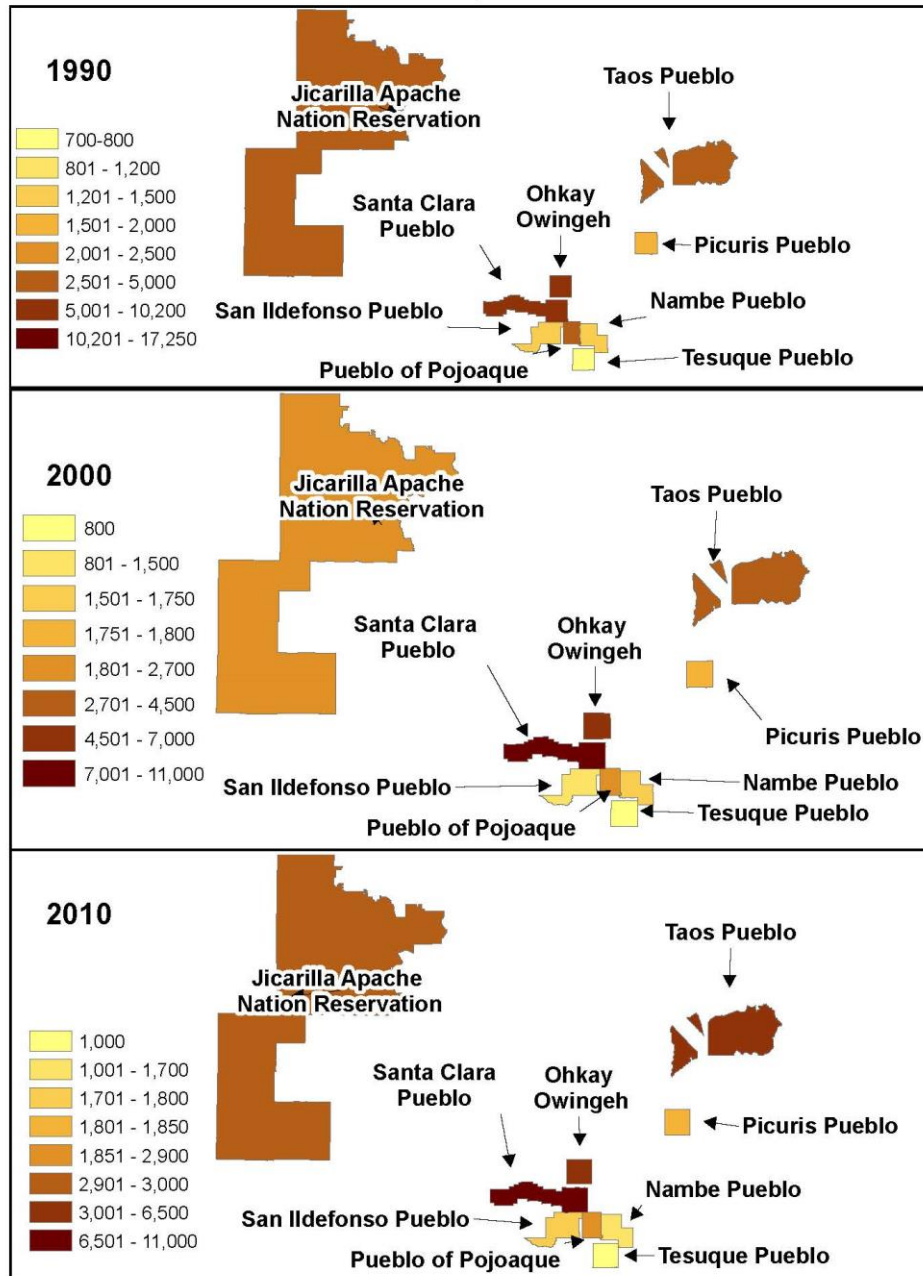
County/Area	1970	1980	1990	2000	2010	2013	Population Growth %		
							1970-2013	2000-2013	2010-2013
Colfax	12,170	13,667	12,925	14,189	13,750	13,094	7.6%	- 7.7%	- 4.8%
Los Alamos	15,198	17,599	18,115	18 343	17,950	17,798	17.1%	- 3.0%	- 0.8%
Mora	4,673	4,205	4,264	5,180	4,881	4,704		0.7%	- 9.2%
- 3.6%									
Rio Arriba	25,170	29,282	34,365	41,190	40,246	40,072	59.2%	- 2.7%	- 0.4%
San Miguel	21,951	22,751	25,743	30,126	29,393	28,541	30.0%	- 5.3%	- 2.9%
Santa Fe	54,774	75,519	98,928	129,292	144,170	147,423	169.1%	14.0%	2.3%
Taos	17,515	19,456	23,118	29,979	32,937	33,035	88.6%	10.2%	0.3%
NCNM District	151,451	182,479	217,458	268,299	283,327	284,667	88.0%	6.1%	0.5%
New Mexico	1,017,055	1,303,303	1,515,069	1,819,946	2,059,179	2,085,287	105.0%	14.6%	1.3%
U.S. (000)	203,392	226,546	248,791	281,422	308,746	316,129	55.4%	12.3%	2.4%

Source: U.S. Census Bureau



Consistent with the greater District region, tribal population has seen very slow growth and in some cases declining population.

Pueblo and Tribal Reservation 1990, 2000, and 2010 Population Data



Per Capita Personal Income

Since 1983, the inflation-adjusted per capita personal income of the District's residents has increased at a similar rate to that of New Mexico and of the U.S. However, since 2003 the per capita personal incomes in Los Alamos and Santa Fe Counties have declined, which has slowed the District's rate of increase to a level below the State or nation. The more positive note is that the District's average per capita personal income has increased in relation to the U.S. and outpaced the change in the State. Indication of declining percentage of middle class is reflective of State trend.

County/Area	1983	1993	2003	2013	% Change		% of U.S.	
					1983-2013	2003-2013	1983	2013
Colfax	\$23,052	\$26,064	\$34,487	\$37,211	61.4%	7.9%	78.3%	83.1%
Los Alamos	\$42,973	\$52,129	\$69,669	\$62,284	44.9%	-10.6%	146.0%	139.1%
Mora	\$13,334	\$17,311	\$22,363	\$30,760	130.7%	27.3%	45.3%	68.7%
Rio Arriba	\$16,719	\$18,546	\$28,540	\$30,106	80.1%	5.2%	56.8%	67.3%
San Miguel	\$17,051	\$19,962	\$26,230	\$33,845	98.5%	22.5%	57.9%	75.6%
Santa Fe	\$28,572	\$35,698	\$43,866	\$44,309	55.1%	-1.0%	97.1%	99.0%
Taos	\$19,925	\$21,843	\$31,046	\$32,195	61.6%	3.7%	67.7%	71.9%
NCNM District	\$24,974	\$30,082	\$39,017	\$40,428	61.9%	3.6%	84.9%	90.3%
New Mexico	\$24,404	\$27,740	\$33,124	\$35,965	47.4%	7.9%	83.0%	80.3%
U.S.	\$29,431	\$34,476	\$41,094	\$44,765	52.1%	8.2%	-	-

Source: StatsAmerica. Income adjusted for inflation – i.e. a 5% rise in real income becomes a 1% decline in spendable dollars if inflation is 6% for the same period.

NM Middle Class = those making 67% - 200% of State Median Income

New Mexico Middle Class Declining!!!

2013 = 43.2% vs 2000 = 48%

Median Income

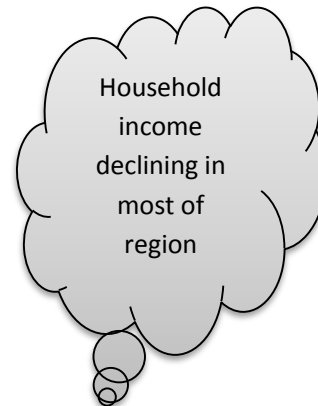
2013 = \$ 43,872 vs 2000 = \$47,036 (inflation adjusted)

Source: Pew Charitable Trust (March 2015)

Median Household income Comparisons

Median Household Income

County/Area	2000	2010	2013	% Change	
<u>2000-2013</u>	<u>2010-2013</u>				
Colfax	\$30,744	\$ 39,249	\$ 37,152	20.8%	- 5.3%
Los Alamos	\$78,993	\$100,423	\$110,930	40.4%	10.5%
Mora	\$24,518	\$ 33,622	\$ 29,263	19.4%	-13.0%
Rio Arriba	\$29,429	\$ 42,514	\$ 36,716	24.8%	-13.6%
San Miguel	\$26,524	\$ 30,956	\$ 31,222	17.7%	1.2%
Santa Fe	\$42,207	\$ 52,923	\$ 51,697	22.5%	- 2.3%
Taos	\$26,762	\$ 35,800	\$ 33,021	23.4%	- 7.8%
New Mexico	\$34,133	\$ 42,742	\$ 44,026	29.0%	3.0%
U.S.	\$41,994	\$ 51,425	\$ 52,250	24.4%	1.6%



Source: US Census Bureau: American Community Survey 2009-2013

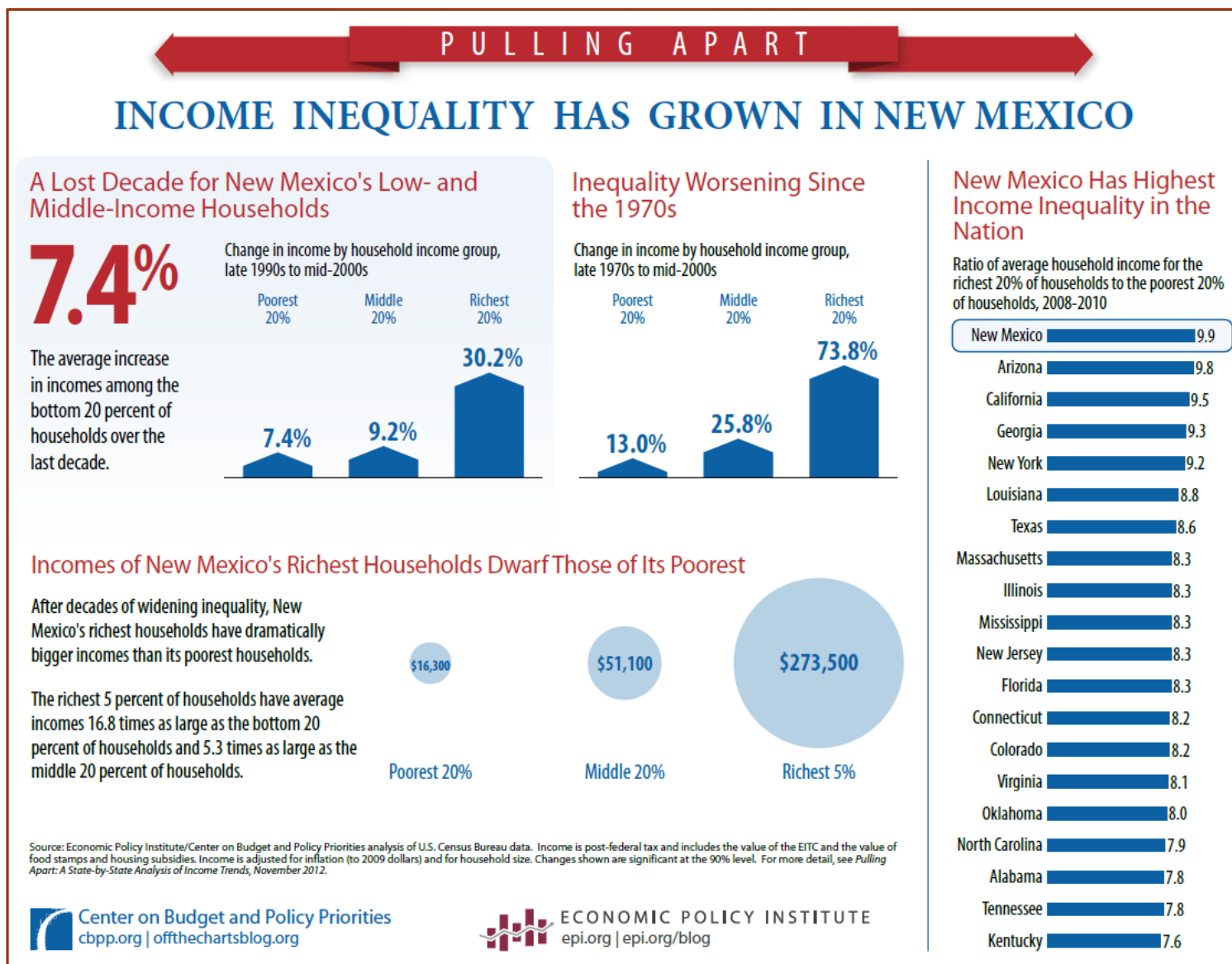
Poverty

In contrast to rising average incomes in the District, poverty rates have increased significantly to a point where one in five District residents was living in poverty in 2013, and poverty affected over one in four persons under the age of 18. This is tempered somewhat by the traditional cultural values of District residents where real income is less important because families take care of their own, many people harvest their own food and wood for fuel, and barter is an accepted way to purchase necessities.

County/Area	Total Population			Population Under 18		
	Percent in Poverty		Percent Change	Percent in Poverty		Percent Change
	2000	2013	2000 to 2013	2000	2013	to 2013
Colfax	15.8%	20.1%	17.5%	25.6%	32.2%	-18.6%
Los Alamos	2.7%	4.0%	44.0%	2.8%	4.4%	35.6%
Mora	24.2%	23.8%	-10.6%	32.3%	37.3%	-36.9%
Rio Arriba	18.3%	24.8%	1.8%	24.7%	32.6%	8.6%
San Miguel	23.7%	32.4%	29.5%	30.4%	43.3%	-2.8%
Santa Fe	12.3%	18.1%	67.8%	17.9%	26.9%	54.8%
Taos	21.5%	26.2%	34.3%	30.5%	37.5%	11.9%
NCNM District	15.3%	20.7%	36.4%	21.6%	29.3%	21.8%
New Mexico	17.3%	21.4%	42.0%	25.5%	30.1%	17.8%
U.S.	11.3%	15.8%	57.1%	16.2%	22.2%	-0.5%

Source: StatsAmerica

Moreover, the growing gap of income inequality is widening and in turn will affect factors such as workforce and consumer purchasing.



Source: Economic Policy Institute/Center on Budget and Policy Priorities analysis of U.S. Census Bureau data. Income is post-federal tax and includes the value of the EITC and the value of food stamps and housing subsidies. Income is adjusted for inflation (to 2009 dollars) and for household size. Changes shown are significant at the 90% level. For more detail, see *Pulling Apart: A State-by-State Analysis of Income Trends*, November 2012.

Center on Budget and Policy Priorities
cbpp.org | offthechartsblog.org

ECONOMIC POLICY INSTITUTE
epi.org | epi.org/blog

Labor Force Data

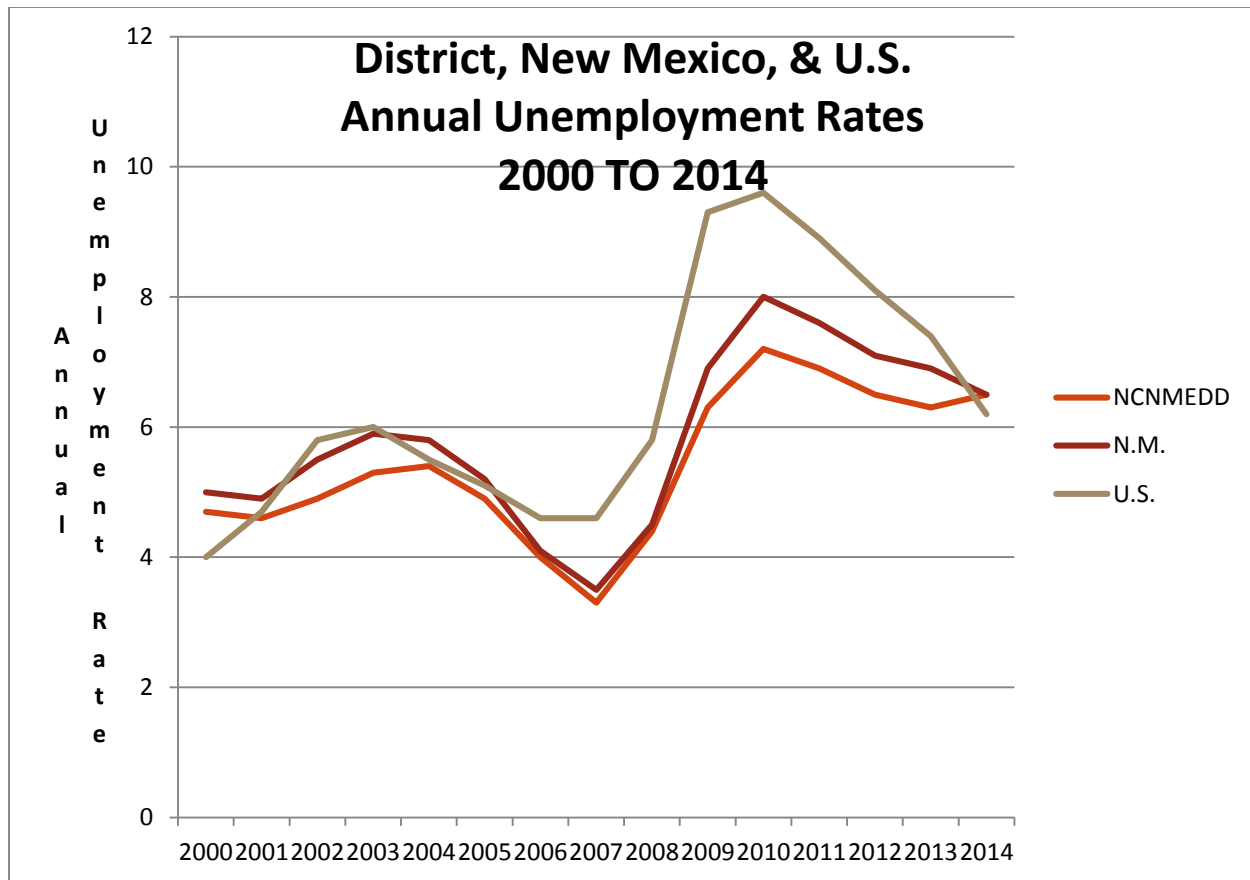
The following chart and tables present data on the labor force, employment and unemployment for the United States, the state of New Mexico, and the NCNMEDD region from 2000 to December, 2014. Jobs have been lost in the District in recent years, and job creation remains a critical issue in the District, even though the District unemployment rate was below that of the U.S. or New Mexico from 2001 to 2014. The creation of high wage, high quality jobs is a challenge in all parts of the District. Tourism and hospitality services do not pay wages comparable even to State government, let alone to jobs at the Los Alamos National Laboratory. The decline of mining and construction has lowered the wages in parts of the region and among population groups dependent on those jobs.



ANNUAL UNEMPLOYMENT RATE COMPARISON, 2000 TO 2014

	<u>NCNM District</u>	<u>New Mexico</u>	<u>U.S.</u>
2000	4.7%	5.0%	4.0%
2001	4.6%	4.9%	4.7%
2002	4.9%	5.5%	5.8%
2003	5.3%	5.9%	6.0%
2004	5.4%	5.8%	5.5%
2005	4.9%	5.2%	5.1%
2006	4.0%	4.1%	4.6%
2007	3.3%	3.5%	4.6%
2008	4.4%	4.5%	5.8%
2009	6.3%	6.9%	9.3%
2010	7.2%	8.0%	9.6%
2011	6.9%	7.6%	8.9%
2012	6.5%	7.1%	8.1%
2013	6.3%	6.9%	7.4%
2014	6.5%	6.5%	6.2%

Source: N.M. Department of Workforce Solutions



The employment impact of the recent recession is shown clearly on the above chart.

New Mexico Department of Workforce Solutions Labor Force Data Comparison for 2000, 2011, and 2014

Area	Civilian Labor Force			Unemployment Rate			Unemployment Rate as Percent of U.S. Rate		
	2000	2011	December, 2014	2000	2011	12/2014	2000	2011	12/2014
U.S.	142,538,000	153,617,000	155,922,000	4.0%	8.9%	6.2%			
New Mexico	852,293	927,785	918,206	5.0%	7.4%	6.5%	125%	85%	105%
NCNMEDD County	137,400	142,616	130,646	4.7%	6.9%	6.5%	118%	77%	105%
Colfax	6,976	6,506	6,280	5.0%	8.0%	6.1%	125%	86%	98%
Los Alamos	10,511	9,880	8,406	3.2%	3.2%	4.1%	78%	35%	66%
Mora	1,971	1,918	2,128	10.6%	14.9%	11.1%	265%	141%	179%
Rio Arriba	18,974	19,940	16,356	6.1%	8.3%	8.3%	153%	81%	134%
San Miguel	12,586	12,900	11,214	5.8%	8.0%	7.7%	145%	79%	124%
Santa Fe	70,781	74,644	71,510	3.6%	6.0%	5.4%	90%	64%	87%
Taos	15,601	16,828	14,752	6.8%	9.4%	9.7%	170%	95%	156%

Source: New Mexico Department of Workforce Solutions Bureau of Economic Research and Analysis

Total Jobs Per Industry Sector by County for 2010

								District Total	
	Colfax	Los Alamos	Mora	Rio Arriba	San Miguel	Santa Fe	Taos	No.	%
Farm	394	0	590	1,274	760	515	604	4,137	3%
Forestry/Fishing	*	25	61	124	*	141	*	*	*
Mining	*	*	*	123	*	691	419	*	*
Utilities	40	*	*	138	29	139	137	*	*
Construction	450	174	119	886	553	4,135	1,192	7,509	5%
Manufacturing	207	*	*	397	139	1,352	369	*	*
Wholesale Trade	98	119	*	155	89	1,377	196	*	*
Retail Trade	917	587	79	1,739	1,283	10,137	1,845	16,585	10%
Transp. /Warehse.	145	57	*	208	146	694	147	*	*
Information	60	123	*	126	106	1,653	210	*	*
Finance & Insurance	245	401	84	330	317	3,222	436	5,035	3%
Real Estate	366	304	48	458	292	4,276	941	6,685	4%
Professional &									
Scientific Services	268	11,765	45	*	362	6,701	*	*	*
Mngmt. Services	31	*	*	*	*	273	*	*	*
Waste Mngmt.Srvcs	139	*	55	569	*	2,805	805	*	*
Education Srvcs	*	273	*	281	*	2,214	294	*	*
Health Care	*	1,047	*	2,072	*	10,114	1,996	*	*
Arts, Enter. & Rec.	146	310	34	427	247	3,870	1,314	6,348	3%
Lodging & Food	1,102	534	41	1,028	751	8,544	2,167	14,167	9%
Other Services	700	484	63	755	453	5,224	912	8,591	5%
Government	1,587	1,992	354	5,210	4,334	18,910	2,390	43,415	21%
Total Employed	7,618	19,853	2,028	16,919	12,455	86,987	17,391	163,251	100%

* Data not shown to avoid disclosure of confidential information.

Source: U.S. Bureau of Economic Analysis (BEA) Data after 2010 is not available since BEA discontinued production of this data due to sequestration.

Total Covered Jobs Per Industry Sector by County for 2013

Note: Covered Jobs are less than total jobs because they do not generally include farm workers and the self-employed, and because workers on a contract basis are usually reported at the location of their central office rather than at the place they are actually working.

								District Total	
	Colfax	Los Alamos	Mora	Rio Arriba	San Miguel	Santa Fe	Taos	No.	%
Ag/Forestry/Fishing	52	*	*	57	38	158	16	*	*
Mining	52	*	*	91	24	87	308	*	*
Construction	191	191	*	295	238	2,955	415	*	*
Manufacturing	117	58	*	115	75	828	119	*	*
Wholesale Trade	67	59	*	80	40	945	93	*	*
Retail Trade	647	381	67	1,074	916	9,010	1,295	13,390	12.2%
Transp. /Warehse.	61	36	33	127	196	753	110	1,313	1.2%
Utilities	40	94	*	119	29	124	133	*	*
Information	34	51	*	59	58	971	128	*	*
Finance & Insurance	138	323	15	157	205	1,780	192	2,810	2.6%
Real Estate	59	84	*	24	57	840	235	*	*
Professional & Scientific Services	80	10,046	*	9	95	2,386	302	*	*
Mngmt. Services	23	*	*	*	*	194	*	*	*
Waste Mngmt.Srvcs	34	*	*	213	43	1,948	24	*	*
Education Srvcs	368	175	*	1,030	*	1,492	861	*	*
Health Care	407	861	*	1,445	*	8,347	1,658	*	*
Arts, Enter. & Rec.	61	151	16	24	26	2,317	560	3,155	2.9%
Lodging & Food	1,119	482	*	784	*	8,468	2,083	*	*
Other Services	503	277	*	144	113	2,468	257	*	*
Public Admin.	373	513	50	2,410	466	9,784	846	14,442	13.1%
Total Employed	5,060	15,537	673	9,378	8,202	60,663	10,391	109,904	100%

* Data not shown to avoid disclosure of confidential information.

Source: U.S. Bureau of Labor Statistics

Workflow Issues for All Counties

The table below shows workflows by county within the District in 2010. The data shows the extent to which Santa Fe and Los Alamos Counties attract workers from other counties, and that the District provided 2,767 more jobs than are filled by its available labor force.

County	Live/Work In County	Commute Out of Residence County	Commute In to Employment County	Net Job Flow (+/-)
Colfax	3,083	1,704	1,402	- 302
Los Alamos	6,979	2,325	8,253	+5,928
Mora	491	778	243	- 535
Rio Arriba	4,986	9,467	4,223	-5,244
San Miguel	5,696	5,074	2,909	-2,185
Santa Fe	37,245	19,148	25,272	+6,124
Taos	8,170	3,619	2,600	-1,019
District Totals	66,650	42,115	44,902	2,767

Source: Census Bureau, Residence County to Workplace County for New Mexico, 2010

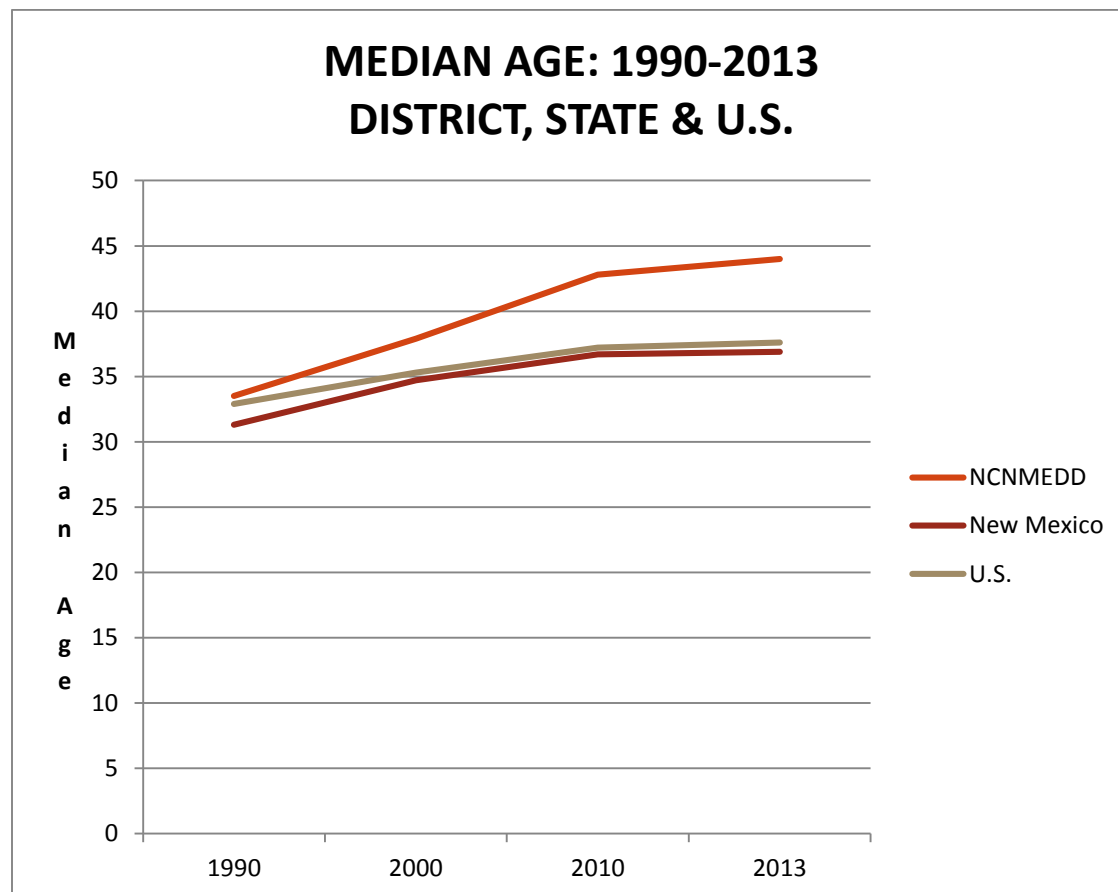
Aging Workforce

District is unable to retain youth and workforce

The table and chart below show how much faster the District population is aging compared with New Mexico and the U.S. In 23 years (about one generation) the median age disparity with the country as a whole has increased from less than one year to almost seven years. This trend will have serious consequences for workforce availability if it continues.

Geography	Median Age in Years			
	1990	2000	2010	2013
Colfax County	35.5	41.0	46.7	47.5
Los Alamos County	37.8	40.5	44.3	43.6
Mora County	33.8	39.4	46.0	47.9
Rio Arriba County	29.9	34.9	39.0	39.9
San Miguel County	30.5	35.0	40.7	42.5
Santa Fe County	34.3	38.4	43.0	44.3
Taos County	33.9	39.6	45.2	47.0
NCNM District	33.5	37.9	42.8	44.0
New Mexico	31.3	34.7	36.7	36.9
U.S.	32.9	35.3	37.2	37.6

Source: U.S. Census



Urban/Rural Disparity

The table below shows one definition of urban/rural where all incorporated places are classed as urban and unincorporated areas are rural. Under this classification, 86% of the District's population is "urban." However, 12 of the 18 incorporated places have less than 5,000 population.

County	Incorporated Area	<u>Change 2000 - 2010</u>			
		2000	2010	Number	Percent
Colfax	Angel Fire	1,048	1,216	168	16.0%
	Cimarron	917	1,021	104	11.3%
	Eagle Nest	306	290	-16	-5.2%
	Maxwell	274	254	-20	-7.3%
	Raton	7,282	6,885	-397	-5.5%
	Springer	1,285	1,047	-238	-18.5%
<i>Colfax</i>	<i>Subtotal</i>	<i>11,112</i>	<i>10,713</i>	<i>-399</i>	<i>-3.6%</i>
Los Alamos	Los Alamos	18,343	17,950	-393	-2.1%
	Wagon				
Mora	Mound	369	314	-55	-14.9%
Rio Arriba	Chama	1,199	1,022	-177	-14.8%
	Espanola	9,688	10,224	536	5.5%
<i>Rio Arriba</i>	<i>Subtotal</i>	<i>10,887</i>	<i>11,246</i>	<i>359</i>	<i>3.3%</i>
San Miguel	Las Vegas	14,565	13,753	-812	-5.6%
	Pecos	1,441	1,392	-49	-3.4%
<i>San Miguel</i>	<i>Subtotal</i>	<i>16,006</i>	<i>15,145</i>	<i>-861</i>	<i>-5.4%</i>
Santa Fe	Santa Fe	62,203	67,947	5,744	9.2%
	Edgewood	1,893	3,735	1,842	97.3%
<i>Santa Fe</i>	<i>Subtotal</i>	<i>64,096</i>	<i>71,682</i>	<i>7,586</i>	<i>11.8%</i>
Taos	Questa	1,864	1,770	-94	-5.0%
	Red River	484	477	-7	-1.4%
	Taos	4,700	5,716	1,016	21.6%
	Taos Ski				
	Valley	56	69	13	23.2%
<i>Taos</i>	<i>Subtotal</i>	<i>7,104</i>	<i>8,032</i>	<i>928</i>	<i>13.1%</i>
Urban Places	Subtotal	230,018	243,868	13,850	6.0%
Rural Places	Subtotal	38,211	39,459	1,178	3.1%
Region	Total	268,229	283,327	15,028	5.6%
State	Total	1,819,046	2,059,179	240,133	13.2%

Source: U.S. Census Bureau, Decennial Census, 2000 and 2010

Under another definition used by the U.S. Department of Agriculture (USDA), any community with less than 20,000 population is considered rural and eligible for many USDA programs. Under this definition, the only "urban" residents of the District are the 67,947 persons living in the City of Santa Fe.

Chapter III Economic Resilience



What is Economic Resilience?

Regional economic prosperity is linked to the District's ability to withstand, prevent, or quickly recover from major disruptions to its underlying economic base; or, its economic resilience. Resilience is defined in most dictionaries as the ability to recover from or adjust easily to misfortune or change; and economic resiliency can be defined as the District's ability to, adequately and expediently, recover after human-made, natural, or economic disasters through cohesive coordination. Human-made or natural disasters affecting the District may be short-term events such as forest fires and the resulting floods, or long-term situations such as drought and climate change. The recent national recession is an example of an economic disaster that is affecting the District as shown by declining population, labor force, jobs, and wealth. Primary effects of these events are disruptions to the base regional economy, community and natural environment.

Human-Made and Natural Disasters

Forest fires have long been common to the North Central New Mexico Economic Development District – an area where 27% of the District's land is owned by the Federal Government as national forest and other natural areas.

Percent of Total Land Area That Is Owned By:					
County	Total Area In Square Miles	Private	State	Tribal	Federal Non-Tribal
Colfax	3,771	88%	12%	0%	1%
Los Alamos	109	7%	0%	0%	93%
Mora	1,944	85%	7%	0%	9%
Rio Arriba	5,883	28%	3%	17%	52%
San Miguel	4,767	81%	6%	0%	13%
Santa Fe	1,909	59%	7%	6%	27%
Taos	2,257	38%	7%	4%	51%
NCNM District Total	20,640	60%	6%	6%	27%

However, since the year 2000 Cerro Grande Fire the impacts have been much more severe. In that Fire, all of Los Alamos County was evacuated for a week, the Los Alamos National Laboratory (one of the District's main economic engines) was closed for a week, and 5% of the County's housing stock was destroyed by fire. Fires threatening surface water supplies continued throughout that decade, and 2011 saw another peak of fire activity with the Las Conchas Fire again causing the evacuation of a portion of Los Alamos County and the temporary closing of the National Laboratory; and the Track Fire causing the evacuation of a portion of Colfax County and the temporary closing of the Philmont Scout Ranch, a major seasonal economic activity. After the fires, the newly barren hillsides caused severe flooding situations that poured fire debris into scarce surface water supplies. One Los Alamos County reservoir that was filled with debris after the 2000 fire had just been restored when the 2011 fire refilled it with debris.

The increasing forest fire severity can be related to increased drought conditions that started in the early 1990's, and has been classed as severe and extreme over most of the District in the last ten years. Drought can be related to global climate change and can have long-term economic impacts. The District is a national and even international tourism destination, and its declining water supplies may have to be increasingly diverted

towards agriculture and population support and away from tourism activities such as watering golf courses and snow-making for ski areas.

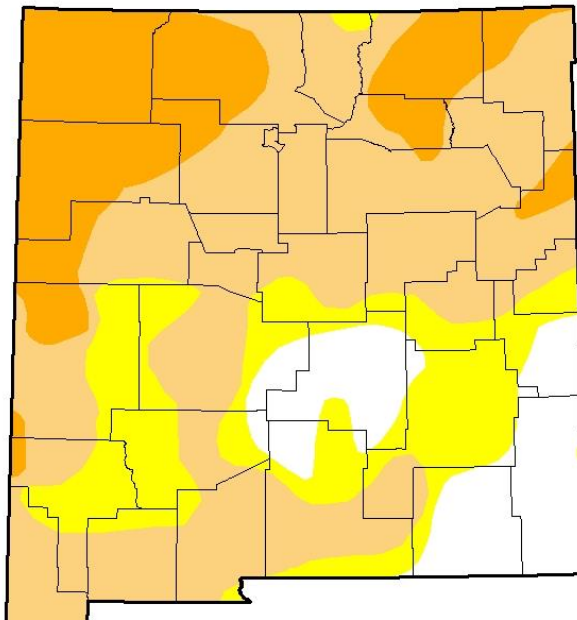
Drought

U.S. Drought Monitor New Mexico

March 3, 2015

(Released Thursday, Mar. 5, 2015)

Valid 7 a.m. EST



Drought Conditions (Percent Area)

	None	D0-D4	D1-D4	D2-D4	D3-D4	D4
Current	12.81	87.19	67.59	19.68	0.00	0.00
Last Week 2/24/2015	13.84	86.16	67.61	25.98	3.70	0.00
3 Months Ago 12/2/2014	12.01	87.99	64.92	29.10	3.70	0.00
Start of Calendar Year 1/5/2015	12.01	87.99	65.38	29.10	3.70	0.00
Start of Water Year 9/30/2014	16.70	83.30	62.57	30.04	8.08	0.00
One Year Ago 3/4/2014	0.41	99.59	96.50	66.65	23.27	0.00

Intensity:

■ D0 Abnormally Dry	■ D3 Extreme Drought
■ D1 Moderate Drought	■ D4 Exceptional Drought
■ D2 Severe Drought	

The Drought Monitor focuses on broad-scale conditions. Local conditions may vary. See accompanying text summary for forecast statements.

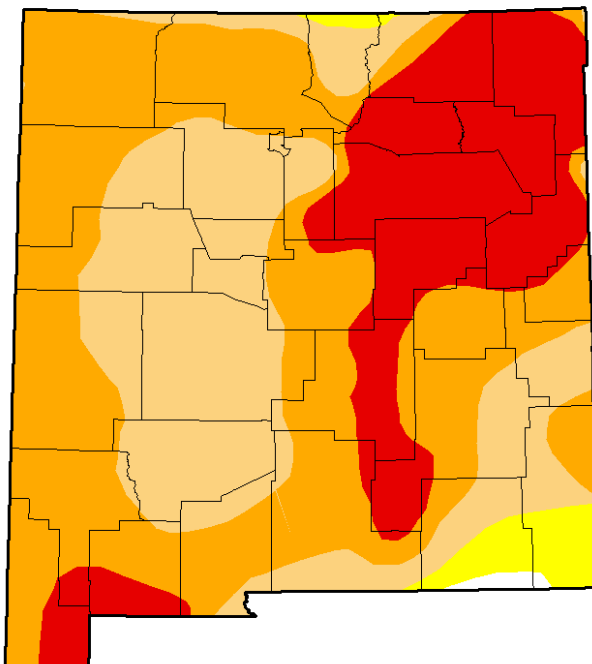
Author:

David Simeral
Western Regional Climate Center



March 4, 2014

<http://droughtmonitor.unl.edu/>



Much of the region, as with the State, has been experiencing prolonged drought conditions. While the severity of the conditions has seen some improvement recently, the region remains extremely vulnerable. Many efforts are dedicated to address factors related to drought and the adoption of resiliency will be paramount for not only viability of irrigation activities, but for sustaining the basic water needs of businesses, institutions and communities. This will require better complementary water conservation/efficiency investment and development of innovative approaches to water resource and quality management along with effective asset management of the water systems and infrastructure in place and to be developed.

Economic Disasters

The national economic recession that started in 2008 is an economic disaster that is still impacting the District. The unemployment rate for the District rose from 3.3% in 2007 to 7.2% in 2010 which paralleled that national trend but was not nearly as severe. Similarly, the unemployment rate has since declined to a level below 6% which is about equal to the U.S. unemployment rate. However, whereas the national economic improvement is driven by an expanding economy, the District's recovery appears to be caused by a shrinking economy. The number of jobs in the District has declined, the labor force has responded by growing smaller, and the population in most of the counties in the District is less than it was in the 2000 Census. The Census Bureau's latest American Community Survey reported that from 2012 to 2013 over 600 more persons moved out of the District than moved into the seven county region. This is a disturbing trend that may be very difficult to turn around from a relatively short-term "event" to a long-term downward spiral, and impacts the strategy that the District needs to pursue for the next five years.

*Resiliency
needed;
actions
urgent*

The District is currently with the rural small community of Questa responding to a major disruption through a closure and resulted in 300 displaced workers.

and immediate factors to include development of workforce with the University of New Mexico for displaced workers in eligible skills training and assistance with placement to surrounding areas. Parallel activities collaborative strategic economic development planning and active policy and resource development to attract potential investment and enterprises.



working
on
economic
large mine
close to
Interim
consider
program
enrolling
repurpose
include

Regional Economic Development Strategy Implications

Infrastructure has been an issue in the District since its creation in 1967, and water resources, water quality, and water transmission have been critical areas through the years. Water improvements in the semi-arid, high plains that characterize the District are, by necessity, long-term and expensive. The San Juan-Chama water diversion project completed by the Federal Government in 1987 has just come on-line to communities in the District in recent years. The Aamodt water suit was finally adjudicated after decades in court, and may be another decade away from providing a positive improvement to the water supply.

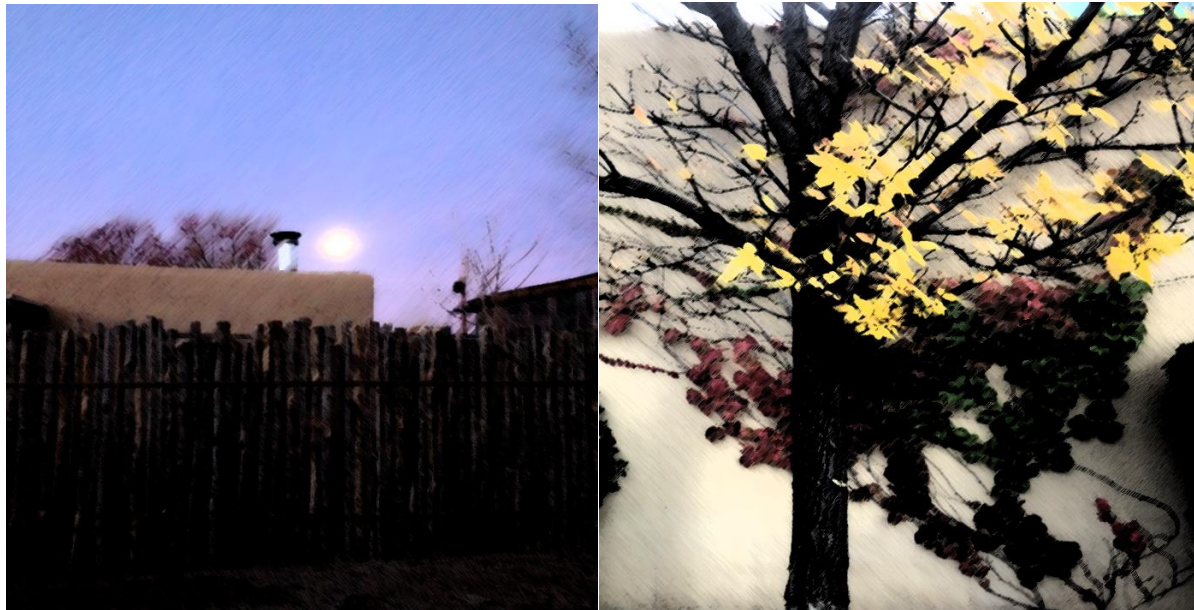
High-speed broadband is a newer addition to the District's infrastructure strategy list, but was given a jump-start by Federal funding of the District's REDI Net "middle mile" project completed in 2013. REDI Net is a Joint Powers Agreement (JPA) entity operated and governed by 9 local and tribal government jurisdictions along with NCNMEDD. In addition to enabling better governmental services, provide services to key community anchor institutions and partnerships with ISPs (Internet Service Providers), REDI Net's primary mission is to support improvements to the sectors of healthcare, education, public safety and economic development. Expansion of REDI Net to other parts of the District may offer a solution to the water issue to

the extent that jobs and population growth will be restricted to parts of the District where water is available, and REDI Net can link the rural populations to the jobs and health and education services concentrated there. Opportunities to integrate transportation, energy and other infrastructure development are potential applications of the broadband network.

Workforce development is another critical economic factor that has been an issue since the District's first planning efforts. On one hand, the District has an abundance of high-paying jobs requiring a highly trained workforce that includes:

- Scientific and engineering skills at the Los Alamos National Laboratory in Los Alamos County;
- Medical and higher education skills at State institutions in Colfax, San Miguel and Santa Fe Counties;
- Financial management skills at the national businesses in Santa Fe County; and
- Governmental management skills in the State capital in Santa Fe County.

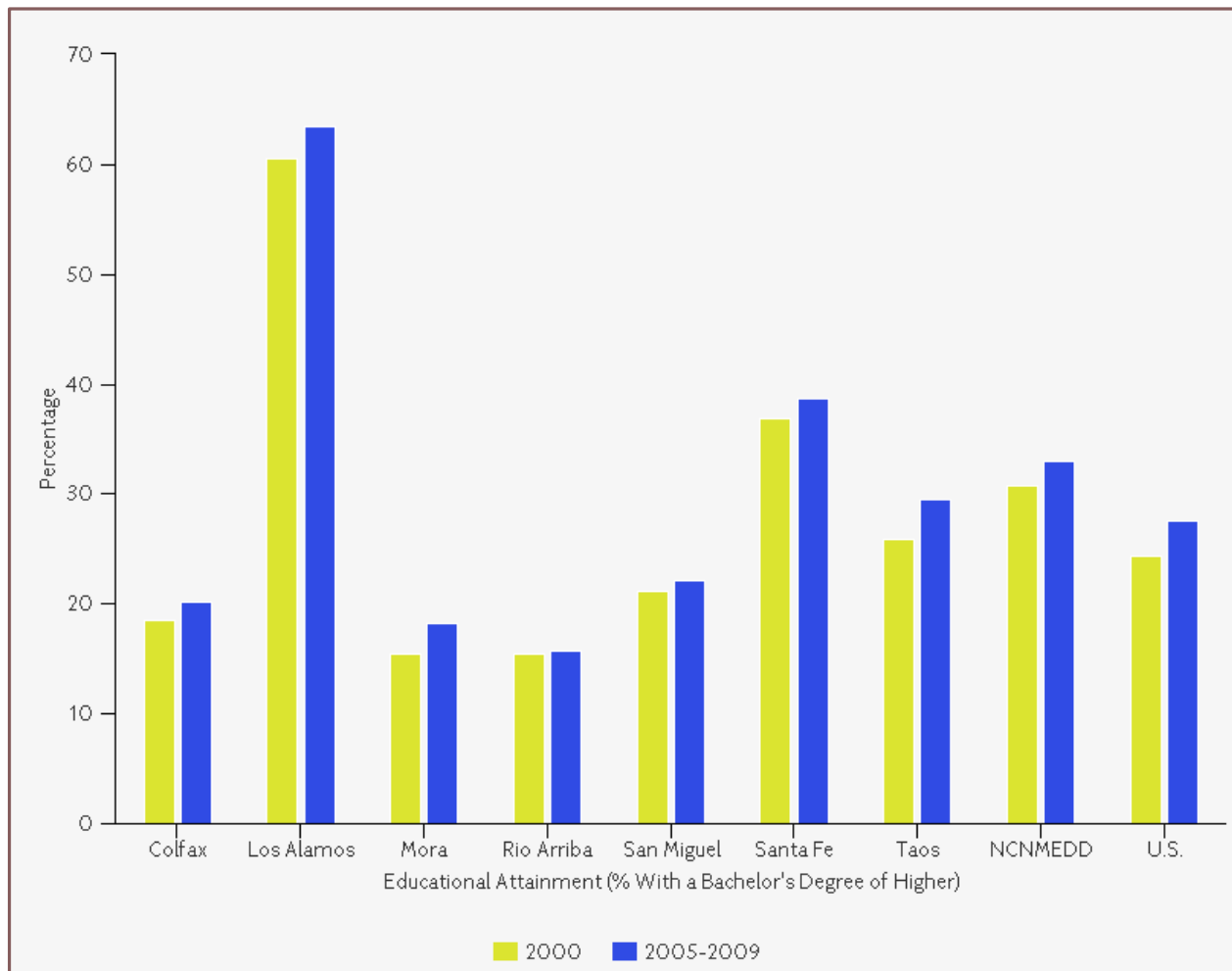
This is also indicated by the fact that the percentage of persons 25 years and older in the District with a BS degree or higher is greater than the percentage in the State or the U.S., as shown in the table above. On the other hand, the New Mexico K-12 education system is not preparing the youth for those higher quality job opportunities, as indicated by reading and math proficiency scores, school retention rates, graduation rates, and preparedness for higher education scores. Thus, it appears that the employers with high quality jobs in the District are having to recruit outside the District or the State for qualified employees, or even recruit internationally in the case of the National Laboratory. The District will have to assemble a significant effort to better align the workforce preparedness of its indigent population with the needs of the high quality employers in the seven counties.



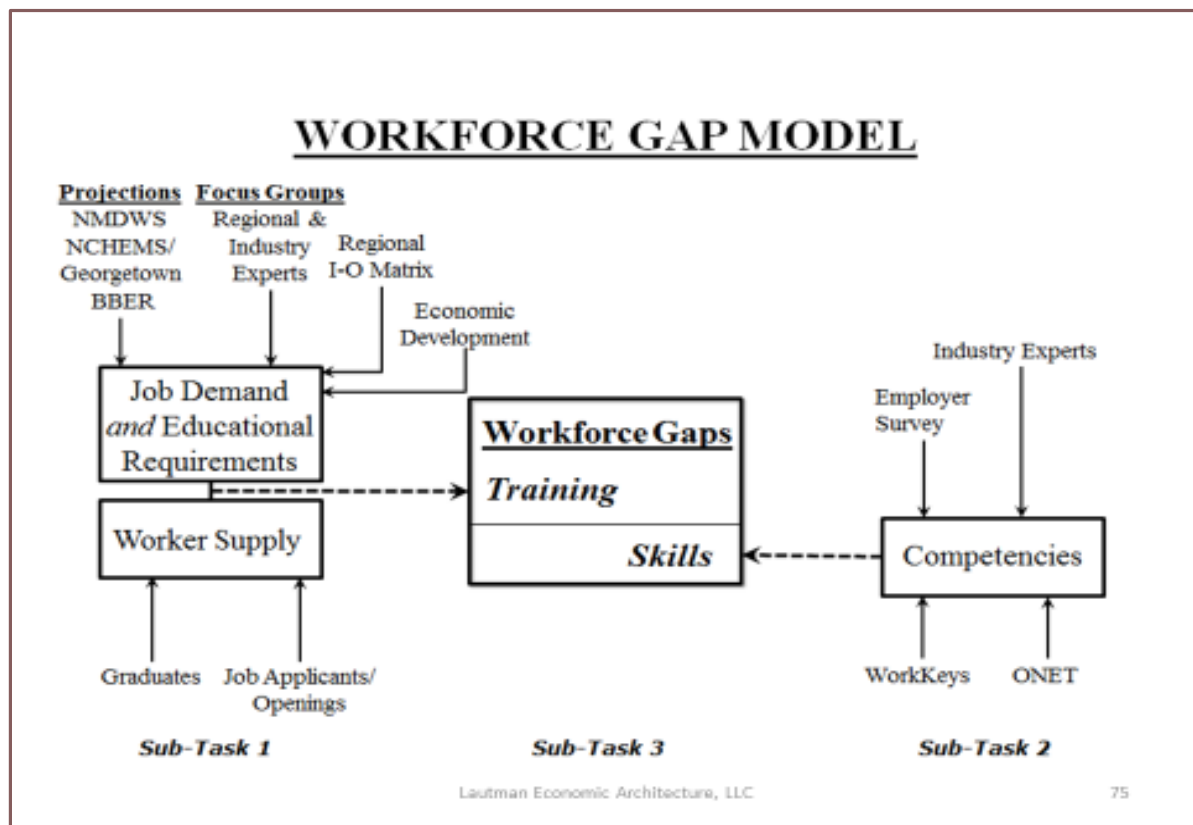
**Educational Attainment by County in Comparison with the U.S. and New Mexico
Population 25 Years and Older**

County	% With a Bachelor's Degree or Higher		% High School Graduate or Higher	
	2000	2009-2013	2000	2009-2013
Colfax	18.5%	19.8%	80.8%	86.6%
Los Alamos	60.5%	63.4%	96.3%	97.0%
Mora	15.5%	9.5%	69.8%	84.1%
Rio Arriba	15.4%	16.4%	73.0%	79.2%
San Miguel	21.2%	19.6%	74.5%	83.9%
Santa Fe	36.9%	39.7%	84.5%	87.0%
Taos	25.9%	29.5%	79.1%	87.5%
NCNMEDD Region	30.8%	33.4%	81.3%	86.2%
New Mexico	23.5%	25.8%	78.9%	83.6%
U.S.	24.4%	28.8%	80.4%	86.0%

Source: US Census Bureau: American Community Survey 2009-2013



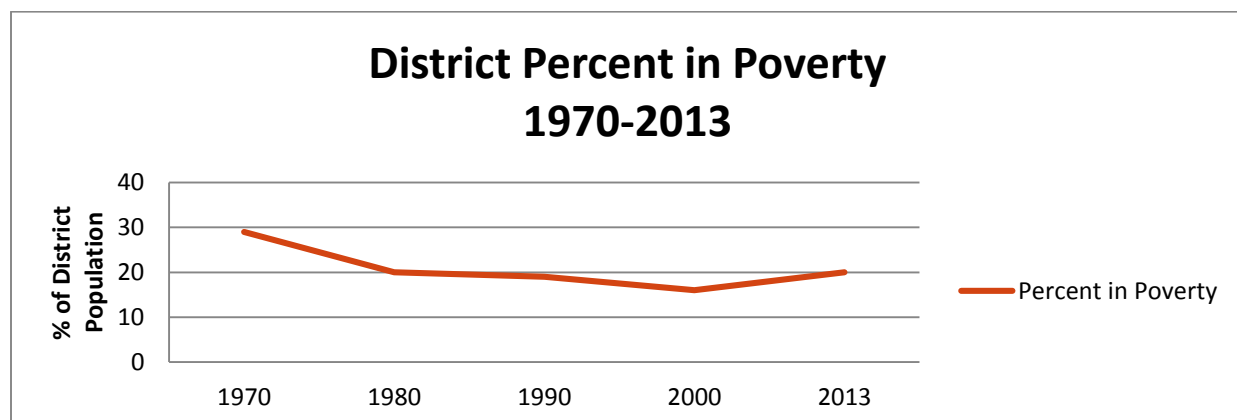
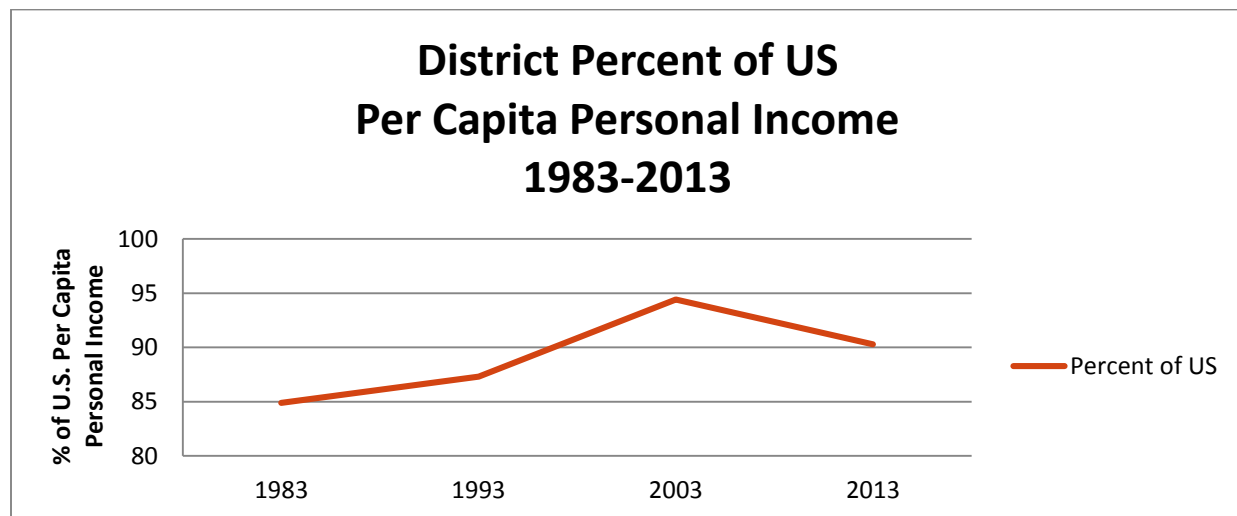
*...align the workforce
preparedness of its
indigent population
with the needs of the
high quality employers*



Wealth Creation

From the District's creation in 1967 to the start of the economic recession in 2007, significant improvement was made in wealth creation as indicated by the two charts below. Per capita personal income in the District increased significantly as a percentage of U.S. per capita personal income, but then has shown a substantial decline since the recession. Conversely, the percent of the District population in poverty status declined for several decades, but then has increased as the recession has proceeded.

For the District, building wealth is more than simply growing the amount of money. Only focusing on creating jobs and generating income, however appealing as those goals may be, are never enough to build lasting wealth. It is critical to encourage and support community stakeholders to make adequate and timely investments across multiple forms of essential community capital, establish foundation assets in place through local equity ownership and influence, and ensure that many residents—especially underserved and low-income population, places and entities—participate in decision making, fostering long-lasting trusting relationships and, in development of businesses further along on the product value chain with higher-skilled labor and higher profits.



Statewide Perspective

Many of the economic resiliency issues faced by the seven County District are similar to those faced by New Mexico. Faced with these issues, the State Legislature created in 2013 a special committee made up of State Legislators and private sector representatives called the Legislative Jobs Council (LJC). From the outset, the LJC determined to work closely with the seven Economic Development Districts / Council of Government in the State. In its first year, the LJC took a statewide view that identified

- The number of jobs needed to reduce the unemployment rate to the four percent level that existed prior to the recession,
- The number of jobs needed to accommodate population growth in the next ten years, and
- The number of jobs needed to replace the jobs lost through normal attrition.

The next step was to identify those industries in the State that were most likely to offer job creation opportunities, and to do a general allocation of the jobs in each sector to the seven Districts in the State. The final step in the first year was to determine which categories of jobs to be developed were most subject to government incentives, and to start the development of those incentives. The LJC's second year started with



drilling down to the Districts and consulting with local government and business leaders to refine the projected number of jobs by industry by County. The LJC also developed a \$70 million package of job creation incentives to be considered at the 2015 Legislative session based on a projection of significant surplus revenues for the 2016 fiscal year. Unfortunately, the steep decline in gasoline prices resulted in most of the projected surplus disappearing. Given that the number of jobs in the State continues to decline and that the State had its first decrease in population in memory, the work of the LJC can hopefully be revived when and if the State government's financial situation improves.

For the North Central Council of Governments (Economic Development District) the work of the LJC, as refined by sub-regional meetings with local government and business leaders, resulted in the following table with a ten year need for over 17,000 economic base jobs. This number is about 25% of the number of jobs needed for the State, and economic base jobs traditionally only represent about a third of the total number of jobs created. Meanwhile, the job situation continues to worsen, evidenced by the closing in the molybdenum mine in the Village of Questa (see case above in Economic Disasters section) resulting in the termination of over 300 highly-paid employees. District staff is working with the Village and the County with financial assistance from the EDA, and the economic resiliency strategies developed in Questa may have to be applied in other communities in the District if the current economic decline continues.

Combined North Central New Mexico Economic Development District Predicament Matrix

	2014	2024	Assumed	Assumed	Decade
		Consensus	Percent	Percent	
Change			(Current)	(Future)	
Population	287,307	310,464		8%	23,157
Workforce					
Participation	134,345	147,905	47%	48%	13,560
Unemployment					
Rate	11,601	7,277	9%	5%	4,324
Full Employment					
Rate	122,744	140,628	91%	95%	17,884
E-base Jobs					
Rate	44,188	50,626	36%	36%	6,438
E-base Attrition					
Rate		10,125		20%	10,125
Total E-Base					
Job Needs					16,563
Annual E-base					
Jobs Needs					1,656

Source: New Mexico Legislative Jobs Council

Chapter IV

Strength, Weaknesses, Opportunities, & Threats

(SWOT) Analysis

The District held two sub-regional meetings in mid- to late-2013 and then repeated the meetings in 2014. Close to 200 individuals attended, representing local economic experts, small businesses and local, tribal, state and federal governments. The sub-regions were basically oriented to those communities east of the central mountain chain on the high plains, and those west of the mountains in the Rio Grande River valley as the two areas have somewhat diverse economic interests. The issues identified below are aggregated from the comments received at those meetings. Please also refer to additional details in Appendix sections.

A. Civil Infrastructure


	Strengths	Weaknesses
Water	Increased opportunity for State funding of water projects by creation of the Water Trust Board and classification of mutual domestic water user associations as units of local government.	Semi-arid climate with lack of ground water and annual precipitation. Historic water allocations challenge population growth and economic development. Lack of water impacts economic sectors as diverse as manufacturing and tourism. Transmission of water resources from where they exist to where they are needed is often costly and fraught with legal issues. Legal issues related to water rights take years and even decades to resolve – i.e. the Aamodt Settlement, Taos Pueblo, and Texas vs. New Mexico
	Inherent awareness of limited water resources require region to consistently pay attention to management and use.	
	Strong and active acequias irrigation network.	
	Opportunities	Threats
	Water resource management incentives and innovation consideration. Use of grey/black water.	Water quality issues such as contamination of existing ground water resources from naturally-occurring and human-made materials. Climate change has reduced annual precipitation to extreme drought levels. Urban vs. rural demands. Depleting groundwater sources detected throughout region.
	Better coordinated regional water planning and asset management. Improvements to leverage and coordinate funding and resource development and investment. Prioritize investment regionally and to better inform funding agencies and policy decisions.	Extremely costly capital costs for improvements and replacement and recurring operating expenses. Lack of cohesive asset management and regional coordination can affect short and long term investment and increase costs and burden of operation.
	Bridge competitive urban vs. rural use, especially with balancing needs of agriculture and urban development	

	Strengths	Weaknesses
Transportation	Public transportation has made significant strides outside of Santa Fe, in the past ten years with services such as the NCRTD, New Mexico Park & Ride, and Railrunner adding home/work connections. Para-transit services have increased to serve aging citizens through work by the Non-Metro Area Agency on Aging which is administered by the District. The BNSF Railroad has a major line parallel to I-25 with both passenger and freight capacity service.	Outside of Santa Fe, the private motor vehicle is the primary mode of transportation. The recent recession has decreased funding for road construction and maintenance. Santa Fe has limited air service, and most of the remainder of District virtually has no air service.
	Opportunities Although the spread-out rural area is difficult and/or not amenable to scheduled public transit there is an opportunity to initiate a transportation management system to provide better on-call service. Better agency coordination as well as urban and rural alignment to address demographic changes and demand for transportation, especially in addressing aging population. Other transit-oriented planning efforts may better align with development patterns and environmental constraints.	Threats Amtrak has threatened to remove passenger service and freight service is essentially defunct. A long-term reduction in State and Federal transportation funding would harm not only roads and highways on which the District is dependent, but also the emerging public transportation services. Local public tax resources compete with other public service demands.

	Strengths	Weaknesses
Broadband	REDI Net open access middle-mile project provides a basic backbone for a District-wide network which included important tribal jurisdiction participations. Kit Carson Electric Co-op fiber-to-the- premise project connects 6,000 customers in the northern part of the District. The 2 networks interconnect and work collaboratively. Continue efforts to further improvement for rural and urban region and in cooperation with private and public entities.	Widely-dispersed rural communities create high upfront capital costs for development. Adaption of services is slow. Limited access to federal funds for expansion. No significant state funding committed for infrastructure development. With a few exceptions, private service providers not yet established business model to take advantage of the public investments in place. Lack of general literacy and knowledge about emerging broadband applications.

	Opportunities	Threats
	<p>REDI Net can accommodate expansion to other parts of the District to support economic development, health care access, distance learning/education and public safety. REDI Net and Kit Carson projects demonstrate how rural broadband can be successfully implemented and further cooperate to improve access and quality of services. Alignment and leverage of other infrastructure such as energy, water and transportation will be key to address and actualize cost effective and efficient regional systems.</p>	<p>Lack of local capital investments on longer term basis render expansion of networks difficult. Over-reliance on federal funding sources along with ineffective public-private partnerships will delay much needed investments and shared costs continue to escalate. Inability of region to adopt to use the networks will hamper development, access to education, health care and compromise public safety. Lack of urban and rural network planning and alignment will create disjointed access and increase costs.</p>



Energy	Strengths	Weaknesses
	<p>The District has adequate electric power for current demand; Los Alamos County generates a portion of its power using hydroelectric sources at two lakes in the District. The largest photovoltaic array in North America has recently gone on-line in the District. New Mexico has one of the most progressive requirements for the proportion of power to be generated from renewable sources. Natural resources in solar and wind are plentiful.</p>	<p>Most of the electricity is generated outside of the District. Significant portions of the grid need to be updated and upgraded. The District is not located near large concentrations of population with major electric power needs. There are topographic and distance issues with power transmission. Natural gas infrastructure is lacking in portions of rural region. Energy efficiency efforts are active but need more investment, especially in remote rural areas.</p>
	Opportunities	Threats
	<p>The Tres Amigas project to interconnect the Nation's three power grids is sited just outside the District. The State has created the Renewable Energy Transmission Authority (RETA) to assist in utilization of renewable resources. The District has policy structure in place for Renewable Energy Financing District (Santa Fe County). Los Alamos County, the National Laboratory and six Japanese technology companies are involved in the Smart Grid demonstration project combining renewable and energy-saving technology. Kit Carson developing smart grid application with broadband and this can be considered in greater region. Consider micro-grid applications.</p>	<p>Financing capital costs to update and upgrade the grid often results in rate hikes to communities, and the capacity of customers to absorb costs is limited. Maintenance and operations costs of electric networks are accelerating due largely to lack of capital and technological improvements to aged infrastructure.</p> <p>Deployment of renewable energy sources lacking in financial and cohesive regional policies to attract investments.</p>

B. Business Support Systems and Targeted Industry Clusters

Strengths	Weaknesses
There are a plethora of State and local organizations to support businesses and business development. Facilities have recently been completed to support several of the target industries such as New Mexico Consortium Research Laboratories. The region has previously supported and continue to develop the key industry clusters of high-technology, value added agriculture, green/renewable energy and digital/film media.	The existing organizations are underfunded to meet their program needs. There is a lack of accountants, software engineers, lawyers, etc. with specific skills to serve the target industry clusters. The diversification of industry activities and creation of higher value chain products are slow in developing. Infrastructure and workforce are key production factor gaps.
Opportunities	Threats
Legislative Jobs Council initiative may result in increased funding for targeted support entities. Alignment of related services and shared resources will enhance leverage of multitude of services. In addition to the key industry sectors promoted, the District can further enhance economic diversity by developing opportunities for solo-workers, healthcare and tourism/culturally based opportunities. Developing industry cluster activities that balance economic base and local community based economic development, along with endeavors that fit into the cultural resources of the District will improve success and generate investment and wealth for communities.	Lack of coordination among the network of business support services will continue to create competition for limited resources and funding. Lack of dedicated and continuing investments from public and private levels to develop higher-profit value chain activities to support cluster industries will result in stagnant economic growth, depleting workforce and unattractive conditions for businesses to expand and/or locate in the area.

C. Access to Capital and Policies

Strengths	Weaknesses
There is an existing network of community banks and non-profit loan programs, including the District's EDA Revolving Loan Fund program; equity investments and tax credit programs exist mostly in areas for high tech and healthcare ventures. Public finance programs, incentives and policies supported by local and state governments invest in myriad of infrastructure and development initiatives; many local jurisdictions have adopted Local Economic Development Act Ordinances to support direct assistance to qualified entities	Financing for large economic development projects mostly rely on out-of-state sources. Capital for some of the target industries, such as film and technology, requires sophisticated and specialized sources. Lacking coordinated recruitment and attraction efforts that align public and private resources rendering assessment of feasibility difficulty. Lack of comprehensive financing strategies to ensure, optimize, and leverage limited resources—public and private.
Opportunities	Threats
The District's EDA RLF program is being redirected to emphasize loans to the target industry clusters. Educating the decision makers and regulators about structuring financing issues in the target industries. Leverage investment regionally and not as single project when possible and practical, especially in support of infrastructure. Assist local communities to better establish basic public finance policies and programs.	Out-of-state financing sources may require emerging firms to relocate near them. Regulators may say "no" when faced with issues they're not knowledgeable about. Silo-approaches to funding that have very limited objectives will unlikely yield effective investment and not result in projects fully financed.

D. Workforce Development

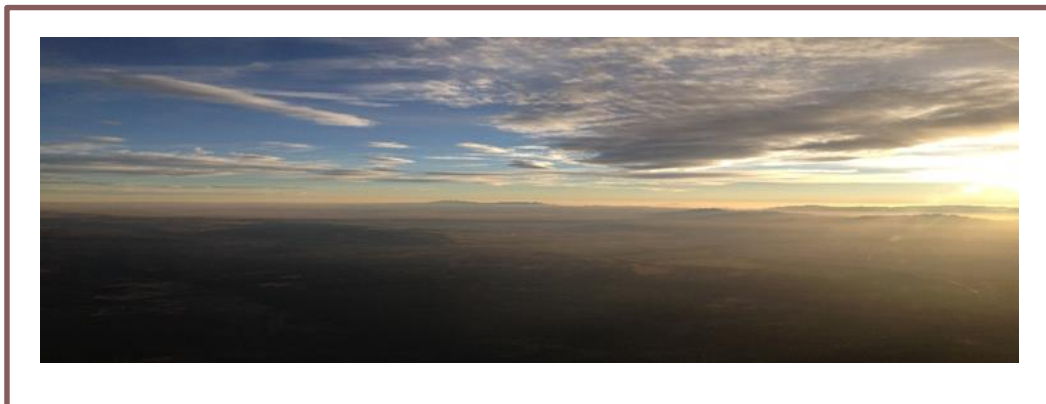
		Strengths	Weaknesses
Vocational Training		Community colleges in the District are increasingly offering trades and vocational training in addition to college classes. The State Job Training Incentive Program assists employers train workers for specific skill on-the-job.	There is not always a tie between the training offered and the training desired by students or the training needed by employers.
		Opportunities	Threats
		The Department of Workforce Solutions has started offering the WorkKeys program to employers and high school students to better assess skill sets. Align higher education training programs with region employers to establish alignment of industry and regional environmental needs and job opportunities. Develop programs for youth retention and ensure heritage skills such as sustainable framing and specialty crafts are supported.	In addition to importing scientists and engineers, employers may have to import trained employees. Lack of opportunities for youth impacts talent availability for the future. Lack of investment in continuing education and training will render absolute and outdated skills, especially related to rapidly changing technology.

	Strengths	Weaknesses
Skilled Workforce Shortage	Los Alamos National Laboratory attracts a highly skilled workforce from an international labor market. The District's physical environment is an attractive location to live and work.	Much of the skilled workforce has to be imported from out-of-District, and even out-of-State.
	Opportunities	Threats
	The attractive physical environment, combined with the availability of broadband, make the District attractive to a skilled workforce that can work around the world from home, so long as they are "connected". This connectivity can apply to better	If investment strategies and regional coordination are lacking, broadband service may not be able to be expanded into more rural areas and even in urban centers the opportunities will be limited. Lack of coordination among the various level of

	access and opportunities for training and education for higher education, elementary and secondary education institutions. Tap into retiree and aging talent pool and integrate with skills training for younger generation.	education and workforce programs result in limited training opportunities, especially in attainment of higher skill sets.
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E. Land Use, Housing and Other Development Factors

Strengths	Weaknesses
There are a significant number of county and municipal governments with planning and land use regulation authority. Affordable housing initiatives are supported in policy and programs in some parts. Most communities and tribal governments have housing authorities and assisted-housing units available. Land use consideration in parts of region, such as the Santa Fe County Growth Management Plan, reflect the limitation and constraints of natural environment and resources. The region possess rich cultural and historic assets and resources which is key to sectors such as tourism and agriculture.	Many rural communities do not have the financial resource to use their available authority. There is a lack of consistency in land use regulation that is an issue for effective economic development. Small housing authorities with a small number of units are increasingly facing financial difficulties. Small community commercial business districts are losing retail and service business to the metro Santa Fe area. Housing stock in much of rural region in need of upgrades and modernization, including energy efficiency. Public land management and coordination with local development is often incompatible and/or lack mutual cooperation.
Opportunities	Threats
Several smaller communities, such as Los Alamos and Espanola, have initiated successful downtown redevelopment projects and have potential to align land use and development patterns to support growth for appropriate infrastructure and targeted industry development. Further identify sites for economic development and develop inventory of assets. Housing programs should be compatible to integrate land use with investment of capital and other factors supporting development of economic, transportation and quality of life opportunities;	The aging populations and changes in demographics will place increasing demand on accessing goods and services in both the public and private sectors. If land use, housing and development patterns are not aligned strategically to recognize the impact to community, economy and environment, depletion of natural resources will result--especially water; unmet infrastructure needs and availability of services will become stressed.



F. Urban/Rural Disparity

Strengths	Weaknesses
The District has a significant diversity with a small city and State capitol and very isolated rural areas. Many of the incorporated municipalities are considered rural in characteristics and maintain rich cultural elements which is proliferated throughout the entire region along with its natural beauty of landscapes.	There is a major diversity and often divergent of interests that create problems in agreeing on common plans and activities between urban and rural needs. This creates a severe urban vs. rural competitive environment for requests of public funds, especially evident for capital outlay from the State.
Opportunities	Threats
Both rural and urban areas are still feeling the effects of the recent economic recession (2008-2009) and much of the impact prompts better strategic planning to support coordination and alignment of limited resources and generate data driven performance measures. Opportunities exist for broader co-investments by urban and rural communities, especially in critical infrastructure and systems such as housing, energy efficiency, transportation, broadband and water. Shared resources in workforce and industry development to meet the changing demographics needs should be supported. Rural healthcare and education are significant economic development opportunities for the region.	There are many more programs and endeavors available to assist urban areas than there are for rural areas. Significant part of population, including the elderly, still reside in rural region and access to resources and services becoming increasingly limited in these areas. The friction and competitive approach to attaining natural resources such as water pin a divide between protecting culturally based agriculture activities with urban development patterns.



Chapter V. Strategy and Action Plan

Five-Year Economic Development Strategy

The five year economic development strategy is organized around 1) work done to prepare the Statewide CEDS, 2) the work of the Legislative Jobs Council, 3) the New Mexico Economic Development Department's five year plan completed in 2013, 4) work done by the District on the REDI and NEEDO plans, 5) regional forums held in the District in 2013 and 2014, and 6) plans adopted by the local governments in the District.

To adequately address the main purpose of actualizing economic resiliency, the goals and objectives developed and to be implemented must be specific, measurable, achievable, relevant and time-bound.

Economic Development Needs

Regional economic development needs were identified during the recent engagement with stakeholder groups as well as a continuum of previous efforts of the Regional Economic Development Initiative (REDI):

1. New Mexico, and northern New Mexico in particular, are overly dependent on government jobs and investment. Diversification in appropriate targeted cluster industry and leverage of inherent cultural resources are critical to achieving economic vitality.
2. New Mexico has some of the lowest educational indicators in the U.S., and rural schools typically lag behind. Need for improved access to education opportunities and retention.
3. Mora, Rio Arriba, San Miguel, and Taos Counties have very low incomes and high poverty rates. Income inequality is plaguing the region and poverty levels have increased as a whole for the District. Need for better job opportunities at livable wages.
4. Northern New Mexico suffers from a "brain drain" of its best and brightest, who move away for better economic opportunities and lower costs of living. There is need for developing quality of life and employment/economic opportunities to retain and attract skilled workforce and region's human capital.
5. The University of New Mexico's Bureau of Business and Economic Research (BBER) is projecting a substantial shift in New Mexico's population to the urban areas such as Santa Fe. There is also indication that demographics is aging and this places demand on goods and services that will require adequate and appropriate development patterns.
6. There is a need to support activities and investment to better prioritize infrastructure development and to mitigate, prevent and respond to natural disruptions such as the prolonged drought and major fires.

Economic Development Goals

The economic development needs identified generated the following economic development goals for the District for the near and long term to achieve economic **resiliency and to support appropriate development and sustain resources to build wealth and equity**:

- ❖ the identification of *assets and vulnerabilities*;
 - Primary Goal: develop coordinated regional inventory of assets and assess vulnerabilities in systems and infrastructure

- ❖ delineates the *strategies and post-disruption to the base economy as collaborations* among stakeholders;
 - Primary Goal: identify and establish common policies, investment, shared resources and expertise to mitigate, prevent and respond to disruptions.
- ❖ furthers *asset management to preserve and develop limited resources*; and
 - Primary Goal: promote ongoing innovation and sustainable practices in planning, development and measuring performance.
- ❖ the enhancement of *economic diversification*.
 - Primary Goal: improve effective investment, job creation/retention and development of cluster industries such as health care, tourism, high technology, agriculture and media/film

In recognizing these major primary goals, other important goals can be supported to include:

1. Development of a high-quality workforce.
2. Increasing the number of higher-paying jobs.
3. Retaining and attracting youth and families.
4. Making rural communities vibrant.

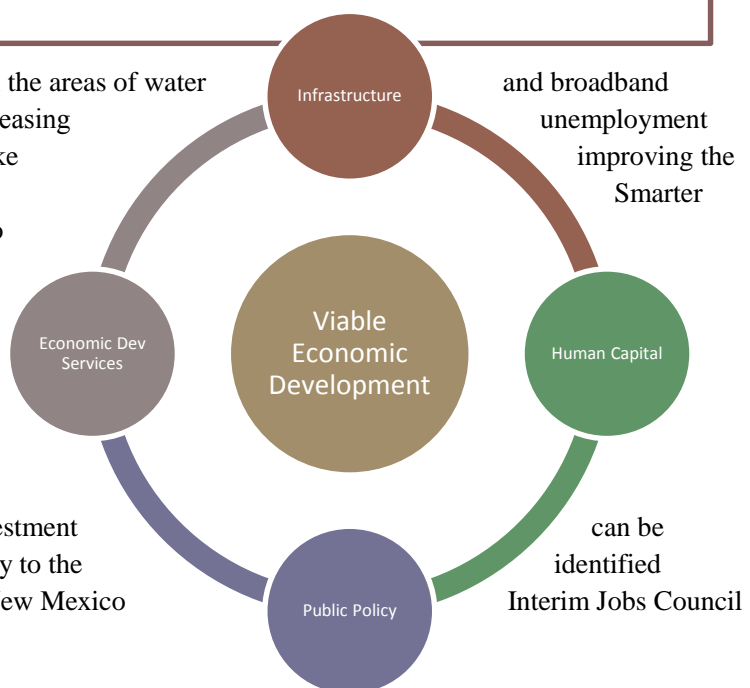
Economic Development Building Blocks

Strategic investments in four key areas in which the public sector has significant control or influence are needed before economic development efforts can be truly effective:

1. Infrastructure
2. Human Capital
3. Public Policy
4. Economic Development Services

Infrastructure is a key factor, particularly in the areas of water facilities. The region's low skill levels, increasing rate, and poor educational performance make current and future workforce an imperative. public policies are an essential ingredient to accomplish the identified goal. Local government interest in regional approaches, due to restricted revenues in a largely-rural region, is driving the need for more consolidated economic development services

In establishing building blocks, private investment attracted. The above is also complementary to the production gaps in collaboration with the New Mexico (see section below)



Target Industry Clusters

The planning process identified economic clusters as targets for future emphasis that are consistent with the goals and that are emerging, rather than, just existing major businesses. The target industry clusters identified are:

1. Healthcare and social services
2. Tourism and Recreation—cultural and visitor based
3. Renewable Energy/Green Industry
4. Technology—emerging high tech, information technology and data
5. Agriculture
6. Digital Media/Film
7. Education
8. Exported Services (Financial, Research, Environmental, Construction Management, Philanthropic)
9. Government
10. Solo-workers—independent workers suitable for the District geographic environment

These clusters are overlapping with each other and with existing business groups. For example, the media cluster represents an intersection of technology, arts and culture, and tourism. The strategic plan can add much more value to a media cluster than it can to the arts and tourism sectors which are already well-supported and organized. The strategic plan has conducted an analysis of strengths, opportunities, weaknesses, and challenges for each target industry cluster, and produced the initial recommendations. The planning team has been preparing business plans for some clusters and identifying organizations willing and able to implement the business plans. It should be noted that efforts must be dedicated to create higher profitability activities within and among the industry sectors so adequate leverage and shared resources and benefits can be actualized.

Job Goals

Since the recession started in 2008, New Mexico has been losing jobs, and the New Mexico Legislature created a public/private Legislative Jobs Council (LJC) in 2013 and has continued it in 2014. The LJC, composed of legislators, local government leaders, and business representatives, identified a number of base economic jobs that need to be created over the next ten years in order to bring the State job opportunities back up to 2008 levels, accommodate future growth, and replace jobs lost in the normal course of events. The ten-year, 162,000 projected base job need, was then distributed among 13 sectors creating economic base jobs in New Mexico, and then was further subdivided by allocating the sector jobs among the State's seven economic development districts. With participation from all of the District's communities, the ten year goal (2014-2024) for the North Central New Mexico Economic Development District was set at 17,600 new economic base jobs, and those jobs were broken down into economic base sectors, as follows:

- | | | |
|--|----------------|-------|
| • Health and Social Services | 3,300 new jobs | |
| • Visitor-Driven (Tourism) | 5,000 new jobs | |
| • Government | 1,700 new jobs | |
| • Agriculture, Food & Forestry | 1,450 new jobs | |
| • Exported Services(to Customers outside of the State) | | 1,250 |
| new jobs | | |
| • Solo/Independent Work | 1,400 new jobs | |
| • Other Economic Base Sectors | 3,500 new jobs | |

Since economic base jobs constitute about 35% of total jobs, the 17,600 economic base jobs translate to about 50,000 total jobs that need to be created over the ten year period.

In 2013, the LJC process for the District also identified statewide gaps in the factors needed to produce those jobs (factors of production gaps), recommended to the Legislature potential legislative actions and State policies to fill those gaps, and suggested evaluation criteria to determine which policies are being effective so that course adjustments can be made over the ten year period. In 2014 the LJC worked with the economic development districts to bring the goals to the local level. In North Central New Mexico, the ten most significant production gaps, or economic development needs, in declining priority order were:

1. Availability of capital for business investment,
2. Leadership in economic development activities,
3. Qualified workforce to fill created jobs,
4. Lack of resources for economic development marketing and lead generation,
5. Inventory of available, vacant buildings suitable for contemporary business needs,
6. State and local tax and regulatory issues,
7. Lack of bandwidth and data storage infrastructure,
8. Lack of suitable housing,
9. Lack of water supply and water and sewer infrastructure, and
10. Lack of economic development sales and deal structuring capability.

The LJC will be working with the Legislature to identify existing capabilities to begin implementation of recommended actions, and, where necessary, to create new entities to begin implementation activities.

Infrastructure Strategies

- a. Water - To promote improved quality, utilization, conservation and development of the District's water resources. The District will:
 - Work with and prioritize municipal and mutual domestic water association systems in the development of a regional water and wastewater infrastructure capital improvements program to assist in funding from the EPA, USDA, HUD, Bureau of Reclamation, New Mexico Water Trust Board, NM Environment Department and the New Mexico Legislature.
 - Work with small municipalities and mutual domestic water associations to obtain funding for water system planning and project implementation.
 - Work with regional, state and federal entities on water management and conservation issues.
 - Work with the New Mexico Finance Authority, New Mexico Department of Finance and Administration, New Mexico Economic Development Department, New Mexico Environment Department, and the New Mexico Water Trust Board to implement programs for water and wastewater projects.
 - Work with San Miguel County and the City of Las Vegas to resolve water issues that inhibit their growth and development.
 - Support the affected Pueblos on their implementation and use of Aamodt Settlement and Abeyta Adjudication water resources.
 - Work with the Office of the State Engineer and the Interstate Stream Commission to update and implement the regional water plans affecting the District.

- b. Transportation - To foster the development of new transportation facilities, the upgrading of existing facilities, and the expansion of alternate transportation services. The District will:
- Continue to support transportation planning across the District in collaboration with NMDOT, local and tribal governments and in development of GIS application and resources.
 - Assist in implementing transportation projects and programs through the state and regional transportation plans.
 - Work with the Northern New Mexico Regional Transit District, other transit services and the state on the expansion of public transportation services to the rural areas in the District.
 - Advance the improved coordination of special transit serves provided by senior citizens service providers and other public transportation providers through the establishment of a transportation management system such as “One Call – One Click”.
 - Continue the provision of special transit services to senior citizens through operation of the Area Agency on Aging and contracts for transportation services with providers in the District.
- c. Broadband – To provide accessible, high speed broadband connections to all parts of the District. The NCNMEDD will:
- Support regional stakeholders and REDI Net middle mile high speed broadband infrastructure expansion and improvement to promote opportunities for healthcare, education, public safety and economic development.
 - Support REDI Net initiatives to better integrate energy, water and transportation infrastructure systems.
 - Support REDI Net to work with broadband providers to expand services throughout the region
 - Work with REDI Net to coordinate with other electric coops and communication providers in the District to replicate the fiber-to-the-door work done in the Kit Carson Electric Coop service area.
 - Support the LJC recommendation to fund a capital outlay set-aside that requires telecommunications companies to partner with local businesses for existing fiber optic connections.
 - Collaborate with New Mexico Department of Transportation and other agencies to develop and administer a rural deployment plan for broadband in highway rights-of-way and through other means.
- d. Energy – To support a balanced and reliable means to affordable and accessible energy for the District’s economic and community needs. The District will:
- Support local and regional development of renewable energy projects and programs
 - Support and assist energy efficiency resource development, especially in rural areas where housing modernization is most needed
 - Support efforts of local and tribal governments in assessing land use and energy planning and policy development.
 - Support regional solution and resource development to waste management
 - Support housing opportunities that integrate with sustainable land use development and management of natural resources

- Support other social services infrastructure development to meet the changing needs of the District's communities, such as investments and resources for youth development and in serving the aging demographics.
- e. Social Infrastructure – To support an integrated approach with community services such as housing, social and health services which in turn can affect economic development opportunities. The District will:
- Assist and support community based housing opportunities, especially in consideration of adequate workforce and special needs housing.
 - Support modernization--such as energy efficiency, water conservation, etc.--of existing housing stock, especially in rural areas
 - Support and coordinate with non-metro Area Agency on Agency and other senior services stakeholders to further economic development opportunities for aging demographics
 - Support and coordinate with health and other social services agencies in addressing systemic changes such as food insecurity/hunger, access to tele-health opportunities
- f. Green Infrastructure –Balance commerce and economic development opportunities with environmental resources to ensure regional viability and sustainability. The District will:
- Assist with land use planning related to appropriate economic development opportunities and coordination with local, state, tribal and federal agencies to ensure cross and common interests are aligned and shared investment may better take place.
 - Assist with environmental planning and development efforts to effect integration of natural resources that can align with regional economic development opportunities.

Innovation and Sustainability Strategies

- a. Support Systems – To create jobs by assisting businesses to stay in business, stay in New Mexico, and expand in New Mexico. The District will:
- Assist local governments to adopt Local Economic Development Act Ordinances pursuant to New Mexico law that will permit them to offer some business development incentives.
 - Assist local governments to submit applications to the New Mexico Economic Development Department to become certified under the State's Certified Communities Initiative.
 - Continue to work with the SBDCs to provide a full range of business support to existing and growing businesses.
 - Support the development and expansion of business incubators to support businesses with shared space and business experience, and possibly special purpose incubator facilities such as artisan incubators.
 - Continue to work with and support the development of local economic development organizations and chambers of commerce to support business growth and development.
 - Continue to work with and support the development of business and trade associations, particularly in the District's target industry clusters.
 - Support development of a state assessment and planning process that accommodates not only economic base jobs, but non-economic base jobs that do not bring money into the State.

- Support aligning the New Mexico Economic Development Department's team regions and the New Mexico Department of Workforce Solution's district boards with council of government boundaries to facilitate data collection, analysis, planning, and accountability.
 - Assist local businesses in becoming vendors to the Film industry.
 - Attract, grow, and retain new media and IT businesses throughout the region, with increasing expansion into rural areas as broadband is deployed.
 - Assist in the growth of agriculture, new technology, film and IT businesses to the next level: i.e. from 1-4 employees to 5-8, etc.
 - Because there is a lack of accountants, lawyers, and people with marketing expertise for film, there is a need to attract, grow, and create businesses in these areas. This may be a good potential for location-neutral businesses and solo-workers.
 - There is a lack of software engineers for the new media industry cluster, and a need to attract, grow, and create new businesses. This cluster has good potential for LANL retirees and location-neutral businesses. Continue to promote education programs and career pathways to new media.
 - Sponsor film festivals, symposia, lectures, and publications that celebrate the District's film history.
- b. Research and Development/Technology Transfer – Leverage LANL as a national leader in technology, attract, grow and create new technology businesses region-wide. Support system innovation that improve sustainability. The District will:
- Support the research work underway and innovative development such as initiatives by the New Mexico Consortium and New Mexico Algae Production, LLC.
 - Work to develop broadband infrastructure where it is needed to provide an optimal environment for researchers and innovators, as well as in development of solutions for public safety, healthcare, education and cluster industry economic development with integrated technological and infrastructure systems, including energy, water and transportation.
 - Work to support innovation and sustainable approach for food and ecological systems, water resource management and integrated infrastructure systems

Business Climate and Competitiveness Strategies

- a. Legislative Jobs Council (LJC) – The District will support State efforts to:
- Develop a statewide assessment and planning process to clarify the economic development challenges.
 - Expand and improve proven economic development programs.
 - Create innovative new programs to exploit promising economic sectors.
 - Improve the factors of production for statewide job creation such as inadequate workforce, infrastructure, facilities, housing, and capital; and improvements in tax and regulatory competitiveness.
- b. Access To Capital – To provide access to business financing programs of all types. The District will:
- Continue to target the District's EDA RLF loans to leverage funds and create/retain jobs in identified target industry sectors.
 - Continue to utilize the District's Economic Development Fund program for special purpose projects.

- Work with the NMFA, WESST, NMCDLF, ACCION, etc. business financing programs to provide capital for business growth and development, and for job creation.
 - Continue to work with banks to provide capital to businesses.
 - Support the LJC efforts to create and expand a discretionary closing fund for strategic economic development projects.
 - Support the LJC recommendation to ask the State Investment Council to increase its private equity investments.
- c. Civic Leaderships and Governance – To promote common shared resources for achieving adequate and sustainable economic development investments. The District will:
- Continue to work with leadership and key stakeholders among and across disciplines that will advance economic development policies in the District
 - Support and collaborate with tribal constituents to promote economic development opportunities



Workforce Development and Expanded Opportunity Strategies

Address and collaborate to improve and develop policy and programs to support skills development, retraining, and expertise development for alignment of targeted industry needs with education opportunities.

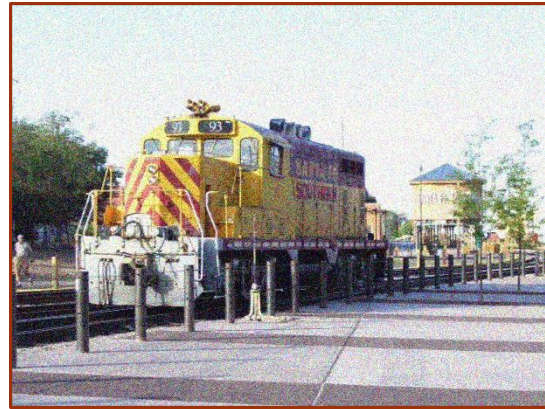
- District will continue to assist the District's higher education entities to utilize EDA and other funding for job training infrastructure.
- District will work with private and public and tribal entities to coordinate and develop workforce development opportunities.
- The District will work with REDI Net to bring distance learning and other workforce development opportunities to all parts of the District via improved telecommunications infrastructure and systems.
- Support the LJC recommendation to fund a physics early education pilot program for middle schools.
- Support the LJC recommendation to fund an on-line tourism training program.
- Support the LJC recommendation to make "Work Keys" one of the exit options for high school graduation.
- Support the LJC recommendation to provide matching funds for the expected surge in jobs resulting from federal health care legislation.
- Support the LJC recommendation to fund a series of pilot programs that focus on individual workers engaged in significant economic base activity.
- Support the LJC recommendation to fund a pilot program designed to expand and recruit small start-up businesses that export their services out-of-state.
- Develop and support youth retention and attraction and engage millennials.



Action Plan and Implementation

The action plan supports a limited number of activities, identified as strategies in the CEDS, with the highest priority and potential for regional impact, as determined by each region's prioritization process which the District will engage with key stakeholders during the near term to formalize. The two most critical production gaps identified are infrastructure and workforce therefore much of the initial development of the work plan will address these gaps.

Current strategic activities to support the primary goals and needs as outlined in the CEDS will guide the prioritization of implementation.



Developing the high priority activities of regional significance include:

- a) An outline of the steps required to take each selected high-priority activity from inception to successful completion;
- b) A roster of the key individuals and institutions who will be responsible for implementing and supporting these steps;
- c) A reasonable estimate of the costs associated with the implementation of the activity;
- d) An identification of the funding sources to support the costs (public, private, non-profit); and
- e) A realistic time frame for execution (i.e., implementation schedule), with relevant benchmarks and performance measures that speak to overall impact.

The District will work with broad-based participation from regional stakeholders, involving those affected by the proposed activities and those that can ensure their success. Coordination with a variety of organizations and the private sector in the region will be part of the implementation. Identifying elements for action will use the following questions for guidance:

- What are the activities and what are the expected benefits?
- Which activities address the area's greatest need or best enhance the region's competitive advantages?
- Do these activities represent the best use of limited resources?
- Will the activities have positive economic, environmental, and social impacts and how can these be measured?
- Will the activities contribute to the overall economic resiliency of the region?

Chapter VI. Evaluation Criteria

The evaluation framework serves as an apparatus to measure progress on the implementation of the overall CEDS while providing information for the CEDS Annual Performance Report, as required by EDA. These regular updates keep the strategy and action plan outlined in the CEDS current and the plan as a whole relevant. The evaluation framework is an important element of the ongoing planning process and seeks to answer the questions “How are we doing?” and “What can we do better?”



The evaluation criteria are formed around the strategy which support means to achieve goals for actualizing economic resiliency and related intent. For some factors, the number can be direct, such as job creation and retention. However, job creation should be balanced with other elements of successful economic development such as broadband adoption, quality of place, established entrepreneur networks, supply of skilled workers, ability to attract investment, and a climate of innovation. In other situations the criteria may be more symptomatic, such as how the percent of annual

precipitation or the length of the skiing season reflect water supply conditions. Yet other criteria may be indirect – i.e. that the change in the number of communities creating Main Street or Cultural Districts leads to making rural communities more vibrant and acting to retain the workforce, as well as other quality of life factors, in those regions. Given these factors, the District will integrate performance measures that are quantitative, qualitative, data driven and supports effective asset management.

1. **Quantitative** – Evaluate performances of numeric based statistics, often found in US Census, Labor Statistic, higher education and research institution publications. These inform comparative indicators such as unemployment rate, median income, available water rights, number of riders on public transit routes, developed lots within region, etc. Analysis based on quantitative information present mostly a snapshot and/or references to historic details useful in some cases for projections or assessing current progress. The District is collaborating with the LJC and Statewide CEDS process in the development of dashboards which include, but not limited to:

Labor trends

1. Employment
2. Unemployment
3. Labor force participation rate (Percent of population in the labor force)

Demographic Indicators

1. Population
2. Educational attainment
3. High school graduation rates

Income and Poverty

1. Per capita personal income
2. Poverty rates
3. Median household income
4. Broadband access
5. Real GDP per capita
6. Homeownership rate

Regional Dashboard Example

Statewide Job Creation Potential – Legislative Interim Jobs Council

Area: County, Region, State

Time Period: 2014-2024

Predicament	
Population Change	25,000
Population in Workforce	15,000
Unemployment Reduction	3,000
Total Jobs	18,000
Economic Base Jobs	6,000
E-Base Attrition	2,000
Total Economic Base	8,000
Annual Economic Base	800

Economic Sector Selection			
Sector	Jobs	Transactions	Factors of Production
Back Office	300	3	Facilities
Health and Social Services	2,500		Workforce
Visitor Driven	700		
Intergrated IT	300	5	Workforce
Manufacturing	400	3	
Exported Services	400	6	
Solo-Work	400		
Extractives	800	3	Housing
Digital Media	300	4	Broadband
Federal Government	200		
Agriculture	300		Water
Education	900		
Emerging Technologies	400	5	Workforce

Background

Explanatory – Scan Over

Current – Up to Date by Regions

Sustainable – NewMARC website

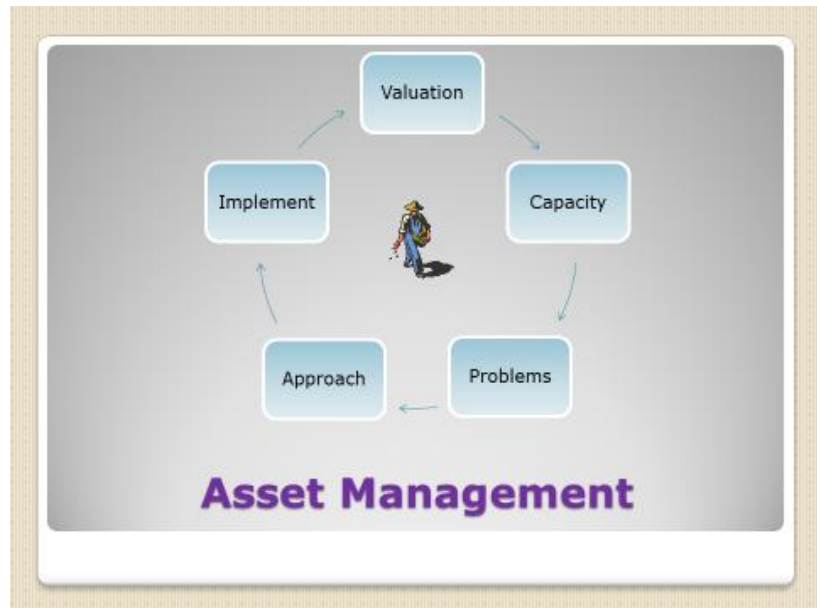
Interim Jobs Council



July 23 - Albuquerque

2. Qualitative – Complementary to quantitative measures, qualitative evaluation offers a broader and at times more robust way of interpreting progress. The analytics integrate deeper dimensions of behavior, cultural and sociological perspectives. For the District, these evaluations can inform how implementation of strategies may be meeting the combined and shared economic, community and environmental goals of the region—often referred to as “triple bottom line”. The District deploys value chain elements developed by WealthWorks as means to support these measurements:
 - Build lasting wealth—financial, community and environmental—that is owned, controlled, and reinvested locally and regionally.
 - Forge valued trusting partnerships among a flexible network of people and resources that can connect and reconnect over time to create increasingly resilient regions.

- Directly improves the livelihoods of underserved and low-income people, firms, and places, offering unprecedented opportunities for upward mobility.
 - Wealth as the collection – or stock – of eight capital categories: political, individual, cultural, social, built, intellectual, financial, and natural.
3. Data Driven - Measuring performance requires an effective and efficient way of collecting, evaluating and applying data for monitoring as well as gauging availability of resources. The District is developing GIS and web-based database platforms, mapping and application to track not only raw data, but to develop analytics for assessing performance of investment and project development. The District is working collaboratively with the Statewide CEDS and LJC process as mentioned above and preliminary efforts to structure components include transportation, economic development, water and capital outlay data and projects. The District is also working with the State Department of Transportation to develop GIS resources for rural and statewide transportation long range planning. Ongoing activities with the State Department of Information Technology share collected data and opportunities to develop complementary tools for assessment will be key to building capacity. The District will also refer and integrate the work of Cluster Mapping to better establish industry data relevant to the region.
4. Asset Management – The District will adopt value based and equity building asset management approach to ensure that return of investment complement resources available and can be deployed. In other words, sustainability of resources is a key factor of measurement. To support performance measures, an asset management framework must take the following in consideration:



Develop a decision framework: to plan, evaluate, select and implement the most effective and efficient initiative. Structures are developed for value, cost and risk. Within the Value Structure, Value Factors should be developed for:

- Users – providing services
- Social and Environmental benefits
- Government Operational/Foundational – improvements in operations and enabling future initiatives
- Strategic/Political – contributions that will help achieve strategic goals, priorities and mandates

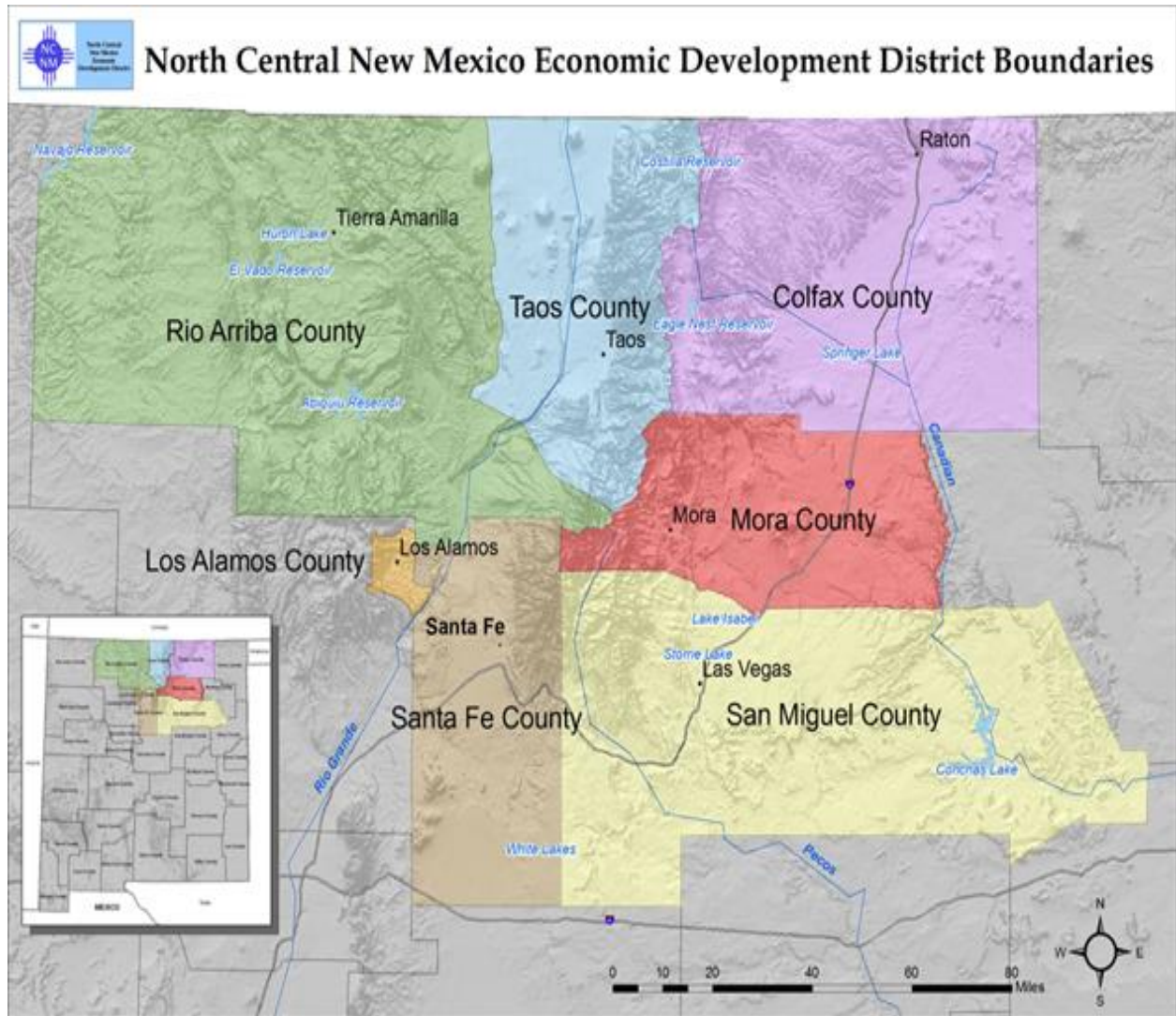
- Government Financial – financial benefits to both sponsoring and other agencies (Standardized measures include the amount of money the Federal Government will save/avoid spending by implementing an initiative.)

Perform an alternatives analysis. Value, cost and risk structures are used to compare a potential investment against alternative methods. Uncertainty, sensitivity and risk analyses are conducted to better calculate cost and value.

Gather all the information. Cost estimates, value projections and analyses are brought together to see how these elements relate to each other. Value and risk “scores” are developed, along with decision metrics that compare value to investment and financial ROI.

Communicate and document. The value of the initiative needs to be communicated to users and stakeholders. Budget justifications can be prepared at this point. The lessons learned can be used to improve processes, and the documentation will provide an audit trail

APPENDIX A



APPENDIX B

NORTH CENTRAL NEW MEXICO ECONOMIC DEVELOPMENT DISTRICT CEDS COMMITTEE

Nick L. Salazar, President	Rio Arriba County	State Legislator	Los Alamos National Laboratory (Retired)
Lawry Mann, Vice President	Los Alamos County	Former County Council Chair	Los Alamos National Laboratory (Retired)
Jim Trujillo, Secretary	Santa Fe County	State Legislator	Business Owner
Ernesto Salazar, Treasurer	San Miguel County		Banker
Fred Sparks	Colfax County	Former Mayor	BNSF Railroad (Retired)
David Woodruff	Los Alamos County		Banker
Thomas Garcia	Mora County		Business Owner
Michael Padilla	Rio Arriba County		Banker
Roberto Gonzales	Taos County	State Legislator	Business Owner
James R. Madalena	Jemez Pueblo	State Legislator	Tribal CEO

APPENDIX C

Below are selected snapshot information on several of the key cluster industries that the region has identified for focused support. The District aims to update relevant information on an annual or more frequent basis using web-based platforms so more dynamic data may be presented.

Renewable Energy and Green Industry Cluster

Strengths and Opportunities	Recommendations
Name recognition and history of applied technologies in Taos and Santa Fe for green, solar, and sustainable Existing concentration of solar and green building Businesses.	Position Taos and Santa Fe as “demonstration sites” for green innovation. Retain, expand, and create solar, green building and energy efficient businesses Increase local demand.
Concentration of local-serving installation and construction services.	
Concentration of R&D businesses.	Attract, grow, and retain new R&D businesses

Weaknesses and Challenges	Recommendations
Renewable energy cluster is highly competitive	Determine through a business plan northern NM’s comparative advantage vis-à-vis other regions.
Limited access to “the grid.”	Determine through the business plan how northern NM can participate in State production and distribution efforts.
Weak manufacturing base.	Explore prototyping and rapid manufacturing in the Espanola valley. Partner with Albuquerque or others.
Weak marketing and distribution.	Attract, grow and create marketing and distribution businesses.

New or Digital Media Cluster

Strengths and Opportunities	Recommendations
Emerging hub for film production in Santa Fe	Support the recently completed Santa Fe Studios and expansion of the Santa Fe County Media Park.
Strong film production segment	Hire regional film liaison to attract films throughout the region
Demand for vendor services in film	Assist local businesses in becoming vendors to the Film industry
Concentration of new media businesses in Los Alamos And Santa Fe, and potential for new media region-wide	Attract, grow, and retain new media businesses throughout the region, with increasing expansion into rural areas as broadband is deployed.
Concentration of IT businesses in Santa Fe	Attract, grow, and create IT businesses throughout the region, with increasing expansion into rural areas as broadband is deployed

Weaknesses and Challenges	Recommendations
----------------------------------	------------------------

Most businesses and small employers	Grow businesses to the next level (1-4 employees to 5-8, etc.)
Post production still occurs on studio lots in CA	Determine through cluster business plan if post production can be transportable, and if northern NM can at least take advantage of simul-post.
Undeveloped music cluster	Determine advantages through cluster business plan
Lack of accountants, lawyers, and people with marketing expertise for film.	Attract, grow, and create businesses in these areas.
Lack of software engineers for new media	Good potential for location-neutral businesses.
	Attract, grow, and create new businesses. Good Potential for LANL retirees, location-neutral businesses. Promote education programs and career Pathways to new media
Weak marketing and distribution for IT and new media	Attract, grow, and create marketing and distribution businesses.

Technology Cluster

Strengths and Opportunities

LANL national leader in technology

Santa Fe concentration of innovation firms

Greater variation in firm size than other clusters

Recommendations

Attract, grow and create new technology businesses region-wide

Support SFBI, SFIP, SFCC, and attract, grow and create new technology businesses region-wide

Partner with Northern NM Connect to assist firms in Growing to the next level.

Weaknesses and Challenges

Lack of management companies

Lack of couriers and suppliers

R&D weak outside of Los Alamos and Santa Fe

Lack of integration between R&D and other parts Of the value chain

Potential for high-tech firms to leave northern NM if Acquired

Attract management firms, strengthen linkages with existing firms

Attract/create courier service, work with suppliers to improve products, services, and convenience

Infrastructure investments for flexible space in Taos, And business incubator in Espanola

Explore prototyping/rapid manufacturing in Espanola/Pojoaque, and establish regional alliances for manufacturing

Early stage technology business program, and business attraction to replace acquired firms

Value-Added Agriculture Cluster

Strengths and Opportunities

Existing grass-fed beef study for Taos County

Potential for high value alfalfa products

Potential to develop higher-value crops for local, regional, and in-state markets

Recommendations

Help implement recommendations of the grass fed beef study region-wide

Evaluate through the cluster business plan the potential to develop local capacity for high value alfalfa products

Partnerships to educate producers on high-value crops/products. Support farmer's markets and commercial kitchen infrastructure

Small, developed wine segment
Fiber arts market for wool producers

Potential to link agriculture with other clusters and
Their focus on higher-paying economic base jobs

Strengthen marketing for export
Strengthen linkages between local producers and
Retail outlets and studios
Explore agriculture R&D. Explore renewable
energy resources and applications

Weaknesses and Challenges

Most producers are small employers
Weak distribution and marketing

Recommendations

Grow producers to the next level
Partnerships to address access to market issues,
Including distribution and storage infrastructure.
Explore business creation for distribution and
Marketing

Source: Regional Economic Development Initiative, Regional Strategic Plan, 2008

APPENDIX D

REGIONAL DEMOGRAPHIC INFORMATION

Data from the 2009-2013 American Community Survey of the Census gives a picture of the residents of the District and their present status relative to other citizens. The following charts and tables provide data for further analysis. Information is generally presented on a county basis. Since 2000 the Census has totally revised the way it obtains and releases detailed data. The data will no longer be collected every ten years with a “long form” sampling 20% of the population. Now, data is collected with sample surveys on a continuing basis depending on the size of the local government. Those communities with over 65,000 population are surveyed every year and will have current data on income, poverty, etc. The local governments with populations between 20,000 and 65,000 will be surveyed every three years, while those less than 20,000 population are surveyed every five years. Since the District has one county over 65,000, three counties between 20,000 and 65,000, and three counties less than 20,000 comparable data for the entire District will only be available in five year bands. The most recent data is released as the “2009-2013” American Community Survey, some of which is summarized on the STATS America website supported by the U.S. Economic Development Administration.

Basic County Data	Population in 2013	Land Area in Square Miles	Persons Per Square Mile	Percent Persons Below Poverty	Per Capita Income
<u>Location</u>				<u>2013</u>	<u>2013</u>
Colfax County	13,094	3,758	3.7	20.1%	\$37,211
Los Alamos Cnty	17,798	109	164.7	4.0%	\$62,284
Mora County	4,704	1,931	2.5	23.8%	\$30,760
Rio Arriba County	40,072	5,828	6.9	24.8%	\$30,106
San Miguel Cnty	28,541	4,717	6.2	32.4%	\$33,845
Santa Fe County	147,423	1,909	75.5	18.1%	\$44,309
Taos County	33,035	2,203	15.0	26.2%	\$32,195
NCNM District	284,667	20,455	13.9	17.7%	\$40,428
New Mexico	2,085,287	121,356	17.0	21.4%	\$35,965
U.S.	316,128,839	3,537,441	87.4	15.8%	\$44,765

Source: STATS America, 2015

Population Data

District Age and Sex Demographic Data by County

	% Male	% Female	Median Age	% Under 18	% 18-64	% Over 65
Colfax County	50.8%	49.2%	47.5	19.6%	57.9%	22.5%
Los Alamos County	50.1%	49.9%	43.6	23.3%	60.2%	16.5%
Mora County	51.1%	48.9%	47.9	19.4%	59.3%	21.3%
Rio Arriba County	49.2%	50.8%	39.9	24.3%	59.9%	15.8%
San Miguel County	49.5%	50.5%	42.5	20.2%	62.1%	17.7%
Santa Fe County	48.6%	51.4%	44.3	19.9%	61.7%	18.4%
Taos County	49.2%	50.8%	47.0	19.2%	59.9%	20.9%
NCNM District	49.1%	50.9%	44.0	20.6%	61.0%	18.4%

New Mexico	49.4%	50.6%	36.9	24.3%	61.0%	
14.7%						
U.S.	49.2%	50.8%	37.6	23.3%	62.6%	14.1%

Source: STATSAmerica, 2015.

District Race and Ethnicity Data by County

	<i>White</i>	<i>Black</i>	<i>American Indian</i>	<i>Asian</i>	<i>Pacific Islander</i>	<i>Other</i>	<i>Any Race</i>	Hispanic
Colfax County	94.0%	0.9%	2.5%	0.4%	0.2%	2.0%		48.4%
Los Alamos Cnty	89.3%	0.7%	1.2%	6.3%	0.1%	2.5%		16.1%
Mora County	93.9%	1.0%	3.1%	0.4%	0.0%	1.5%		80.6%
Rio Arriba Cnty	78.3%	0.9%	18.0%	0.8%	0.2%	1.8%	71.4%	
San Miguel Cnty	92.2%	1.7%	2.9%	1.1%	0.2%	1.9%	76.9%	
Santa Fe County	91.2%	1.1%	4.0%	1.4%	0.2%	2.1%		50.6%
Taos County	88.2%	0.8%	7.4%	0.9%	0.1%	2.6%		56.1%
NCNM District	89.2%	1.1%	6.0%	1.4%	0.2%	2.1%	55.3%	
New Mexico	82.9%	2.5%	10.4%	1.6%	0.2%	2.4%	47.3%	
U.S.	77.7%	13.2%	1.2%	5.3%	0.2%	2.4%		117.1%

Source: STATSAmerica, 2015

Pueblo and Tribal Reservation 1990, 2000, and 2010 Population Data

Tribe	1990	2000	2010	% Change 1990-2010
Jicarilla Apache	2,617	2,735	3,127	19.5%
Nambe Pueblo	1,402	1,764	1,710	22.0%
Ohkay Owingeh Pueblo	5,209	6,748	6,677	28.2%
Picuris Pueblo	1,882	1,801	1,858	-1.3%
Pojoaque Pueblo	2,556	2,712	2,934	14.8%
San Ildefonso Pueblo	1,499	1,524	1,821	21.5%
Santa Clara Pueblo	10,193	10,658	10,439	2.4%
Taos Pueblo	4,681	4,484	5,347	14.2%
Tesuque Pueblo	697	806	988	41.8%
Region Total	30,736	33,232	34,981	13.8%

Source: US Census Bureau: Decennial Censuses

Population Growth Comparison for District Municipalities; 1990-2010.

Municipality	1990	2000	2010	% Change 1990-2010
Angel Fire	93	1,048	1,216	1,207.5%
Chama	1,048	1,199	1,022	- 2.4%
Cimarron	774	917	1,021	31.9%
Eagle Nest	189	306	290	53.4%
Edgewood	3,306	1,893	3,735	12.9%
Espanola	8,389	9,688	10,224	21.9%
Las Vegas	14,753	14,565	13,753	- 6.8%

Maxwell	247	274	254	2.8%
Pecos	1,012	1,441	1,392	37.5%
Questa	1,707	1,860	1,770	3.7%
Raton	7,372	7,282	6,885	- 6.6%
Red River	387	484	477	23.3%
Santa Fe	55,859	62,203	67,947	21.6%
Springer	1,262	1,285	1,047	-17.0%
Taos	4,065	4,700	5,716	40.6%
Taos Ski Valley	*	56	69	23.2%
Wagon Mound	319	369	314	- 1.6%

***Was not incorporated in 1990**

Source: US Census Bureau: Decennial Censuses

There is great variation in population size and growth rate among the counties. Mora has less than one twentieth the population of Santa Fe County. Santa Fe County has the highest consistent growth rate, one so high as to have potential consequences for land, resources and quality of life. The following chart shows the population growth rates for ten-year periods from 1970 to 2010.

Population Growth Rate by Decade

County	1970-80	1980-90	1990-2000	2000-10
Colfax	12%	- 5%	13%	- 3%
Los Alamos	16%	3%	6%	- 3%
Mora	-10%	2%	12%	- 6%
Rio Arriba	16%	18%	12%	- 2%
San Miguel	4%	14%	13%	- 6%
Santa Fe	40%	31%	30%	12%
Taos	11%	20%	20%	10%
NCNMEDD Region	21%	19%	23%	6%

Source: US Census Bureau, Decennial Census

Socioeconomic Data

The following tables from the U.S. Census Bureau detail salient characteristics for each county and compares the data with the region, the State, and the U.S. as a whole. A brief comparison of these tables serves to emphasize the disparity among the counties in the District. And, while the region as a whole has higher rates of high school and college completion than the State or U.S., the per capita incomes, which have long lagged behind, have now closed the gap and are about equal to the U.S.

All counties in the District, as well as the State of New Mexico, had increases in per capita income between 1999 and 2009 that exceeded the U.S. increase in per capita income; and all counties and the State increased their per capita income as a percentage of the national per capita income to the extent that District per capita income was equal to U.S. per capita income in 2009.

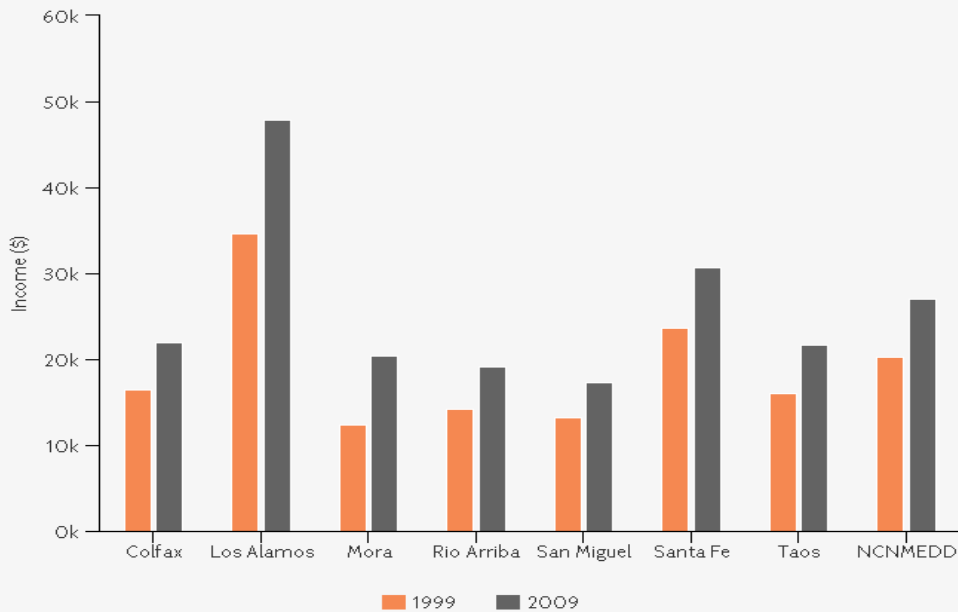
Per Capita Personal Income by Counties with Comparisons

Location/ County	Population in 2010	Per Capita Income 1999	Per Capita Income 2009	% Change 1999-2009	% of U.S. Per Capita Income	
					1999	2009
Colfax	13,750	\$16,418	\$21,923	33.5%	76%	81%
Los Alamos	17,950	\$34,646	\$47,848	38.1%	160%	177%
Mora	4,881	\$12,340	\$20,432	65.6%	57%	76%
Rio Arriba	40,246	\$14,263	\$19,134	34.2%	66%	71%
San Miguel	29,393	\$13,268	\$17,278	30.2%	61%	64%
Santa Fe	144,170	\$23,594	\$30,714	30.2%	109%	114%
Taos	32,937	\$16,103	\$21,720	34.9%	75%	80%
NCNM District	283,327	\$20,324	\$27,111	33.4%	92%	100%
New Mexico	2,059,179	\$17,261	\$22,461	30.1%	80%	83%
U.S.	301,461,533	\$21,587	\$27,041	25.3%	100%	100%

Source: US Census Bureau: American Community Survey 2005-2009

Note: Income not stated in constant dollars.

County Income Change



However, since 2009, per capita incomes in the District have failed to keep pace with the U.S. as shown in the table below.

Location/ County	Per Capita Income 2009	Per Capita Income 2013	% of U.S. Per Capita Income		
			1999	2009	2013
Colfax	\$21,923	\$37,211	76%	81%	83%
LosAlamos	\$47,848	\$62,284	160%	177%	139%
Mora County	\$20,432	\$30,760	57%	76%	69%
Rio Arriba County	\$19,134	\$30,106	66%	71%	67%
San Miguel County	\$17,278	\$33,845	61%	64%	76%
Santa Fe County	\$30,714	\$44,309	109%	114%	99%
Taos County	\$21,720	\$32,195	75%	80%	72%
District	\$27,111	\$40,428	92%	100%	90%
New Mexico	\$22,461	\$35,965	80%	83%	80%
United States	\$27,041	\$44,765	100%	100%	100%

Educational Attainment by County in Comparison with the U.S. and New Mexico

Population 25 Years and Older

County	% With a Bachelor's Degree or Higher		% High School Graduate or Higher	
	2000	2009-2013	2000	2009-2013
Colfax	18.5%	19.8%	80.8%	86.6%
Los Alamos	60.5%	63.4%	96.3%	97.0%
Mora	15.5%	9.5%	69.8%	84.1%
Rio Arriba	15.4%	16.4%	73.0%	79.2%
San Miguel	21.2%	19.6%	74.5%	83.9%
Santa Fe	36.9%	39.7%	84.5%	87.0%
Taos	25.9%	29.5%	79.1%	87.5%
NCNMEDD Region	30.8%	33.4%	81.3%	86.2%
New Mexico	23.5%	25.8%	78.9%	83.6%
U.S.	24.4%	28.8%	80.4%	86.0%

Source: US Census Bureau: 2000 Census and American Community Survey 2009-2013

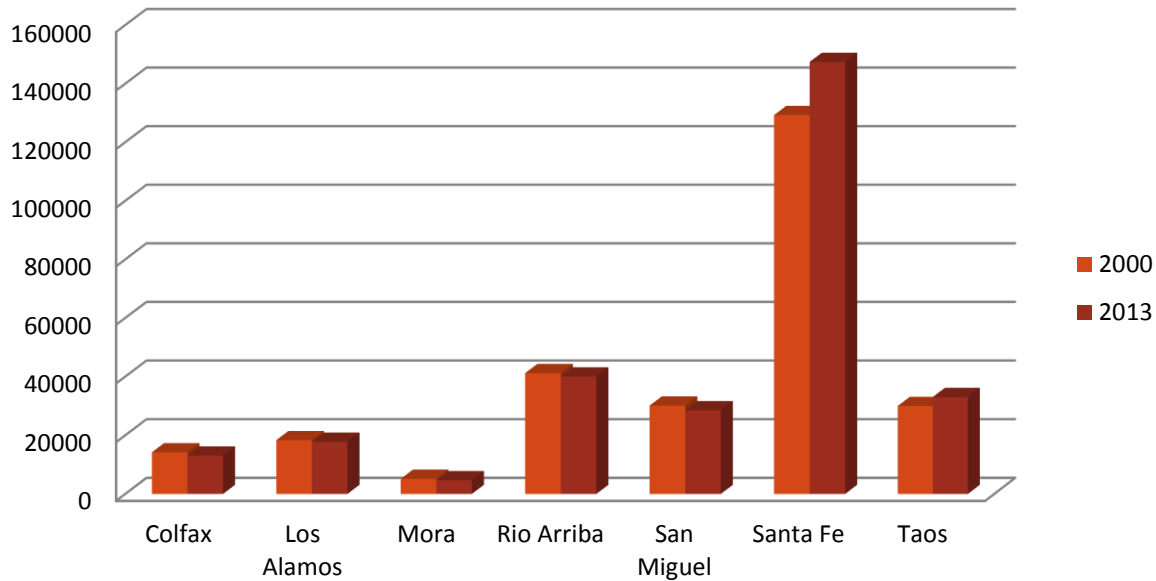
Demographics

Between the years 2000 and 2013, the seven counties in the District grew 6.1% in population from 268,299 to 284,667. By comparison, the State of New Mexico's population grew 14.6% from 1,819,046 in 2000 to 2,085,287 in 2013. The table and chart below shows the change by county, with five of the seven counties losing population during the thirteen year period.

County	April 1,	April 1,	2013	2000-	Change
	2000	2010	Estimate	2013	Percent
Colfax	14,189	13,750	13,094	-1,095	-7.7%
Los Alamos	18,343	17,950	17,798	-545	-3.0%
Mora	5,180	4,881	4,704	-476	-9.2%
Rio Arriba	41,190	40,246	40,072	-1,118	-2.7%
San Miguel	30,126	29,393	28,541	-1,585	-5.3%
Santa Fe	129,292	144,170	147,423	18,131	14.0%
<u>Taos</u>	<u>29,979</u>	<u>32,937</u>	<u>33,035</u>	<u>3,056</u>	<u>10.2%</u>
NCNMEDD	268,299	283,327	284,667	16,368	6.1%
New Mexico	1,819,046	2,059,179	2,085,287	266,241	14.6%

Source: U.S. Census Bureau, Decennial Census

POPULATION CHANGE BY COUNTY 2000-2013

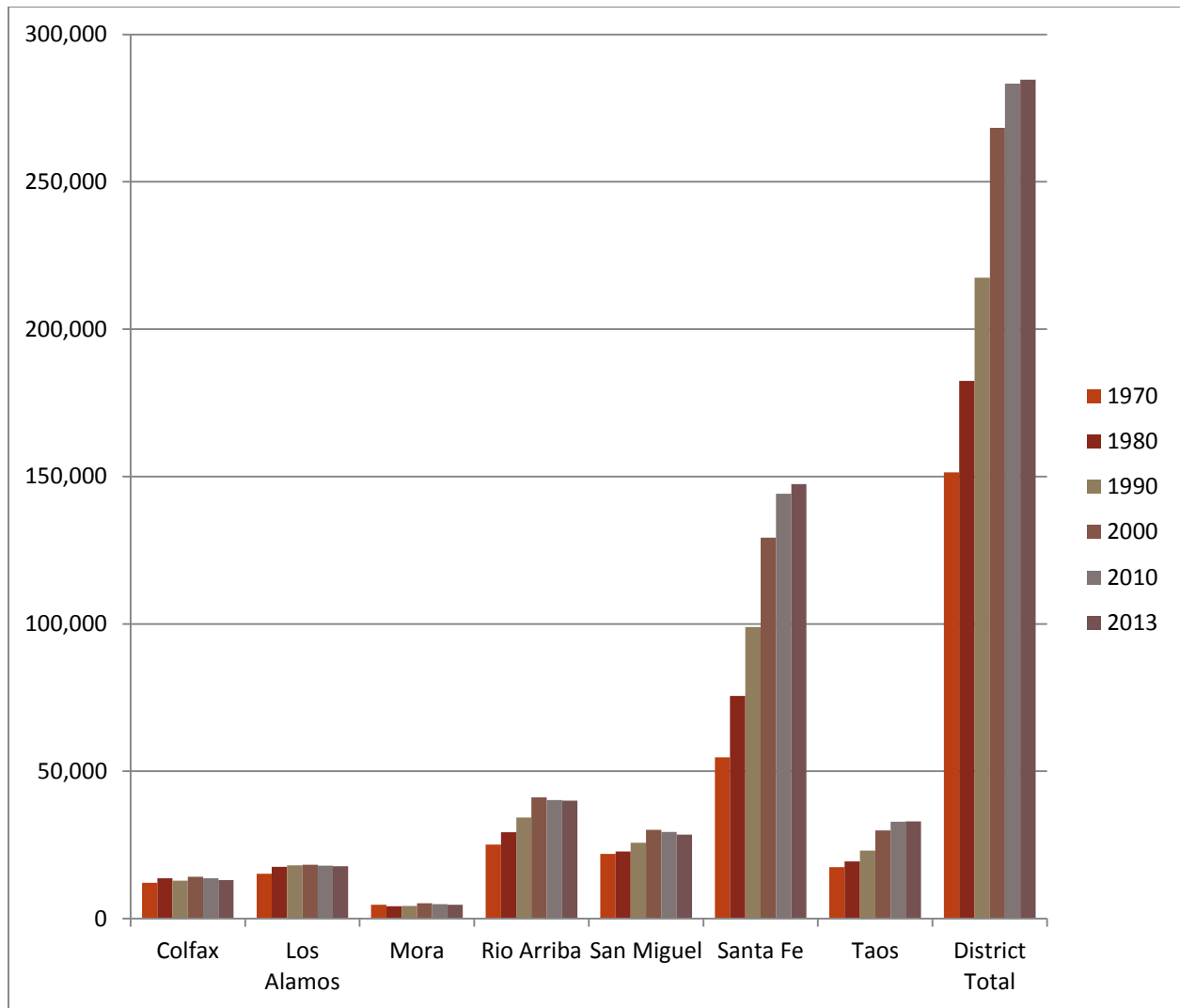


GROWTH OF THE DISTRICT

2010 marked the fifth decennial Census since the District was formed in 1967. All seven counties have had increases in population since 1970, although Colfax, Los Alamos, Mora, Rio Arriba, and San Miguel Counties have declined slightly since the 2000 Census.

	1970	1980	1990	2000	2010	2013
Colfax	12,170	13,667	12,925	14,189	13,750	13,094
Los Alamos	15,198	17,599	18,115	18,343	17,950	17,798
Mora	4,673	4,205	4,264	5,180	4,881	4,704
Rio Arriba	25,170	29,282	34,365	41,190	40,246	40,072
San Miguel	21,951	22,751	25,743	30,126	29,393	28,541
Santa Fe	54,774	75,519	98,928	129,292	144,170	147,423
Taos	17,515	19,456	23,118	29,979	32,937	33,035
District Totals	151,452	182,479	217,458	268,299	283,327	284,667

Source: U.S. Census Bureau, Decennial Censuses

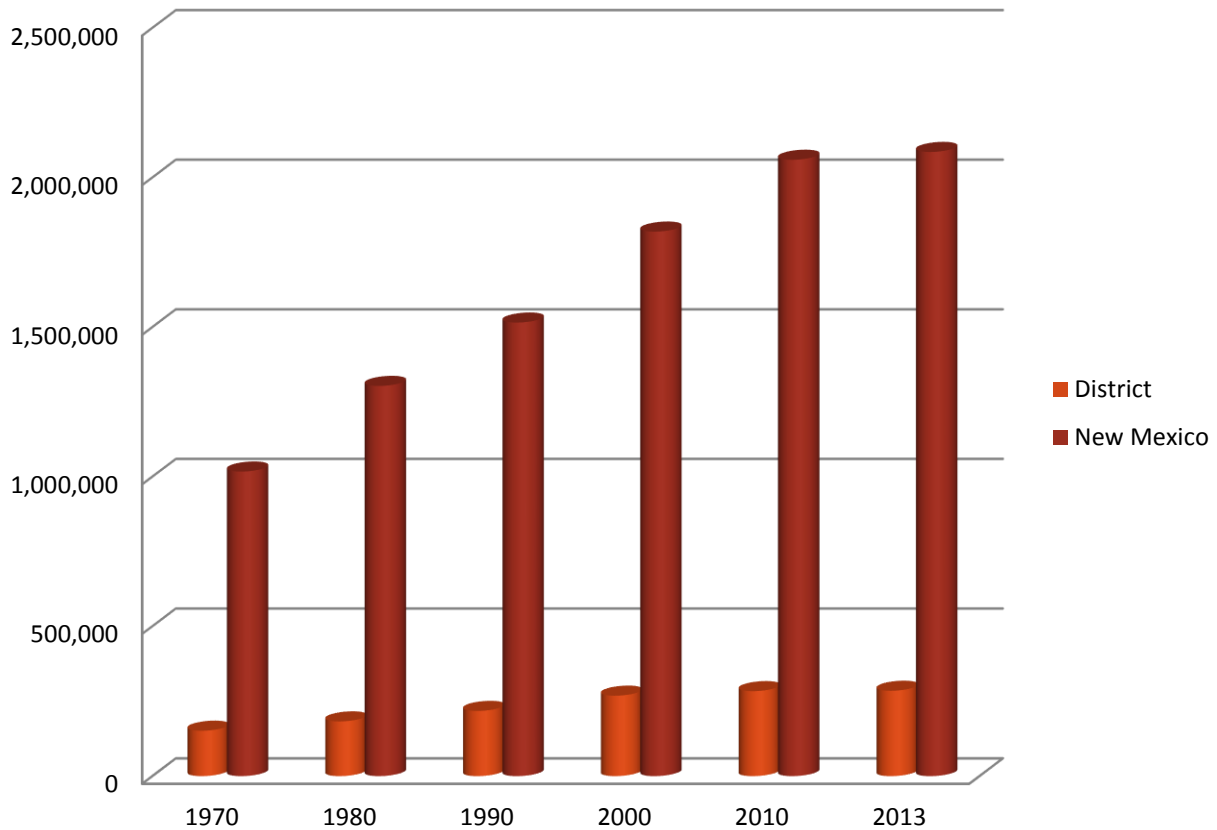


While the District's population has increased 88% since 1970, this increase does not begin to match the increase in New Mexico's population over the same time period of 105%.

	1970	1980	1990	2000	2010	2013	Percent Change 1970-2013
District Population	151,452	182,479	217,458	268,299	283,327	284,667	88%
New Mexico Population	1,017,055	1,303,303	1,515,069	1,819,046	2,059,179	2,085,287	105%

Source: U.S. Census Bureau, Decennial Census

1970-2013 Population Change District Versus New Mexico



URBAN VERSUS RURAL POPULATION

The table below shows the population change in the incorporated places (municipalities) in the District from 2000 to 2010. If one defines the incorporated places as “urban” and the remaining areas as “rural”, the District became slightly more “urban” over the decade. The population in the rural areas grew 3.1%, while the urban places grew 5.6%, even though eleven of the eighteen municipalities experienced population declines over the decade.

County	Incorporated Area	Change 2000 - 2010			
		2000	2010	Number	Percent
Colfax	Angel Fire	1,048	1,216	168	16.0%
	Cimarron	917	1,021	104	11.3%
	Eagle Nest	306	290	-16	-5.2%
	Maxwell	274	254	-20	-7.3%
	Raton	7,282	6,885	-397	-5.5%
	Springer	1,285	1,047	-238	-18.5%
<i>Colfax</i>	<i>Subtotal</i>	<i>11,112</i>	<i>10,713</i>	<i>-399</i>	<i>-3.6%</i>
Los Alamos	Los Alamos	18,343	17,950	-393	-2.1%
	Wagon Mound	369	314	-55	-14.9%
Rio Arriba	Chama	1,199	1,022	-177	-14.8%
	Espanola	9,688	10,224	536	5.5%
<i>Rio Arriba</i>	<i>Subtotal</i>	<i>10,887</i>	<i>11,246</i>	<i>359</i>	<i>3.3%</i>
San Miguel	Las Vegas	14,565	13,753	-812	-5.6%
	Pecos	1,441	1,392	-49	-3.4%
<i>San Miguel</i>	<i>Subtotal</i>	<i>16,006</i>	<i>15,145</i>	<i>-861</i>	<i>-5.4%</i>
Santa Fe	Santa Fe	62,203	67,947	5,744	9.2%
	Edgewood	1,893	3,735	1,842	97.3%
<i>Santa Fe</i>	<i>Subtotal</i>	<i>64,096</i>	<i>71,682</i>	<i>7,586</i>	<i>11.8%</i>
Taos	Questa	1,864	1,770	-94	-5.0%
	Red River	484	477	-7	-1.4%
	Taos	4,700	5,716	1,016	21.6%
	Taos Ski Valley	56	69	13	23.2%
<i>Taos</i>	<i>Subtotal</i>	<i>7,104</i>	<i>8,032</i>	<i>928</i>	<i>13.1%</i>
Urban Places	Subtotal	230,018	243,868	13,850	6.0%
Rural Places	Subtotal	38,211	39,459	1,178	3.1%
Region	Total	268,229	283,327	15,028	5.6%
State	Total	1,819,046	2,059,179	240,133	13.2%

Source: U.S. Census Bureau, Decennial Census, 2000 and 2010

HOUSING

In contrast to the ten year population declines in five of the seven counties in the District, all counties showed an increase in the number of housing units from 2000 to 2013. Even Los Alamos County, which lost almost 5% of its housing units due to the Cerro Grande Fire right after the 2000 Census was counted has had an increase in the number of housing units. Three of the possible reasons for these increases in the housing stock may be 1) the continued decline in the average population per household, 2) the popularity of the District as a location for second homes, and 3) overbuilding by the housing industry prior to the housing market “bubble” bursting in 2007. The table below shows this data by county within the District, and in comparison with the State of New Mexico and the U.S. While the seasonal homes were not identified in the 2009-2013 American Community Survey, in the 2000 Census the percent of all housing that was considered “seasonal” was over 8%, or more than twice the percentage in New Mexico (4.1%) or the U.S. (3.1%). The proportion of housing in the District that was identified as a “mobile home” was 19.3%, which was almost 3% higher than in the State and nearly three times the proportion in the U.S. The other significant housing indicator is that the percent of households paying more than 35% of their income for housing was in between the U.S. and the State at 23.0% for the District, 22.1% for the State and 28.6% for the U.S.

	Number of Housing Units		Change 2000-2013	
	2000	2013	Number	%
Colfax	8,959	10,004	1,045	11.7%
Los Alamos	7,937	8,332	395	5.0%
Mora	2,973	3,174	201	6.8%
Rio Arriba	18,016	19,495	1,479	8.2%
San Miguel	14,254	15,512	1,258	8.8%
Santa Fe	57,701	71,204	13,503	23.4%
Taos	2,880	20,181	2,880	16.5%
NCNM District	127,244	148,005	20,761	16.5%
New Mexico	780,579	902,302	121,723	15.6%
U.S.	115,904,641	132,802,859	16,898,218	14.6%

Source: U.S. Census Bureau, 2000 Census and American Community Survey 2009-2013

	2000 % Seasonal Homes	2013% Mobile Homes	2013% of Occupied Units Paying More Than 35% of Income For Housing Costs
Colfax	25.3%	16.9%	19.0%
Los Alamos	0.9%	2.9%	8.2%
Mora	14.4%	29.4%	9.7%
Rio Arriba	5.8%	38.5%	16.0%
San Miguel	10.8%	31.6%	24.0%
Santa Fe	4.0%	13.7%	26.9%
Taos	17.1%	17.5%	23.9%
NCNM District	8.4%	19.3%	23.0%
New Mexico	4.1%	16.6%	22.1%
U.S.	3.1%	6.5%	28.6%

Source: U.S. Census Bureau, 2000 Census and American Community Survey 2009-2013

APPENDIX E

PHYSICAL CHARACTERISTICS OF THE DISTRICT

Geography

The seven counties comprising the District have a total land area of 20,484 square miles which is larger than nine of the States. Yet the population is only one-half of that of the least populous State – Wyoming.

The District includes both plains and mountains. Wheeler Peak, the highest mountain in New Mexico at 13,161 feet, presides over the north and settles down to the Great Plains on the eastern side of the District. The Sangre de Cristo and Jemez Mountains to the south and west and meets the high desert plateau of Navajo Country to the far west. Denver may be a mile high, but Santa Fe, Los Alamos, and Taos are all over 7,000 feet in elevation, as are many of the smaller towns in the mountains. Colfax, San Miguel and Mora – the counties in the northeastern plains – still average over 6,000 feet elevation, and these are the lowlands. 85% of the entire state is over 4,000 feet above sea level. Altitude affects aspects of life as disparate as climate, pressurization of gases for industry, response to cardiovascular disease, high-altitude training, baking and the flight of golf balls.

Abiquiu, Heron, El Vado and Storrie Lakes provide open water in the District, with many smaller lakes offering excellent fishing and recreational opportunities. The Rio Grande, the Rio Chama, the Pecos River, and the Canadian River are the primary river resources. River resources are more valuable (and more controversial) for the water rights they contain than for scenic beauty. Compacts with Colorado, Texas and Mexico govern the use of water in the interstate streams.

Mountain ranges and wilderness designations have a profound effect on the District's communities. Because of the rugged central mountain chain, the Sangre de Cristo Mountains, east-west roads are very limited. With much of that land as wilderness, development and population follow the Rio Grande north-to-south on the western side of the mountains and follow the plains north-to-south up the I-25 corridor to the eastern side. This limits the communication among many communities and creates sub regions in the District that may have little in common with each other. Dulce, New Mexico in the far northwest corner of the region is almost 300 miles and a six hour drive from Bell Ranch, New Mexico in the far southeast corner of the region. Even to drive from Raton to Dulce along the New Mexico-Colorado state line is a 225 mile drive of over four hours, but is only that fast if one crosses the mountains into Colorado.

Climate

The region has generally a mountain desert climate with upwards of 300 days of sun a year and limited precipitation, most of which falls as snow. Snow pack held in the mountains provides water in the summer for recreation and irrigation, and renews drinking water resources. Differences of thirty degrees or more from day to night are not uncommon in any season, making summer nights cool and reducing reliance on air conditioning even in the hottest weather.

Annual precipitation in 2011 and 2012 in the District ranged between 18% to 69% of normal, creating extreme drought conditions over half of the lands in the District. This had considerable economic impact on the region in agriculture, tourism and the cessation of many other development activities. The National Oceanographic and Atmospheric Administration listed the District as ranging from stage 2 severe drought through stage 3 extreme drought to stage 4 exceptional drought. Further discussion of the impact of water will be undertaken in the section on analyses of infrastructure and of the institutional factors affecting the economy.

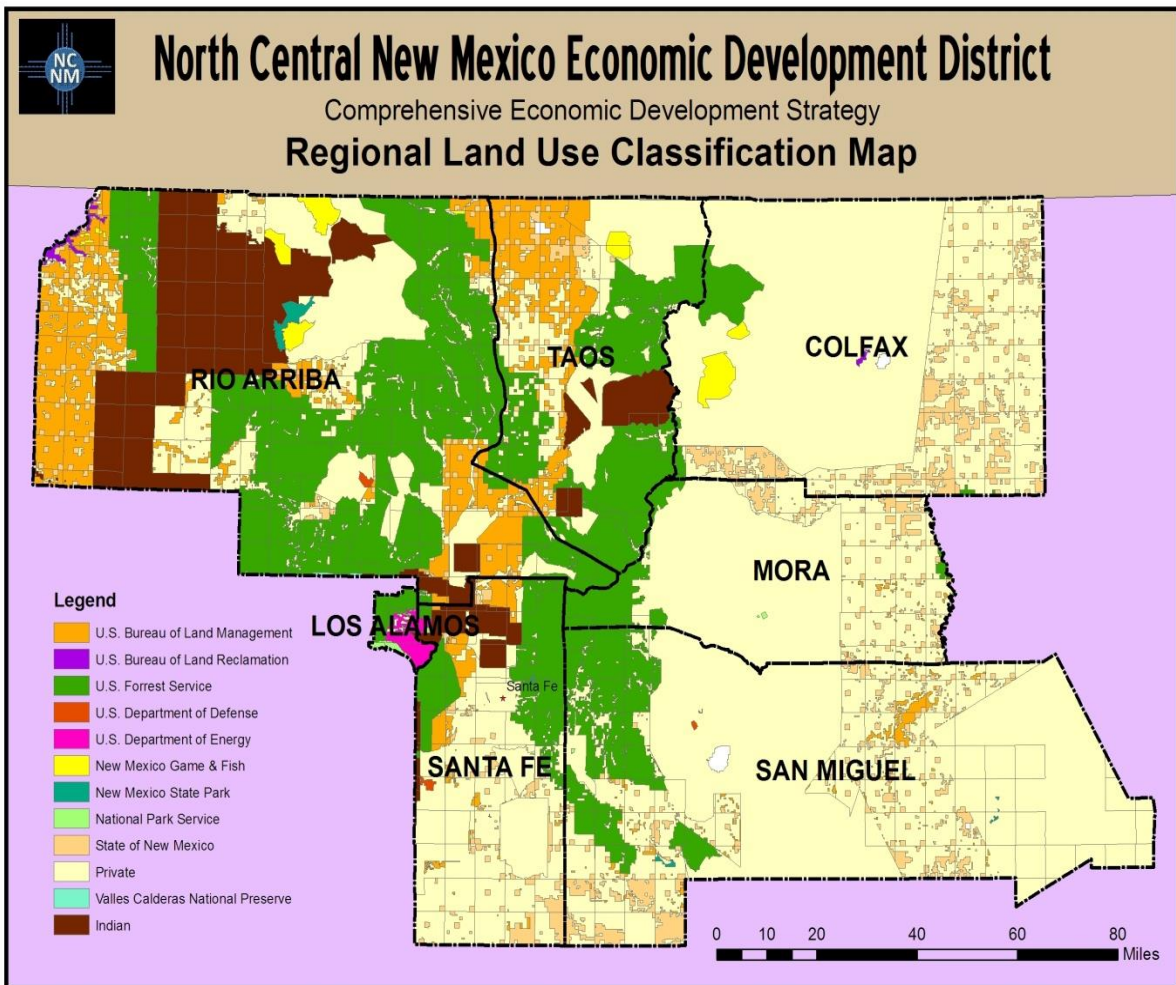
Other important climatic features include solar, biomass, and wind power generation potential. The New Mexico Energy, Minerals and Natural Resources Department website shows that the state experiences more than 3,200 hours of sunlight annually, higher than most states in the US. The state also has enviable wind resources, which NMEMNRD supports by providing assessments of wind resources statewide.

Environmental and Natural Resource Profile

Land Ownership

Land ownership in the District is characterized by large landowners. East of the central mountains, most land is privately held in very large ranch holdings. West of the mountains, much of the land is in Federal government ownership, under management of the Forest Service, Bureau of Land Management, Bureau of Indian Affairs, National Park Service, Department of Energy, and other agencies. The table below shows for each county how much of the land area is owned privately and by the Federal and State governments.

County	Total Area In Square Miles	Percent of Total Land Area That Is Owned By:			
		Private	State	Tribal	Federal
Colfax	3,771	87%	12%	0%	1%
Los Alamos	109	9%	0%	0%	91%
Mora	1,944	84%	7%	0%	9%
Rio Arriba	5,883	28%	3%	17%	52%
San Miguel	4,767	81%	6%	0%	13%
Santa Fe	1,909	58%	7%	6%	27%
Taos	2,257	38%	7%	4%	51%
Regional Total	20,640	61%	6%	6%	27%



Timber

Major forest fires in the District starting in the year 2000 brought new attention to timber resources. Government policies that allowed the accumulation of fuel near inhabited areas, water supplies, and archeological treasures are being challenged. The procedures surrounding controlled burns are being examined. The Cerro Grande, Viveash, Manuelitas, Las Conchas, Track, and other, smaller fires in the District destroyed over 500,000 acres of forest. The Cerro Grande Fire destroyed 350 homes in Los Alamos in 2000, and the Las Conchas Fire destroyed over 50 homes in Sandoval County just outside of the district in 2011. Fires have threatened homes and water resources in all counties in the District, and portions of the communities of Raton and Los Alamos have been evacuated for up to a week in 2011 due to imminent fire danger.

The City of Santa Fe and Los Alamos had already begun thinning and forest maintenance in their watersheds and surrounding areas. Los Alamos has undertaken a major restoration project following Cerro Grande Fire and will start anew following the Las Conchas Fire. Los Alamos can point to areas thinned prior to the fires that helped protect important assets. The City of Santa Fe has voted to fund watershed protection measures. The City of Las Vegas had its watershed threatened in 2000, and if the city had not already been on water use restrictions, might still have faced disaster from the Viveash Fire. Because conservation had kept the reservoir relatively full, ash-contaminated water was diverted away from the reservoir, protecting filtration and distribution equipment. Santa Fe faced threats to the watershed in 2002 and USDA reported that the entire watershed could be consumed in only six hours under existing conditions. This would have set the stage for catastrophic flooding of the historic downtown area and destroyed the water filtration system with the first monsoonal rains.

The recent fires may bring a rethinking of timbering practices in the District. However, there is still considerable disagreement between environmental groups and others as to how best to reduce fire danger. Forest restoration projects will all need a way to deal with slash and cleared debris. Hence, economic development opportunities using small diameter timber, burned timber, or debris are critical to the cost effective management of wild lands.

Oil and Gas

According to a Wall Street Journal report in March, 2012, the State of New Mexico has the fifth largest oil reserves of the 50 states. "The oil and gas industry has a strong presence in New Mexico, which sits atop 700 million barrels of proved reserves of crude oil. The industry accounts for 10.6% of the State's economy and is responsible for 7.5% of total jobs." New Mexico has three oil refineries which ties the state at fourteenth among the states.

In the District,

- Rio Arriba County ranks 3rd statewide in oil production and 2nd in gas production
- Colfax County ranks 8th in gas production.

Oil and gas prices have a big impact on New Mexico, both in terms of state revenue and employment. The New Mexico Energy, Minerals, and Natural Resources Department reports that for every \$2.50 increase (or decrease) in the per barrel price of crude oil, roughly 1,000 jobs will be recouped or lost in the next quarter as businesses adjust to costs and prices.

Minerals and Mining

Historically, the District has mined coal, molybdenum, gold, silver, turquoise and construction materials. Coal was mined in Colfax County until recently. The Pittsburg and Midway Complex outside of Raton in Colfax County mined 1,137,181 short tons of coal in 2000, but announced in 2002 that they would cease operation in Raton. This decision brought an end to an industry that predated statehood. Although mine reclamation also provides economic activity, the employment opportunities are not equivalent.

Molybdenum has been mined in Taos County for over 80 years. All extractive industries are intensely price sensitive, so the Questa mine has been up and down in recent times.

In addition, Raton is home to the development of mining technology. In 2002, R & D Magazine announced Stolar Horizon, Inc. as a winner of a prestigious R & D 100 Award for Electromagnetic Wave Detection and Imaging Transceiver (EDIT™) technology. EDIT provides detection and imaging of underground geology (of coal-seam horizons) and buried objects such as utility conduits and landmines.

Air Quality

US Environmental Protection Agency data shows no air quality non-attainment areas in the District. Air quality in New Mexico is generally good, even in urban areas. Dust, pollen and smoke are the primary air quality offenders. Fires in New Mexico and Arizona contributed to many days of reduced air clarity in 2011. Drought conditions added to the dust burden.

Water Quality and Availability

Water resources have taken on critical importance in economic development in the District. A full explanation of the issue is beyond the scope of this study. The problem can be briefly outlined as follows:

- The District is a desert region with an average annual precipitation of between 9 and 13 inches.
- Existing water law in New Mexico is complex and is based on “first beneficial use” derived from over 400 years of Spanish, Mexican and US written and case law.
- Competing population growth, traditional irrigation and industrial uses have made it evident that all needs cannot be easily accommodated.
- Federal demands for endangered species protection further stress water supplies and threaten to disrupt ongoing litigation.
- Tribal water rights in the District may exceed available water in some basins.
- The Office of the State Engineer may not have the informational, technological or legal tools with which to meet the demands of the situation.
- The current drought, which matches conditions not seen since the 1950’s, may be only the beginning of a normal dry cycle which may extend for many years.
- Natural and man-made pollutants are increasingly being found in water tables threatening wells, mutual sources and municipal water supplies

Actual water availability is poorly understood, with no statewide hydrological survey or database extant that can reliably state how much water is available for use now and in the future. Communities

are increasingly reluctant to permit residential or industrial development unless water rights are secured. Water rights may not be a guarantee of wet water. Traditional practices and users are competing with growing residential and commercial demands while interstate and international compacts are demanding state resources for litigation and protection.

While much of the west and southwest are arid, New Mexico's unique legal, tribal and governmental structures make water law and water adjudication in New Mexico more problematic than is required for many kinds of economic development. Water intensive industrial and commercial processes are inappropriate. The length of time required to secure and exercise water rights may be too costly or too discouraging for companies or individuals.

Water quality is an additional concern. New Mexico in general has a high level of background arsenic in the drinking water, and naturally-occurring uranium is prevalent in the mountains. Stricter standards will mean that communities in the District will spend millions of dollars on water quality, which might otherwise have been used to extend water or wastewater services to those not presently served. Some communities will not be able to tax or borrow to meet this burden.

Other water quality issues include fluoride and other minerals and various contaminants. Sewage treatment plants are generally found only in areas of denser population, and usually only in incorporated areas. Counties and unincorporated areas have relatively limited funds for development of these expensive services. As a result, contamination is increasing.

The state response to the problem has been significant in recent years. The formation of the Water Trust Board has helped to focus state, tribal and private resources on a working group that has statutory authority and state funds to help meet present drought emergencies and protect New Mexico's water resources.

Water adjudication remains an issue. The Aamodt suit involving the City of Santa Fe, Santa Fe County, San Ildefonso Pueblo, Pojoaque Pueblo, Tesuque Pueblo and Nambe Pueblo has produced an actual settlement approved by Congress in 2011. This settlement may require the importation of water from outside the basin. The impact on economic development and on the status of the tribes as regional powers will be significant. A similar suit by Taos Pueblo has not proceeded to this point.

The City of Santa Fe and Santa Fe County are now utilizing San Juan-Chama water from west of the Continental Divide. Other communities also have rights to San Juan-Chama water, but have been unable to finance the actual utilization of those rights.

The City of Las Vegas and San Miguel County have continuing water availability issues that have seriously hampered population and job growth in those areas.

The over one hundred mutual domestic water associations in the District have continuing issues with water availability and quality, as well as with operation and maintenance of aging physical facilities.

Solid Waste Disposal

Solid waste is a continuing issue in the District, and communities are increasingly fostering recycling to reduce the waste stream.

Hazardous Waste Sites

Sites in Los Alamos County have been identified as potentially contaminated from past radioactive waste disposal practices. In San Miguel County, mine tailings have contaminated the Pecos River, seriously affecting the economy because of reduced recreational fishing opportunities. Cleanup of this site is proceeding with state and private financing. Other possibly contaminated sites from mining activities are in Taos, Santa Fe and Colfax counties.

Infrastructure

Water and Wastewater

Development and management of water and wastewater infrastructure is made all the more complicated by the fact that much of the sources lie outside of municipal boundaries, and because only a few of New Mexico's counties are able to provide appropriate oversight. Counties have limited funds and have virtually no authority regarding septic tanks and wastewater systems. Permitting of domestic well drilling and septic tanks is a state function for which only limited reserves have been set aside in recent years. Mutual Domestic Water Users Associations (MDWCA's) have become eligible for state funding because of an amendment to the Sanitary Projects Act in 2006. As non-profits, MDWCA's are voluntary organizations which have had limited viability over longer periods of time. Water and wastewater infrastructure needs are catalogued in the annual New Mexico ICIP plan. The ICIP for District communities is included by reference in the CEDS and is automatically updated every September 30. Funds for such infrastructure are sought from Federal Department of Housing and Urban Development Community Development Block Grants, USDA Rural Utilities Service funds or the state of New Mexico. In the 1970's, the US Environmental Protection Agency offered grants for the development of rural water systems to insure potable water in many small communities. Now forty years old, many of these systems in the District are no longer able to meet the demand. But, now the funding has changed very largely to loans, drinking water standards have evolved to be more restrictive, and some previously reliable sources of water have failed or become contaminated. In recent years, the state legislature has funded the New Mexico Finance Authority and the Water Trust Board to help eligible entities in grants and loans for water and wastewater infrastructure. The perspective has widened to include more wastewater infrastructure as fear of contamination grows.

Highways and Transportation

Highways are the lifelines for the District. Interstate 25 runs north-south from Albuquerque through Santa Fe, Las Vegas and Raton to Denver. No limited access highways run east-west in the region. I-25 follows the eastern slope of the Sangre de Cristo Mountains, across which there are few roads. Travel in the District is generally on one side of the mountains or on the other side, with the land in the middle being wilderness and generally inaccessible.

The northeast part of the District hopes to see improved highways as part of the Ports to Plains TRADE Corridor. This national initiative was inspired by the North American Free Trade Agreement and will link Mexico to Vancouver, with a loop around Denver that includes Raton, via Dalhart, TX. This is a high priority for the Raton/Colfax area, as they already have considerable traffic from Texas and Oklahoma and would like to capitalize on the economic opportunities this represents. On the west side of the mountains, limited improvements have been made. US 84 runs from Española to Chama. Largely limited to two lanes, it is nevertheless a major truck route to Denver. US 64 connects Santa Fe to Española and Taos. Basically, this configuration meant that all traffic bound north to Taos passed through the center of Santa Fe until the completion of the Santa Fe Bypass. There is no bypass around Española or Taos, making distribution of goods difficult and expensive.

Public transportation in the District is limited, but has been increasing in recent years. The city of Santa Fe has a bus system that made national news when it began running a fleet of natural gas fueled vehicles. Taos, Angel Fire and Los Alamos now have public transportation systems. The State created Northern New Mexico Park & Ride connecting Los Alamos and Santa Fe employment centers to Las Vegas and Espanola residential areas; and developed the RailRunner which provides commuter rail service between the Santa Fe and Albuquerque metro areas. Most communities have transportation as part of their services to the elderly. However, reliable transportation remains a serious obstacle to employment throughout the rural portions of the District.

Santa Fe has the largest airport in the area. The airport has commercial air service and two fixed base operators. Los Alamos has an airfield with airspace partly restricted because of security concerns. Previous attempts at regular commercial flights were attempted periodically with limited success. Angel Fire has a resort airport that operates with commercial service during the ski season. Taos, Las Vegas and Raton have municipal airports with limited services. Questa, Lindrith and Springer have airports that where the FAA list livestock as features of the runways. Ohkay Owinghe Pueblo has an airstrip that is now reopened.~~closed~~. The Jicarilla Apache Nation has a facility that is open to the public.

Amtrak provides rail service in Raton, Las Vegas and Santa Fe as part of the Southwest Chief running from Chicago to Los Angeles. Recently announced problems with maintenance of the line are threatening to halt service in the District. With limited air service in the northeast part of the district, cessation of rail would be an additional burden for some communities. In addition, the restoration of heritage rail stations has begun, with most to serve as an intermodal hub for transportation services.

Electric Power

While the coal, oil, and gas produced in the District have long fueled power plants in other regions, the District has always been dependent on imported power. In 1988 Los Alamos County developed two small hydro plants at Abiqui and El Vado Lake dams to provide summer power for the Laboratory's peak experimental season. In the last six years, New Mexico has enacted some of the strongest renewable energy requirements for local power producers, and major photovoltaic facilities have been recently put on line in Colfax County. San Miguel County has recently enacted a revised zoning ordinance to permit development of a major wind farm enterprise. Similarly, Mora County has been reviewing proposals for a biomass-fueled electric power project. New Mexico has created a Renewable Energy Transmission Authority to finance power lines to bring generated power to major

markets. Also in the financing stage is the Tres Amigas project just outside the District near Clovis at the intersection of the nation's three separate power grids. The operating systems of the three grids do not now permit the sharing of excess power between the three grids, and Tres Amigas will enable that sharing to occur. The District and its abundant renewable energy resources are strategically located to take advantage of the proximate location Tres Amigas when it becomes operational.

Affordable Housing

The New Mexico Mortgage Finance Authority prepared a housing needs analysis in 2008 titled "New Mexico Regional Affordable Housing Opportunities." Several of the conclusions about northern New Mexico housing needs are reprinted below:

- Much of the affordable rental stock in smaller towns is public housing units in disrepair that need substantial rehabilitation. Private rentals in many areas are also of low quality and do not meet Housing Quality Standards (HQS).
- Some counties have immediate existing housing gaps for rental and affordable for sale housing that need to be addressed.
- The increasing number of senior households make senior housing a priority housing need in much of the region.
- In some counties, there is a need for more single family development targeted at 80% or less AMI.
- Many very low income owners live in Region 1 who need housing rehabilitation assistance. In some very poor communities households live without water or septic systems.
- Most housing authorities have long waiting lists for subsidized rental units and Section 8 Vouchers.
- Some communities within the region need more housing choices for persons with disabilities.
- Most counties report that homelessness is a current housing need, and that families are doubling up to deal with low wages and high housing costs in many areas of the region.

The analysis also reports on land use, regulation, and infrastructure issues in the District, as follows:

- Some municipalities are not able to annex more land because they are bordered by federal or tribal lands. Gaining higher land utilization is critical in an area where the incorporated boundaries are frozen.
- Many communities report that they are having problems with their utility infrastructure: both water supply and water treatment. This problem limits the ability of developers to bring new housing on-line. The City of Las Vegas reports that it will not approve any new construction because there are no available water taps. This constriction on the supply of new housing will continue to force the prices of existing homes higher. Las Vegas is considering adopting an affordable housing act ordinance yet perhaps the most

effective action that could be taken would be to expand the system and water supply to provide for new taps.

The analysis recommends six strategies related to housing issues in the District.

1. Increase opportunities for homeownership
2. Preserve the Region's existing affordable housing stock
3. Expand the supply of housing and services to assist the homeless
4. Expand housing opportunities and access for special needs populations
5. Expand the supply of decent affordable rental housing
6. Form innovative partnerships and collaborations among local and regional entities to maximize human and financial resources for affordable housing programs and development.

Strategy number six above is a key component in dealing with housing issues in the District. Outside of the City of Santa Fe there has been no agency that is equipped to take on the multiple housing issues in the region. Since the report was completed in 2008, the NMMFA has acted to deal with public housing on a regional basis. The NMMFA issued a request for proposals, and has recently selected an agency in Taos to act as the Northern Regional Housing Authority to support operations from many of the small authorities with an inadequate number of units to provide consistent operating income. The table below shows the number of units of affordable housing, of Section 8 vouchers, and of other affordable housing units in the District. There is still a major unmet need for an organization to deal regionally with weatherization, rehabilitation, senior housing development, etc. The NMMFA has requested funding to deal with this gap, but to date has not been successful.

County	Housing	Public Housing	Other Assisted	Other Housing
Community	Authority	Units/Sec 8	Housing	Programs
Colfax	No	-0-	-0-	No
Angel Fire	No	-0-	-0-	No
Cimarron	Yes	16/0	-0-	No
Maxwell	Yes	22/0	-0-	No
Raton	Yes	156/0	-0-	No
Springer	Yes	56/0	-0-	No
Los Alamos	No	-0-/106	178	Yes-HD
Mora	No	-0-/66	-0-	Yes-W
Wagon Mound	Yes	18/0	-0-	Yes-W
Rio Arriba	Yes	53/25	-0-	No
Chama	Yes	37/0	-0-	No
Espanola	Yes	178/204	-0-	No
Ohkay Owingeh				
Pueblo	Yes	41/0	-0-	Yes-W,R,HD
San Miguel	Yes	0/177	-0-	No
Las Vegas	Yes			
Pecos	Yes	32/0	-0-	No

Santa Fe	Yes	200/ 316		
Edgewood	No	-0-	-0-	No
Nambe Pueblo	Yes	65/0	-0-	No
Pojoaque Pueblo				
San Ildefonso Pueblo	Yes	61/0	-0-	No
Santa Clara Pueblo	Yes	76/0	-0-	No
Santa Fe	Yes	461/348	1,702	Yes-W,R,HD
Tesuque Pueblo	Yes	22/0	-0-	No
Taos	Yes	168/400	-0-	Yes-W/HD
Picuris Pueblo	Yes	16/0	-0-	No
Questa	No	-0-	-0-	No
Red River	No	-0-	-0-	No
Taos	No	-0-	-0-	No
Taos Pueblo	Yes	109/0	-0-	No
Taos Ski Valley	No	-0-	-0-	No

Note: Other Assisted Housing: Private housing assisted by HUD, FFHA, Tax Credits, etc.

Other Housing Programs: W=Weatherization; R=Rehabilitation; HD=Housing Development Assistance

Source: New Mexico Mortgage Finance Authority Report: New Mexico Regional Affordable Housing Opportunities. 2008

Central Business Districts

Central business districts are found in Santa Fe, Los Alamos, Española, Chama, Taos, Raton, and Las Vegas. The smaller towns and villages lack the size, variety of services and market area to qualify as "business districts". Many of these communities, however, are working hard to maintain and expand their retail offerings as quality of life concerns, as economic opportunities and to increase the tax base for the provision of essential services.

Santa Fe, Taos and Española are showing considerable growth, with downtown growth management addressed in current discussions of general plans and in planning and zoning ordinances. The business districts in Espanola and Los Alamos are undergoing significant redevelopment, as the communities are generally short of space because most of the adjacent land is federal land.

Regional population growth as discussed elsewhere in the report will dictate the growth in these cities, town and villages.

Community Facilities and Services

Infrastructure remains a problem in northern New Mexico, as it does in the state, as a whole. This report does not extensively catalog the need. Most of the infrastructure needs of the District are listed and prioritized annually in the Infrastructure Capital Improvement Program (ICIP) report, due from each local government to the Department of Finance and Administration Local Government Division by September 30 of each year. Projects on this list are eligible for funding from the state. Copies of the ICIP relevant to the District are available on request and are incorporated into this plan.

Higher educational institutions include the following:

-----UNM-North, services of the University of New Mexico in Santa Fe, Los Alamos and Taos;

-----New Mexico Highlands University in Las Vegas;

-----St. John's College, in Santa Fe;
 _____ The Santa Fe University of Art and Design in Santa Fe
 -----Southwestern College, in Santa Fe;
 -----Northern New Mexico Community College in Española and El Rito;
 -----Luna Community College in Las Vegas;
 -----Santa Fe Community College; and
 -----The University of Phoenix in Santa Fe.

Medical facilities available in the District are found in the table below.~~on the following page.~~
 Services and facilities for senior citizens are determined through the Area Agency on Aging, a part of the District's operation. Annually, each community covered by the plan examines its services, holds a public hearing for new input and prepares a budget and proposal. The Area Agency on Aging compiles the information from the twenty-one counties it serves, presents it to the State Agency on Aging for approval and funding, and awaits the outcome of state and federal appropriations.

Recent projections concerning the elderly population in New Mexico highlight the need for long term and in-home services for the aging. In some cases, these services can provide employment. Some communities are exploring adult day care and other services to the frail as job creation activities.

Hospitals and Health Clinics in the District

<u>County</u>	<u>Hospital/Clinic</u>
Colfax	Miners Colfax Medical Center <i>El Centro Family Health Springer</i> <i>Presbyterian Health Clinic Angel Fire</i> <i>Moreno Valley Health Care Clinic Angel Fire</i> <i>Cimarron Healthcare Clinic</i>
Los Alamos	Los Alamos Medical Center
Mora	<i>Mora Valley Medical Center</i> <i>El Centro Family Health Wagon Mound</i>
Rio Arriba	Espanola Valley Hospital Rio Arriba Health Commons Clinic <i>Valley Community Health Center</i> <i>El Centro Family Health Espanola</i> <i>El Centro Family Health Coyote</i> <i>El Centro Family Health Embudo</i> <i>El Centro Family Health Penasco</i> <i>El Centrol Family Health Truchas</i> <i>Indian Health Service Dulce Health Center</i>
San Miguel	Alta Vista Regional Hospital Las Vegas Medical Center Northeastern Regional Hospital
Santa Fe	Christus St. Vincent Regional Medical Center PHS Santa Fe Indian Hospital

Taos

Holy Cross Hospital
El Centro Family Health Taos
Health Center of Northern NM Penasco
Questa Health Center