ASAP AREA SECTOR ANALYSIS PROCESS

Helping communities identify targeted, sustainable economic development.

MORA COUNTY, NM

ASAP MODEL OUTPUT

OCTOBER 27, 2020

ASAP is a regional collaborative project of the Western Rural Development Center. **wrdc.usu.edu**

ASAP is a regional collaborative effort between these institutions and the Western Rural Development Center:

WESTERN RURAL DEVELOPMENT CENTER

University of Nevada Cooperative Extension

University of Nevada, Reno Center for Economic Development

EXTENSION UtahStateUniversity

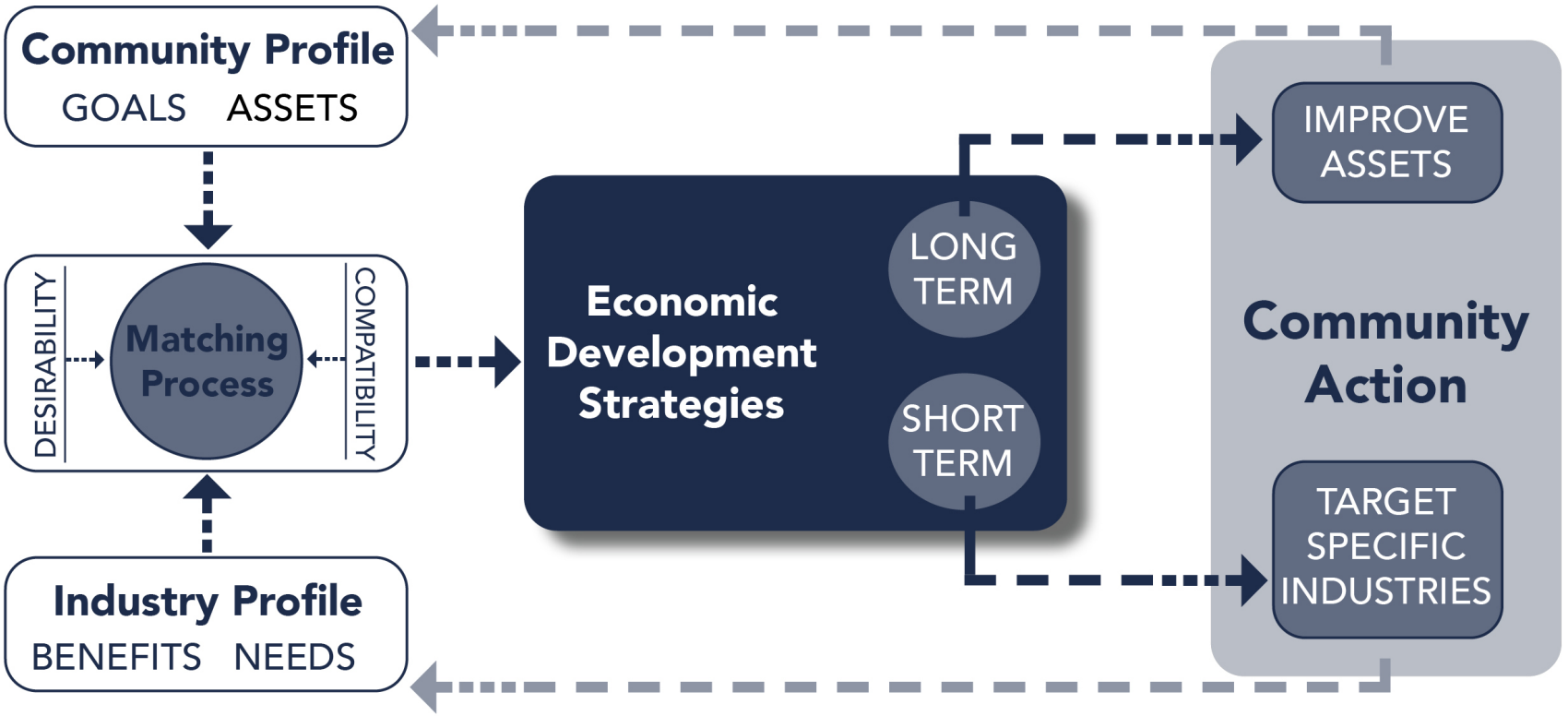
University of Idaho

THE UNIVERSITY OF ARIZONA Cooperative Extension

NM STATE UNIVERSITY

NC NM

ASAP MODEL


Community Profile
GOALS ASSETS
DESIRABILITY
Matching Process
COMPATIBILITY
Industry Profile
BENEFITS NEEDS
Economic Development Strategies
LONG TERM
SHORT TERM
IMPROVE ASSETS
Community Action
TARGET SPECIFIC INDUSTRIES

ASAP DATA REQUIREMENTS

Primary

- Industry expansion and/or relocation needs and factors
  - Business survey
- Economic development goals and priorities
  - Business survey
  - Community survey
- Assets
  - Community asset inventory

Secondary

- IMPLAN
- U.S. Census Bureau
- U.S. EPA
- U.S. Bureau of Economic Analysis
- U.S. Bureau of Labor Statistics
- FBI
- Federation of Tax Administrators
- Etc.

BUSINESS RELOCATION CHOICE SURVEY

- Data collection began in 2003
  - Ongoing – ~150 new firms added per year since 2011
- Firms 'represent' 4-digit NAICS sector
  - 2,502 individual firms
  - 276 4-digit 2012 NAICS (88.5% of 312 sectors)
- Average observations per sector = 9
  - Median = 6
  - Min = 1 / Max = 69
- Target 10 observations per specific sector
  - Target 20 observation per 'other' sector
    - Emerging markets
  - Re-survey portion of existing firms

BUSINESS SURVEY DATA EXAMPLE

NAICS 4239 - Miscellaneous Durable Goods Merchant Wholesalers Physical Infrastructure	Not Important	Somewhat Important	Important	N = 9 Very Important
Access within 30 minutes to an interstate highway	22%	44%	11%	22%
Access within 30 minutes to package freight services	67%	0%	0%	33%
Immediate access to a railhead or rail spur	78%	11%	0%	11%
Access within 30 minutes to rail freight	78%	22%	0%	0%
Access within 30 minutes to passenger air services	67%	33%	0%	0%
Access within 30 minutes to port or harbor facilities	78%	11%	0%	11%
Access within 30 minutes to an international trade port	78%	11%	0%	11%
Access to natural gas pipeline	100%	0%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need	22%	11%	11%	56%
Access within one day, at a reasonable cost, to your customers	33%	33%	0%	33%
Access to 3-phase electric power	56%	0%	11%	33%
Access to fiber optic lines	22%	22%	11%	44%
Availability of high-volume water supply	100%	0%	0%	0%
Availability of high-volume wastewater disposal	100%	0%	0%	0%
Availability of solid waste disposal	67%	33%	0%	0%
Availability of cell phone service	0%	0%	11%	89%
Availability of local public transportation	78%	11%	11%	0%
Possibility for future expansion at site	22%	33%	22%	22%
Availability of high-speed internet	11%	0%	0%	89%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

BUSINESS SURVEY DATA EXAMPLE, CONT.

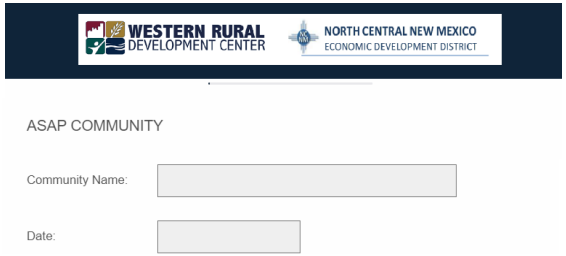
Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	44%	33%	0%	22%
Availability of skilled workforce	33%	33%	0%	33%
Availability of technical workforce	44%	11%	11%	33%
Availability of unskilled workforce	67%	11%	0%	22%
Favorable local labor costs	33%	33%	0%	33%
Favorable worker's compensation tax rate	33%	11%	11%	44%
Favorable local business tax rates	11%	11%	0%	78%
Favorable state and local government incentives	100%	0%	0%	0%
Availability of union labor	56%	0%	0%	44%
Availability of specialized job training programs	89%	0%	0%	11%
Availability of long and short term financing	33%	56%	0%	11%
Existence of a business/trade association	78%	22%	0%	0%
Lenient environmental regulations	67%	11%	11%	11%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	11%	0%	22%	67%
Availability of affordable housing	11%	22%	11%	56%
Clean air and water	0%	11%	11%	78%
High quality natural ecosystem	22%	33%	22%	22%
Outdoor recreation opportunities	11%	44%	22%	22%
Social and cultural opportunities	33%	44%	22%	0%
Retail shopping opportunities	33%	67%	0%	0%
Quality educational system (K-12)	22%	0%	33%	44%
Access within 30 minutes to college or university	67%	22%	0%	11%
Availability of quality healthcare	22%	22%	22%	33%
Availability of public safety services (e.g. police, fire station)	11%	11%	22%	56%
Climate	22%	11%	22%	44%
Ease of attracting skilled workers	0%	0%	0%	0%

MORA COUNTY, NM
COMMUNITY GOAL SURVEY

- 17 Surveys Completed
  - **Community Name** Responses:

    Mora
- Ranking of five goals per category
  - Environmental, Economic, Social
- Economic outlook
  - Personal and communities
- Rank quality of community characteristics
- Demographics



MORA COUNTY, NM
COMMUNITY GOAL SURVEY

Table 1: Mora County, NM Community Development Goal Rankings

	Goal	*Weight*	*Rank*
G1.	Economic Quality	43.80%	1
G2.	Environmental Quality	38.70%	**2**
G3.	Social Quality	17.50%	3

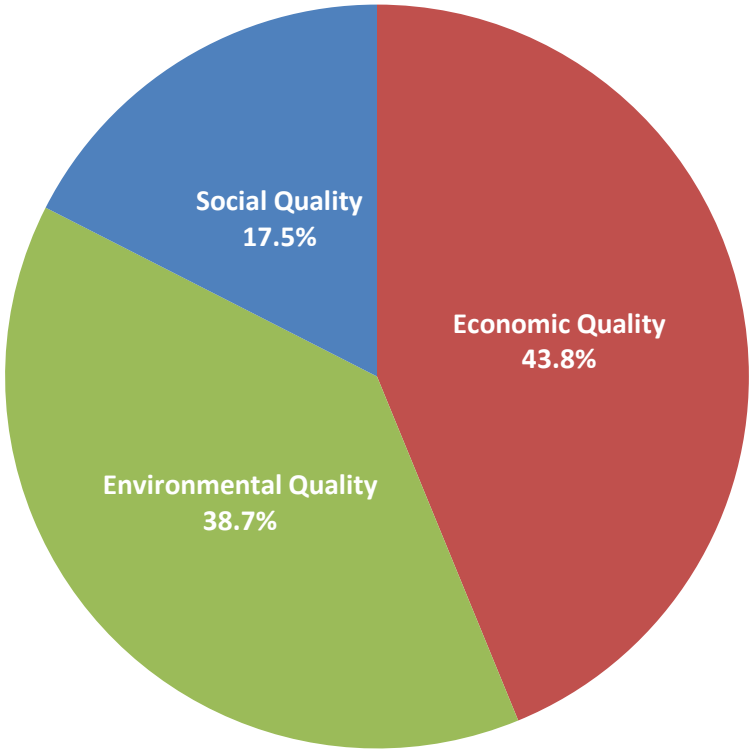
Table 2: Community Development Indicator Rankings

	Indicator	*Weight*	*Rank*
G1.	G1.I1 - Every new job generates additional jobs in the community	10.07%	3
	G1.I2 - New businesses return profits to the community	8.94%	5
	G1.I3 - New businesses hire locally	11.34%	1
	G1.I4 - New businesses buy locally	6.66%	8
	G1.I5 - New businesses increase the average local wage	6.79%	7
G2.	G2.I1 - New businesses do not pollute the water	11.07%	**2**
	G2.I2 - New businesses do not release toxic chemicals in the air	8.94%	4
	G2.I3 - New businesses are in compliance with hazardous waste management	7.35%	6
	G2.I4 - New businesses do not emit greenhouse gas	5.88%	9
	G2.I5 - New businesses do not develop undeveloped land	5.46%	10
G3.	G3.I1 - New businesses increase the local tax base	2.99%	14
	G3.I2 - New jobs are full-time	3.64%	12
	G3.I3 - New jobs offer benefits (health and/or retirement)	4.99%	11
	G3.I4 - New jobs provide training programs	2.54%	15
	G3.I5 - New businesses support community activities	3.34%	13

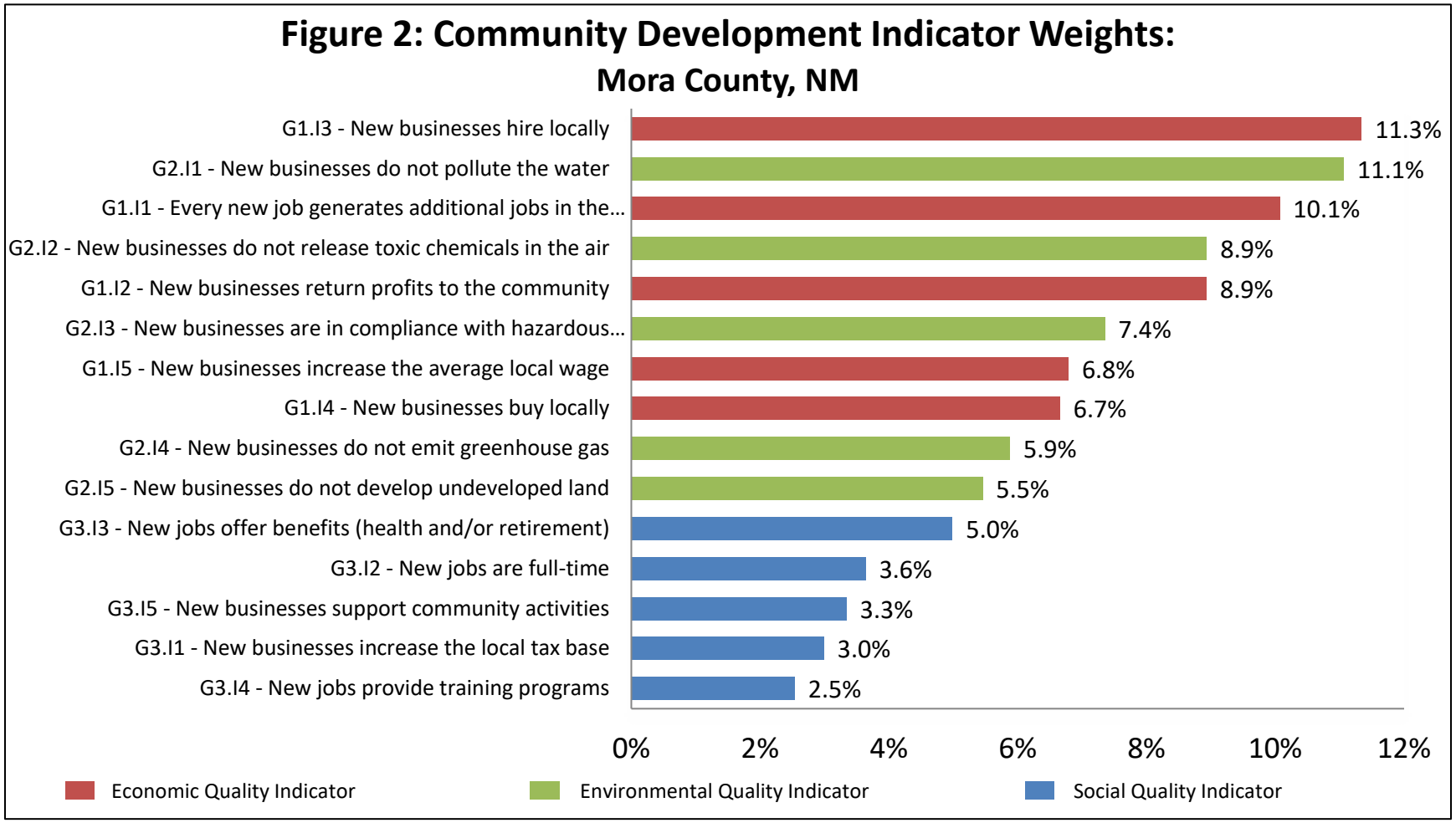
Number of observations	17

MORA COUNTY, NM
COMMUNITY GOAL SURVEY

Figure 1: Community Development Goal Weights: Mora County, NM



MORA COUNTY, NM
COMMUNITY GOAL SURVEY, CONT.



COMMUNITY ASSET INVENTORY

- Current and projected
  - Building space (retail, industrial, mfg., office)
  - Land (developed & undeveloped, ag and non-ag)
- Availability of infrastructure and services
  - Access to all types of transportation
  - Hi-tech
  - Water/sewer etc..
- Business and social indicators
  - Workforce (education, prevailing wage, etc..)

COMMUNITY ASSET INVENTORY (1 OF 2)

			Asset Values			Asset Value Basis	
Asset	Description	Source	Mora Co., NM	Baseline	Ratio	Mora Co., NM	Baseline
S1	Local acreage available (private)	CAI	1,234,944	---	---		
S2	Local manufacturing space availability (sq ft)	CAI	-	---	---		
S3	Local warehouse availability (sq ft)	CAI	-	---	---		
S4	Local office space availability (sq ft)	CAI	87,817	---	---		
S5	Local retail space availability (sq ft)	CAI	87,817	---	---		
A1	Access within 30 minutes to interstate	CAI	Yes	---	---		
A2	Access within 30 minutes to package freight	CAI	Yes	---	---		
A3	Access within 30 minutes to railhead	CAI	Yes	---	---		
A4	Access within 30 minutes to rail freight	CAI	Yes	---	---		
A5	Access within 30 minutes to passenger air	CAI	Yes	---	---		
A6	Access within 30 minutes to port/harbor	CAI	Yes	---	---		
A7	Access within 30 minutes to international port	CAI	Yes	---	---		
A8	Access to natural gas pipeline	CAI	Yes	---	---		
A9 & A10	Driving miles to metropolitan area population > 50,000	CAI	84	282	29.787%	Santa Fe, NM	Glasgow, MT
A11	3-phase electric	CAI	Yes	---	---		
A12	Fiber optic lines	CAI	Yes	---	---		
A13	High-volume water supply	CAI	No	---	---		
A14	High-volume wastewater disposal	CAI	No	---	---		
A15	Solid waste disposal	CAI	Yes	---	---		
A16*	Cell phone service	CAI	N/A	N/A	N/A		
A17	Local public transportation	CAI	No	---	---		
A18	Expansion site	CAI	Yes	---	---		
A19	High-speed internet	CAI	Yes	---	---		

COMMUNITY ASSET INVENTORY (2 OF 2)

			Asset Values			Asset Value Basis	
Asset	Description	Source	Mora Co., NM	Baseline	Ratio	Mora Co., NM	Baseline
A20	% of workforce with college degree or equivalent	CAI	0.084	0.785	10.701%		Falls Church City, VA
A21	% of workforce with HS degree or equivalent	CAI	0.916	0.988	92.713%		Falls Church City, VA
A22	% of workforce with less than HS degree	CAI	0.112	0.664	16.867%		Kenedy Co., TX
A23	Prevailing yearly wage	CAI	$ 26,738.00	$ 78,830.00	33.919%		Los Alamos Co., NM
A24	Workers compensation tax rate	CAI	0.011	0.031	34.091%		NY
A25	Business income tax rate	CAI	0.054	0.100	53.554%		PA
A26*	Local and state government incentives	CAI	N/A	N/A	N/A		
A27*	Union labor	CAI	N/A	N/A	N/A		
A28	Specialized job training programs (excl. college and university)	CAI	Yes	---	---		
A29	Short- and long-term financing	CAI	Yes	---	---		
A30*	Business/trade association	CAI	N/A	N/A	N/A		
A31	Crime rate	CAI	0.069	0.083	82.645%		St. Louis, MO
A32	Median home price	CAI	$ 103,300.00	$ 1,251,200.00	8.256%		San Jose (et.al), CA MSA
A33	Air and water quality	CGS	8.4	---	---		
A34	Natural ecosystem	CGS	8.2	---	---		
A35	Outdoor recreation opportunities	CGS	7.6	---	---		
A36	Social and cultural opportunities	CGS	6.0	---	---		
A37	Retail shopping opportunities	CGS	2.5	---	---		
A38	Education system (K-12)	CGS	4.8	---	---		
A39	Access within 30 minutes to a college or university	CAI	Yes	---	---		
A40	Health care services	CGS	4.8	---	---		
A41	Public safety services (e.g. police, fire)	CGS	5.4	---	---		

* = Not included in ASAP Model

CAI = Community Asset Inventory - values provided by steering committee; ratio values validated and modified where necessary

CGS = Community Goal Survey - average of all community survey rankings (1=lowest, 10=highest)

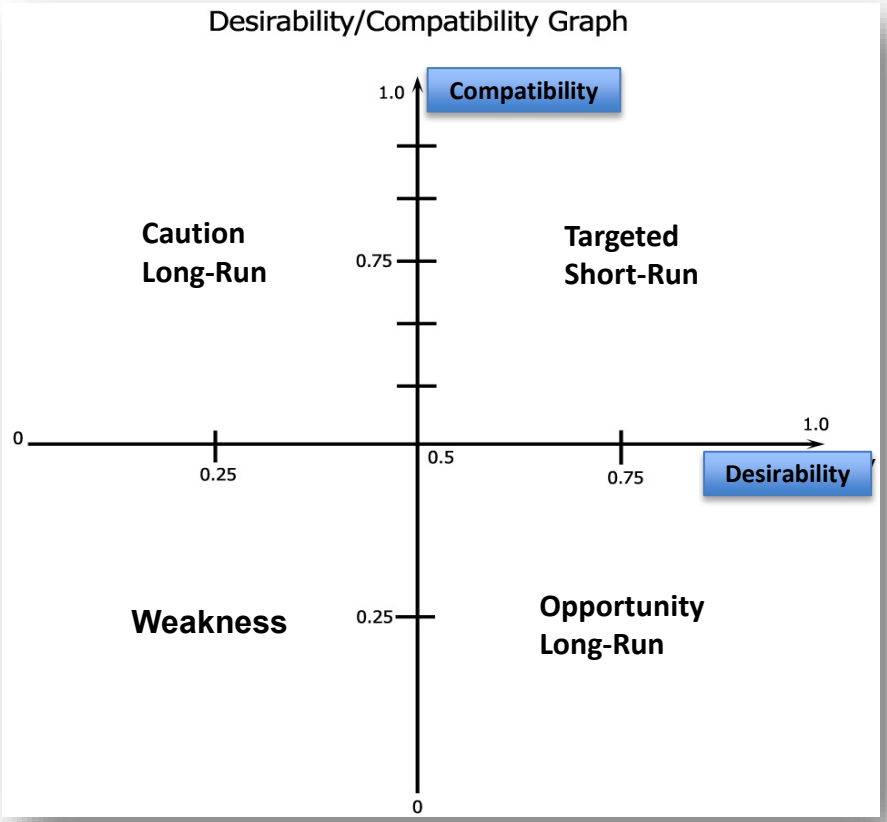
NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM – (NAICS)

- NAICS is the standard classification system used by federal agencies when reporting economics statistics related to business sectors.
- NAICS sectors can be aggregated at several different levels from 2-digit to 6-digit with the numerical NAICS code increasing as the business sector is further disaggregated.
- ASAP targeted sectors are reported using 2017 NAICS 4-digit level of aggregation.

NAICS Aggregation	NAICS Aggregation Description	NAICS Example	NAICS Example Sector Description
XX	Industry Sector (20 broad sectors up from 10 SIC)	11	Agriculture, Forestry, Fishing and Hunting
XXX	Industry Sub sector	111	Crop Production
XXXX	Industry Group	1113	Fruit and Tree Nut Farming
XXXXX	Industry	11133	Non-citrus Fruit and Tree Nut Farming
XXXXXX	U.S., Canadian or Mexican National specific	111331	Apple Orchards

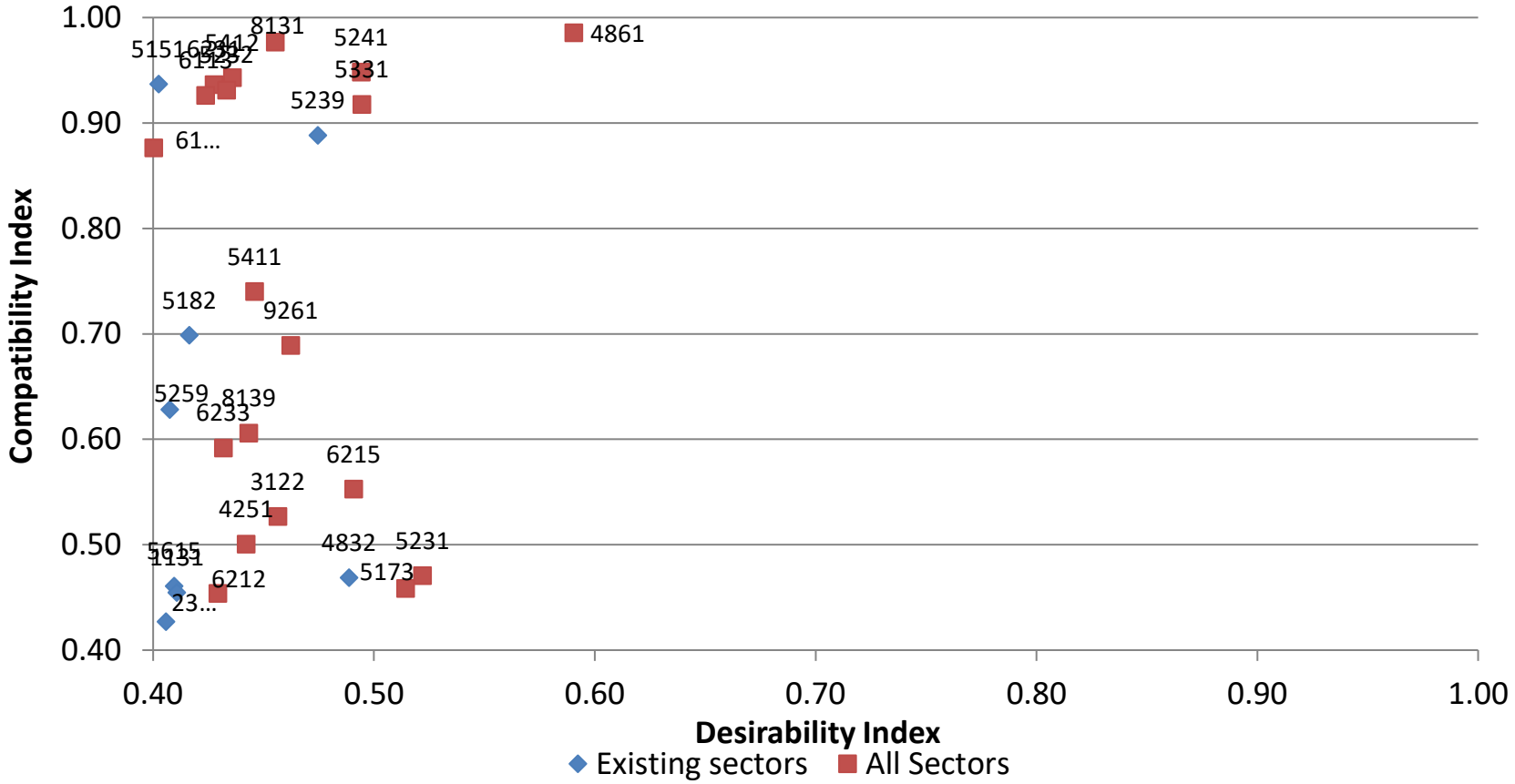
COMPATIBILITY AND DESIRABILITY INDEXES

- Compatibility = community meets industry production requirements
  - Objective measures (assets)
- Desirability = industry meets community goals and priorities
  - Subjective measures (survey ranking)
- Remember ‘C’ before ‘D’



MORA COUNTY, NM – HIGH INDEX NAICS COMPATIBILITY AND DESIRABILITY >.40

Figure 4: Mora County, NM ASAP Results (Zoomed)



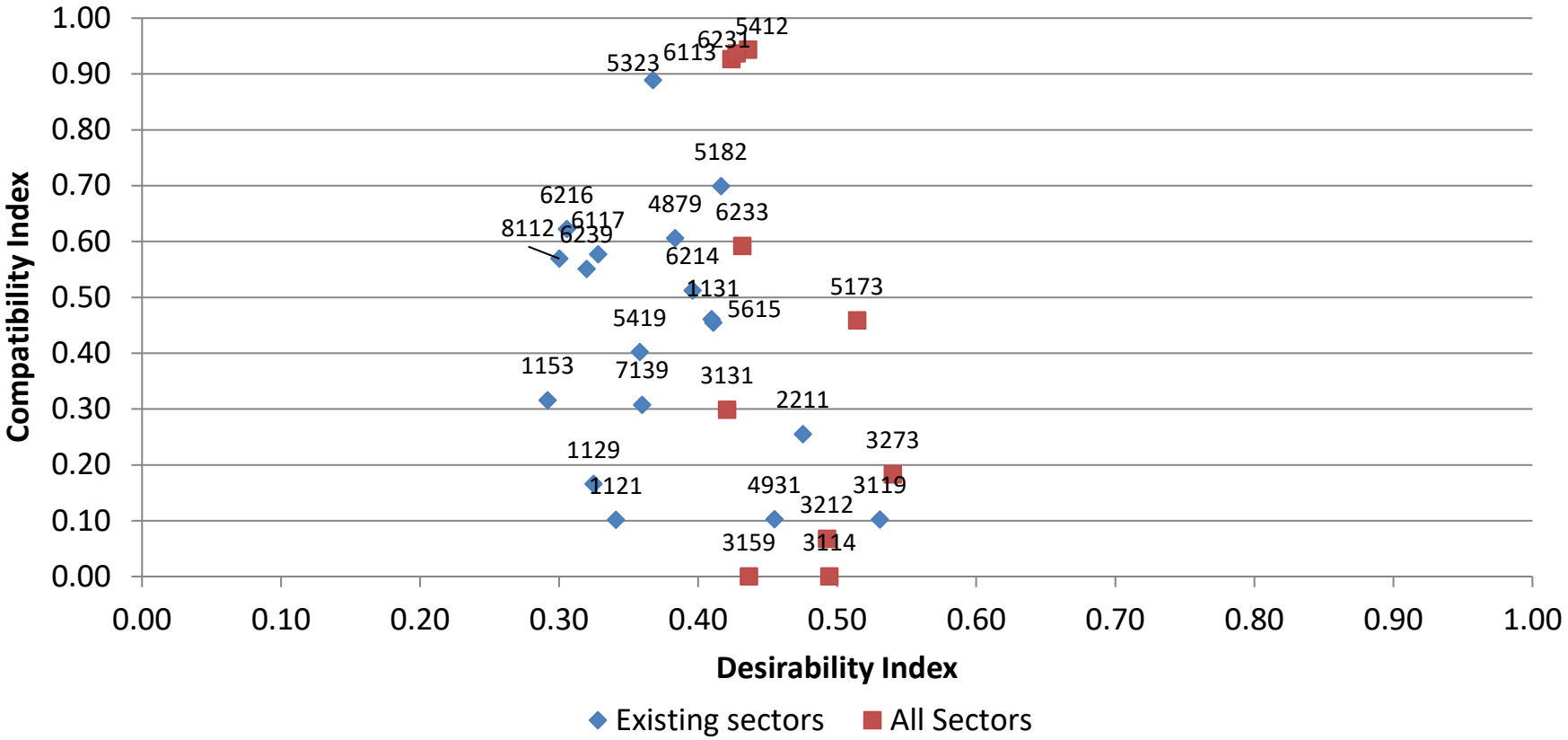
MORA COUNTY, NM– HIGH INDEX 3-DIGIT NAICS COUNT BY INDUSTRY SUB-SECTOR

Table 4: Industries with High Desirability and Compatibility Index Scores (Index > .40)

NAICS3	Description	Count
113	Forest and Logging	1
114	Fishing, Hunting and Trapping	1
115	Support Activities for Agriculture and Forestry	1
311	Food Manufacturing	2
313	Textile Mills	1
315	Apparel Manufacturing	1
321	Wood Product Manufacturing	1
327	Nonmetallic Mineral Product Manufacturing	1
487	Scenic and Sightseeing Transportation	1
488	Support Activities for Transportation	1
493	Warehousing and Storage	1
517	Telecommunications	1
518	Data Processing, Hosting, and Related Services	1
532	Rental and Leasing Services	1
541	Professional, Scientific, and Technical Services	2
561	Administrative and Support Services	1
611	Educational Services	5
621	Ambulatory Health Care Services	2
623	Nursing and Residential Care Facilities	3
811	Repair and Maintenance	1

MORA COUNTY, NM– TARGET INDUSTRIES

Figure 5: Mora County, NM ASAP Results (Targeted)



MORA COUNTY, NM– TARGET INDUSTRIES

NAICS3	Description	Examples
111	Crop Production	Fruit and Nut Tree Farming
112	Animal Production and Aquaculture	Cattle Ranching and Farming
113	Forestry and Logging	Timber Tracts Operations
115	Support Activities for Agriculture and Forestry	Planting Crops
221	Utilities	Solar, Wind and Geothermal
311	Food Manufacturing	Animal Food and Dairy Products
313	Textile Mills	Fiber, Yarn and Fabric Mills
315	Apparel Manufacturing	Apparel Contractors and Tailors
321	Wood Product Manufacturing	Veneer, Plywood and Engineered Products
327	Nonmetallic Mineral Product Manufacturing	Cement and Concrete
487	Scenic and Sightseeing Transportation	Sightseeing Trolleys
493	Warehousing and Storage	Warehousing (excludes self storage)
517	Telecommunications	Satellite and Broadband Services
518	Data Processing, Hosting, and Related Services	Computer Data Storage Services
532	Rental and Leasing Services	Rental Vehicles or Equipment
541	Professional, Scientific, and Technical Services	Accounting, Research and Development
561	Administrative and Support Services	Travel Services
611	Educational Services	Colleges, Universities, Professional Schools
621	Ambulatory Health Care Services	Urgent Care Centers
623	Nursing and Residential Care Facilities	Hospice, Disability and Foster Care
713	Amusement, Gambling, and Recreation Industries	Outdoor Recreation
811	Repair and Maintenance	Computer Repair

22 Industry Sub-Sectors identified for Mora County

MORA COUNTY, NM– TARGET INDUSTRIES

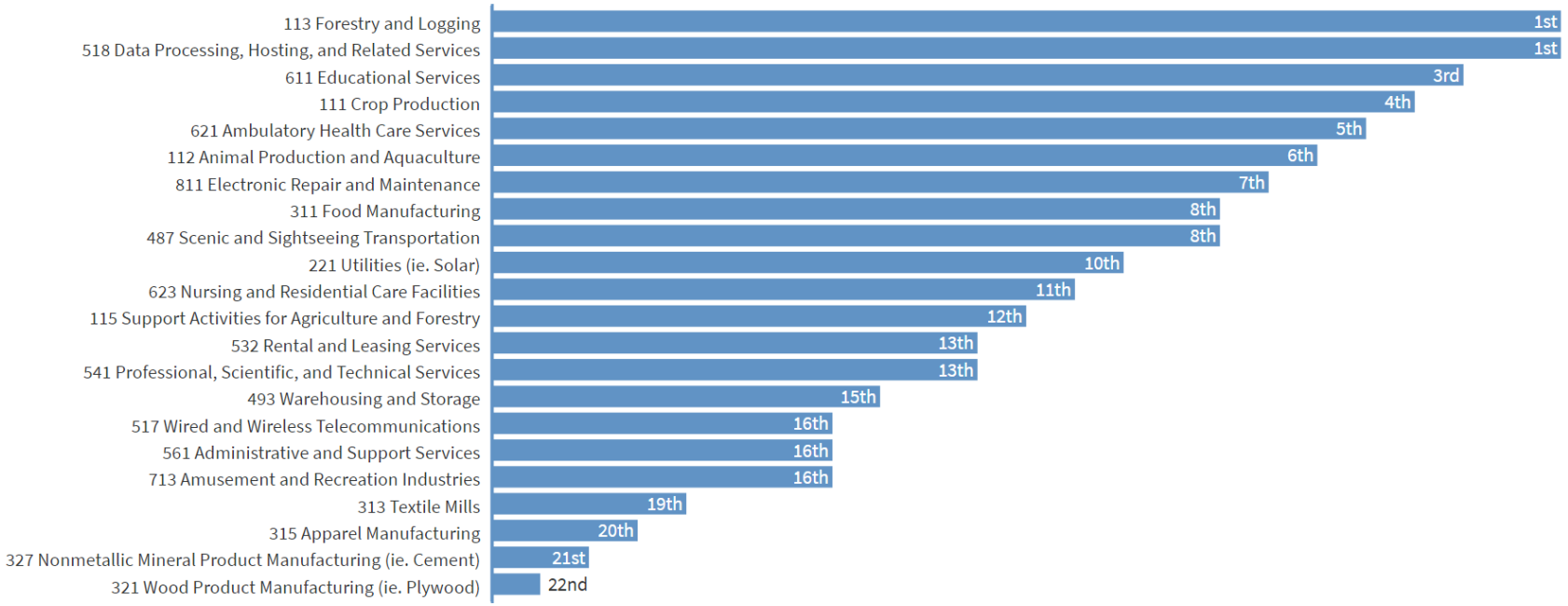
NAICS4	Description	Existing	DI	CI
1121	Cattle Ranching and Farming	X	0.3408	0.1015
1129	Other Animal Production	X	0.3248	0.1659
1131	Timber Tract Operations	X	0.4108	0.4546
1153	Support Activities for Forestry	X	0.2918	0.3156
2211	Electric Power Generation, Transmission and Distribution	X	0.4753	0.2551
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing		0.4944	0.0000
3119	Other Food Manufacturing	X	0.5307	0.1018
3131	Fiber, Yarn, and Thread Mills		0.4209	0.2988
3159	Apparel Accessories and Other Apparel Manufacturing		0.4366	0.0000
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing		0.4926	0.0675
3273	Cement and Concrete Product Manufacturing		0.5400	0.1826
4879	Scenic and Sightseeing Transportation, Other	X	0.3835	0.6060
4931	Warehousing and Storage	X	0.4548	0.1027
5173	Wired and Wireless Telecommunications Carriers		0.5143	0.4584
5182	Data Processing, Hosting, and Related Services	X	0.4164	0.6988
5323	General Rental Centers	X	0.3675	0.8888
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services		0.4359	0.9432
5419	Other Professional, Scientific, and Technical Services	X	0.3581	0.4020
5615	Travel Arrangement and Reservation Services	X	0.4096	0.4606
6113	Colleges, Universities, and Professional Schools		0.4238	0.9264
6117	Educational Support Services	X	0.3280	0.5772
6214	Outpatient Care Centers	X	0.3960	0.5120
6216	Home Health Care Services	X	0.3056	0.6221
6231	Nursing Care Facilities (Skilled Nursing Facilities)		0.4276	0.9366
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the		0.4318	0.5919
6239	Other Residential Care Facilities	X	0.3197	0.5509
7139	Other Amusement and Recreation Industries	X	0.3597	0.3076
8112	Electronic and Precision Equipment Repair and Maintenance	X	0.3002	0.5694

QUESTIONS?

TIME TO RANK THE SECTORS!

DISCUSSION

Mora 3DIG - Rank Target Industries



Poll Everywhere

WHAT'S NEXT?

- Comprehensive Economic Development Strategy (CEDS)
  - NCNMEDD will follow up with participants from the Roadshow meetings to review the draft CEDS
  - Specific section for each county
  - Target industries will be addressed for each county and the region as a whole
- Implementation Strategies in Spring 2021
  - Western Rural Development Center and NCNMEDD will reconvene Roadshow participants to discussion specific strategies for the target industries
  - In person meetings, if possible

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