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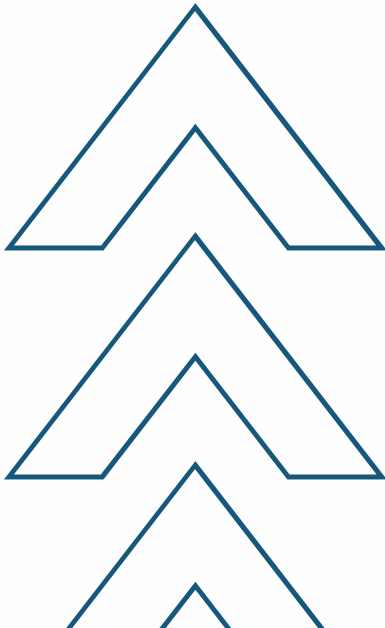
Comprehensive Economic Development Strategy

2024

UPDATE

**Southwest Missouri
Council of Governments**

ECONOMIC DEVELOPMENT
DISTRICT (EDD)





Serving Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney, & Webster Counties

This publication was prepared by Southwest Missouri Council of Governments. The statements, findings, conclusions and recommendations are those of the author(s) and do not necessarily reflect the views of the Economic Development Administration.



BOARD APPROVED AUGUST 28, 2024

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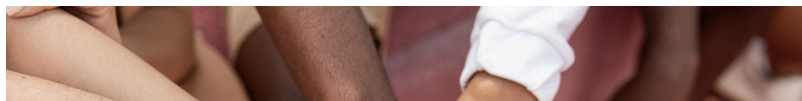
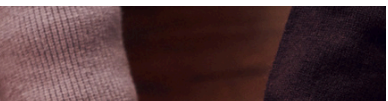
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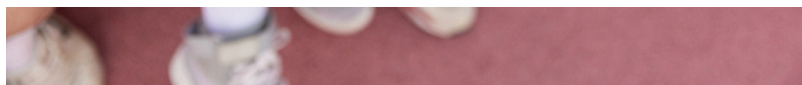
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SUMMARY BACKGROUND



INTRODUCTION

The 2024 Southwest Missouri Comprehensive Economic Development Strategy (CEDS) is an update of the original plan prepared in 1998, which was last updated in 2023 and previously in 2017. The principle of the CEDS is to continue a local, intergovernmental network for promoting regional economic growth, development, and diversity, while collectively bringing together the local public and private sectors in creating an economic strategy to strengthen the regional economies of all 10 counties located in Southwest Missouri. The CEDS presents an analysis of the regional economy as the basis for developing and implementing goals and objectives, investment priorities, and funding sources.

Local elected officials and representatives from the various socio-economic public and private sectors in the region were appointed to participate in and guide the development of the Southwest Missouri CEDS. This document is a result of SMCOG's cooperative regional approach to economic development in Southwest Missouri.

SMCOG, re-established in 1989, is an associate of local governments in southwest Missouri. It was created under the Missouri State and Regional Planning and Community Development Act of 1966 (251.032 – 251.440, RSMo.). In 1998, when the original plan was developed, SMCOG membership included six member counties and 27 cities. Current membership includes all 10 counties in the region (Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney, Webster), as well as 57 cities, 19 villages, 15 associate members, and non-governmental representatives throughout the region. SMCOG administers various Federal, State, and local programs and provides planning expertise and services for the southwest Missouri throughout the region. SMCOG administers various Federal, State, and local programs and provides planning expertise and services for the southwest Missouri region.

The SMCOG Board has officers serving as Chair, Vice-Chair, Secretary, and Treasurer. The SMCOG Board Executive Committee meets every month, while the Board of Directors meets eight times per year. The Board includes 11 non-governmental citizen members, in addition to members from participating governments. The list of participating governments matches the recognized membership shown below.

WHAT IS THE CEDS?

CEDS stands for Comprehensive Economic Development Strategy. It is a strategy document created by a regional planning organization that outlines a plan for promoting economic growth, development, and diversity within a region. The CEDS includes an analysis of the regional economy, identifies goals and objectives, and outlines investment priorities and funding sources.

The document is created through a collaborative process involving public and private sector stakeholders and serves as a guide for regional economic development efforts.

The CEDS is required by the U.S. Economic Development Administration (EDA) for regions seeking EDA funding for economic development projects.

SMCOG MEMBERS

NON-GOVERNMENTAL AND EXECUTIVE COMMITTEE

EXECUTIVE COMMITTEE

Cindy Stephens	Chair	OTC
Allen Kunkel	Vice-Chair	MSU
Todd Wiesehan	Treasurer	Christian County
Steve Childers	Secretary	City of Springfield
Chris Coulter	Past-Chair	Greene County
Wayne Blades	Member	Stone County
Duane Lavery	Member	GRO Marshfield
Jerry Harmon	Member	H2Ozarks
Bill Monday	Member	O'Bannon Bank/City of Buffalo
Howard Fisk	Member	Fisk Transportation
Nathan Piche	Member	Indian Point

NON-GOVERNMENTAL

Bill Monday	President	O'Bannon Bank
J. Howard Fisk	Owner	Fisk Transportation
Jerry Harman	Program Director	H2Ozarks
Matt Morrow	President	Springfield Area Chamber of Commerce
Alice Wingo	VP of Regional Advancement	Community Foundation of the Ozarks
Janice Piper	I & A Director	SeniorAge
Allen Kunkel	Associate VP Economic Development, Director of Jordan Valley Innovation Center	Missouri State University
Yolanda Lorge	President	Grupo Latinoamericano
Devin Fisher-Sonnenfelt	Economic Development & Key Accounts	White River Valley Electric Cooperative
Cindy Stephens	Director of Technical Innovation	Ozarks Technical Community College
Jonas Arjes	Executive Director	Taney County Partnership
Michelle Garand	VP of Affordable Housing & Homeless Prevention	Community Partnership of the Ozarks

**SMCOG members and associates are accurate as of July, 2024*

SMCOG MEMBERS

REPRESENTING JURISDICTIONS

BARRY COUNTY

Village of Arrow Point
 City of Butterfield
 City of Cassville
 City of Chain-O-Lakes
 City of Emerald Beach
 City of Exeter
 City of Monett
 City of Purdy
 City of Washburn
 City of Wheaton

CHRISTIAN COUNTY

City of Billings
 City of Clever
 City of Fremont Hills
 City of Highlandville
 City of Nixa
 City of Ozark
 City of Saddlebrooke
 City of Sparta

DADE COUNTY

Village of Arcola
 City of Dadeville
 City of Greenfield
 City of Lockwood
 City of South Greenfield

DALLAS COUNTY

City of Buffalo
 City of Louisburg

GREENE COUNTY

City of Ash Grove
 City of Battlefield
 City of Fair Grove
 City of Republic
 City of Rogersville
 City of Springfield
 City of Strafford
 City of Walnut Grove
 City of Willard

LAWRENCE COUNTY

City of Aurora
 City of Freistatt
 City of Halltown
 City of Hoberg
 City of Marionville
 City of Miller
 City of Mount Vernon
 City of Pierce City
 City of Stotts City
 City of Verona

POLK COUNTY

Village of Aldrich
 City of Bolivar
 City of Fair Play
 City of Flemington
 City of Halfway
 City of Humansville
 City of Morrisville

STONE COUNTY

City of Branson West
 Village of Coney Island
 City of Crane
 City of Galena
 City of Hurley
 City of Kimberling City
 City of McCord Bend
 City of Reeds Spring
 Village of Blue Eye
 Village of Indian Point

TANEY COUNTY

City of Branson
 City of Bull Creek
 City of Forsyth
 City of Hollister
 City of Kirbyville
 City of Rockaway Beach
 Village of Taneyville

WEBSTER COUNTY

City of Diggins
 City of Fordland
 City of Marshfield
 City of Niangua
 City of Seymour

**SMCOG members and associates are accurate as of July, 2024*

SMCOG MEMBERS

REPRESENTING EX-OFFICIO AND ASSOCIATE

EX-OFFICIO	TITLE	DISTRICT	PARTY
Curtis Trent	Sen	20	R
Sandy Crawford	Sen	28	R
Mike Moon	Sen	29	R
Lincoln Hough	Sen	30	R
Karla Eslinger	Sen	33	R
Ann Kelley	Rep	127	R
Mike Stephens	Rep	128	R
John Black	Rep	129	R
Bishop Davidson	Rep	130	R
Bill Owen	Rep	131	R
Crystal Quade	Rep	132	D
Melanie Stinnett	Rep	133	R
Alex Riley	Rep	134	R
Elizabeth (Betsy) Fogle	Rep	135	D
Stephanie Hein	Rep	136	D
Darin Chappell	Rep	137	R
Brad Hudson	Rep	138	R
Bob Titus	Rep	139	R
Jamie Gragg	Rep	140	R
Hannah Kelly	Rep	141	R
Travis Smith	Rep	155	R
Brian Seitz	Rep	156	R
Mitchell Boggs	Rep	157	R
Scott Cupps	Rep	158	R

ASSOCIATE

City Utilities	Esterly, Schneider Architects
H2Ozarks	Nesbitt Construction
Allgeier, Martin and Associates	StoneBridge Village POA
TREKK Design Group	Crawford, Murphy and Tilly, Inc
Toth & Associates	Liberty Utilities
Olsson	
OWN	
Paragon Architecture LLC	
OTC - Workforce Development	
Bartlett & West Inc.	
GRO Marshfield	
Springfield CVB	
NFORM Architecture	

**SMCOG members and associates are accurate as of July, 2024*



SMCOG ADMINISTRATION

SMCOG has a Cooperative Agreement with the Center for Resource Planning and Management at Missouri State University to provide professional and administrative services for the Council. Under the terms of this Agreement, the University provides staffing, facilities, administrative and operational services for SMCOG.

The Center's full-time staff includes:

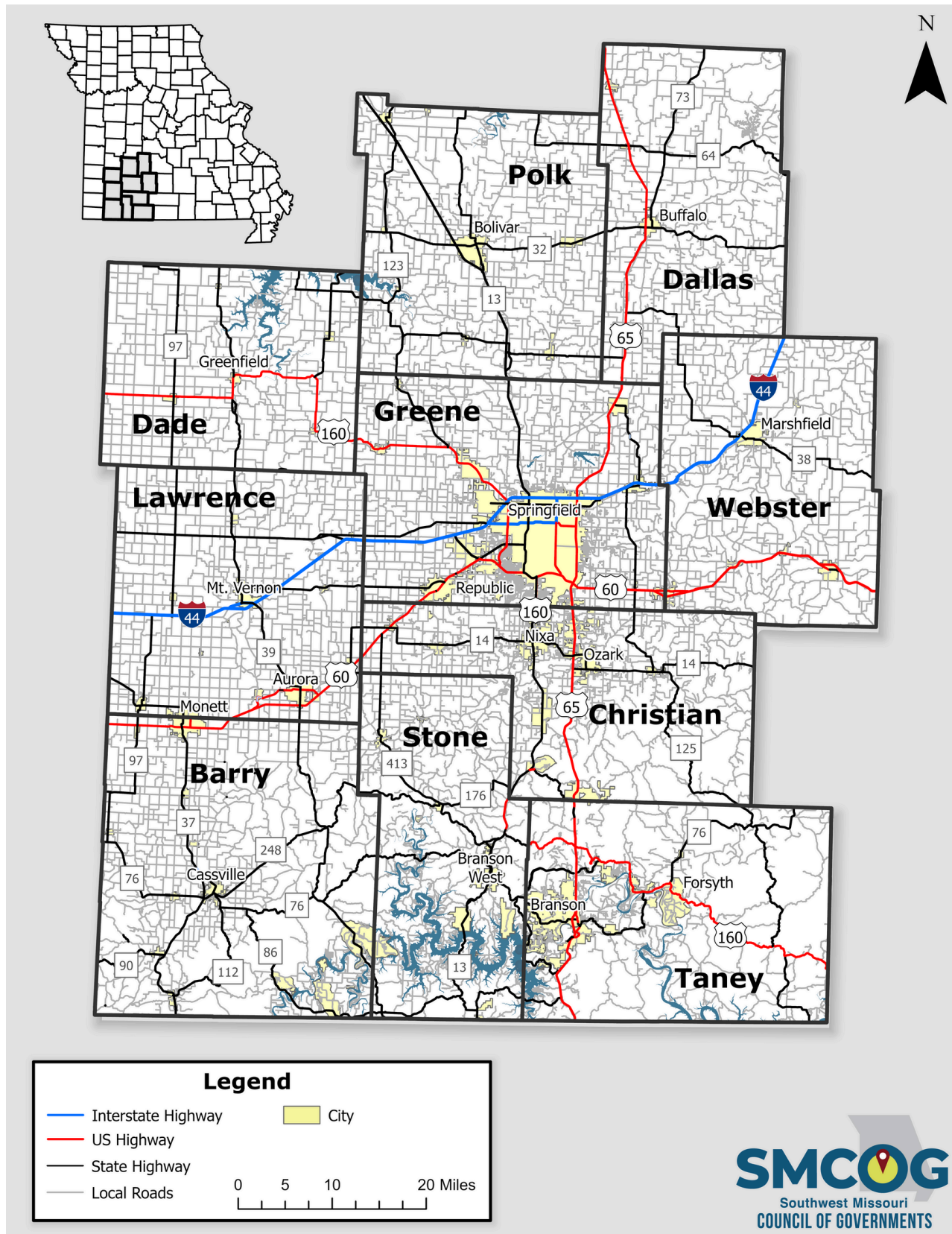
- Jason Ray, AICP, Director
- Jane Hood, EDFP, Associate Director
- Jake Phillips, Associate Planner
- Aishwarya Shrestha, AICP, Associate Planner
- Thomas Cunningham, Associate Planner
- Kelsi Burton, Grants Administrator
- Garrett Colony, Grants Administrator
- Krissy Dickens, Fiscal Officer
- Courtney Pinkham, CAP, Administrative Assistant
- Michael Kohler, Part-Time Planner

The Center also employs student interns and graduate students on a part-time basis to assist with CEDS activities. SMCOG engages the public through regular SMCOG meetings, involvement with other entities, and routine communications, as outlined below:

- Regular SMCOG meetings include the Board of Directors meetings, Transportation Advisory Committee meetings, and several CEDS committee meetings. All of these meetings are open to the public with a posted notice and have a wide representation of the communities and varied interests of the region.
- SMCOG staff routinely attends and participates in local meetings for partner and other local organizations, such as the Workforce Investment Board, the Springfield Regional Economic Partnership, the Ozarks Transportation Organization, and the Regional Homeland Security Oversight Committee, as well as chambers of commerce and city council meetings, among others. These meetings are crucial to staff's understanding and advancement of regional goals and priorities.
- SMCOG recognizes that communication is integral to the success of the region. A monthly newsletter, complete with federal/state/private funding and grant opportunities as well as regional updates, is sent to municipalities, along with updates to SMCOG's website.

PLANNING AREA

The U.S. Economic Development Administration has designated all 10 counties within the SMCOG geographic jurisdiction as the Southwest Missouri Economic Development District. The planning area includes Barry, Christian, Dade, Dallas, Greene, Polk, Lawrence, Stone, Taney, and Webster counties, as well as 28 cities.



PLANNING PROCESS

The planning process was instrumental to the outcome for the CEDS. The CEDS planning process utilized the knowledge from a CEDS committee that reflects the region's diverse economy and population, technical skills of SMCOG staff, and public input gathered via survey and public forum. The CEDS planning process relies heavily on local knowledge and input to provide guidance for future economic development.

Overall, the CEDS process included CEDS committee meetings, public outreach surveys, and board meetings.

Furthermore, collaboration with key economic development partners is integral to the final implementation of the CEDS.

1 TEAM

SMCOG staff organized meetings and facilitated the creating of the CEDS Committee to provide key insights for the region.



2 VISION

The team performed regional analysis, public survey, and developed goals to achieve the region's vision.



3 PRIORITIZATION

The CEDS team prioritized the goals and objectives and list projects and plans.



4 DEVELOP ACTION PLAN

Strategies established and plan development.



5 DRAFT PLAN

The plan was drafted by SMCOG staff, who subsequently shared the results of their findings with the committee and Board.



6 SUBMIT TO EDA

Plan was published for a 30 public review period, approved by the committee, SMCOG Board, and submitted to EDA.



7 IMPLEMENTATION

The SMCOG EDD, members, partners and organizations work together to implement the CEDS plan.



TEAM CEDS

Citizens, board members, and public officials were encouraged to provide input from the region's various socio-economic sectors through a community survey. In addition to CEDS Committee members, other SMCOG board members, agency representatives, public officials, and interested citizens were encouraged to attend CEDS Committee meetings and contribute to the preparation of the CEDS. Community members included representatives from the Springfield Regional Economic Partnership (SREP), chambers of commerce in the region, planning staff from several cities throughout the area, non-profit organization representatives, and local citizens. The Committee worked with community members, SMCOG members, and partner agencies such as Missouri Department of Transportation, Missouri Department of Natural Resources, USDA Rural Development, Missouri Department of Economic Development, and State and national representatives of the region. SMCOG also collaborates with SREP working with outlying chambers of commerce to focus on fostering economic development within the 10-county SMCOG region.

Under the guidance of the SMCOG Board of Directors, the CEDS Committee and staff held working meetings to discuss regional economic development issues and to formulate economic development strategies for the CEDS. Staff was primarily responsible for research, data collection, and analysis of existing conditions, characteristics, and resources of the CEDS planning area. The work of the CEDS Committee focused on determining the goals, objectives, and action plan elements of the CEDS. In addition to feedback comments from the SMCOG Board, staff met with SMCOG's Executive Committee to further review and edit the CEDS document prior to final presentation to the SMCOG Board of Directors.

Both the SMCOG Board and staff are invested in the economic health of the region. SMCOG is governed by an experienced Board of Directors with strong leadership skills. The staff also brings extensive experience in community and regional planning and development. In 2016, Jason Ray replaced Diane May as the Executive Director and oversaw the 2016 CEDS SMCOG update while continuing to serve the region with Jane Hood as the Associate Director. SMCOG administration continues leveraging their vast experience in regional planning and economic development and will provide direction for the day-to-day implementation of CEDS. Additional staff include Jake Phillips, Associate Planner; Thomas Cunningham, Planner; Michael Kohler, Part-time Planner; John Myers, Intern; and Christopher Lynn, Intern, who bring over 35 years of economic development experience to the region. Missouri State University administers SMCOG, forming a partnership that combines robust leadership capabilities and abundant resources for effective project implementation.

The CEDS Committee members, on the following page, represent the following interests: regional chambers of commerce, electric and utility companies, the arts, contractors' associations, educational institutions, county commissions, municipalities, and workforce development boards.

CEDS COMMITTEE

MEMBER	POSITION	ORGANIZATION
Allen Kunkel	Vice President Research and Economic Development	Missouri State University
Callie Linville	Business Relations Specialist	City Utilities of Springfield
Chrystal Irons	Director	MO Small Business Development Center
David Taylor	Corporate VP of Expansion	CoxHealth
Duane Lavery	Executive Director	GroMarshfield
Jesse Reed	VP of Commercial Lending	OakStar Bank, Sunshine Branch
Jonas Arjes	Executive Director	Taney County Partnership
Sheila Thomas	Executive Director	Table Rock Lake Chamber of Commerce
Sherri Rhuems	Executive Director	Southwest Region WIB
Sherry Coker	Executive Director	Coker Consulting
Theresa Sampaio	Regional Engagement	MO DED
Devin Sonnenfelt	Economic Development Specialist	White River Electric
Rusty Worley	President & CEO	Downtown Springfield Association
Amanda Alexander	Owner	Old World Realty LLC
Avery Parrish	Corporate Art & First Friday Art Walk Coordinator	Springfield Regional Arts Council
Hollie Elliot	Executive Director	Dallas County Economic Development Group
Steve Childers	City Administrator	City of Springfield
Megan Herzog	CEO	Springfield Contractors Association
Tyler Barnes	Contracts and Procurement Specialist	Toth & Associates
Michael Eaton	CEO	Missouri Association of Manufacturers
John Black	MO District 129	Missouri House of Representatives
Matt Morrow	President & CEO	Springfield Area Chamber of Commerce
Howard Fisk	Owner	Fisk Limousine
Jeff Seifried	Interim Senior Project Manager	Springfield Area Chamber of Commerce
Danny Perches	Assistant Director of Economic Vitality	City of Springfield
Emily Denniston	Director of Community Engagement and Operations	efactory
Olivia Hough	Regulatory Strategist	City Utilities
Andrea Sitzes	Market Executive, VP	Arvest Bank
Brad Testerman	President & CEO	Bolivar & Polk County Economic Development Partnership
David Taylor	Expert Consultant	Healthcare Industry

**Representative of 2023 and 2024 CEDS Committees.*

KEY PARTNERS

ECONOMIC DEVELOPMENT PARTNERS

SMCOG recognizes that successful economic development of the region cannot be achieved through a single organization or entity. Externally, SMCOG works closely with state and federal governments, municipal and county governments within the region, chambers of commerce, educational institutions, and other local economic development organizations.

State and federal agencies provide oversight and assistance for local projects via grant and loan programs, in addition to a wealth of information and data used in regional analyses. These agencies include, but are not limited to:

- U.S. Economic Development Administration
- U.S. Department of Agriculture
- U.S. Department of Housing and Urban Development
- U.S. Department of Labor
- U.S. Department of Energy
- U.S. Department of Transportation
- U.S. Census Bureau
- Small Business Administration
- Environmental Protection Agency
- Missouri Department of Economic Development
- Missouri Department of Natural Resources
- Missouri Department of Conservation

Municipal and county governments provide information and input directly from citizens. This information guides the decision-making process to align with public needs and wishes, as well as informing SMCOG on the socio-economic status of the region.

Non-profit community and economic development organizations are vital to communicating the sentiments of local businesses, industries, and residents. The region's key community developers with which SMCOG closely works include, but are not limited to:

- Springfield Area Chamber of Commerce
- Missouri Chamber of Commerce
- Missouri Economic Development Council
- Ozarks Area Community Action Corporation
- Leaders for Ozarks Region Involvement (LORE)
- Springfield Regional Economic Partnership
- Show Me Christian County
- Taney County Partnership

Educational institutions are critical components of the region's talent development pipeline, major sources of employment, and drivers of economic activity through facility expansion and renovation projects. Economic developers and municipalities have a great opportunity to utilize these important resources and capture their direct economic impacts. Public and private school systems take significant measures to develop a diverse range of skills in students, including partnering with businesses to create apprenticeship programs throughout the region. Higher education has also play a vital role in providing industry-specific assistance in building new technologies and advancing innovation across the region.

EXECUTIVE SUMMARY

The Southwest Missouri Council of Governments (SMCOG) Economic Development District oversees a diverse and growing economy that it has fostered from humble beginnings. Transitioning from its 19th-century agricultural roots, the region is now a major hub for healthcare, education, and manufacturing in Missouri. Thanks to its strong economic vision and the diligent work of community leaders, Southwest Missouri is poised to capitalize on nearly any given economic opportunity that presents itself, swiftly adapting to changes in the nation's economy.

The region's strongest industries—healthcare and education—employ nearly half of the total workforce. Additionally, a strong transportation sector strengthens the area's connection to outside markets, facilitating widespread national and international commerce. The resources and natural beauty of the Ozark landscape attracts more than a million visitors yearly, further cementing the tourism industry's role in the regional economy. The region is now engaging and embracing the growing tech industry by investing in commercial infrastructure and strengthening collaboration between industry leaders, community developers, and innovators.

While the region has much working in its favor, there are limiting factors to this growth that must be overcome. Access to essential industrial and commercial utilities, such as natural gas and broadband, is lacking in many rural parts of the region, stifling industry growth as it persists. Employers frequently struggle to find qualified, skilled workers to meet their operations' labor needs, a byproduct of mismatched workforce development efforts and a declining talent pool. Families and single parents struggle to find reliable and affordable licensed childcare, without which their workforce participation is severely limited. A lack of attainable and affordable housing hinders in-migration of labor and limits the economic activity of residents. Challenges such as these stand in the way of the region's overall vision of a prosperous, equitable, and resilient economy.



EXECUTIVE SUMMARY

CONTINUED

Effective communication and collaboration between economic and community development groups, municipal governments, local industry leaders, and advocacy groups can lead to a better understanding of the region's challenges and pave the way towards achieving collective goals. Utilizing the regional data and understanding the inherent strengths and weaknesses of the region, a committee of key economic development partners representing a range of industries and areas within SMCOG developed the regional Comprehensive Economic Development Strategy (CEDS). This strategy outlines the regional goals and objectives for the SMCOG region. These goals were developed as a guide for economic growth throughout the region and are as follows:

- 1 Deliver programs and resources that enhance the health, safety, and overall well-being of residents of all socioeconomic backgrounds.**
- 2 Develop an affordable and attainable housing market capable of accommodating current residents and an incoming labor force.**
- 3 Sustain a vibrant and active sense of place across the region attractive to current and prospective residents as well as visitors.**
- 4 Assemble a knowledgeable and skilled workforce capable of meeting the needs of emerging businesses and industries.**
- 5 Maintain a diversified industry portfolio consisting of small-businesses and enterprises from within and outside the region.**
- 6 Promote initiatives to elevate local investment in evolving, high-growth industry sectors.**
- 7 Bolster resilience to environmental hazards and economic shocks.**
- 8 Develop and uphold a transportation network that affectively meets the needs of residents, businesses, and visitors.**
- 9 Guarantee the capacity of public infrastructure meets the industrial, commercial, and residential demands of projected economic expansion.**

SUMMARY BACKGROUND HISTORY

Southwest Missouri's history is marked by hardships and resilience, beginning with the Osage people who thrived off its rich forests and streams for generations. The arrival of French voyageurs in 1785 initiated a period of European incursion. In 1808, the Osage ceded their lands in Missouri and Northern Arkansas through a treaty with the United States Government.

After the War of 1812, the Kickapoo Tribe established a town where Springfield now stands, home to about 500 people. By the 1820s, the Delaware Tribe also settled in the area, drawn by promises of land from the government. However, in 1830, the federal government forcibly removed all Native Americans from Southwest Missouri, paving the way for an influx of German, Irish, and Scottish settlers.

The 1838 Trail of Tears saw the Cherokee pass through the region, a somber testament to the forced migrations of indigenous peoples. As European settlements grew, the local economy thrived on agriculture and light industries like button-making and logging.

The Civil War brought further turmoil. Southwest Missouri, largely under Confederate control, witnessed significant conflict, notably the Battle of Wilson's Creek in 1861. Union forces traveled west from St. Louis, encountering southern troops near Springfield. The ensuing battle resulted in a loss for the Union and high casualties on both sides, including the first death of a Union General in combat. The region remained a battleground for years afterwards due to its proximity to Confederate Arkansas.

Post-war recovery and prosperity were driven by the 1870 construction of the St. Louis - San Francisco Railway, connecting Southwest Missouri to industries in the east and establishing Springfield as the region's industrial hub. The commissioning of U.S. Highway Route 66 in 1926 established a road, spanning from Chicago to Los Angeles, that ran straight through the heart of business districts and town centers across Southwest Missouri. Route 66 established the region's culture of celebrating the sense of freedom and exploration granted by the automobile.

The subsequent construction of I-44 in 1956 further integrated Southwest Missouri into the national transportation network, boosting commerce and tourism to major cities like Springfield, however, to the detriment of smaller towns not along its path. Because of I-44, the region has become a major hub for multimodal freight transportation, cementing its place in the nation's supply chain. Today, Southwest Missouri's rich history and ongoing connectivity have fostered a unique culture that honors the natural beauty of the Ozarks and the diverse people who have shaped the region.



DEMOGRAPHICS

According to the 2020 Decennial Census, the Southwest Missouri Council of Governments region population was 642,678 people. The overall population growth from 2010 to 2020 was 6.63%, an increase of 39,975 people. This growth is significantly less than the previous decade (2000 to 2010), which had an increase of 17.9%. This decline follows similar trends since the 1990s, which had an increase of 25.7%.

The recent decline in growth could be due to COVID-19 and the economic issues that followed; however, several counties have experienced a decline in population that have historically seen positive growth. It is important to note that there is a lot of intra-regional variance, which is expected with a region as large and diverse as SMOG's. The population distribution across all ten counties can be seen in figure below.

Following previous trends, a majority of the region's growth is in the northern part around the Springfield metropolitan area. This is due to the rapid growth of Nixa, Ozark, and other surrounding towns. Taney County also experienced notable growth. This is most likely due to the expansion and development of the City of Branson over the last decade.

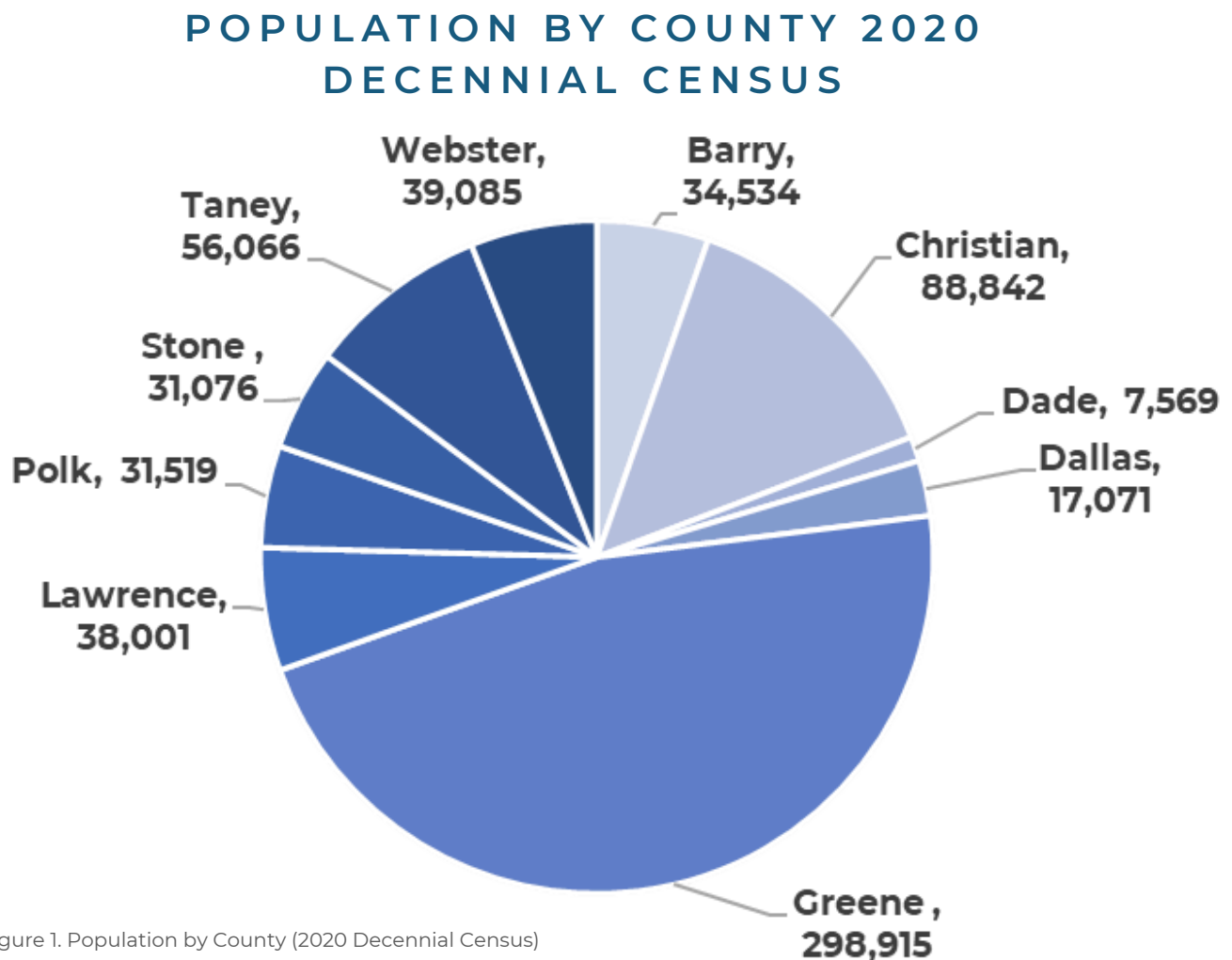


Figure 1. Population by County (2020 Decennial Census)

URBAN & RURAL POPULATION

Figure 2 shows the distribution of population living in rural and urban areas as reported by the 2020 decennial census. Despite a prevalence of counties with a majority rural population, the region remains a mostly urbanized area. 60% of the region’s population lives in an urban area, the greatest portion of which belongs to Greene County and the core of the Springfield Metro Area.

The trend of urbanization is amplified when looking at the city population and growth trends. While many counties are experiencing a decline in their growth rate, many cities are experiencing large growth and rapid urbanization. The cities currently experiencing the most growth are Clever in Christian County, Republic in Greene County, Fremont Hills in Christian County, and Rogersville in Webster County.

The SMCOG region continues to be one of the fastest-growing areas, as it has been in the past. In fact, when compared to the surrounding states, the SMCOG region is still experiencing faster growth, indicating that it is more attractive than the neighboring regions. In the southern portion of the region, Taney County is still seeing growth due to the immigration to Branson. However, Stone County and other surrounding counties have seen a large decrease in growth. Over the last decade, Taney County experienced an 8.5% increase in population, while Stone County experienced a -3.5% decrease.

POPULATION DISTRIBUTION BY COUNTY

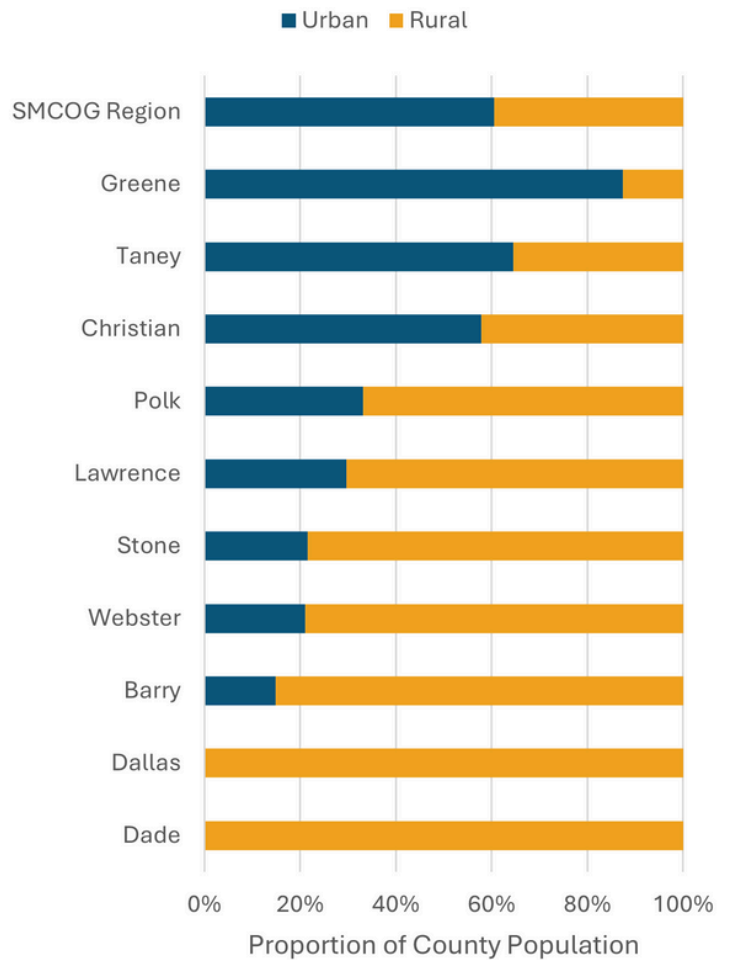


Figure 2. Urban and Rural Population Distribution (Decennial Census, 2020)



RACE & ETHNICITY

Ethnic and racial diversity has seen a substantial increase between 2010 and 2020, especially among the Hispanic and Latino community and individuals of two or more races. Figure 3 shows the various racial and ethnic groups categorized by the US Census Bureau and their respective change in growth or decline in population. While the SMOG region remains largely racially homogenous, 90% of the population being white according to most recent data from the American Community Survey, the growth of minority communities is a sign that the region’s economic opportunity is attracting a diverse wave of in-migration.

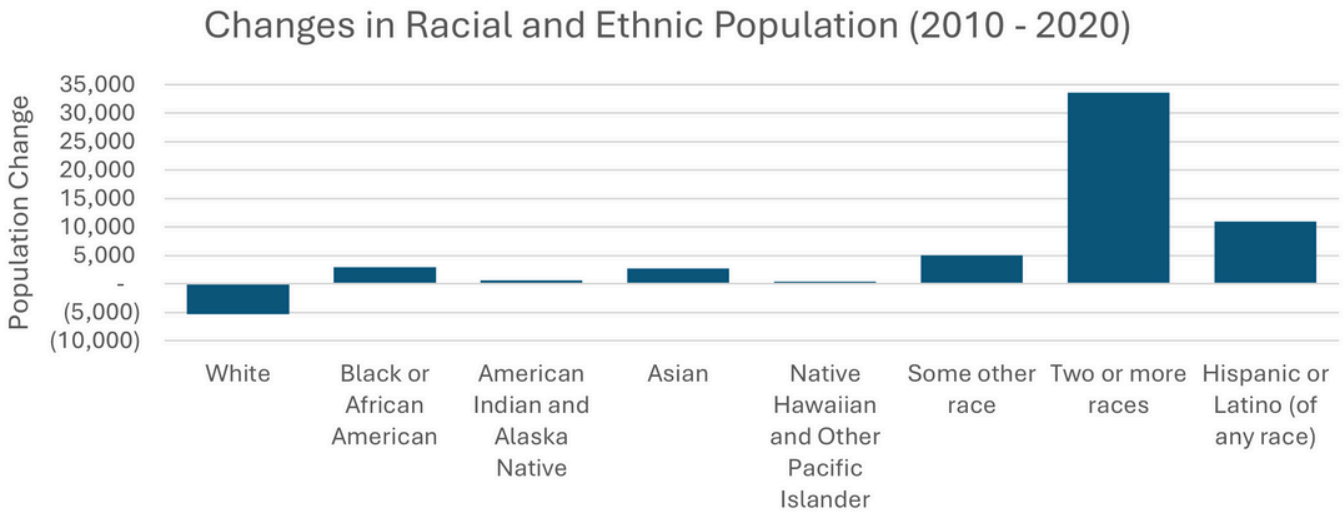


Figure 3. Change in Racial and Ethnic Population (Decennial Census, 2010 & 2020)

While race is a significant factor in the region’s societal fabric, the languages spoken by residents also play a crucial role in shaping their social interactions and opportunities. Of the languages other than English spoken in the region, Spanish remains the most common, testament to the in-migration of individuals from Latin American countries. Of the region’s population, specifically those five years and older, 2.5% speak Spanish either as a secondary or primary language. The largest population of Spanish speakers belongs to Greene County, with 6,700 speakers, while Barry County has the highest proportion with over 6% of their population above five being Spanish speakers. According to data from 2022, 1.9% of the region’s population report being able to speak English less than “very well,” an indicator that some individuals may have a difficulty, among other things, navigating the region’s public resources or finding employment where English is the primary language spoken.

AGE AND GENDER

Southwest Missouri is experiencing the effects of an aging population, a nationwide trend resulting from the Baby Boomer Generation approaching their sixties and seventies. With the individuals 65 years and older accounting for 16% of the region's total population in 2022, the region must consider the implications, economic and demographic, of a large section of the population approaching retirement age. An aging population can increase strain healthcare infrastructure, diminish the labor pool, and potentially burden social welfare programs such as Medicare and social security.

To mitigate the effects of an aging population, the focus should be on retaining college graduates within the region. The presence of multiple colleges and universities has attracted a large population 20 to 24 years of age, as seen in figure 4, but keeping them in the region after graduation has consistently posed a challenge.

Gender distribution across the region is fairly balanced, with almost equal numbers of males and females in most age groups. Discrepancies begin to emerge as the population ages, possibly due to women having a traditionally longer lifespan compared to men.

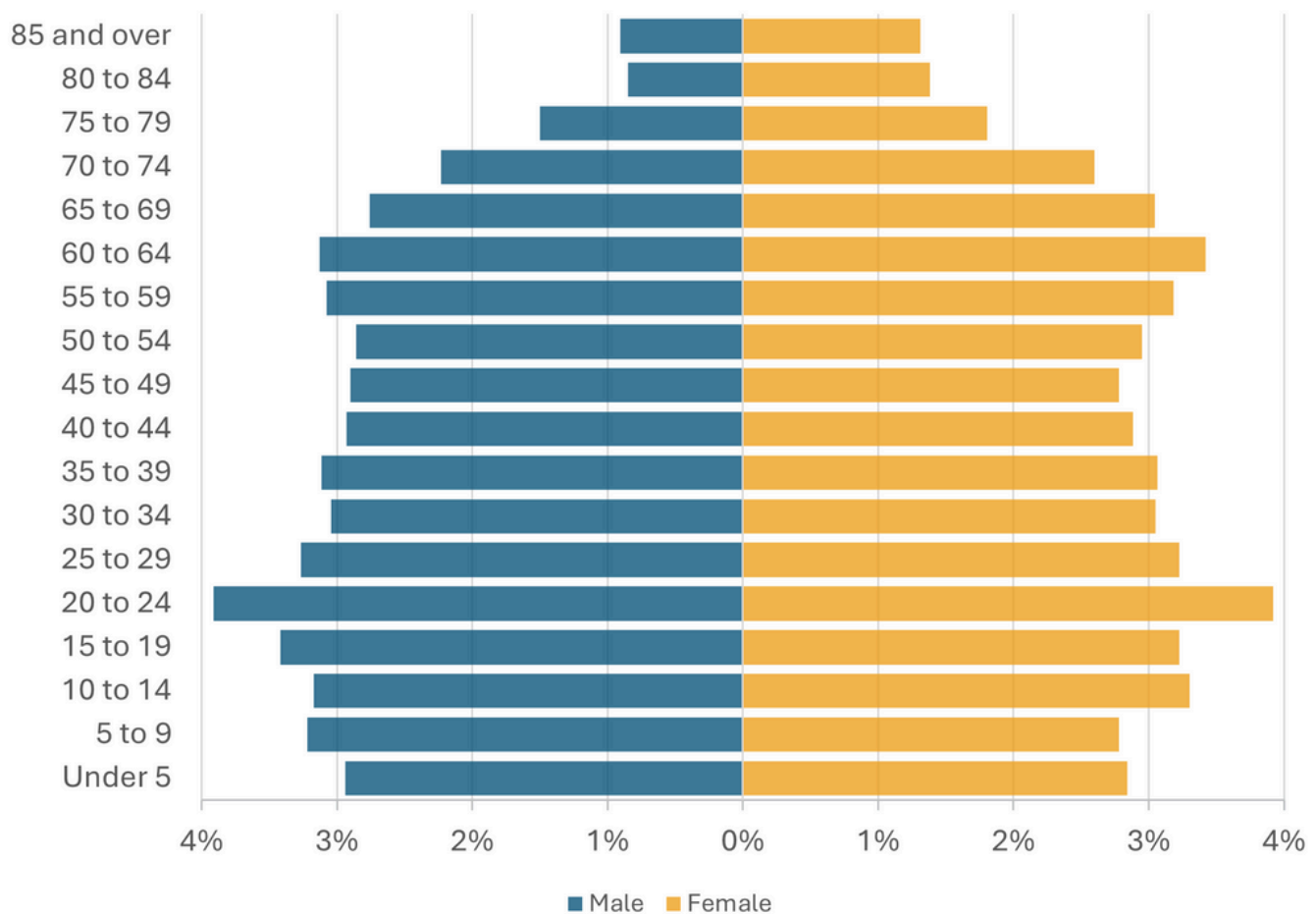


Figure 4. Population Pyramid (American Community Survey, 2022)

HOUSING SUPPLY

The US Census Bureau reports that there are 302,740 housing units across the 10-county region, as of 2023. Whether this housing inventory is adequate to meet the need of some 640,000 residents is another story as housing supply across the nation, state, and, presumably, region struggles to keep up with the demand. The online real estate marketplace Zillow publishes data on the number of housing units listed for sale across all platforms within metropolitan areas. Figure 5 shows a time series of listings for sale within the Springfield Metropolitan and Branson Micropolitan Areas, both demonstrating a general downward trend as the market gets tightens.

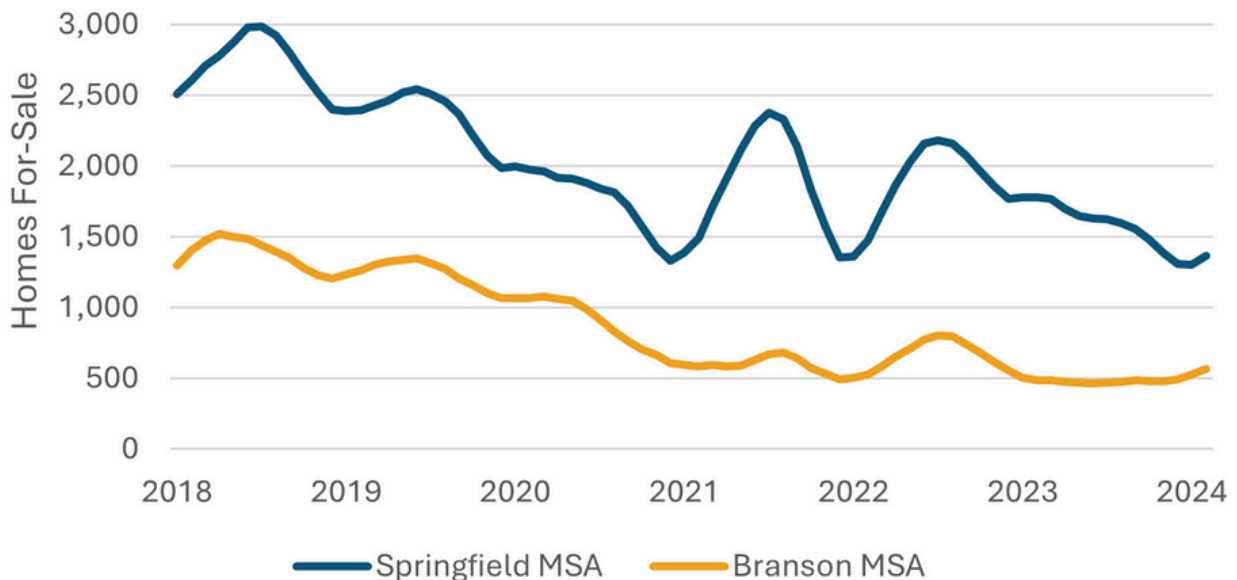


Figure 5. Homes For Sale (Zillow, 2024)

Global supply chain issues resulting from the COVID-19 pandemic have recently impeded developers' ability to construct housing. According to the Department of Housing and Urban Development (HUD), the level of new residential construction in the Midwest has been on the decline since hitting a 15-year peak in 2022, figure 6 demonstrates this decline following a quick recovery from the pandemic shutdowns.

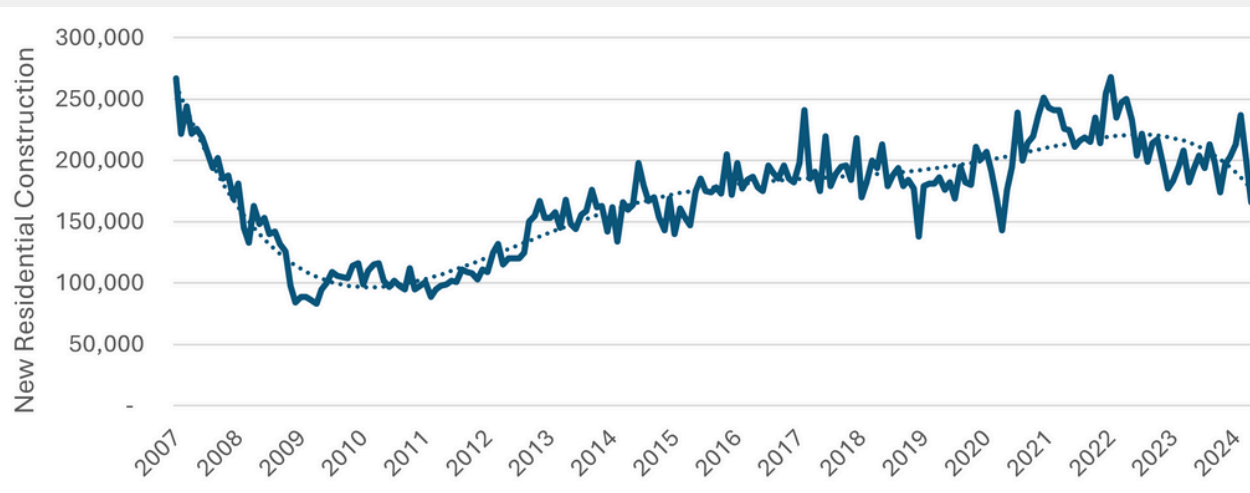


Figure 6. New Residential Construction, Midwest (Zillow, 2024)

Another method of tracking housing supply and construction is through the permits issued for the construction of residential buildings. Figure 7 demonstrates a spike in the granting of permits throughout 2020 and 2021, the majority of which are for single-family homes. Depending on the type of units being constructed and the availability of supplies and labor, units granted permits can be expected to be completed in a time frame ranging from just under a year to nearly two years.

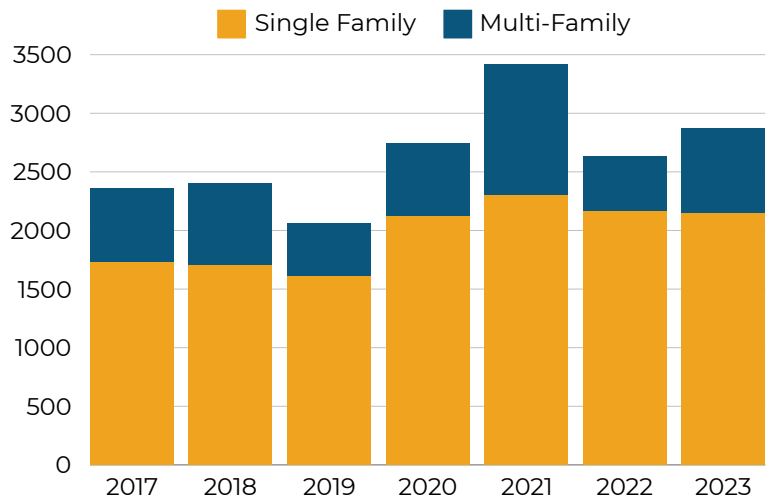


Figure 7. Housing Permits Granted (HUD, 2024)

DEMAND

Demand for housing can be measured in several ways, one of which is measuring the prevalence of vacant housing units in the region. At times when demand for housing is high, vacant housing decreases as more units become occupied by tenants and owners. Figure 8 shows the decline in vacant housing units across the SMCOG region, corresponding with a drop in vacancy across the state and country. Vacancy has been on a steady decline for several years, indicating a steadily shrinking supply of homes ready to be moved into.

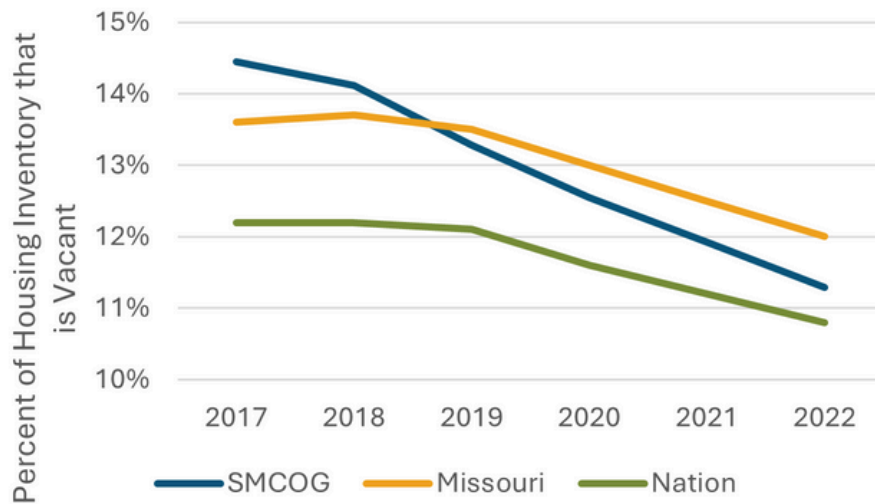


Figure 8. Vacant Housing Units (American Community Survey, 2017-2022)

Housing demand is also reflected in the sales of homes, specifically the frequency at which they are sold and the price for which they are sold. Zillow publishes data on homes and apartments sold and rented across a given region’s housing market. One metric such data informs is their market heat index, shown in Figure 9, a formula that is designed to capture the balance of supply and demand in the market, a higher number signifying market conditions favorable to sellers. Zillow’s assessment of Springfield and Branson’s metro area housing market. Home sellers had a distinct advantage over buyers throughout the years during and immediately following the COVID-19 pandemic, but this advantage has since leveled off to pre-pandemic levels.

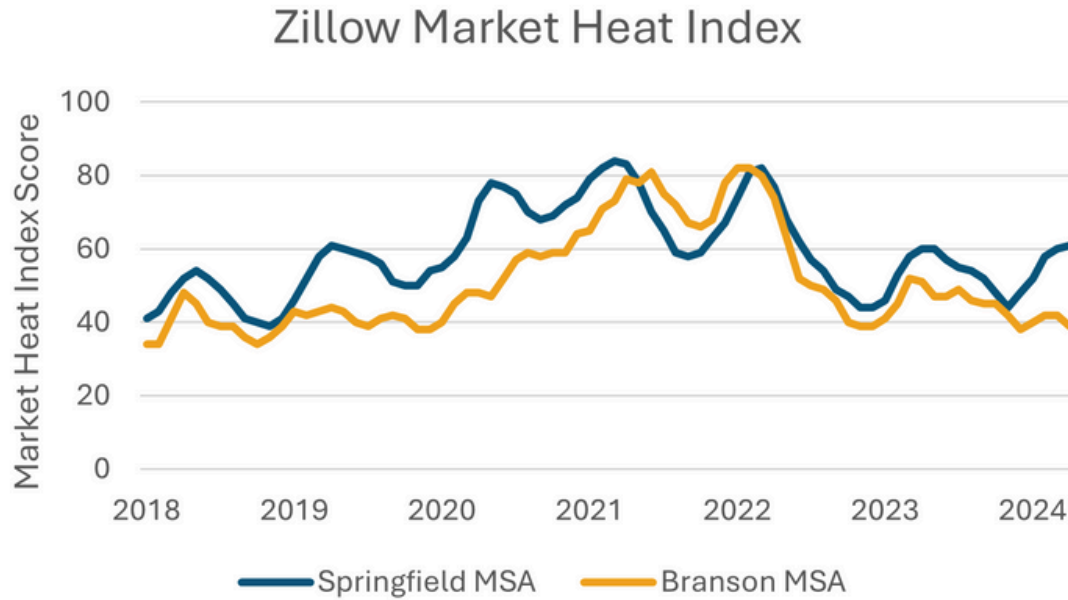


Figure 9. Zillow Market Heat Index (Zillow, 2024)

Given that supply remains relatively the same, an increase in demand correlates with an increase in price. A home that sells for more than what it is listed for likely had multiple prospective buyers attempting to outbid one another for the purchase of the house, and if demand is high, more situations like this will occur. Figure 10 demonstrates that a spike in demand resulted in a higher proportion of homes being purchased for more than their list price.

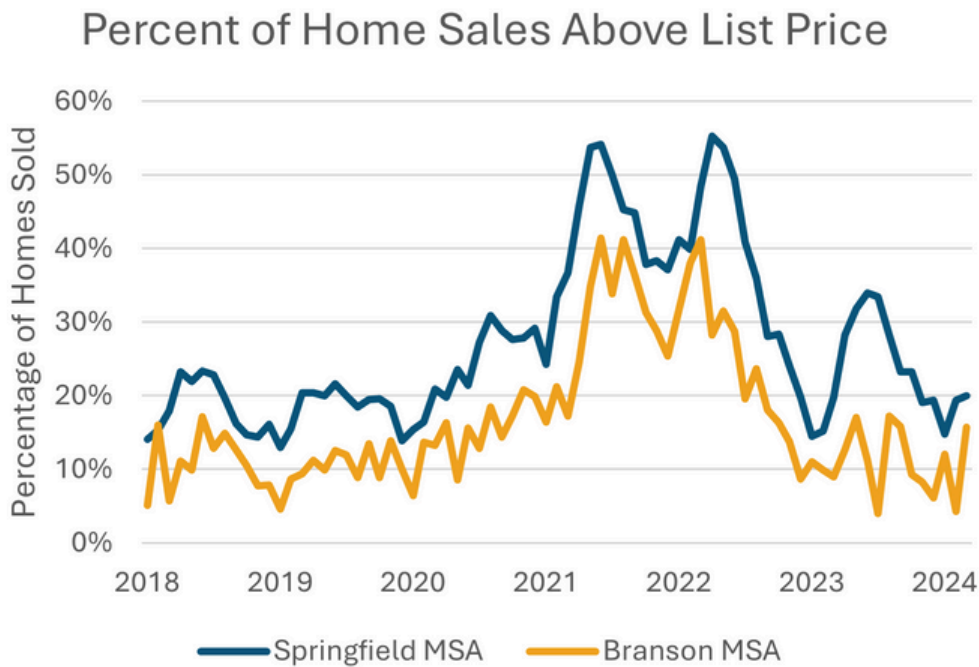


Figure 10. Home Sales Above List Price (Zillow, 2024)

Affordability

The U.S. Department of Housing and Urban Development (HUD) generally defines affordable housing as “housing on which the occupant is paying no more than 30 percent of gross income for housing costs, including utilities.

Each year, the National Association of REALTORS® (NAR) publishes the Housing Affordability Index (HAI), a measure of the typical family’s ability to qualify for a mortgage loan on a typical single-family home. It does this by comparing the area in question’s median household income with the median price on a single-family home, factoring in current interest rates on mortgages. The HAI scores can be interpreted as such:

- Equal to 100: median income exactly meets the price of a mortgage on a median price home.
- Greater than 100: median income is greater than the price of a mortgage on a median price home.
- Less than 100: median income is less than the price of a mortgage on a median price home.

The Springfield Metro Area’s HAI in 2022 was 155.8, signaling that mortgages on the typical single-family home are affordable for most residents. This score, however, has declined from previous years, dropping nearly 60 points from 2019, suggesting that, while housing remains largely affordable, prices are catching up to the level of income. According to this index, Springfield remains one of the more affordable metro areas throughout the state and surrounding areas, as shown in figure 11.

Metro Area	2019	2020	2021	2022
Springfield, MO	215.2	218.2	207.6	155.8
St. Louis, MO-IL	235.4	255.3	237.4	174.2
Columbia, MO	208	207.8	193.5	149.1
Kansas City, MO-KS	205	222.6	196.2	142.9
Cape Girardeau, MO-IL	211.4	251.5	213.1	180.9
Tulsa, OK	219.6	225.2	209	143.1
Oklahoma City, OK	239.6	263.6	233.7	162.3
Memphis, TN-MS-AR	187.3	187	169.2	123.3
Little Rock-North Little Rock-Conway, AR	241.2	256.9	248.7	166.5

Figure 11. NAR Housing Affordability Index (National Association of REALTORS, 2022)

Most homeowners afford their home through use of a mortgage loan rather than buying the house outright with cash. The most common and least risky type of home loan option is the fixed rate mortgage, as opposed to an adjustable-rate mortgage, which locks the interest rate paid on the loan at the prevailing rate at the time of purchase. Given the inflexibility of the loan agreement, perspective home buyers carefully consider the rate at which they can purchase a home, which influences their decision of which home they ultimately choose or whether they should purchase a home at all. The interest on their mortgage also determines the amount paid towards the cost of housing, affecting homeowners' disposable income.

Nationwide Mortgage Interest Rates 2010 - 2024

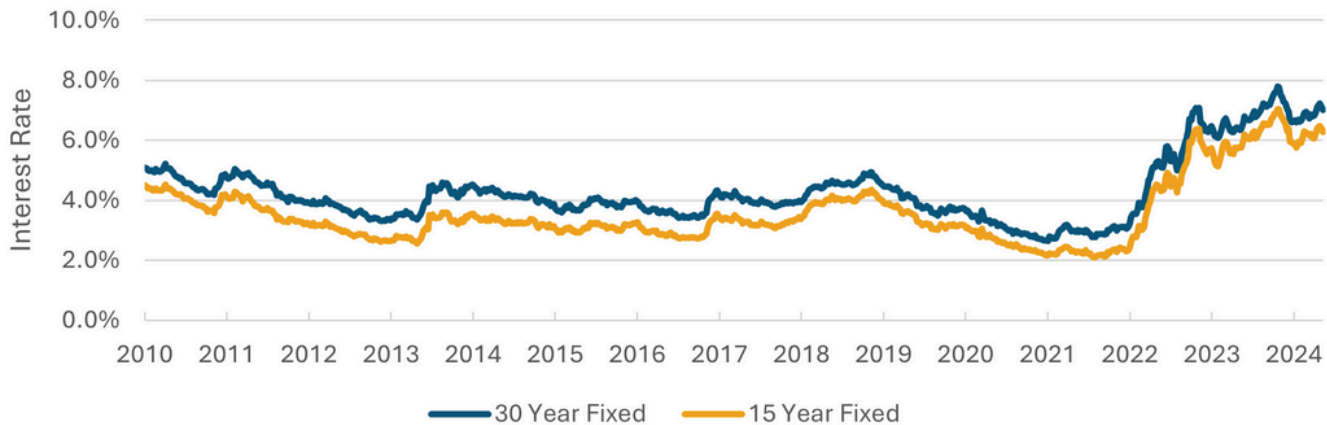


Figure 12. Mortgage Interest Rates, 2010-2024 (Federal Reserve Bank of St. Louis, 2024)

In the past two years, mortgage interest rates have seen a steep increase, following a period of historically low rates. Figure 12 shows nationwide interest trends since 2010. The rate increases of 2022 to 2024 are the greatest seen in over a decade. Someone who purchased a home with a 30-year fixed rate mortgage in 2021 could expect to pay around 3% interest on their home; that same mortgage in 2024 would have an interest rate of around 7%. That said, it is important to note that rates between 2010 and 2021 were at an all-time historical low. However, the sudden and dramatic jump in interest rates was largely unprecedented and quite a shock to the housing market at a time when housing supply shortages and high demand were already driving up the cost of housing.

Zillow Home Value Index, SMCOG Region 2013 - 2024

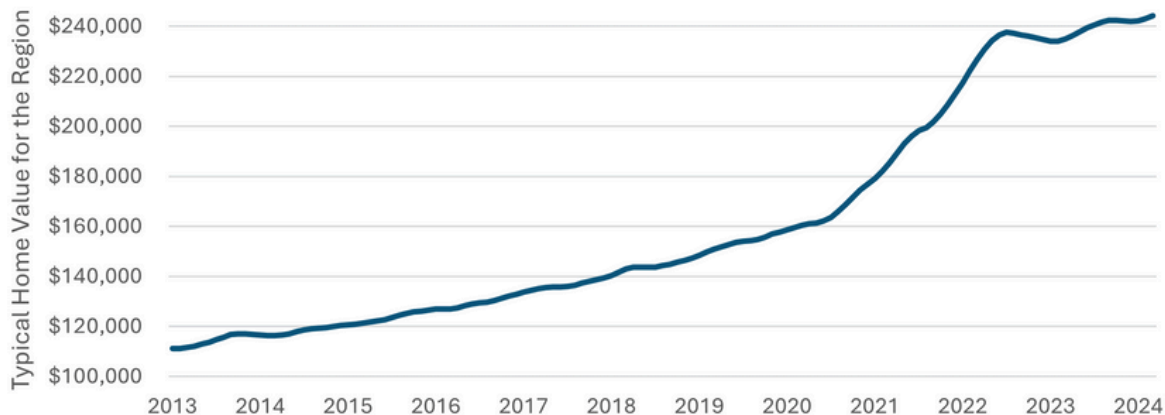


Figure 13a. Zillow Home Value Index (Zillow, 2024)

Regardless of how residents are dealing with their housing expenses, one thing is certain, rent and home prices have been rising quickly in recent years. Figure 13a demonstrates that, immediately following the COVID-19 pandemic, the typical home value for the region saw a sudden and drastic rise, from \$157,741 at the start of 2020 to \$244,196 in April of 2024. While prices had already been on a steady incline for several years, the economic shock caused by the pandemic likely exacerbated the trend.

A similar rise has been observed in the region’s rent prices. Figure 13b shows the long-term trend of rising rent prices across the region, state, and nation. Again, a steady price increase from 2012 to 2019 accelerated after the onset of the pandemic.

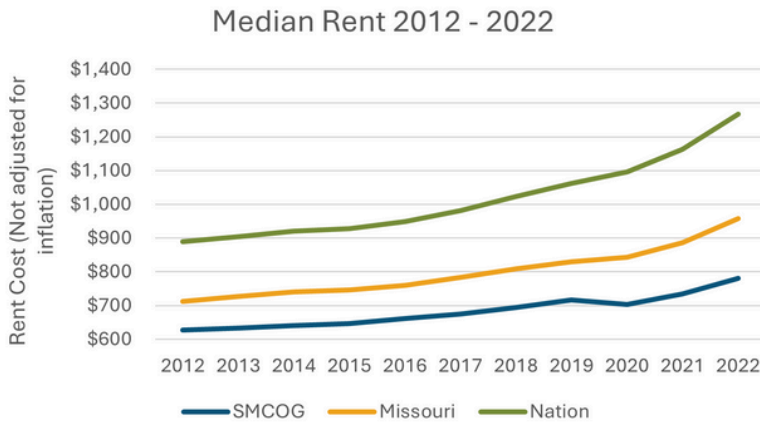


Figure 13b. (Zillow, 2024)

One metric for measuring affordability is the prevalence of households which are “cost-burdened” by their regular housing expenses. Figure 14 demonstrates how renters in the region, state, and nation are far more likely to be cost burdened, that is paying 35% or more of their income towards housing expenses, including utilities, rent, mortgage payments, and insurance among others.

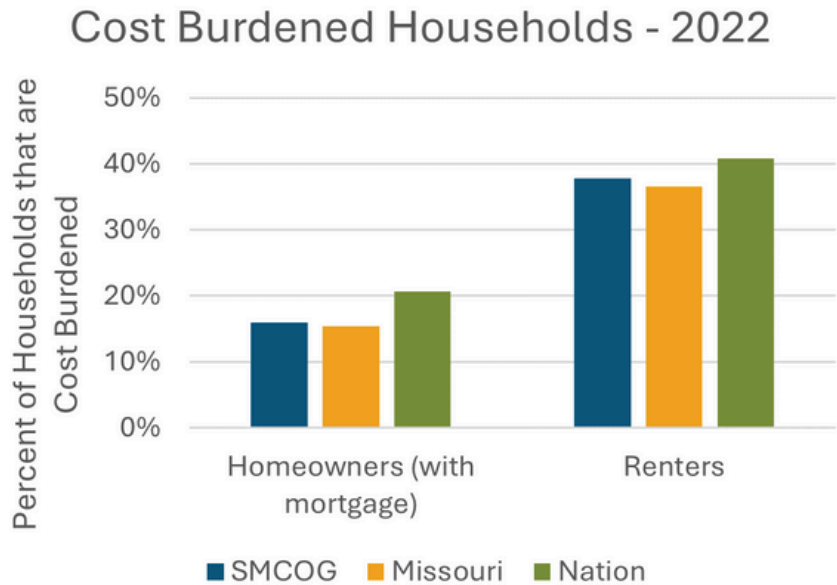


Figure 14. Cost Burdened Households (American Community Survey, 2022)

Homeowner's insurance represents a relatively small portion of monthly housing expenses but presents a major hurdle in the ability to secure ownership of a home. To qualify for a mortgage loan, most banks require the prospective buyer purchase homeowner's insurance on the property. Given that most people can only afford to buy a house through a mortgage, homeowner's insurance is a necessity when owning a home. According to a report from the Missouri Department of Insurance, the average annual premium in 2022 was \$1,678, or about \$140 a month. Even after adjusting for inflation, the cost has seen a steady and consistent rise since 1988. It is very likely that this rise in prices corresponds with a rise in the cost of damages caused by natural disasters throughout the state, a result of their increasing frequency and severity over the past two decades. Figure 15 demonstrates a generalized pattern of damages to homes caused by natural disasters that were paid out by insurance companies throughout the state.

Total Homeowner Insurance Losses, By Cause of Loss, Missouri 5-Year Moving Average

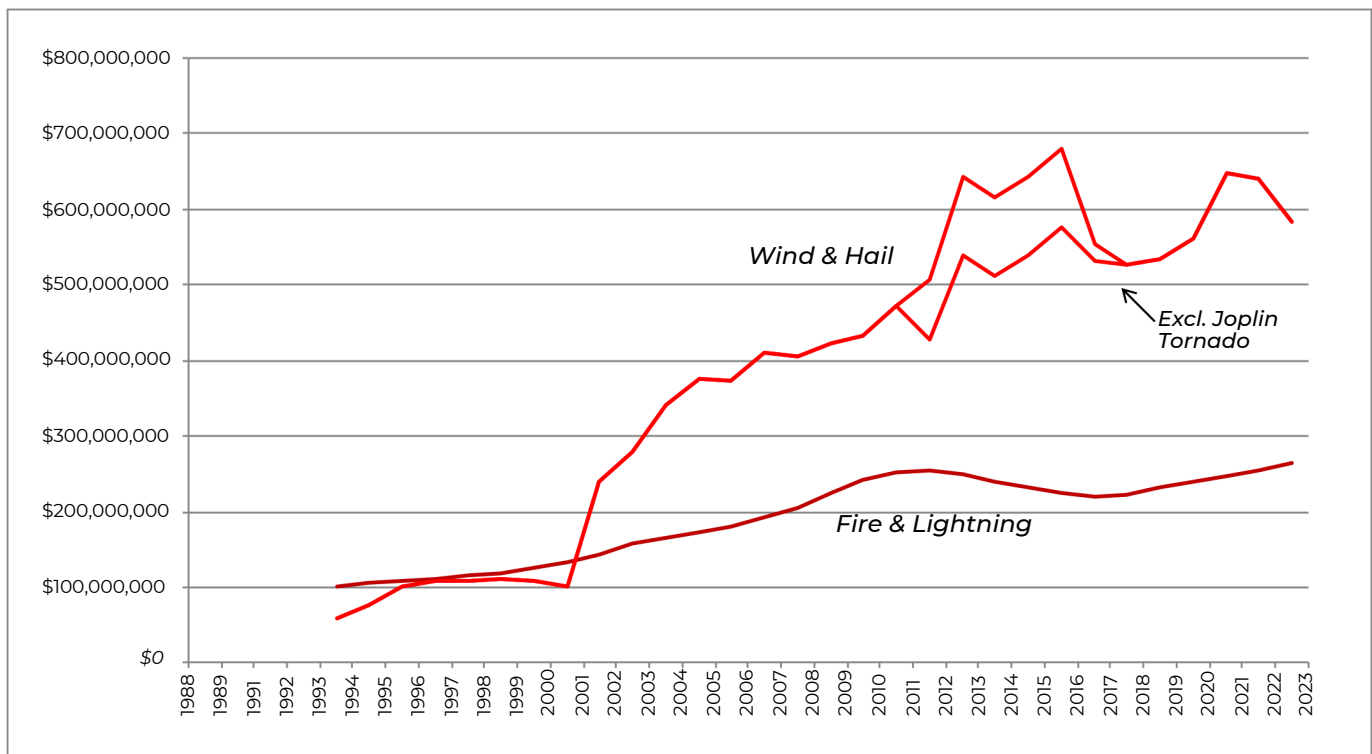


Figure 15. Missouri Homeowner Insurance Losses (Missouri Department of Commerce & Insurance, 2022)

In 2022, almost half a billion dollars in losses were caused by wind and hail alone. Growing concerns about the increasing severity of natural disasters have led to apprehension among insurance companies in their offering of policies in areas where such damage is common. Recent national reporting demonstrates how insurance companies, after years of financial loss caused by outsized natural disaster claims, have decided to raise premiums or rescind coverage in areas prone to frequent severe weather events. After several consecutive years of large losses due to severe weather, some insurance companies have begun to pull out from the state of Iowa, dropping coverage for their homeowner clients. If this trend continues and such consequences spread to Missouri, homeownership will continue to become increasingly unattainable for a large section of the population.

LAND USE

Decisions related to land use have significant impact on municipalities' capacity for economic growth and the economic outcomes of its citizens. Figure 16 demonstrates the many ways in which land use planning and regulation directly and indirectly affects regional economic performance and prosperity.

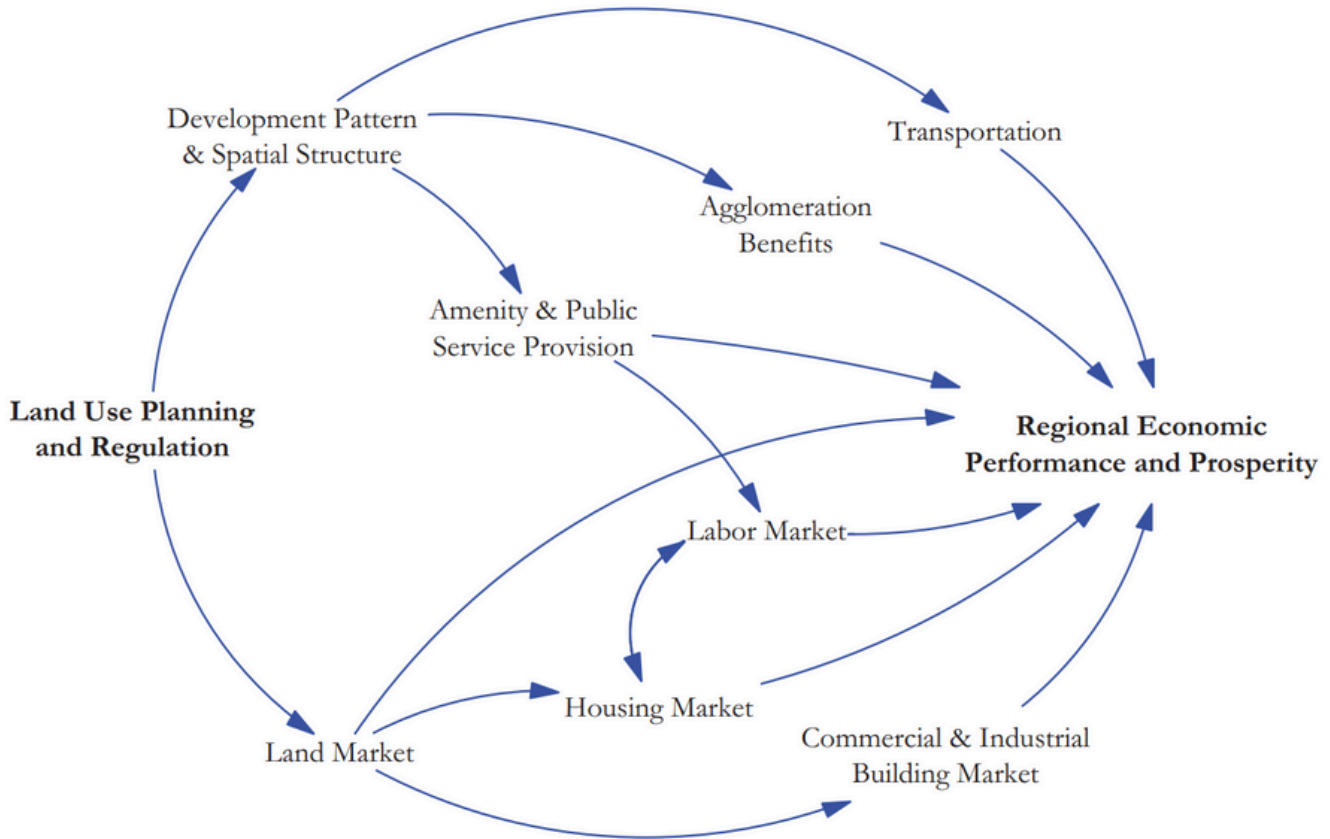


Figure 16. Causal links between land use and regional economies (Kim, 2010)

Land use plans and policies largely determine the spatial configuration of core elements within their jurisdiction, in turn influencing market behaviors and socio-economic dynamics.

LAND USE PRINCIPLE

EXPLANATION

ECONOMIC OUTCOME

ZONING ORDINANCES

Mechanism designating types of uses and activities allowable on specific areas of land. Aims to promote orderly development and mitigate nuisance disputes.

The limiting of negative externalities from nuisances, such as pollution, positively affects land value and preserves the social value produced by public goods.

LAND USE PRINCIPLE	EXPLANATION	ECONOMIC OUTCOME
INFRASTRUCTURE DEVELOPMENT	Consideration of the capacity and spatial dispersion of utility and transportation infrastructure in relation to current and planned development. Efficient allocation of land is needed to optimize infrastructure development and vice versa.	Businesses and citizens depend on public infrastructure to sustain their economic activity, the efficiency and reliability of which impacts their ability to carry out such activities. Equitable access to reliable infrastructure also impacts citizens' economic welfare and productivity.
PROPERTY VALUE PROTECTION	Land values are stabilized and predictable with properly designed and implemented land use policy and planning. Clear and well-defined plans can also induce public confidence in land investments, resulting in gradual increases in value and activity upon or near such land.	Elimination of uncertainty in land use outcomes enables more effective land use analysis (e.g., socioeconomic forecasts, site demand, suitability analyses) and, in turn, strengthens investment confidence, ultimately producing greater efficiency in land market activity. Clearly defined future land use assures investors that their land purchase is safe from negative externalities caused by unforeseen changes in land use nearby.
POPULATION GROWTH CAPACITY	Land use regulations can effectively constrain or increase housing supply, thus affecting a region's capacity for population growth. Over-restriction of residential development can also lead to development incongruent with present market trends.	Housing supply constraints hinder both the supply of labor and tax revenue from property and sales, limiting overall economic growth. Ineffective or undesirable land use patterns can also deter in-migration, also harming capacity for economic growth.
POPULATION DENSITY	Policies or circumstances impacting urban surface area growth (e.g., annexation, urban growth boundaries) can restrict access to developable land, necessitating an increase in the density of land use activities. As a result, urban infill and vertical development will become much more prevalent as space dwindles in availability.	As land use density increases, land values typically rise often correlating with increases in the price of business space, presenting further economic implications. Density may also promote agglomeration effects, enhancing productivity and efficiency, so long as policy, infrastructure, and amenity improvements conducive to higher population density are also properly implemented.

COMPREHENSIVE PLANS

A Comprehensive Plan, also referred to as a Master Plan, is a guiding document that provides a framework for the long-term growth and development of a community. One of the core components to the plan is determining the future land use, an overview of the community's preferred land use composition and policies. These land-use guidelines are created from community feedback collected during engagement events, acting as a reflection of their intentions for long-term development. When determining a development project's cohesion with the community's vision, the future land use map should be used as a primary reference. Land use decisions that are not in line with the future land use map can erode public trust and harm developers' confidence in the future of their investments. That said, demographic and market trends may alter the community's development priorities, prompting necessary divergence from the established land use plan.

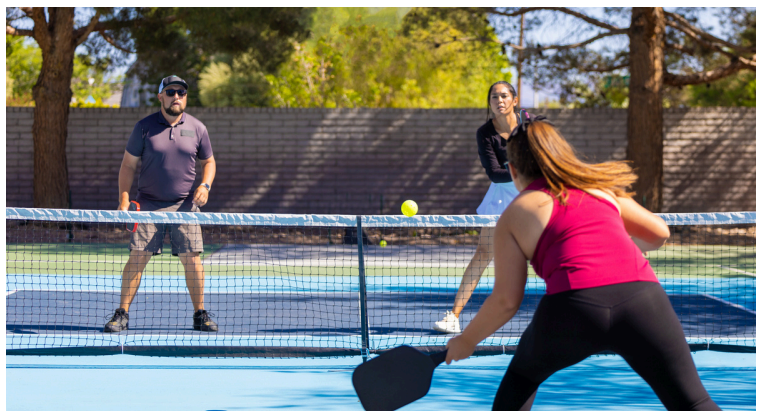
Comprehensive planning provides an opportunity for leaders and stakeholders to analyze the community's future land use in context with the many variables that effect its outcome (e.g., housing, transportation, community facilities, infrastructure, and economic development). Furthermore, under Missouri state law section 89.040, a municipal comprehensive plan is required to enact and enforce land use zoning ordinances. In this way, the comprehensive plan is imperative to controlling future land use and, as a result, several factors affecting the general well-being of the community.

RECREATIONAL AREAS

The SMOG region offers a wide range of recreational opportunities, both on government-owned and private lands. Residents and visitors can enjoy activities such as fishing, hunting, camping, canoeing, hiking, walking, and biking across the ten counties. Many communities also provide their own parks and organize recreational activities for the public.

The state of Missouri owns a significant amount of land in the SMOG region, primarily managed by the Department of Conservation. These areas serve as public fishing access sites and conservation areas. Additionally, the region is home to several state parks, historic sites, and the federally recognized Wilson's Creek National Battlefield.

These natural resources play a crucial role in driving tourism in the region. In 2020, Stone and Taney counties alone welcomed nearly 8 million visitors. The Branson economy, in particular, benefits from tourism, generating approximately \$2 billion annually. To support tourism efforts, the Branson Community received a \$415,000 marketing match grant from the Missouri Division of Tourism.



ENVIRONMENT

SOILS & TOPOGRAPHY

The soils of southwest Missouri are very diverse and capable of sustaining a wide variety of human activities. Prime farmland soils are found primarily in Dade, Dallas, Polk, Lawrence, and Webster. Lawrence County has the most area designated as prime farmland at 46%, followed by Dallas (43%), Polk (42%), Greene (40%), and Dade (39%). Stone has the lowest (6%) and Barry (14%) has the second lowest.

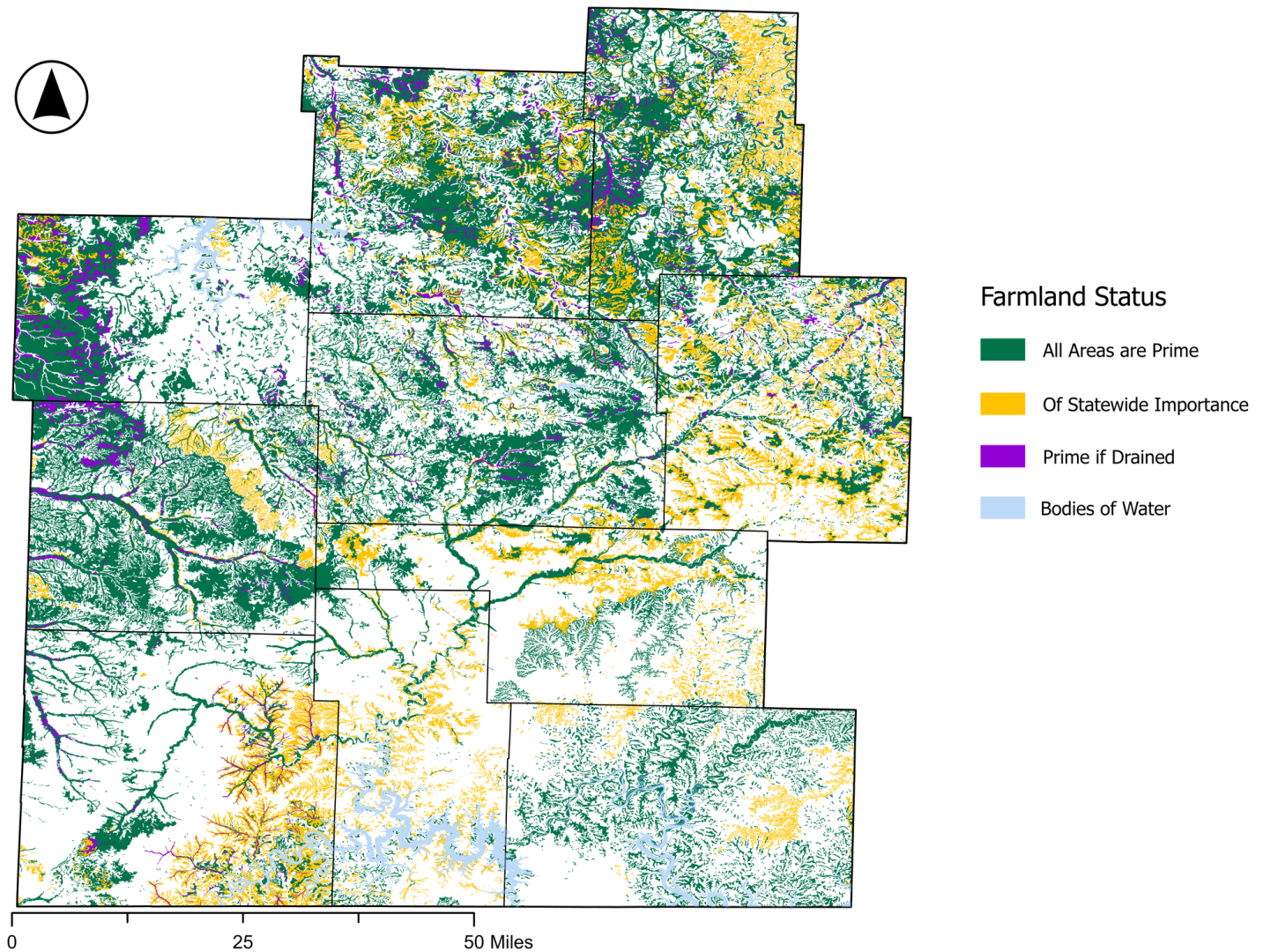


Figure 17. Prime Farmland

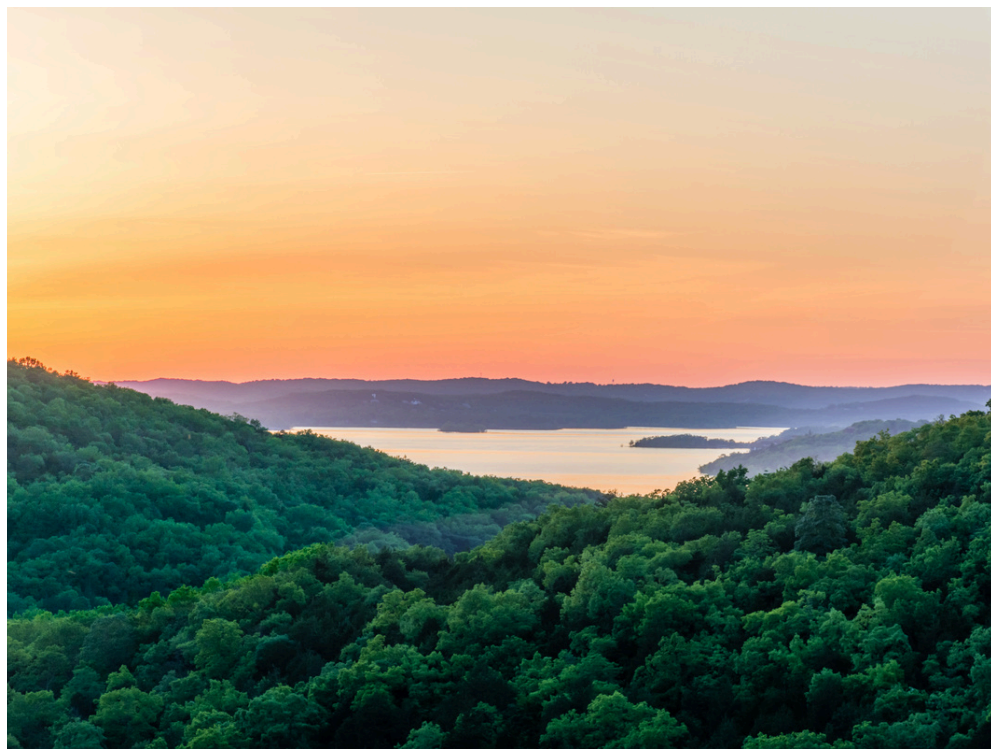
In the rugged hills of Taney, Stone, Barry, and Christian, the steep slopes are prone to soil erosion, karst, and sedimentation of surface waters. Many of the soils have severe restrictions for building development and septic tank use, necessitating careful design, installation, and maintenance of individual on-site waste disposal systems. Many municipalities have their waste and water utilities serviced using septic tanks, private water providers, and personal wells. This can create environmental conflicts, as waste and chemicals may seep into the soil and ground water sources, especially in karst areas.

CONSERVATION, LAND & GEOLOGY

According to Missouri Department of Conservation, conservation areas account for 100,962 acres within the region, including lakes, fish hatcheries, nature centers, river access, and other natural areas. The region is home to pervasive karst terrain that provides an abundance of caves such as Fantastic Caverns and Marvel Cave (both tourist attractions). On the other hand, the fragile nature of karst topography calls for careful deliberation in planning for infrastructure and building sites. State parks in the region include Table Rock, Roaring River, Stockton, and Bennett Springs. Portions of the Mark Twain National Forest are also located within the region, as is Wilson's Creek National Battlefield.

BROWNFIELDS

The Missouri Department of Natural Resources lists 48 assessed brownfield sites and 115 complete brownfield sites. DNR is able to conduct brownfields site-specific assessments on properties for non-profit organizations and public entities such as cities, counties, and quasi-governmental entities. There are also five Superfund sites and three RCRA (Resource Conservation and Recovery Act) sites identified by the Environmental Protection Agency.



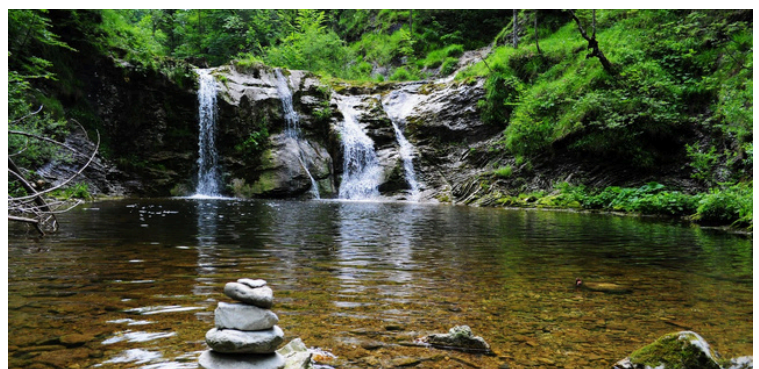
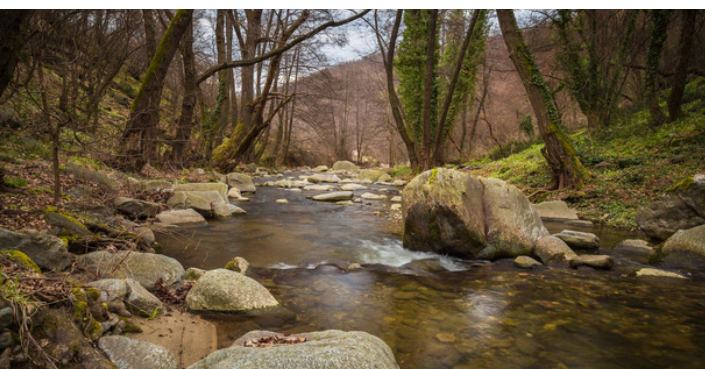
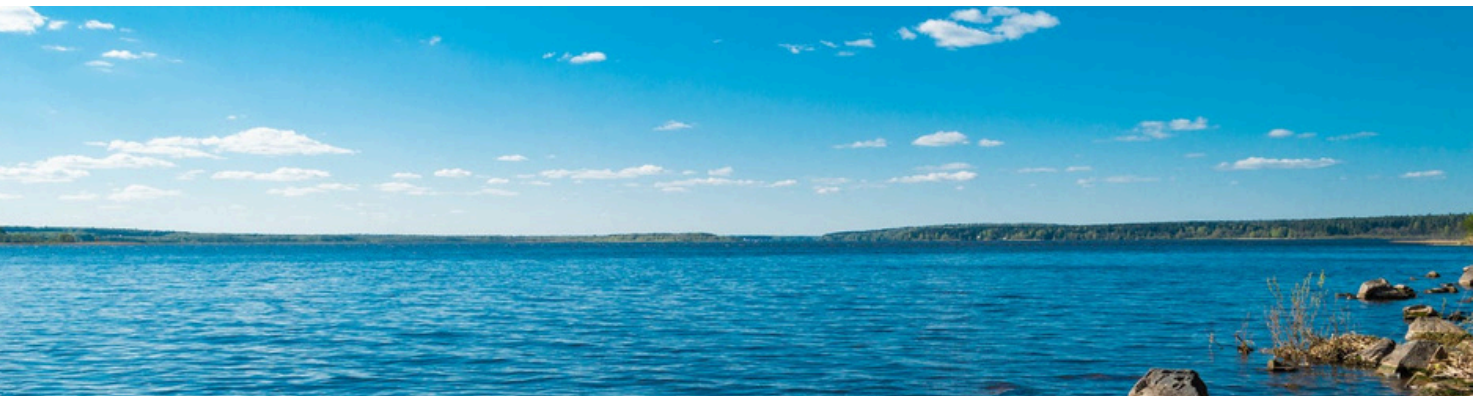
WATER

The Southwest Missouri region's hydrological system is divided into two aquifers. The majority of the counties are located above the Springfield Plateau Aquifer. While the counties of Dallas and Taney, lie above the lower Ozark aquifer. Between the Springfield Plateau aquifer and the Ozark Aquifer is the Ozark confining unit, which consists of shale and limestone of Late Ordovician through Mississippi age. The Ozark Aquifer consists of dolostones, limestones, and sandstones of the Late Cambrian age through Devonian age (USGS, 1998).

Several lakes and numerous river systems provide water for practical usage such as thermoelectric power, irrigation and livestock. Recreational water activities are very popular in the region and provide tourism to several counties. The region's five major surface reservoirs, numerous streams, and rivers are popular sites for swimming, fishing, and boating.

Protection of surface water and groundwater quality is an important environmental concern throughout the region. Much of southwest Missouri exhibits karst topographic features such as sinkholes, caves, lineaments, springs, and losing streams. The underlying bedrock is easily dissolved, allowing surface waters and pollutants into the groundwater system. Pollutants from wastewater treatment facilities, on-site waste disposal systems, animal wastes, and urban runoff can be detrimental to both surface water and groundwater quality.

The major lakes – Bull Shoals, Fellows, Stockton, Lake Taneycomo, Table Rock, and Pomme de Terre – account for roughly 130,000 acres. Major rivers in the region include James River, Sac River, Little Sac River, Niangua River, and Pomme de Terre River. Significant creeks include Flat Creek, Beaver Creek, Swan Creek, and Bull Creek.



FLOODPLAINS & FLOOD ZONES

Eight out of the 10 counties in the SMOG region are members of the National Flood Insurance Program and have floodplain maps. Most cities within the region also have floodplain maps, except for Polk and Barry Counties. Flooding has occurred in low-lying areas across all counties in the region. In the summer of 2007, Polk County experienced significant damage to roads and homes due to heavy and prolonged rainfall.

In December 2015, a devastating winter flood affected multiple communities in the area. This weather event resulted in the loss of ten lives statewide, with 119 water rescues and 198 traffic control issues reported in Greene County alone. The impact of the flood included widespread flooding, road closures (including on Interstate 44), water rescues, sinkholes, power outages, sewer backups, and flooded basements and homes. In response to the situation, Red Cross and municipalities opened several emergency shelters in the area.

In 2017, the region experienced severe thunderstorms and prolonged heavy rainfall, leading to historic and devastating flash floods. The resulting property damage across the region amounted to over \$16 million.

The effective response from emergency personnel, aid organizations, and government staff played a crucial role in mitigating the severe flooding impacts. Their preparedness and swift actions significantly reduced the potential severity of the event.

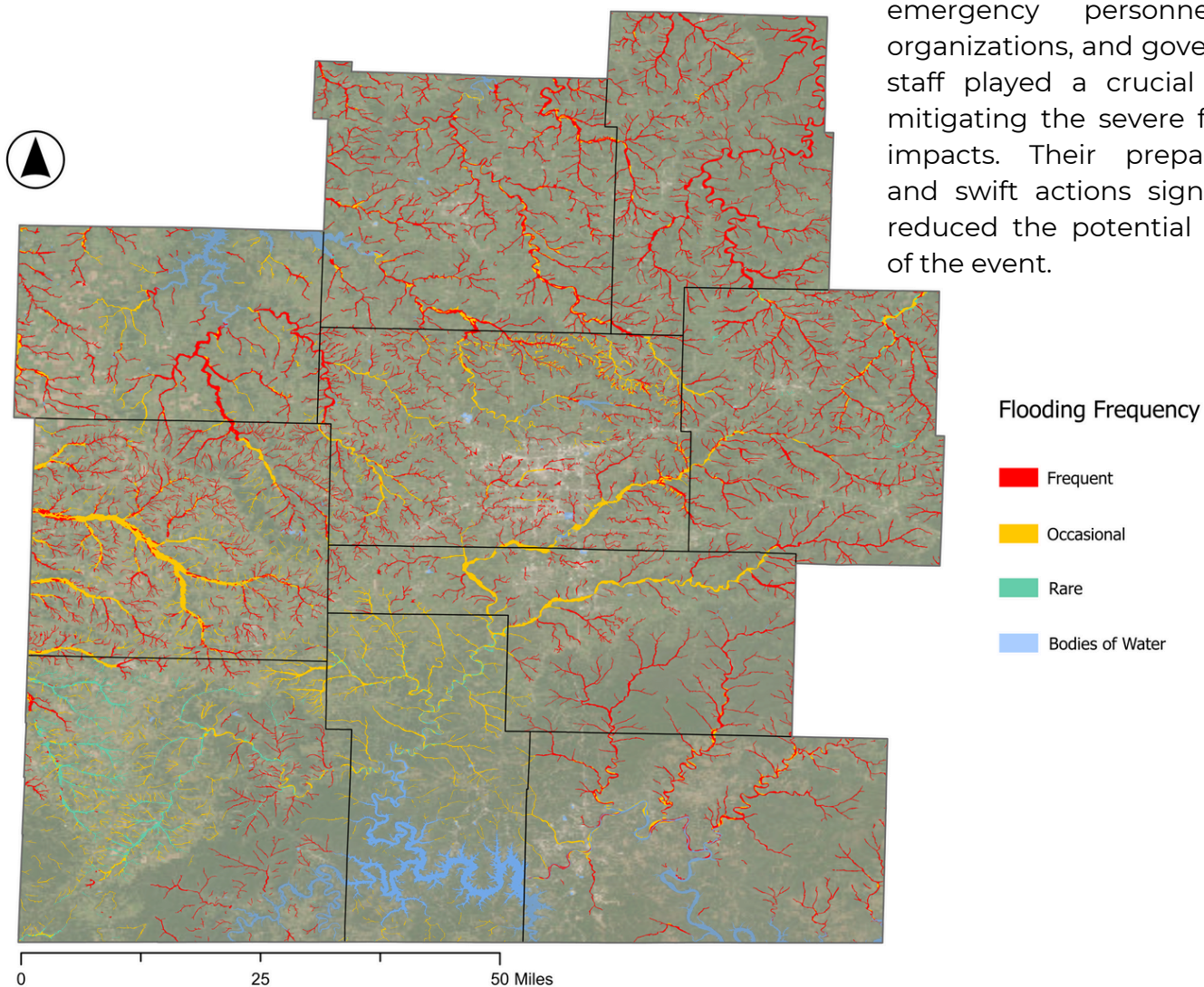


Figure 18. Areas of Frequent Flooding

CLIMATE

The climate for the southwest Missouri region is considered continental: hot summers, and moderately cool winters. The average winter temperature is between 34-35 degrees Fahrenheit, with the average daily minimum between 21-25 degrees Fahrenheit. The average summer temperature ranges between 75-77 degrees Fahrenheit, with the average daily maximum temperature recorded between 87-90 degrees Fahrenheit. Annual precipitation for the region ranges between 39-44 inches, with 55-69 percent of the precipitation falling between April through September. The average seasonal snowfall ranges from 10 inches to 19.5 inches. The sun shines 65-70 percent of the time in the summer, and 50-75 percent of the time in the winter. The prevailing winds typically come from the south, varying between the SSW to SSE, except for Stone County during February and March, when the prevailing winds come from the Northwest. The average wind speed is between 11-13 mph and occurs during the late winter-spring periods.

Climate Resilience

The EDA defines Climate resilience as “the ability to anticipate, prepare for, and respond to hazardous events, trends, or disturbances related to the climate.” In recent decades, changes in climate trends have resulted in increases in the frequency and severity of weather events and climate disruptions. These changes threaten the economic stability of businesses, supply chains, infrastructure, and other community assets. Private sector interests have increasingly shifted towards investing in places prepared to protect community members and assets from the consequences of climate change. By developing resiliency strategies to address such impacts, the region can protect its community and investments whilst capitalizing on market opportunities surrounding environmental sustainability.



The Justice40 Initiative is a federal directive seeking to deliver 40% of the overall benefits of federal investments towards sustainable and resilient development to disadvantaged communities. These communities are determined by a series of socio-economic and environmental risk factors that indicate elevated vulnerability to the impacts of climate change. Figure 19 displays a map of the census tracts within the SMOG region that are designated as disadvantaged. These communities have a special opportunity to leverage federal funds to build resiliency to climate hazards and economic disruptions.

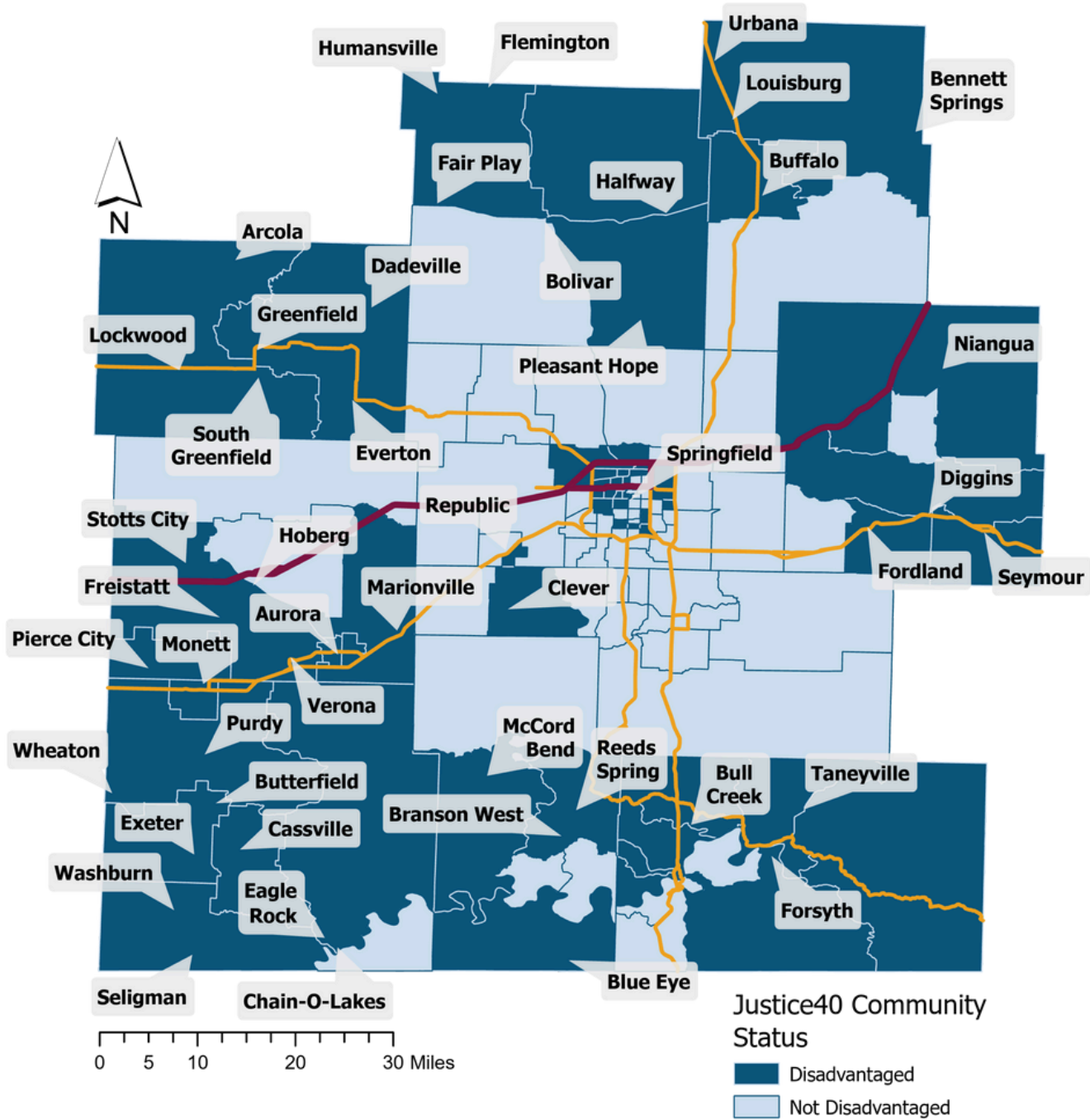


Figure 19. Justice40 Disadvantaged Communities

HAZARD MITIGATION

MCOG takes an active role in building local resiliency against natural and manmade hazards through its Hazard Mitigation planning services. In coordination with the Federal and State Emergency Management Agencies (FEMA and SEMA), SMCOG has helped nine counties in Southwest Missouri prepare consistent updates to their hazard mitigation plans.

- Barry County – 2021
- Christian County – 2020
- Dade County – 2024
- Dallas County – 2023
- Lawrence County – 2022
- Polk County – 2023
- Stone County – 2022
- Taney County – 2022
- Webster County – 2020

Hazard mitigation plans can be viewed at:
www.smcog.org/publications-hazardmitigationplans.

Greene County's most recent Hazard Mitigation Plan was published in 2020 by Springfield-Greene County Office of Emergency Management (OEM); the plan can be viewed at:
greenecountymo.gov/oem/community_programs/mitigation.php.

Climate Adaptation Planning

Missouri does not have a statewide plan or strategy addressing the impacts of climate change. However, several municipalities across the state have in-depth Climate Action Plans including St. Louis, Kansas City, and Columbia. Such plans provide goals and strategies to implement policy and operational changes directed at mitigating the city's impact on the environment and its resiliency to the impacts of climate change. In 2022, the Region 7 office of the EPA published a Climate Change Adaptation Implementation Plan outlining the climate change vulnerabilities of its four-state region (Missouri, Iowa, Nebraska, and Kansas) and detailed climate adaptation actions to address them. The plan commits the office to encouraging investments in climate-resiliency, including investments made with funds from the Bipartisan Infrastructure Law and the Inflation Reduction Act, both passed in 2022. Regional vulnerabilities identified in the plan are applicable to the SMCOG region and may inform localized efforts to conduct community specific Climate Adaptation Plans.



WILDLIFE

Endangered species and their habitats are managed by the Ecological Services Program of the U.S. Fish & Wildlife Service (USFWS) and the fisheries division of the National Oceanic and Atmospheric Administration (NOAA Fisheries). Listed species in the SMCOG region include:

- Gray Bat
- Indiana Bat
- Northern Long-eared Bat
- Ozark Big-eared Bat
- Tricolored Bat
- Alligator Snapping Turtle
- Tumbling Creek Cave Snail
- Eastern Hellbender
- Ozark Hellbender
- Niangua Darter
- Ozark Cavefish
- Spectacle Case Mussel
- Neosho Mucket, Snuffbox Mussel
- Rabbits Foot Clam
- Monarch Butterfly
- Benton County Cave Crayfish
- Geocarpon Minimum
- Mead's Milkweed
- Missouri Bladderpod



FORESTS & TIMBERLANDS

The Ozarks region contains vast acreage of forestland, particularly in the mountainous, southern portions of the region. Forestlands are a defining feature of the natural landscape as well as an important economic asset. Approximately 77% percent of Taney County's land area and over 40 percent of the land area in Barry, Christian, Dallas, and Stone Counties are classified as forestland. The region has roughly 40 percent of its total quantity of land covered with forests.

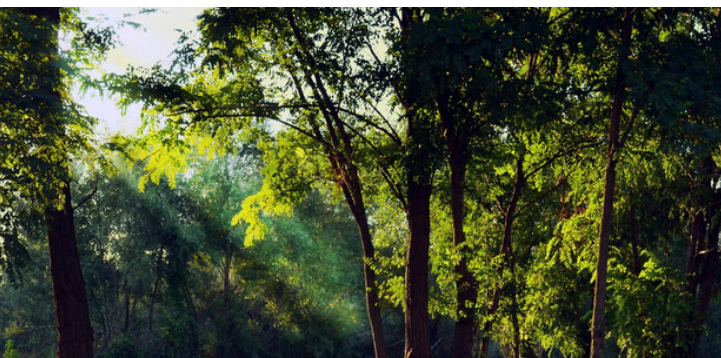
40%

FOREST COVERAGE



Of the region's forestland, 1,512,648 acres are designated by the U.S. Department of Agriculture as timberland. Timberland is forest land that is producing or capable of producing at least 20 cubic feet per acre, per year, of industrial wood crops under natural conditions, that is not withdrawn from timber utilization, and that is not associated with urban or rural development.

Hardwood species account for the majority of the region's timberland. Principal hardwood forest types include Eastern Red Cedar-hardwood, Black-Scarlet Oak, and Post-Blackjack Oak. In Barry County, pine is the principal growing stock and saw timber species.



ECONOMY

INCOME & COST OF LIVING

Income in the region has seen a steady increase over the past decade, managing to outcompete inflation and net positive real income gains. However, trailing supply chain shortages coupled with economic readjustment from the COVID-19 pandemic have contributed to rises in the cost of typical consumer products and services since 2020. Figure 20b demonstrates the relationship between the rise in local incomes and rises in the consumer price index.

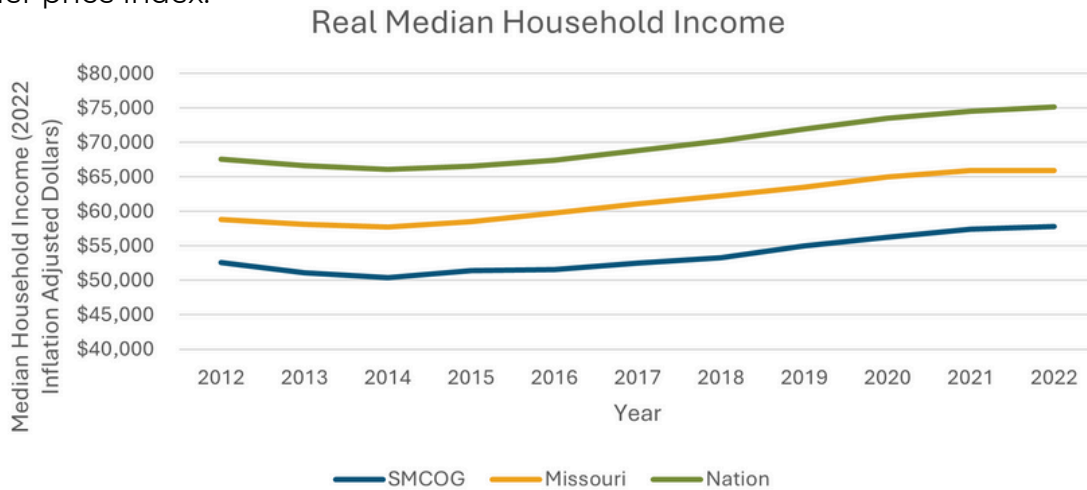


Figure 20a. Real Median Household Income (American Community Survey, 2012-2022)

As income has risen, so has the price of goods and services in the Midwest, making such gains less tangible or effective for the average household. That said, the overall cost of living in the region and state remains low compared to the rest of the country. The Missouri Economic Research and Information Center (MERIC) reports that, in 2023, Missouri had the sixth lowest cost of living in the nation, making it a much more affordable place to live than most states.

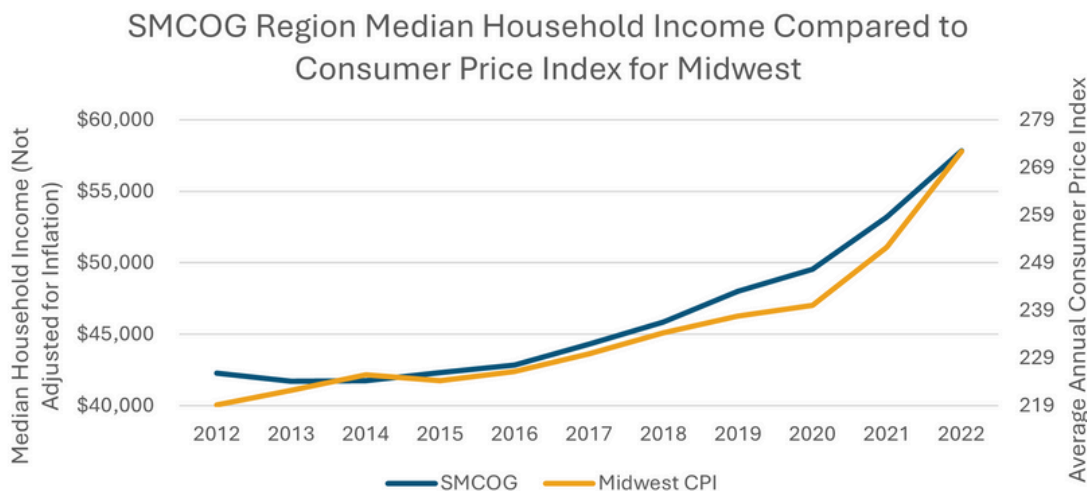


Figure 20b. Median Household Income vs Midwest CPI (American Community Survey, 2012-2022; Bureau of Labor Statistics)

Figure 21 demonstrates how the Springfield Metro Area stacks up against the state's largest urban areas in terms of their cost of living. Springfield remains one of the most affordable urban areas in the state, granting residents the economic benefits of economic agglomeration without sacrificing cost of living.

Metro	Overall Index	Grocery	Housing	Utilities	Transport	Health	Misc.
Joplin, Mo	84.1	92.7	60.2	108.9	92.5	88.5	90.7
Springfield, MO	84.8	94.1	72.3	80.3	89.8	94.9	89.4
Missouri	88.5	93.4	66.3	94.6	91.2	91.7	90.1
St. Louis MO-IL	88.9	96.9	75.8	101.7	93.5	88.7	91.5
Columbia, MO	90.9	96.4	83.3	93.0	89.6	92.9	94.5
Kansas City, MO-KS	93.7	96.5	93.3	109.0	88.9	84.4	91.5
US Average	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Figure 21. Metropolitan, State, & National Cost of Living Index (MERIC, 2023)

POVERTY

Poverty rates indicate the economic well-being of an area, reflecting residents' ability to attain basic needs such as food, shelter, and healthcare. With the exception of Christian County, the 10-county region has higher rates of poverty than both the state and nation.

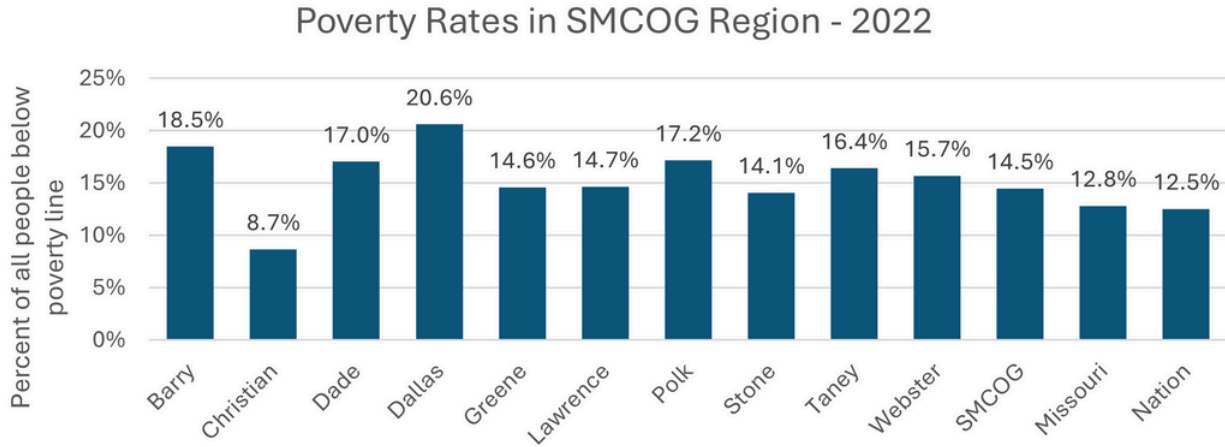


Figure 22. Poverty by County (American Community Survey, 2022)

Within the region, poverty is most prevalent in rural areas, where income and cost of living are typically lower. According to the USDA, nonmetro areas have exhibited higher rates of poverty than metro areas since the 1960's, when poverty rates were first recorded. However, research also suggests that this gap in poverty has been closing in recent years, having dropped from an average difference of 4.5 percentage points in the 1980's to about 3.1 in the 2010's. Regardless, rural communities have been historically disadvantaged compared to their urban counterparts.

Poverty is also prevalent among minority groups in the region. Figure 23 demonstrates the share of each ethnic or racial group living below the poverty line. Whites have the lowest proportion of individuals living below the poverty line whereas African Americans have the highest with more than a quarter of the region's Black individuals living in poverty. Racial disparities in income and economic mobility are common across the nation and inequities that perpetuate this trend must be addressed locally.

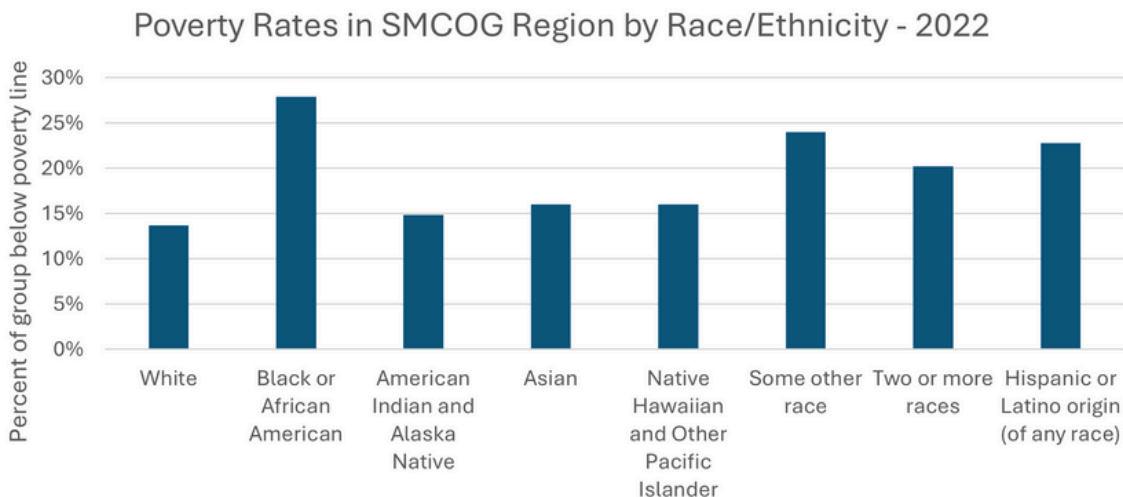


Figure 23. Poverty by Race/Ethnicity (American Community Survey, 2022)

EMPLOYMENT

Unemployment has been on a steady decline across the country since the recession of the early 2010's. Aside from a periodic spike during the economic unrest in the wake of the COVID-19 pandemic, unemployment in the SMCOG region has consistently dropped, from a rate of 9.9% in 2012 to 4.9% in 2022. While the region still has room to improve compared to the state, it is below the nation's average unemployment, a good sign for the health of the job market. Problems with labor can arise from a low unemployment rate, however; chief among them are a corresponding rise in the rate of inflation and potential shortages of labor for local businesses.

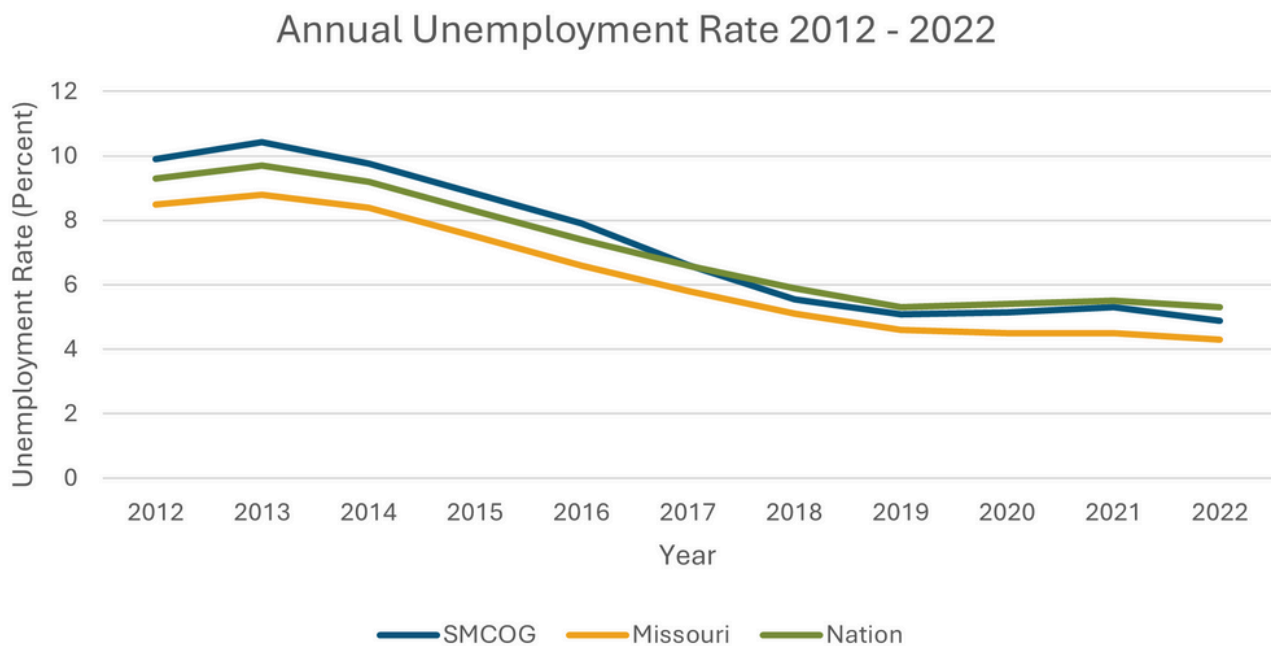


Figure 24. Unemployment Rate (American Community Survey, 2012-2022)

OCCUPATION

A worker's occupation shares connections to a variety of factors related to their livelihoods including their income level, educational attainment, job security, and even lifestyle choices. The most common occupations in the SMCOG region are office and administrative support, representing over 12% of workers. Workers in this occupation, as the Bureau for Labor Statistics explains, "prepare and organize documents, track products, and provide information to the public." The relative stability and modest income of these positions make them a popular employment pursuit, but jobs in this occupation field have been declining and are expected to hold this pattern in the coming years.

Automation poses a substantial threat to job security and employment stability, and occupations vary in their susceptibility to it. Recent concerns over workforce displacement due to artificial intelligence (AI) have been on the rise, especially among office administration and IT professions. However, based on data from Lightcast, the occupations at the greatest risk of automation are blue collar professions involving manual labor. Figure 25 shows the ten occupations most at risk of replacement to automation, based on Lightcast’s automation index score.

Rank	Occupation Description	Total Jobs 2023	Automation Index	Turnover Rate
1	Helpers, Construction Trades	183	134.4	108%
2	Food and Beverage Serving Workers	10,114	129.0	172%
3	Grounds Maintenance Workers	2,524	128.6	87%
4	Other Food Preparation and Serving Related Workers	2,877	128.1	169%
5	Cooks and Food Preparation Workers	12,691	125.7	134%
6	Construction Trades Workers	11,294	125.7	50%
7	Building Cleaning and Pest Control Workers	7,681	122.9	100%
8	Woodworkers	634	120.8	69%
9	Metal Workers and Plastic Workers	3,585	118.4	55%
10	Food Processing Workers	1,952	117.9	76%

Figure 25. Occupation Risk to Automation (Lightcast, 2023)

Workers in these occupations are particularly vulnerable to furloughs and layoffs, with many already experiencing high rates of turnover in their profession. Encouraging these workers to seek further education, advanced training, and certification can both improve their occupational mobility and hedge the likelihood of prolonged unemployment, preparing them for stability during economic shocks and downturns.

TECH OCCUPATIONS

In 2022, there were 12,860 tech occupation jobs in the region, with the vast majority located in Greene County. It is important to remember that despite many tech-focused occupations being found in technology industry sectors, they are not exclusive to one another, and tech jobs can be found at a variety of businesses across all industries.

Compensation for tech occupations is far greater than what is typical for the region. The median annual earnings for occupations in the tech field was \$69,502 region-wide, nearly twice that of the median earnings for all jobs, at \$38,224. This is even more pronounced in Barry County, where tech jobs made more than double what most other jobs earned.

The fastest growing tech job in the region is software development, adding 474 jobs to the economy between 2018 and 2023. In recent years, software developers have seen threats to their occupation emerge, from the proliferation of artificial intelligence in the workplace to industry-wide furloughs.

Occupation	2018 Jobs	2023 Jobs	2018 - 2023 Change
Software Developers	963	1,437	474
Business Operations Specialists, All Other	483	883	401
Project Management Specialists	736	957	221
Computer and Information Systems Managers	342	521	179
Data Scientists	92	214	122

Figure 26. Fastest Growing Tech Jobs (Lightcast, 2023)



EDUCATION & TRAINING

The SMOG region is composed of 55 public school districts, the largest of which is the Springfield R-XII School District, the largest in the state. Several private schools also exist in the region.

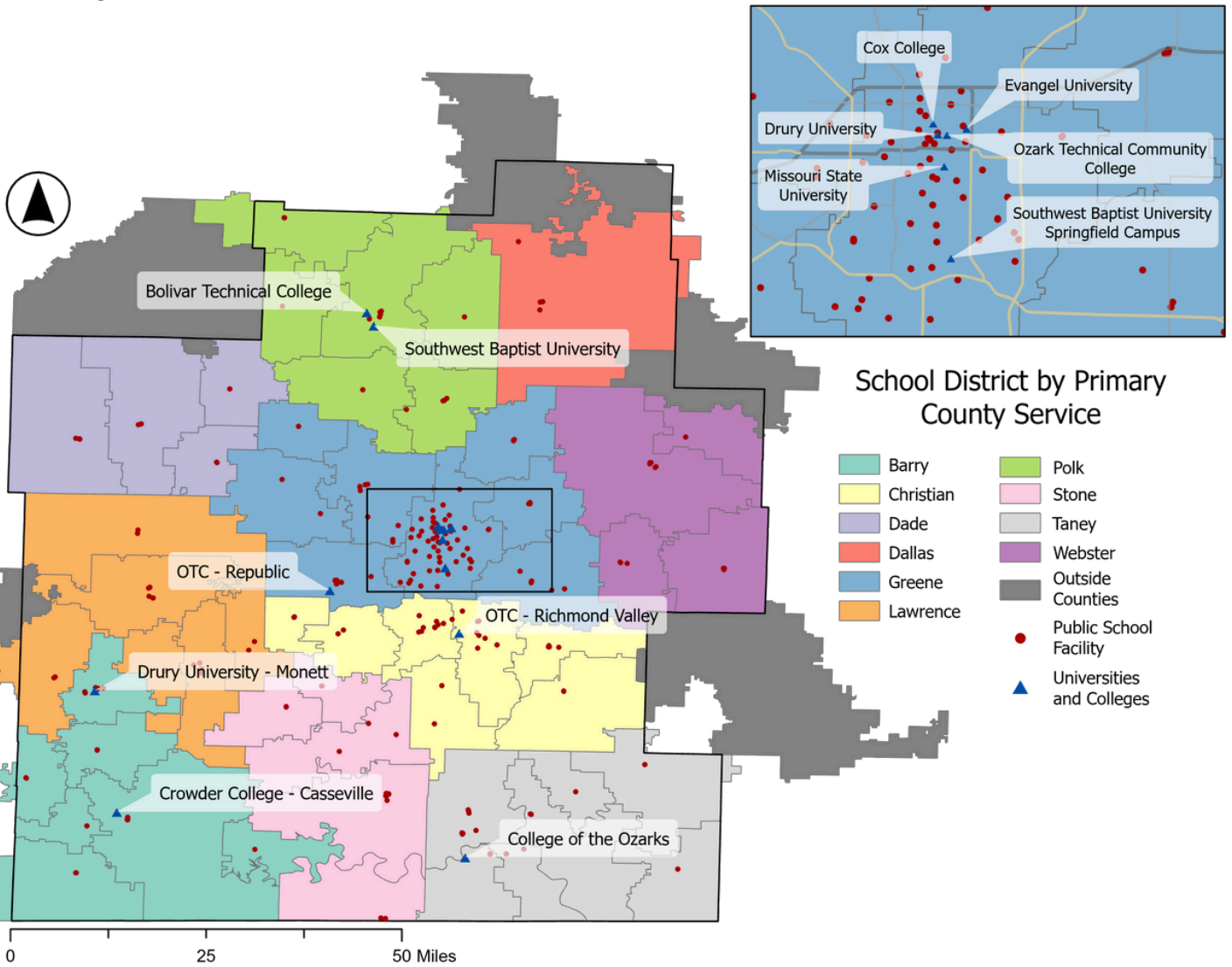
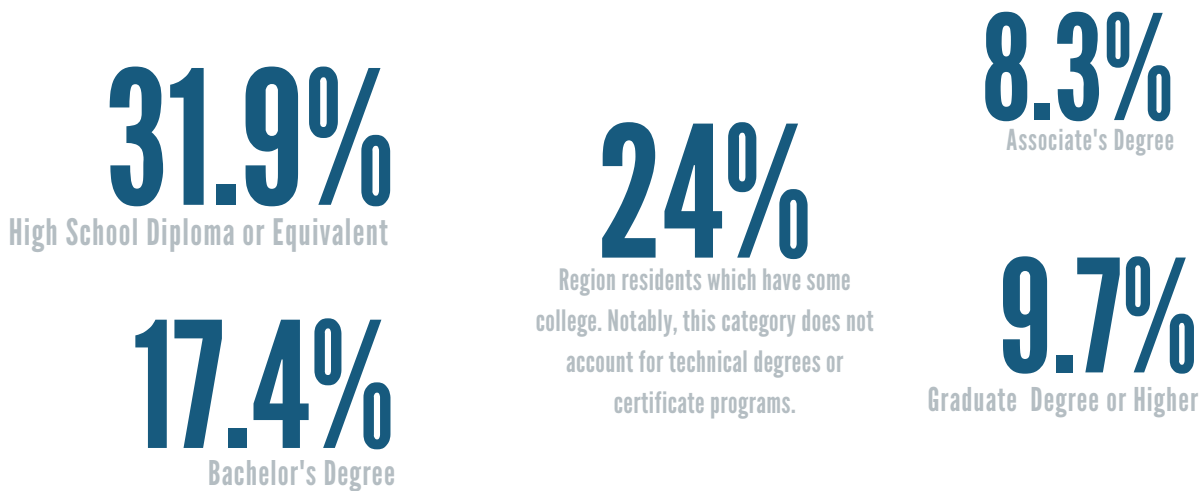


Figure 26. Educational Institutions

The opportunity for higher education in the SMOG region is ample. There are seven higher education institutions throughout the region, including two major institutions of higher education: Missouri State University (MSU) and Southwest Baptist University (SBU). MSU is a public 4-year university located in Springfield that offers Doctorate, Master’s, bachelor’s, and associate degrees with 22,000 students in 2023. The university was recently awarded the Governor’s Award for Excellence in Teaching. SBU is a private 4-year university located in Bolivar that offers Doctorate, Master’s, Bachelor’s, and Associate degrees with approximately 2,709 students in 2023. This institution was one of only 22 universities nationwide to receive an “A” rating by the American Council of Trustees and Alumni.

Crowder College-Neosho offers higher education to citizens in Barry, Dade, and Lawrence counties, with an enrollment of over 2,500. College of the Ozarks, a private, faith-based institution in Branson/Hollister, also offers higher education to students through an innovative educational model by charging no tuition in exchange for employment through the college, expanding the option of higher education to many students who could not otherwise afford to attend.



Source: ESRI; Lightcast™ . 2022

In addition to these educational opportunities, Ozarks Technical Community College provides a more affordable alternative to traditional higher education institutions. This college provides customized training opportunities to meet the needs of employers in the community. With 10,506 credit students enrolled in 2022, earning approximately 130,000 credit hours, OTC is clearly providing a needed resource for the area. According to USDC, nearly 30% of the regional population have attained a 4-year college degree.

To emphasize the strength of the region's education opportunities, seven institutions of higher education in SMOG conferred nearly 11,000 degrees in 2022. This indicates the region's commitment to education and its potential for meeting future labor demands, especially considering the projected employment growth of 30,000 jobs between 2020 and 2030 in industries such as arts, entertainment, and recreation (31.1%), accommodation and food services (23.6%), and transportation and warehousing (16.8%). Therefore, education is crucial to the region's continued growth, which SMOG and its education partners are well-equipped to handle.

WORKFORCE DEVELOPMENT

Workforce development is a vital component of community economic development, focusing on strategies, policies, and programs to create and sustain a skilled workforce capable of meeting the needs of current and future local businesses. Key objectives of workforce development efforts include:

- **Skills Preparation:** Ensuring the workforce possesses the skills necessary for current and anticipated labor market demands. This involves providing training in basic skills, specific job skills, and soft skills such as work ethic and attitude.
- **Economic Mobility and Stability:** Workforce development helps individuals achieve economic mobility and higher earning power, which supports their families and enhances their quality of life. This contributes to a stronger tax base for communities, sustaining and improving overall quality of life.
- **Business Support:** Assisting businesses by ensuring they have access to a skilled workforce, which is critical for remaining competitive. This includes providing incumbent worker training to help existing employees upgrade their skills in response to industry changes.
- **Economic Integration:** Aligning workforce and economic development strategies to create a more sustainable and competitive economic environment. This involves integrating supply-side initiatives (focusing on individual training) and demand-side initiatives (directly assisting businesses).
- **Adaptation to Global Changes:** Preparing the workforce to adapt to the demands of the global knowledge economy. This includes promoting lifelong learning and continuous skills upgrading to keep pace with technological advancements and global competition.

FINDING AND CREATING GOOD JOBS

Good jobs form the foundation of a successful and equitable economy, benefitting workers, their families, businesses, and the economy. They provide economic stability, security, and prosperity, supporting community efforts to maintain their local quality of life. Businesses also recognize their ability to bolster competitiveness in talent recruitment and retention. What constitutes a good job is somewhat ambiguous, but the Departments of Commerce and Labor (DOC and DOL) have created a framework to help identify their key characteristics. The framework consists of eight principles for economic stakeholders to follow (<https://www.dol.gov/general/good-jobs/principles>):

- **Recruitment and hiring** – Qualified applicants are actively recruited – especially those from underserved communities. Applicants are free from discrimination, including unequal treatment or application of selection criteria that are unrelated to job performance. Applicants are evaluated with relevant skills-based requirements. Unnecessary educational, credentials and experience requirements are minimized.
- **Benefits** – Full-time and part-time workers are provided family-sustaining benefits that promote economic security and mobility. These include health insurance, a retirement plan, workers' compensation benefits, work-family benefits such as paid leave and caregiving supports, and others that may arise from engagement with workers. Workers are empowered and encouraged to use these benefits.

- Diversity, Equity, Inclusion, and Accessibility (DEIA) – All workers have equal opportunity. Workers are respected, empowered, and treated fairly. DEIA is a core value and practiced norm in the workplace. Individuals from underserved communities do not face systemic barriers in the workplace. Underserved communities are persons adversely affected by persistent poverty, discrimination, or inequality, including Black, Indigenous, people of color; LGBTQ+ individuals; women; immigrants; veterans; military spouses; individuals with disabilities; individuals in rural communities; individuals without a college degree; individuals with or recovering from substance use disorder; and justice-involved individuals.
- Empowerment and Representation – Workers can form and join unions. Workers can engage in protected, concerted activity without fear of retaliation. Workers contribute to decisions about their work, how it is performed, and organizational direction.
- Job Security and Working Conditions – Workers have a safe, healthy, and accessible workplace, built on input from workers and their representatives. Workers have job security without arbitrary or discriminatory discipline or dismissal. They have adequate hours and predictable schedules. The use of electronic monitoring, data, and algorithms is transparent, equitable, and carefully deployed with input from workers. Workers are free from harassment, discrimination, and retaliation at work. Workers are properly classified under applicable laws. Temporary or contractor labor solutions are minimized.
- Organizational Culture – All workers belong, are valued, contribute meaningfully to the organization, and are engaged and respected especially by leadership.
- Pay – All workers are paid a stable and predictable living wage before overtime, tips, and commissions. Workers’ pay is fair, transparent, and equitable. Workers’ wages increase with increased skills and experience.
- Skills and Career Advancement – Workers have equitable opportunities and tools to progress to future good jobs within their organizations or outside them. Workers have transparent promotion or advancement opportunities. Workers have access to quality employer- or labor-management-provided training and education.

The responsibility of ensuring the availability and accessibility of good jobs locally falls upon local and state governments, local employers and business leaders, and community development organizations. Collaboration between these groups as well as communication with the local workforce is imperative to the delivery of quality jobs.

In 2022, City of Springfield became one of 32 entities taking part in the EDA Good Jobs Challenge, a program created through the American Rescue Plan that focuses on building high-quality, locally led workforce systems. Through the program, Springfield provides short-term job training in the areas of healthcare, transportation and logistics, and paraprofessional education services. The program targets historically underserved and disadvantaged populations such as veterans, at-risk youth, and individuals with disabilities among others. Anyone interested in participating can apply on the City of Springfield’s website: <https://www.springfieldmo.gov/5756/Good-Jobs-Challenge>

SECTORAL PARTNERSHIPS

To align workforce development efforts, employers within a shared industry will establish sectoral partnerships with educational institutions, community-based organizations, workforce boards, trade associations, and unions. These partnerships seek to place workers in high-quality jobs by training them in high-demand, industry specific skills. Sectoral partnerships promote community resilience by facilitating communication between local industries and key stakeholders, ensuring that workforce development is targeting the specific needs of the local economy while building a robust talent pipeline.

Centers for Advanced Professional Studies (CAPS) programs are nationally recognized high school programs that give students real world experience working with well-established businesses and experienced professionals. Students practice solving real world problems, utilizing industry standard tools, and working in a professional environment. In 2015, the Springfield Area Chamber of Commerce (SACC) partnered with local school districts and business leaders to launch the Greater Ozarks Center for Advanced Professional Studies (GOCAPS). The program accepts juniors and seniors from 24 high schools, bridging the gap between the region's skilled labor needs and training opportunities for high school students entering the workforce. GOCAPS serves as an example of a successful sectoral partnership between public entities, community developers, and local businesses.

MAJOR EMPLOYERS

According to the Springfield Regional Economic Partnership (SREP), the major employers for the region can be found in Springfield, Branson, Monett, and Cassville. As hubs of economic activity for the region, these employers are mostly categorized as educational, healthcare, and manufacturing services. The top 20 employers provided nearly 60,000 jobs in 2023, with an average of 2,328 employees per company. Income is indicative of the wealth generated by a region. There is a significant disparity between the income in the SMCOG region and those of the state, particularly those in Dallas and Dade counties.

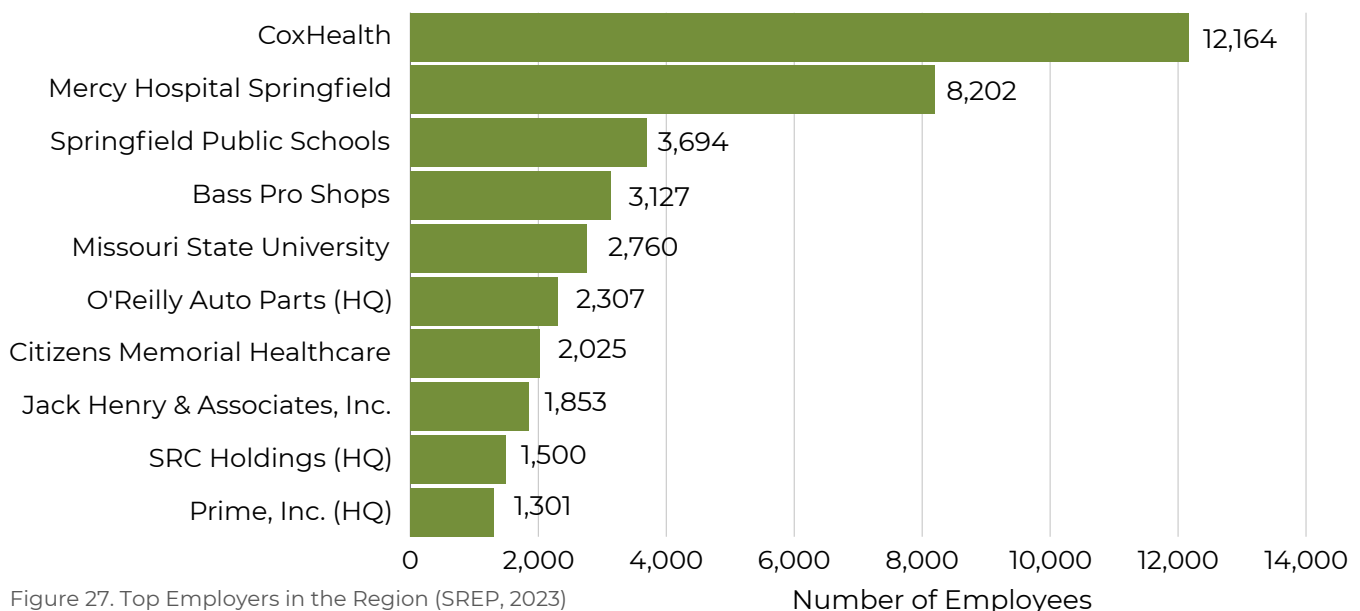


Figure 27. Top Employers in the Region (SREP, 2023)

ENTREPRENEURS AND SMALL BUSINESS

Southwest Missouri has a thriving and prosperous entrepreneurial environment. According to data from Lightcast, more than 4,000 for-profit small businesses operate in the 10-county region, employing nearly 90,000 workers combined or 27% of the entire workforce. These businesses generate \$11.2 billion in sales annually, a substantial contribution to the region's tax base and economic activity.

Entrepreneurial Support Organizations

Economic developers support local entrepreneurs in a variety of ways: financing assistance (accessing venture capital); providing technical assistance (locating suppliers and customers or negotiating regulatory requirements); meeting infrastructure needs (business incubators); and facilitating networking among business leaders (Malizia and Feser, pg. 204). Southwest Missouri has cultivated a strong community of economic development organizations dedicated to helping local small businesses. Entrepreneurial support organizations (ESO) provide services to businesses of all sizes, stages of development, and industry fields. Some, however, specialize in providing support to early stage or pre-venture businesses, guiding them through the rigors of getting a startup off the ground.

efactory is a technology-focused business incubator and entrepreneurial development center, serving as a liaison for Missouri State University's partnerships with startups, small businesses, and the region's largest employers. The downtown Springfield facility is also home to MSU's Small Business Development Center (SBDC), a Small Business Administration (SBA) affiliate that provides business advising and technical assistance. Partnering businesses and innovators have access to mentorship services, leasable coworking space, and informational workshops and events.

efactory has received investment from EDA for facility improvements and in 2022, EDA awarded a 'Build to Scale' grant to support the Southern Missouri Innovation Network (Innovate SOMO) to accelerate tech-based economic development across 47 predominantly rural and historically distressed counties. Innovate SOMO is a partnership between efactory and Codefi and launched with commitments from over 100 leading companies and stakeholders. (See www.InnovateSOMO.org)

Startups & Tech-Based Entrepreneurship

Small businesses vary greatly based on several important factors such as industry sector, development stage, firm age, and business goals. Recently, focus has been placed on encouraging the establishment and growth of startup businesses in high-growth industries, namely technology-based sectors. This sentiment has been echoed by the Missouri Technology Corporation (MTC) through their Catalyzing Innovation Report, and the Missouri Chamber of Commerce and Industry through their Technology 2030 Report. High-growth firms have greater potential to experience exponential growth in scale, thus strengthening employment opportunities, productivity, new-wealth generation, and overall economic activity.

Offsetting these potential rewards is the difficulty of obtaining such levels of success as very few startups in high-growth industries make it past the beginning stages of development. Figure 28 shows the typical growth trajectory of a business within high-growth industries alongside the phases of funding that sustain the firm's operations and expansion.

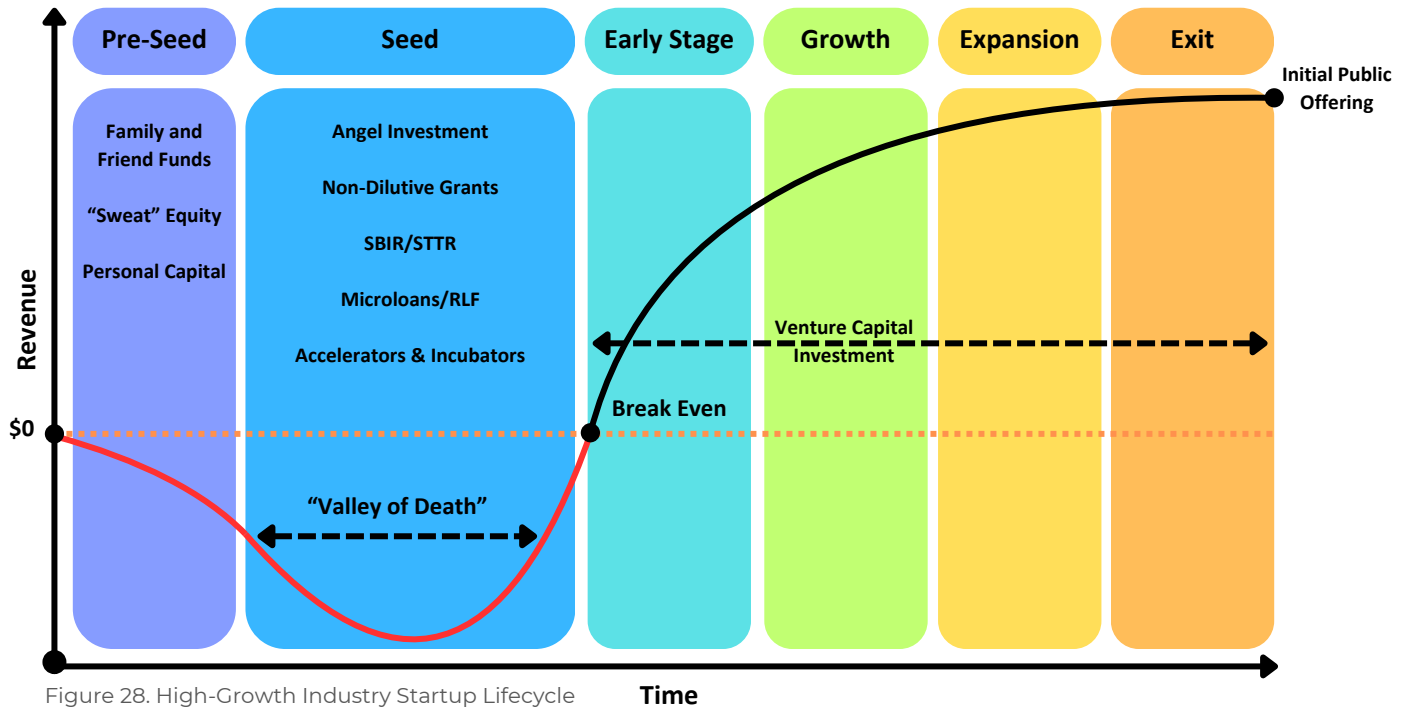


Figure 28. High-Growth Industry Startup Lifecycle

After designing a sound business concept, the biggest hurdle that most startups face is maintaining a consistent revenue stream while bearing the heavy costs of operational expenses and product development during the seed phase of funding. Funding is crucial during this period as it could spell the difference between successfully scaling production to a sustainable level or succumbing to debts and folding the firm. Startups in this stage often seek cash injections in the form of grant rewards, investment from outside investors and incubator programs, or business loans from financial institutions. Access to all three are necessary to successfully navigate the startup development process.

Equity In Business

The strength of innovation and creativity within the entrepreneurial ecosystem comes in no small part from the presence of a varied and diverse community of business leaders. Women and minority groups have been historically excluded from leader positions in business and the same challenge is still present in the region today. Of more than 4,000 small businesses, only 7.3% are women owned and 1.5% are minority owned.

INDUSTRY

The SMCOG region's economy is, like much of America, largely dependent on the service industry. Figure 30 demonstrate how service providing industries represent an outsized portion of both the local job market and production.

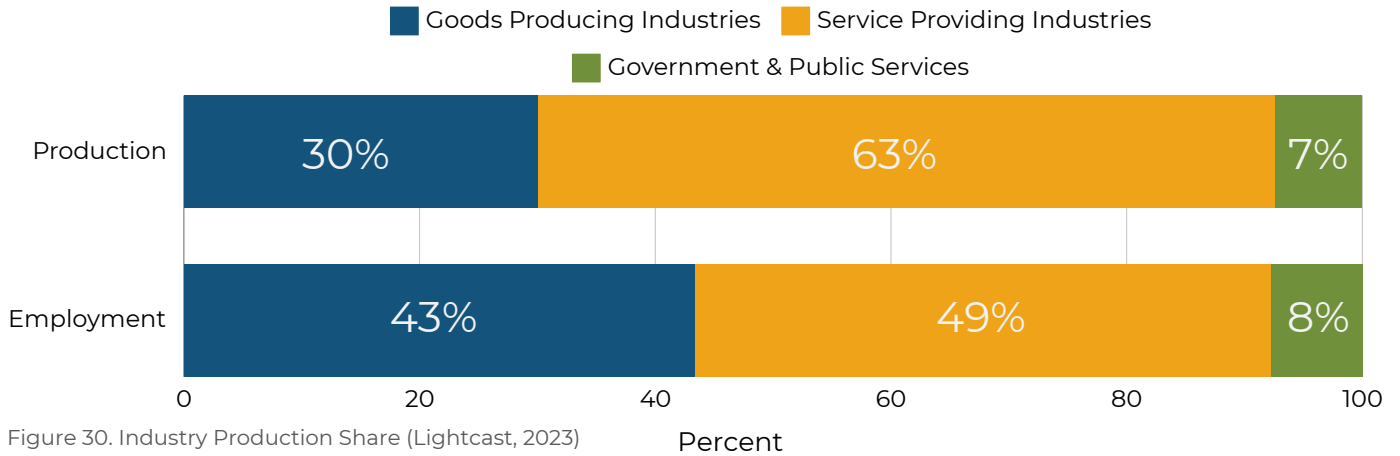


Figure 30. Industry Production Share (Lightcast, 2023)

The region's largest sectors within the service industry are health care and social assistance, retail trade, and accommodation and food services; these three sectors account for more than a third, or 37%, of all jobs in the SMCOG region and contribute nearly \$8 billion towards the ten counties' gross regional production (GRP). The three sectors that make up the goods producing industry, resource extraction, construction, and manufacturing, account for nearly 130,000 jobs and more than \$11 billion in production.

Employment	(Number of Jobs 2023)	Production	(Gross Regional Production 2022)	Wages	(Average Annual Earnings 2023)
Local Government	26,611	Local Government	\$ 1.72 Billion	Petroleum and Coal Products Manufacturing	\$443,601

Figure 31. Top Industries in Employment, Production, and Earnings (Lightcast 2022, 2023)



Wages in goods-producing industries within the region tend to be higher than their service industry counterparts, representative of a higher level of production per position and a greater skill level required for the position. The greatest wages, however, are found in high level service industry sectors namely: utilities, management of companies and enterprises, wholesale trade, and finance and insurance. According to data from Lightcast, the region's utilities and business management industries report average annual earnings of more than \$100,000. The food service and accommodation sector, on the other hand, reports average annual earnings of less than \$30,000.

Industry clusters are geographic concentrations of interconnected companies, suppliers, service providers, and associated institutions in a particular field or industry. Figure 32 shows the region's top industry clusters with scores on their performance based on three criteria: production (contribution to GRP), regional competitiveness (job growth compared to national average), and regional specialization (job concentration compared to national average).

Rank	Production	Score	Regional Competitiveness	Score	Regional Specialization	Score
1	Local Health Services	55	Local Health Services	73	Information Technology and Analytical Instruments	67
2	Local Government Services	50	Recreational and Small Electric Goods	71	Construction Products and Services	67
3	Transportation and Logistics	42	Distribution and Electronic Commerce	69	Food Processing and Manufacturing	58
4	Local Education and Training	41	Construction Products and Services	69	Production Technology and Heavy Machinery	53
5	Local Financial Services	37	Local Retailing of Clothing and General Merchandise	68	Communications Equipment and Services	51

*Score out of 100

Figure 32. Industry Cluster Performance Metrics (Lightcast, 2023)

Local health services represent the largest and fastest growing industry in terms of employment in the region, evident by the prevalence of such large healthcare providers as Mercy and Cox. However, at a national level, the region has a unique concentration among the IT, construction, food production, manufacturing equipment, and communication clusters. These clusters are what set the region apart from others across the country and provide an opportunity to capitalize on established industry strengths.

Industry Diversity

The concentration of a region’s workforce in a handful of industry sectors or clusters can spell danger for the local economy. A diverse and balanced portfolio of industry sectors contributes to the region’s economic resilience in the face of economic shocks and industry-specific contractions. Figure 33 demonstrates the Springfield Metro Area’s employment concentration in certain industry clusters and how they compare to the typical metro area in the US.

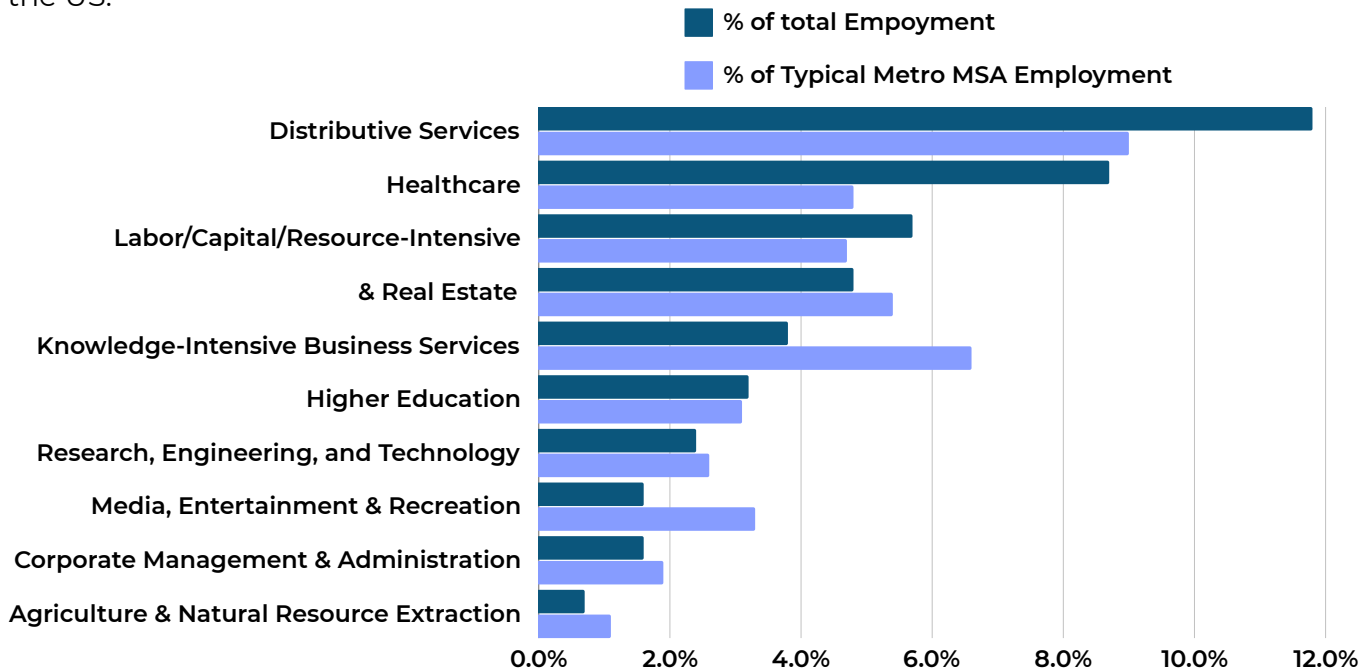


Figure 33. Industry Diversity vs. National Average (Lightcast, 2023)

Springfield and the surrounding metro area concentrates a greater-than-average portion of its employment in the distributive services cluster, which is comprised of industries involved in the transportation, storing, and reselling of goods. Not shown in this chart is the share of jobs dedicated to locally serving industries; this cluster exceeds half of all employment in the metro area, far above what is typical for most metros, at 19%. This trend corresponds with SMCOC’s service heavy industry portfolio but leaves the region vulnerable to disruptions in the service industry. The most apt example of such disruption from recent memory is the COVID-19 pandemic, which dealt a major blow to employment in service industry sectors.

Overall, the Springfield Metro Area has a slightly below average level of industry diversity, ranking 203 out of 384 metro areas nationwide, according to data from Lightcast. Increasing the diversity of the region’s industry profile will increase the region’s long-term resiliency and ability to withstand economic pressure.

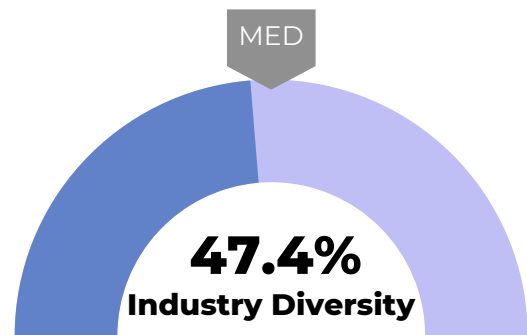


Figure 34. Industry Diversity (Lightcast, 2023)

Tech Industry

Across the state of Missouri, the tech industry accounts for nearly 6% of employment yet it produces about 10% of gross state product. Similarly, in the SMCOG region, the tech industry accounts for 3.6% of employment and contributes 6.9% to the gross regional product. According to the Technology 2030 report, tech positions also produce a job multiplier effect of 2.8, meaning that for every one job created in the tech sector, approximately 1.8 additional jobs are created or supported in the state's economy as a result. This multiplier, the second highest among Missouri's industry clusters, signals the benefit high-growth, tech industry investment grants to the stability and growth of the local job market.

Film Industry

Missouri currently does not have a very active film industry presence; the film industry in Missouri employs only 1,100 workers, with little demand for new hires. Most of these jobs are found in the St. Louis area, boasting nearly half of the state's positions. By contrast, the 10-county SMCOG region has only 93 film industry jobs. While job openings may be scarce, film has a job multiplier effect of 2.09, so each job created in film creates an additional job position in another industry.

The film industry contributed approximately \$146 million to the Gross State Production (GSP) in 2023, including \$5.8 million in taxes.

\$146,000,000
Film Industry State Production Contribution

Recent shifts in the entertainment industry have opened the door for states outside media strongholds like California and New York to enter and thrive in the motion picture industry. States like Georgia and Arizona have taken advantage of the situation, capitalizing upon industry conditions and implementing incentive programs targeting film production. Missouri passed its own tax incentive program, the Show MO Act, in July of 2023. The act promises a 20% tax credit on qualifying expenses with additional credits up to 40% for accompanying activities such as filming in blighted or rural areas. Film industry tax incentives have historically produced lackluster impacts on the volume of film production in their respective states, especially as more states adopt similar incentives, diluting their appeal (Leiser, 2017). Many states have since repealed tax incentives passed in the 2000's and 2010's, citing ineffectual results on film production attraction (Button, 2018).

Since its passing, Southwest Missouri has expressed interest in taking formal and decisive steps towards supporting film industry activity in the region, hoping to capitalize on recent statewide initiatives. One such method is the formation of a regional film commission, a non-profit entity dedicated to attracting and facilitating film production activities in the area. A film commission would serve to attract more film industry activity, the economic impacts of which are uncertain, and its establishment should be approached with care.

Film Industry Jobs	
SMCOG	93
Greene	59
Christian	14
All other counties	20
Kansas City Area	185
Jackson	142
Clay	24
Platte	19
St. Louis Area	541
St. Louis City	194
St. Louis County	274
St. Charles	61
Jefferson	12
Missouri	1102

Figure 35. Film Industry Jobs
(Lightcast, 2023)

TRANSPORTATION

COMMUTING

The characteristics of commuting determine traffic flow patterns, daily cycles of economic activity, and identify the region's centers of employment. Bedroom communities, where most residents commute to work outside the area and few people commute into or within the area, face a host of unique challenges not typically encountered by employment centers. The economic centers of Springfield in Greene County and Branson in Taney County prompt satellite communities to form around their periphery, where many workers set up residence, taking advantage of lower cost of living compared to the urban centers. It is because of the region's well connected and maintained transportation network that this development pattern is especially viable. Figure 37 demonstrates the commuting patterns and employment locations of labor and residents from each of the region's 10 counties. Greene, Taney, and Barry County stand out as areas that import more labor than they export, identifying them as centers of employment rather than commuter suburbs.

County	Employed in the Area but Living Elsewhere	Employed and Living in the Area	Living in the Area but Employed Elsewhere
Barry	8,721	5,250	4,883
Christian	10,879	8,060	30,165
Dade	848	874	1,797
Dallas	1,376	1,066	5,400
Greene	80,194	92,508	27,950
Lawrence	4,427	4,164	12,026
Polk	4,560	4,262	8,668
Stone	3,590	2,933	8,624
Taney	11,543	13,567	9,110
Webster	3,650	2,390	9,061

Figure 37. Population Inflow & Outflow (Census OnTheMap, 2021)

In 2021, the average commute time of the SMCOC region was 25.4 minutes. The state and national averages for commute time to work were 23.8 minutes and 26.8 minutes, respectively. Travel by car (89%), either alone (79%) or in a carpool (9%), was the most frequent way of commuting in 2022. In stark contrast, only 0.5% of commuters used public transit.

25.4 Minutes

Average Commute to Work
(10-County Region)

89%

Commute via Automobile



0.5%

Commute via Public Transit



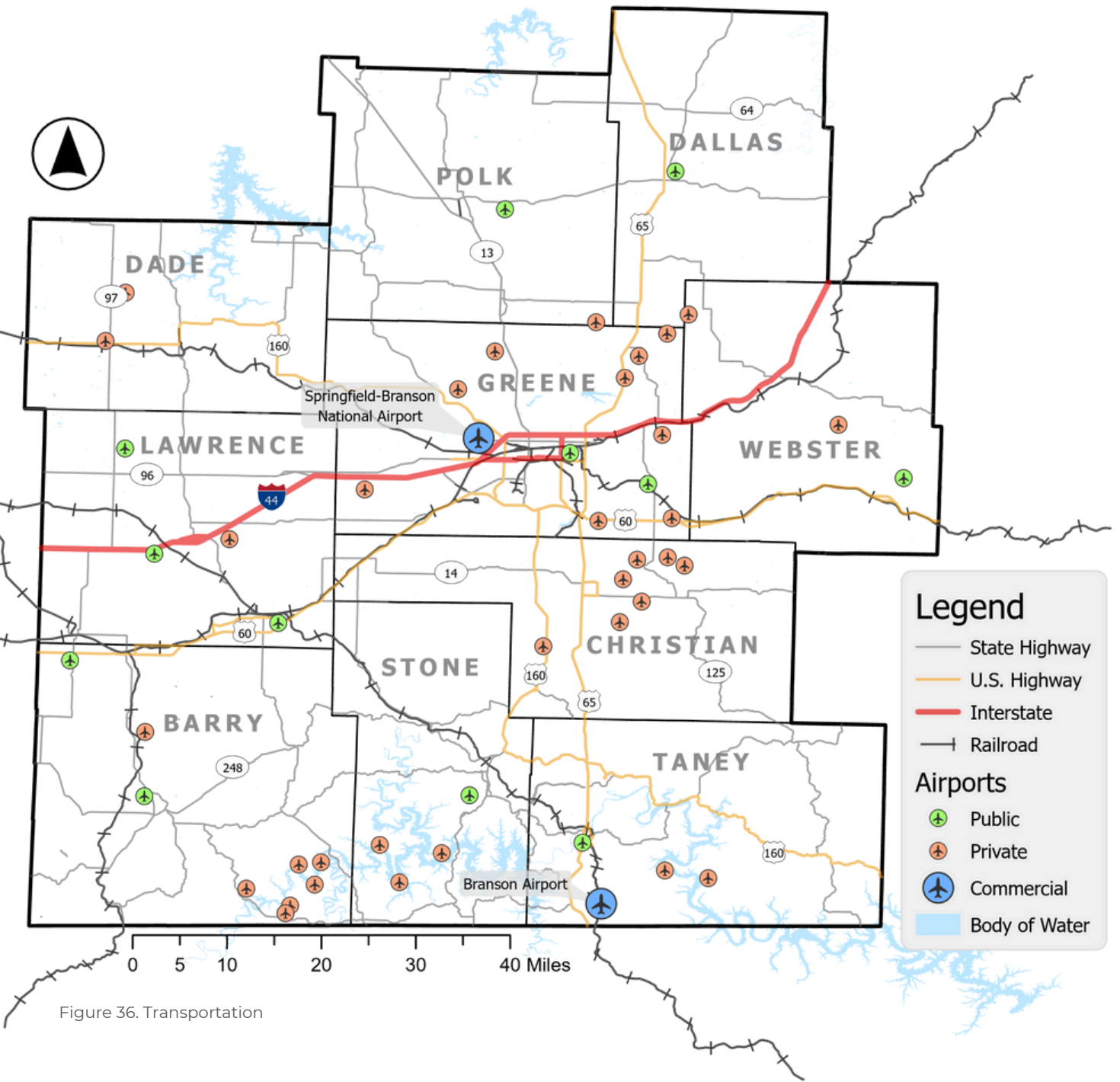


Figure 36. Transportation

ROADS

The SMCOG region, a major transportation hub, resides at the intersection of several major highways and one interstate. These routes directly connect the region to all neighboring states, as well as the two largest cities in Missouri, Kansas City and St. Louis. According to 2023 measurements from MoDOT, the ten-county region contains 6,065.4 total miles of state-maintained pavement, with approximately 90% reported as being in good condition. This road network affords the SMCOG region an extensive, well-maintained, and connected transportation network that, in conjunction with the rail network, establishes the region as an important shipping and logistics hub.

TRANSIT SERVICES

The SMCOG region has a limited variety of public transit options but a plethora of private transit providers serving a variety of purposes and clientele. City Utilities in Springfield operate the largest public transit operation, running both diesel and electric busses across 12 weekday routes and 7 weekend and evening routes. The City of Branson offers a free trolley service with 13 stops in their downtown district. In addition to fixed route bus service, the SMCOG region also has access to variable route services through OATS, a nonprofit transit provider specializing in meeting transportation needs for rural communities, senior citizens, and people with disabilities. Of the region's public transit options, OATS offers the widest reaching routes, spanning multiple counties with dedicated lines between major metro areas and underserved rural areas.

Apart from commuter transit services, the region also has a variety of private transit services offering scheduled shuttles and charter busses. Rideshare services such as Uber and Lyft are also available in many parts of the region.



AIR TRANSPORTATION

Air transportation is serviced by two airports, Springfield-Branson National Airport and Branson Airport, as the primary hubs in addition to locally serving public and private airports. The Springfield-Branson National Airport (SGF) is served by four airlines providing non-stop service to six domestic airports, with seasonal flights to an additional seven locations. Despite a heavy hit to ridership during the COVID-19 pandemic, SGF Airport saw a quick rebound in activity, nearly doubling the annual number of commercial passengers boardings from 2020 to 2021.

SGF Airport also operates as an important cargo hub, housing both FedEx and UPS air freight operations. Nearly 20,000 tons of cargo passed through SGF Airport in 2021, a considerable amount but not quite matching peak, pre-pandemic levels of freight (Airport Master Plan).

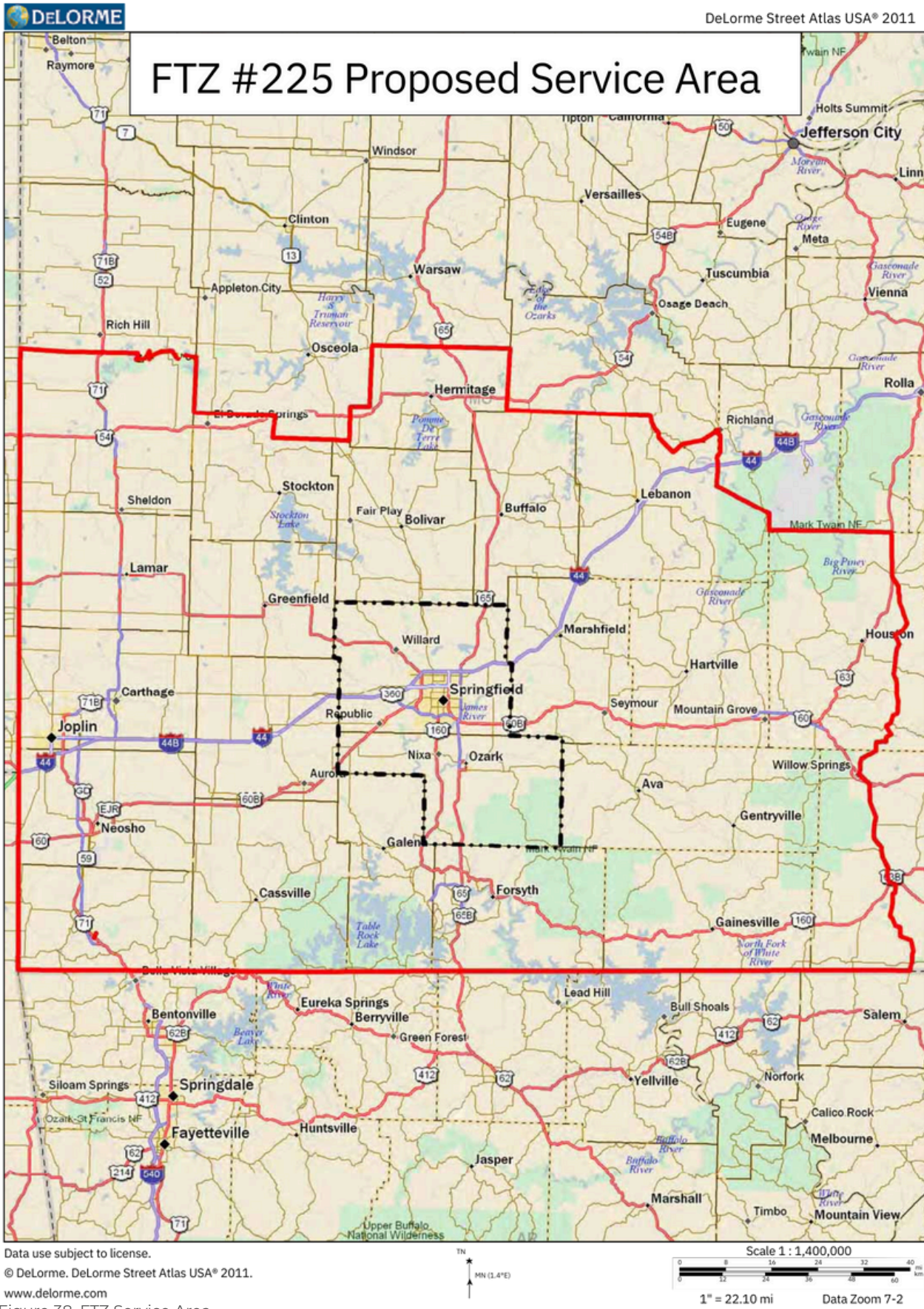
The Springfield-Branson National Airport is also a part of a 23-county Foreign Trade Zone (FTZ) that grants international shipping benefits, including reduced- and non-duty shipping, and reduced customs processing. As of June 2024, three entities, SGF Airport, Newell Brands Distribution, LLC, and EBV Explosives Environmental Co., are actively taking advantage of the trade zone program to enhance their supply chain logistics and lower the cost of doing trade. The FTZ incorporates all modes of cargo transportation: rail, road, air, and sea. Thus, companies with ties to international markets can take advantage of this opportunity regardless of their cargo's mode of delivery. That said, the Springfield Airport Board is the designated administrator of the region's program, hence the misconception that the FTZ's benefits only apply to air cargo. Benefits from the FTZ designation easily translate to positive impacts on the local economy; a study released by MODOT in 2013 found that investment in an FTZ produces a 250% - 300% return within the first year in addition to creating new jobs locally.

More information on the Southwest Missouri FTZ can be found on Springfield-Branson National Airport's website: www.flyspringfield.com/ftz

FREIGHT

Situated at the crossroads of multiple transportation corridors, Southwest Missouri is a major hub for freight traffic, on par with other major metro areas in the state. In 2022, the Missouri Department of Transportation (MODOT) released its first Freight & Rail Plan, in which it calculates the flow of cargo through the state's regions. 55 million tons of freight valued at \$38 billion passed through the Southwest District of Missouri in 2018. Most goods traveling through Southwest Missouri are done so by truck. By value, trucks transported 88% of all goods in the region and 87% by weight, with trains accounting for most of the remaining cargo. While planes are unable to transport a significant amount of weight, the value of their cargo is nearly the same as that of trains, at \$1.9 and \$2.4 billion respectively in 2018.

Springfield is one of three metropolitan areas in Missouri situated along Interstate 44, the others being St. Louis and Joplin. I-44 is the largest freight corridor in the state, carrying 1.3 billion tons of freight in 2018 valued at \$3.7 billion. An additional \$241 million worth of freight was transported along State Route 744 in Springfield, otherwise known as Kearney Street.



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Figure 38. FTZ Service Area

BICYCLE & PEDESTRIAN

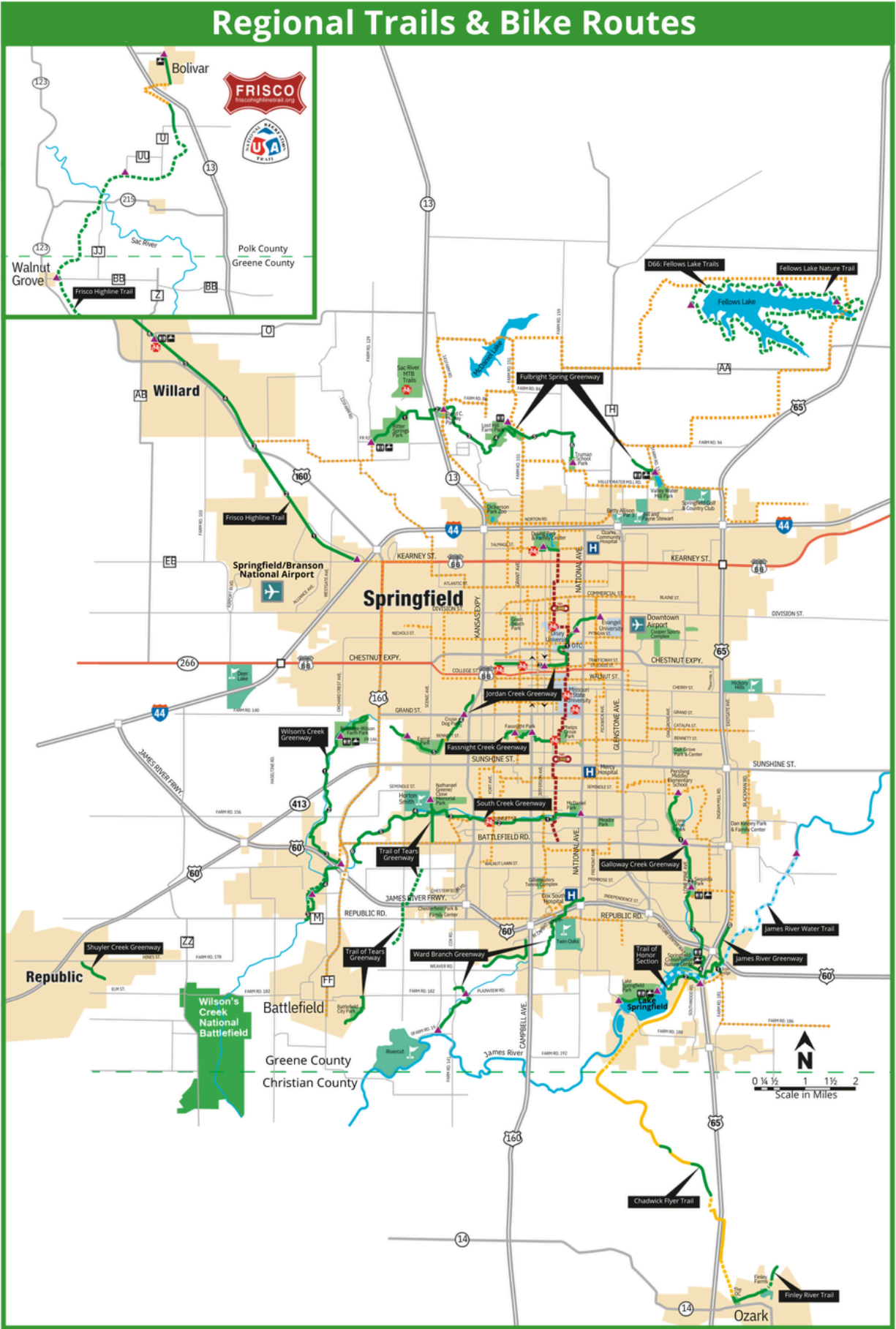
The region is home to an extensive paved and unpaved trail network, useful for both recreation and commuting. The primary organization for the facilitation of trail development in the region is Ozark Greenways, steward of over 110 miles of paved and unpaved trails as well as more than 80 miles of on-street bicycle routes. Ozark Greenways is a non-profit organization ran by a board of directors occupied by local community leaders. To achieve a connected network of trails, the group collaborates with local stakeholders such as city governments to find opportunities where trails can fit into the region's existing and future transportation system. Some of the most prominent trail segments include: the Frisco Highline Trail, a 35-mile paved and gravel cycling and pedestrian path that connects Springfield and Bolivar; Galloway Creek Greenway, connecting Pershing Middle/Elementary School to Sequiota Park and Lake Springfield; and South Creek Greenway, connecting Wilson's Creek Greenway with Nathaniel Greene/Close Memorial Park and The Link.

Expansions to the network are currently underway and planned connections are constantly being identified. One such network expansion, The Chadwick Flyer Trail, will connect Springfield to Ozark via a 12-mile paved trail, serving as a vital active transportation corridor between two neighboring municipalities. The expansion was announced in the Fall of 2022 with approximately 3.2 miles having been completed as of Spring 2024.

The Link is an on-street, bicycle friendly corridor stretching eight miles North and South through the middle of Springfield. The route is located along low traffic volume streets with special signage and lane indicators to improve cyclist safety. The Link intersects with multiple sections of Greenway Trails and serves as a safe alternative connection between dedicated trails.

Two long-distance bicycle touring routes, the Trans America Trail (section 9) and Bicycle Route 66 (Section 2), intersect within the region with the Route 66 path running right through Springfield. A third cross-national cycling route has been proposed by the Missouri Bicycle and Pedestrian Federation along with the Adventure Cycling Association that would run through much of Southwest Missouri and directly through Springfield; USBR 51 plans to span from New Orleans to Minnesota and would include a route connecting Northwest Arkansas to Southwest Missouri, two major economic hubs in the Ozarks. This expansion would provide opportunity for active tourism in the surrounding communities.





Find more trail maps and become a member at ozarkgreenways.org

Figure 39. Ozark Greenway Trails

UTILITIES & PUBLIC SERVICES

A diverse range of services is available to residents of the SMCOC region. These services encompass essential utilities such as municipal water, sewer, and solid waste management, as well as utility services. The region also benefits from police and fire protection, health and social service providers, community and economic development organizations, and recreational opportunities. It is important to note that the availability and scope of these services can vary significantly due to differences in geography and the size of each community within the region.

BROADBAND

According to the National Telecommunications and Information Administration, the current internet service in the SMCOC region is inadequate. Around 77% of the regional population has internet capabilities with minimum download speeds of 3 megabytes (MB) and upload speeds of 0.8 MB. In comparison, approximately 95% of the nation's population has access to internet speeds at this level. However, as technology advances, businesses will increasingly require higher internet speeds for efficient operations. If the new requirement for conducting business effectively becomes download speeds of at least 10MB and upload speeds of at least 3MB, the SMCOC region will significantly lag behind the nation. Currently, only about 65% of the region has coverage at these speeds, whereas 93% of the national population does.

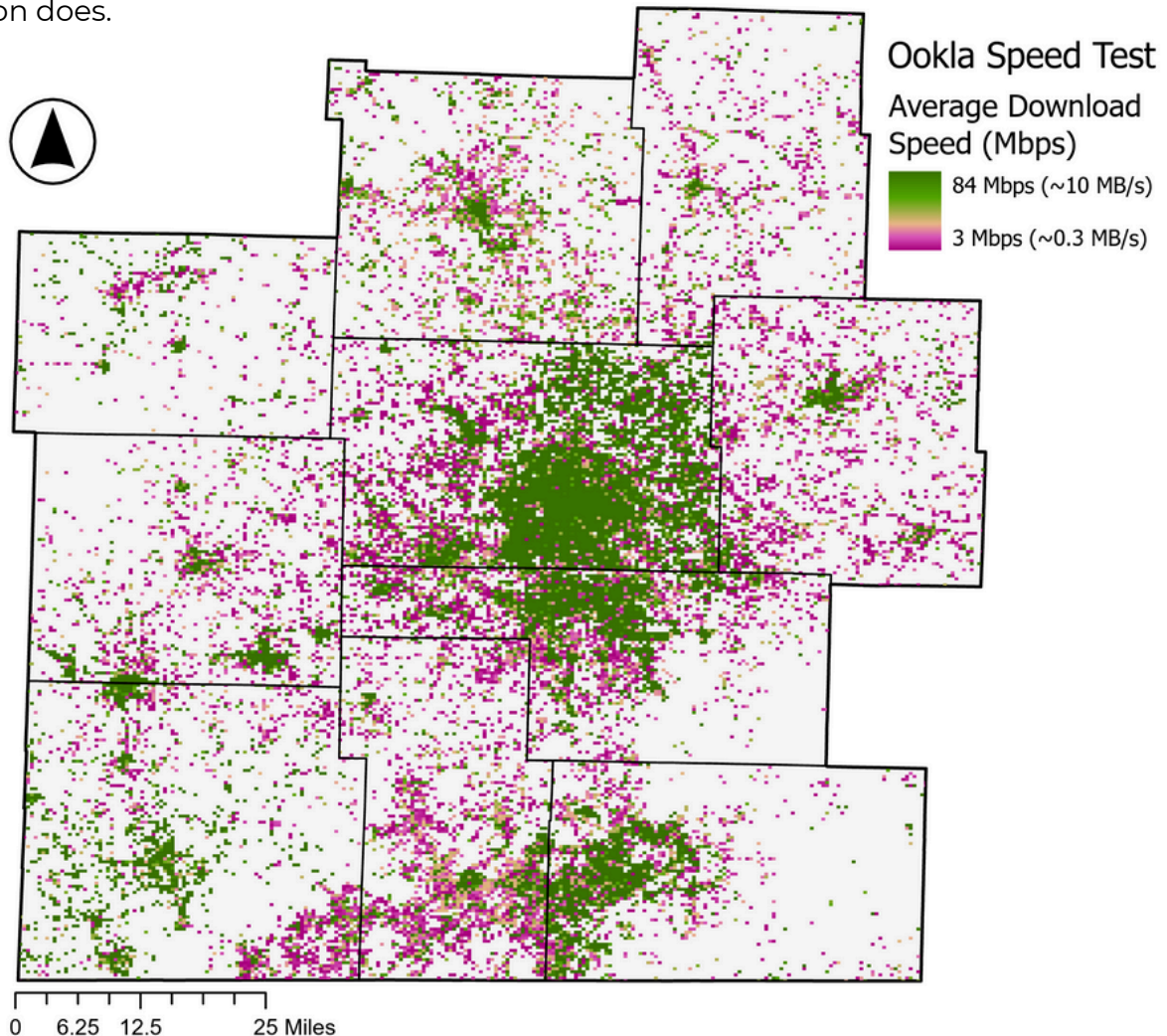


Figure 40. Internet Speeds

WATER

The area has a wide range of water delivery systems, varying from simple systems in smaller cities to the more complex system in Springfield. In most communities, wells are used as the source of water, and water towers serve as storage facilities. Water treatment facilities are only present in the larger cities of the region. The majority of community public water supply systems and public water supply districts rely on groundwater as their source of potable water. This includes municipal water suppliers, public entities, and privately owned wells. However, a few communities like Springfield and Branson utilize surface water reservoirs for their water supplies.

SEWER

The collection and treatment of sewage primarily involves the use of sanitary sewer lines and sewage lagoons. However, smaller communities in the region may rely solely on septic tanks for sewage treatment. In rural areas, septic systems are commonly used for wastewater disposal. Some areas have established sewer districts, while larger communities (with a population over 5,000) and some smaller communities have public wastewater treatment facilities.

Due to rapid population growth, there have been ongoing improvements to both municipal water and sewage systems in order to accommodate the demands of growth and protect the environment. The region is home to 85 municipal wastewater treatment systems, numerous septic systems, and one wetland treatment system. Additionally, a not-for-profit organization called Table Rock Lake Water Quality, Inc. has been established to oversee the installation and maintenance of onsite sewer systems, including cluster systems.

Preserving the quality of aquifers is a significant concern throughout the region, as many communities and residents in rural areas rely on groundwater for their drinking water supply. Consequently, the proper disposal of wastewater is closely monitored to prevent contamination of the aquifers.

SOLID WASTE

There are currently eight landfills registered by the Missouri Department of Natural Resources in the region. The Springfield Sanitary Landfill is the only permitted sanitary landfill in the region. There are five transfer stations located in Greene, Lawrence, Stone, and Taney counties. Also in Greene County are two demolition, utility, and special waste landfills.

ELECTRICITY

Electric service in the SMOG region is provided by several major entities, including utility departments, private enterprises, and cooperatives. Electric service is adequate for the region, with many providers offering options for cleaner energy.

NATURAL GAS

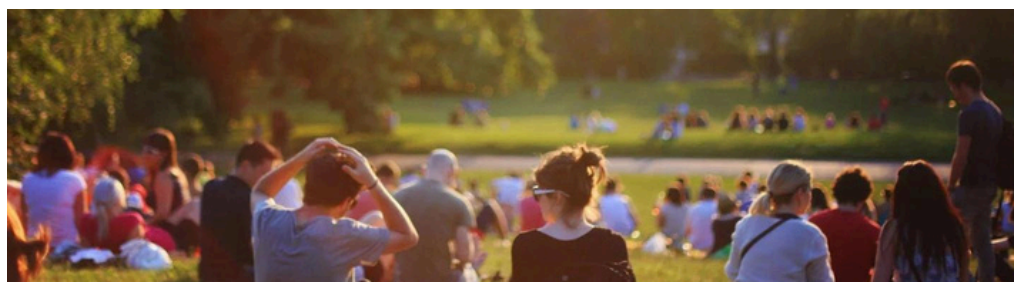
Natural gas is offered in all but two of the region's counties. Dallas and Polk County do not have access to natural gas. The SMOG region is serviced by Spire Energy in Barry, Christian, Dade, Greene, Lawrence, and Stone County; and Summit Natural Gas of Missouri in Taney and Webster County. In Springfield, gas service is administered through City Utilities, a community owned utility company with more than 100,000 customers.

POLICE AND FIRE PROTECTION

Many communities in the region maintain their own police and fire protection services. Unincorporated areas and several of the smaller communities are served by their County's Sheriff Department. Missouri Highway Patrol Region D provides law enforcement along state highway routes and in support of state mandated public safety initiatives. In addition, SMOG administers the Regional Homeland Security Oversight Committee Region D which provides training, resource management, and service delivery systems to prepare for any technological or natural disaster that occurs in the area.

HEALTHCARE

There are several hospitals located within the SMOG service area. Mercy, CoxHealth, and Ozarks Community Hospital all have several campuses throughout the region, with Springfield serving as the main center. Jordan Valley Health Center is also located in Springfield. Citizens Memorial Healthcare has campuses in the region. The Mercy system features 1,016 beds served by over 11,000 employees. The CoxHealth system has 805 beds served by over 550 staffed physicians. All counties in the region have at least one medical center that provides services. Additionally, Springfield operates a Veterans' Affairs Clinic which recently relocated from the Mt. Vernon facility providing better access to local veterans and their families. The Missouri Veterans Homes oversee 1238 beds dedicated to long-term skilled nursing care, ensuring compliance with 157 regulations from the Federal Department of Veterans Affairs. These homes are situated in seven municipalities, including Mount Vernon, which is part of the SMOG region.



CHILDCARE

Access to childcare has a significant effect on parents', particularly mothers, quality of life and economic determinants, namely their ability to participate in the workforce. Parents seeking non-relative childcare can often encounter extensive waitlists and may pursue unlicensed and unregulated childcare options. If no reliable childcare is available, the parent may have to sacrifice time from work to care for their child/children or may choose not to work at all. Licensed childcare providers with availability vary in their affordability, leaving many lower income parents with an inability to afford such care.

Childcare Deficit

According to Childcare Aware of Missouri, the total capacity of all licensed and license-exempt childcare providers in the region is 14,522. In the SMOG region, there are 25,823 children under the age of six with no parents available to watch them during the day, leaving 11,300 children without access to licensed and regulated care. This number does not account for children being cared for by relatives, friends, or neighbors of the parent(s). According to the Census Bureau's Household Pulse Survey, nearly one-third of children under the age of five were cared for during the day by a family member other than a parent; another nine percent were cared for by a nonrelative friend or neighbor.

11,300

Children without access to professional childcare

It is then possible that just under half of the children with no available parent are cared for in this manner, making up for a large portion of the deficit in childcare. That said, relatives and nonrelative caregivers can vary in their dependability and availability. They also are left unregulated, so the quality and safety of the care provided cannot be measured or certified. Many parents, especially mothers, face a difficult decision: leaving a child with a friend or family member or abstaining from work to care for the child themselves.



The Center for American Progress define childcare deserts as “neighborhoods or communities that are either lacking any childcare options or have so few childcare providers that there are more than three children for every licensed childcare slot.” For this analysis, the number of children was narrowed to all children under the age of six with all parental figures in the labor force. Figure 41 demonstrates the census tracts in the SMOG with such definition. Childcare deserts are most common in rural communities; however, the greatest deficits can be found in the census tracts immediately surrounding urban areas like Ozark, Rogersville, Mount Vernon, Branson, and Marshfield. One of the largest deficits is in Republic where nearly 1,500 more childcare slots would need to be added to match the number of young children with working parents. Other tracts with similarly egregious licensed care deficits can be found throughout Springfield as well as in other urban and suburban areas, as shown in the map below.

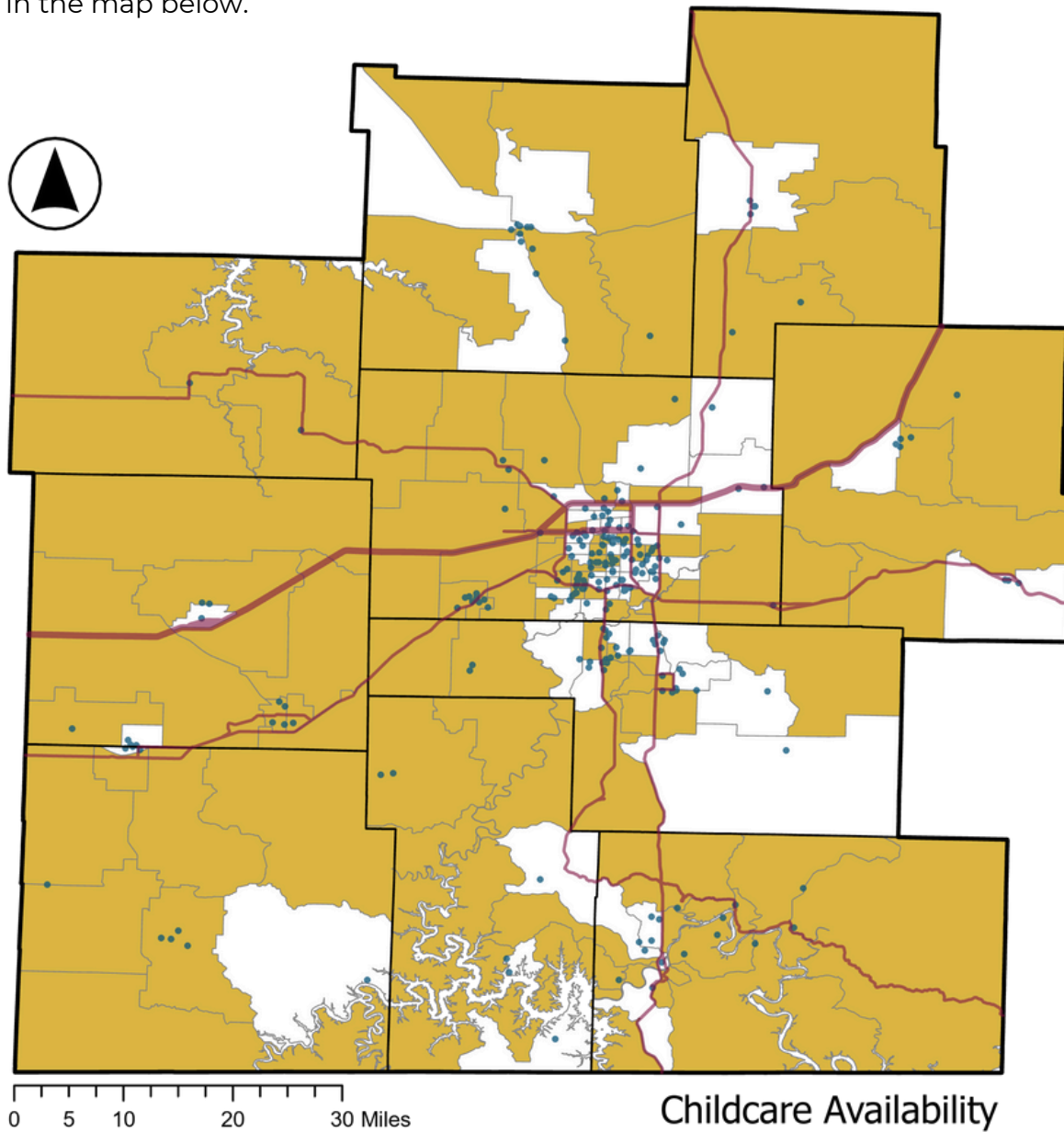


Figure 41. Childcare Deserts

Childcare Costs

Figure 42 shows the average weekly cost of full-time licensed day care facilities, categorized by age group. Costs for licensed childcare are lower in the SMCOG region than the state overall. The lower price is reflective of the lower cost of living and income level of the region; taken as a percentage of median annual household income, SMCOG residents pay roughly what the average parent in Missouri pays for licensed childcare. However, this does not suggest that such costs are affordable. For low-income households and households with more than one child, this cost can represent an outsized proportion of their regular expenditures, significantly limiting their ability to save money or spend on other essentials.

Childcare Facility	Barry	Christian	Dallas	Greene	Lawrence	Polk	Taney	SMCOG Average	All Counties in Missouri
Infant (0-12 months)	\$8,343	\$11,440	\$13,036	\$13,188		\$10,429	\$10,631	\$11,178	\$12,851
One Year Old	\$8,343	\$11,440	\$13,036	\$13,252		\$10,429	\$8,825	\$10,887	\$12,657
Under Two Years Old				\$13,036				\$13,036	\$10,221
Two Years Old	\$7,430	\$9,533	\$1,304	\$10,892	\$7,561	\$8,864	\$7,152	\$7,534	\$10,856
Two to Five Years Old				\$9,125				\$9,125	\$8,546
Three to Five Years Old	\$6,753	\$8,830	\$11,732	\$10,129	\$7,561	\$8,082	\$6,870	\$8,565	\$9,961
School Age Before and After School Care	\$2,346	\$5,019	\$7,821	\$4,823	\$3,911	\$3,129	\$1,564	\$4,088	\$4,979
School Age Full-time/ Summer Care	\$6,257	\$8,343	\$9,125	\$7,645	\$7,561	\$7,821	\$3,650	\$7,200	\$8,092

Figure 42. Yearly Cost of Child Care per Child (Child Care Aware, 2024)
Data note available for Dade, Stone, or Webster Counties.

RECREATION

The SMCOG region offers a wide range of recreational opportunities, both on government-owned and private lands. Residents and visitors can enjoy activities such as fishing, hunting, camping, canoeing, hiking, walking, and biking across the ten counties. Many communities also provide their own parks and organize recreational activities for the public. The state of Missouri owns a significant amount of land in the SMCOG region, primarily managed by the Department of Conservation. These areas serve as public fishing access sites and conservation areas. Additionally, the region is home to several state parks, historic sites, and the federally recognized Wilson's Creek National Battlefield. These natural resources play a crucial role in driving tourism in the region. In 2020, Stone and Taney counties alone welcomed nearly 8 million visitors. The Branson economy, in particular, benefits from tourism, generating approximately \$2 billion annually. To support tourism efforts, the Branson Community received a \$415,000 marketing match grant from the Missouri Division of Tourism.



SWOT ANALYSIS



A woman with dark curly hair and glasses is looking at a whiteboard. The whiteboard has handwritten notes in red marker. The visible text includes: '- RESILIENT SYSTEM', '- SECURE', '- KEEP SERVICE DRY', 'SAFE', 'MAINTAIN', 'NAV', and 'THEIR'. The woman is wearing a black top and a gold bracelet.



SWOT OVERVIEW

ANALYSIS AND FINDINGS

Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis is a tool for strategic planning and decision-making. It provides a structured way to assess an the region's position in the marketplace and identify areas where it can improve or capitalize on opportunities. By understanding its strengths and weaknesses, the region can better position itself to take advantage of opportunities and mitigate potential threats.



Through various committee meetings, community events, and surveys, strengths, weaknesses, opportunities, and threats were identified for the region, which will act as a guide for creating goals and objectives. The responses received from the community survey combined with input from surrounding municipalities and CEDS board members, were used to inform the SWOT analysis. This section provides a summary of the region's SWOT analysis which, along with background and demographic information, was used to develop the strategic direction of CEDS.

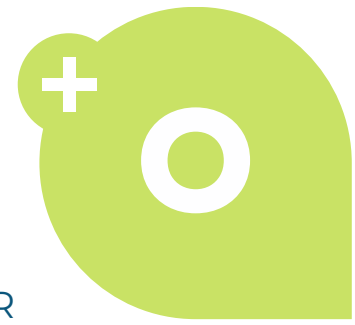


STRENGTHS

COMPETITIVE ADVANTAGES (INTERNAL)

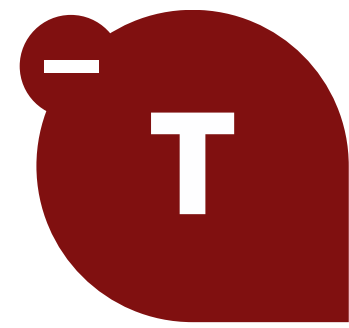
- Strong university and technical college systems.
- Access to natural resources, improving quality of life standards.
- Lower cost of living compared to larger regions.
- Access to industry advisory groups that communicate necessary skills to students.
- Central location with abundant access to highways and railways.
- Prosperous tourist and outdoor recreation attractions.
- Wide range of industries present in the region.
- Large network of stable lenders and banks offering competitive loans.
- Regional culture fostering small business growth and development.
- Abundance of available and developable land.
- Access to an extensive healthcare system.
- Cooperative and cohesive planning from municipal to regional level.
- Competitive and conservative financial environment for businesses.
- Availability of water quality in the region.
- Focus on disaster planning.
- Good urban agriculture in Springfield.
- Strong industry associations with active participation.

OPPORTUNITIES



POTENTIAL TO BRING ABOUT POSITIVE GROWTH OR CHANGE (EXTERNAL)

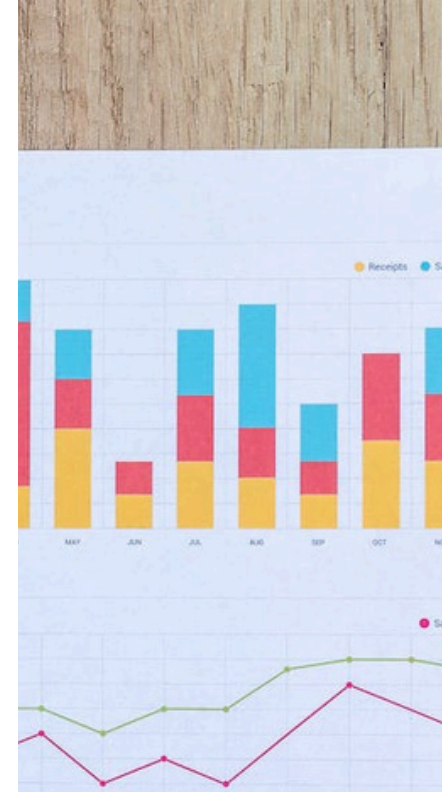
- Increasing apprenticeship and "earn while you learn" opportunities for students.
- Raising awareness of second chance employment opportunities for formerly incarcerated individuals.
- Expanding tourism opportunities throughout the region.
- Enhancing the SGF airport.
- Mobilizing non-profit talent to address local and regional challenges.
- Improving transportation connectivity.
- Promoting IT/Tech and other trending job creation.
- Strengthening collaboration and regionalism for larger programs and infrastructure projects.
- Capitalizing on state funding opportunities due to budget surplus.
- Developing sustainable urban farms and hospital farms.
- Promoting remote work to increase the tax base.
- Increasing site readiness for development.
- Utilizing state incentives more effectively.
- Leveraging underutilized workforce programs from Missouri Department of Economic Development.
- Promoting work/life balance to engage younger workers.
- Rebranding and promoting apprenticeship programs as "earn while you learn" opportunities.
- Increasing utilization of available scholarships.
- Developing sites on greenfield space.
- Improving communication and awareness of federal and state programs among smaller communities.



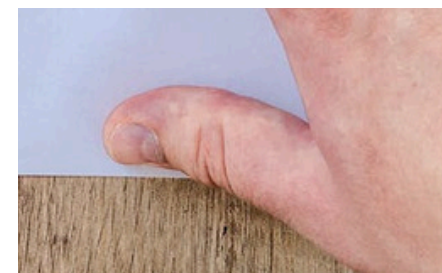
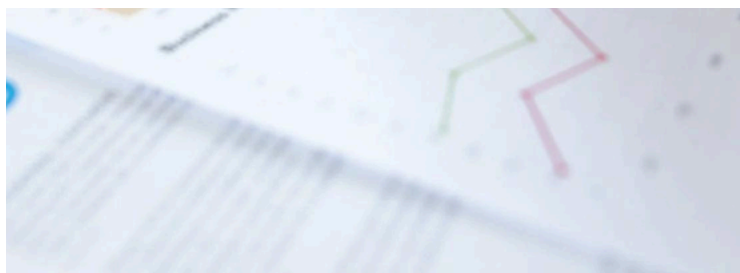
THREATS

NEGATIVE COMPETITIVENESS, SITUATIONS, OR IMPACTS CAUSED FROM OUTSIDE OF THE REGION (EXTERNAL)

- Low interest in trade schools.
- Low demographic diversity throughout the region.
- Talent shortage and misaligned workforce.
- Shortage of attainable housing.
- Utility constraints and supply chain issues.
- Aging population affecting talent supply in the workforce.
- Lack of broadband connectivity in some areas.
- Industry outpacing education and skill misalignment.
- Separation of generations in the workforce.
- Limited availability of workers and workforce preparation.
- Challenges in lending based on work ethic rather than credit score.
- Uncertainty due to black swan events.
- Impact of Artificial Intelligence (AI).
- Environmental regulation requirements.
- Decline of family farms.
- Competitiveness of local businesses in the online marketplace.
- Difficulty in supplying workers to rural areas.
- Benefits and challenges of remote work and education.
- Retaining locally trained individuals.
- Brain drain of local graduates from higher education institutions.
- Keeping up with changing technology and training.
- Early hiring of students before full training completion.
- Education system based on time rather than competency.



STRATEGIC ANALYSIS



REGIONAL ANALYSIS

While the economy of the SMCOC region is strong and self-sufficient, there are both challenges and opportunities that lie ahead. If the SMCOC region is to move forward, it must analyze its current situation and utilize the most effective strategies to develop the economy. Furthermore, the CEDS process allowed the committee to review and incorporate important initiatives and projects from the federal, state, and local governments, as shown below. The region has shown strength in recent years, especially in terms of collaboration within and among cities to promote economic development – and it has been successful. This section provides insights into the identified opportunities, challenges, and community survey responses.

COMMUNITY SURVEY

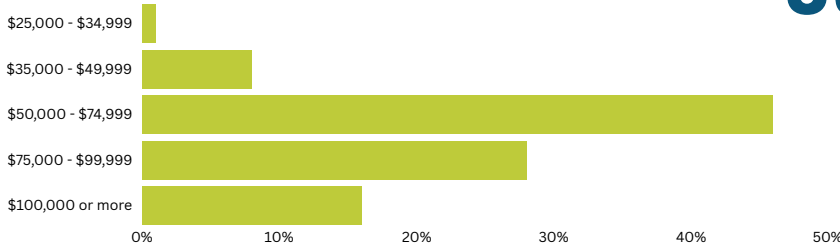
Over the past few years SMCOC has conducted many different surveys for all planning activities including comprehensive plans, transportation plans, and hazard mitigation planning. These surveys have provided essential information regarding public views and needs regarding land use and economic development. The CEDS community survey, in particular, was open from April 21 to May 7, 2023. The survey included topics related to respondent demographics, income and employment, quality of life, housing, business and entrepreneurship, broadband and infrastructure, community facilities, environment, and equality. The results of survey as highlighted through the section.



Message from our Community

Community Survey Spring 2023

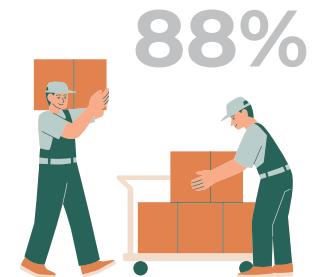
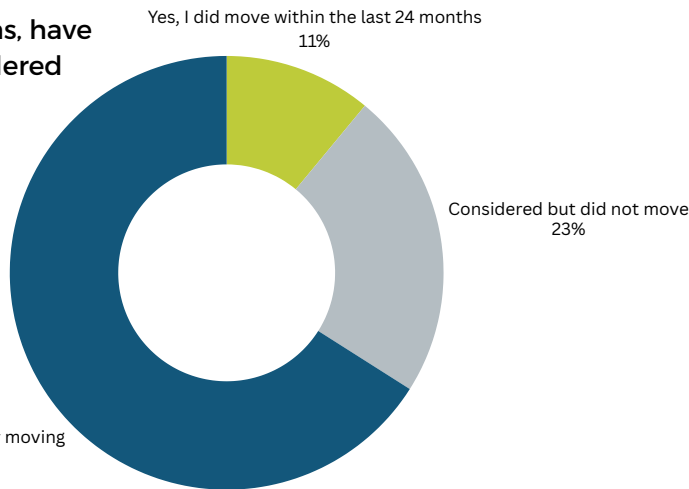
In terms of household income, what do you consider to be an affordable range? (Allows your household to pay all bills and live a moderate lifestyle within our region)



43%

Decided NOT to move because they could not find a unit that met their needs in their price range

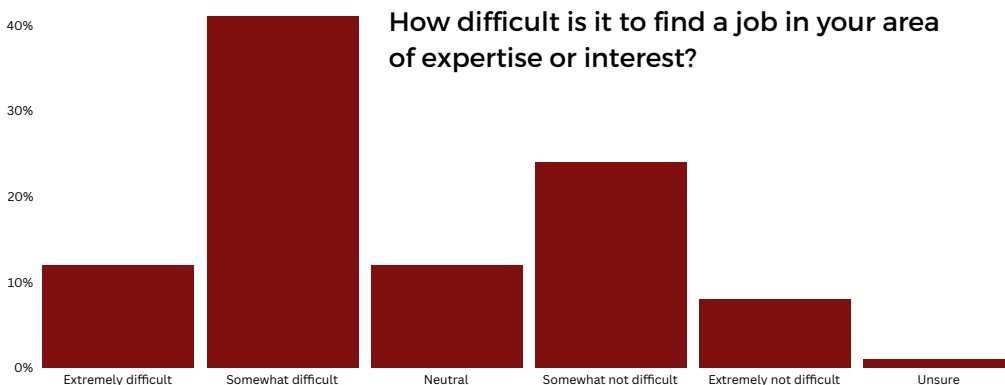
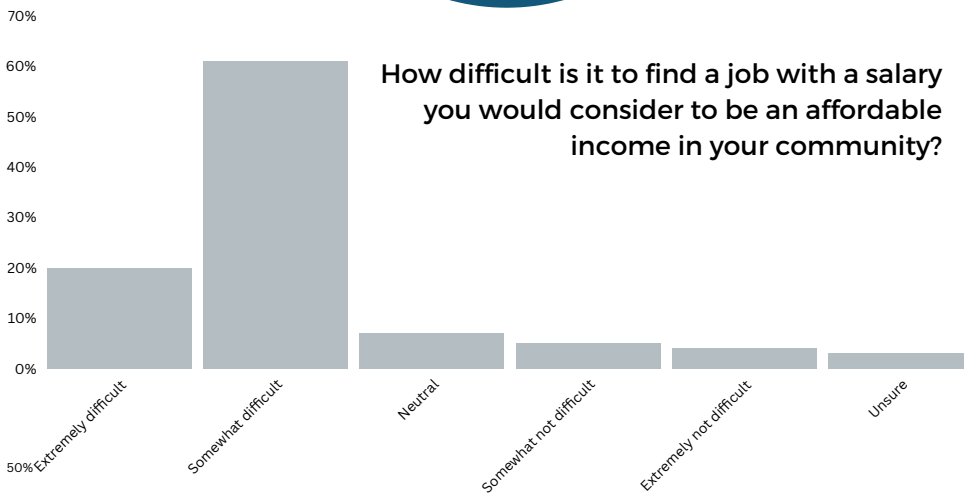
In the past 24 months, have you moved or considered moving?



88%

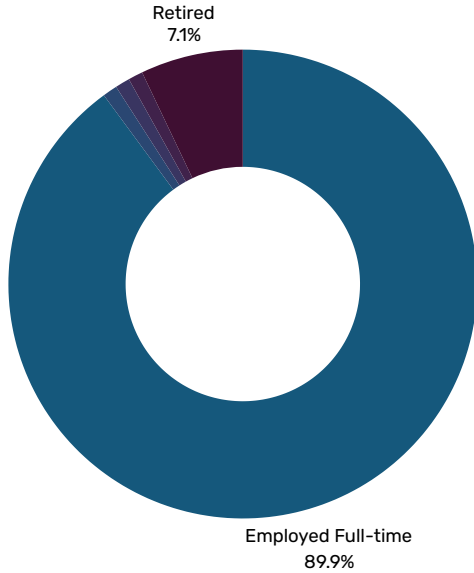
Of those who moved within the last two years, claimed it was either somewhat or difficult to find a housing unit that met their needs and within their price range

Did not move, did not consider moving 66%

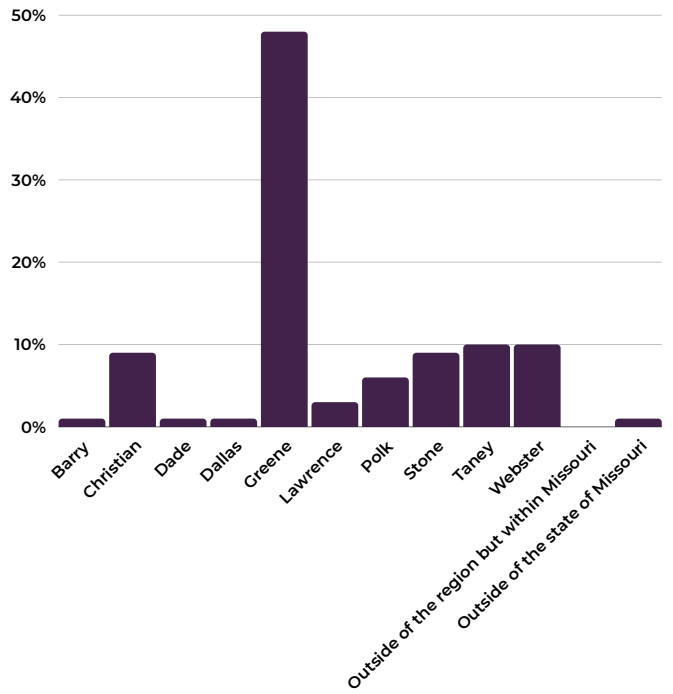


COMMUNITY SURVEY

Respondents Employment Status



In which county do you work or seeking work?



How would you describe your current living situation?

86%

Homeowner

10%

Renter

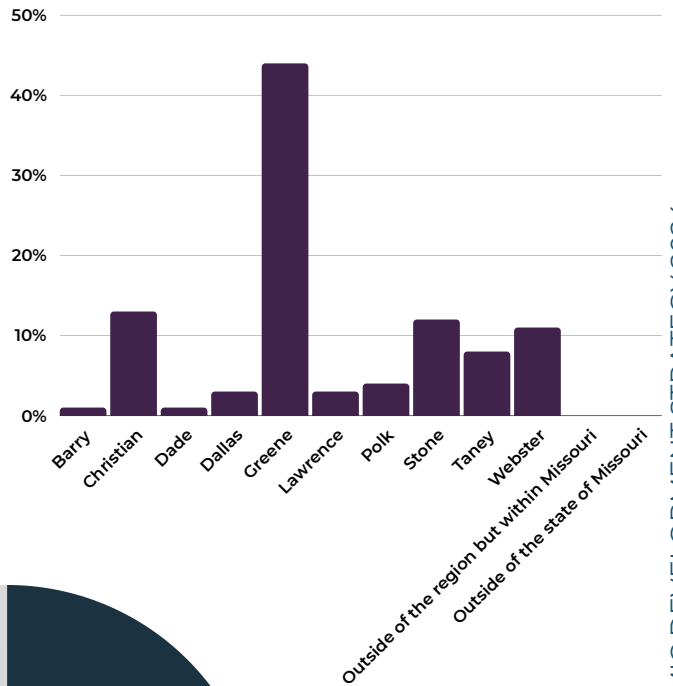
3%

Live with other and assist with living expenses

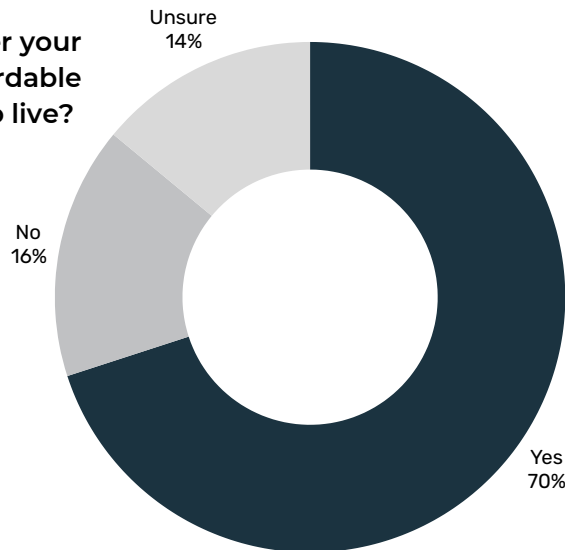
1%

Live with other but do NOT assist with living expenses

In which county do you live?



Do you consider your community an affordable place to live?



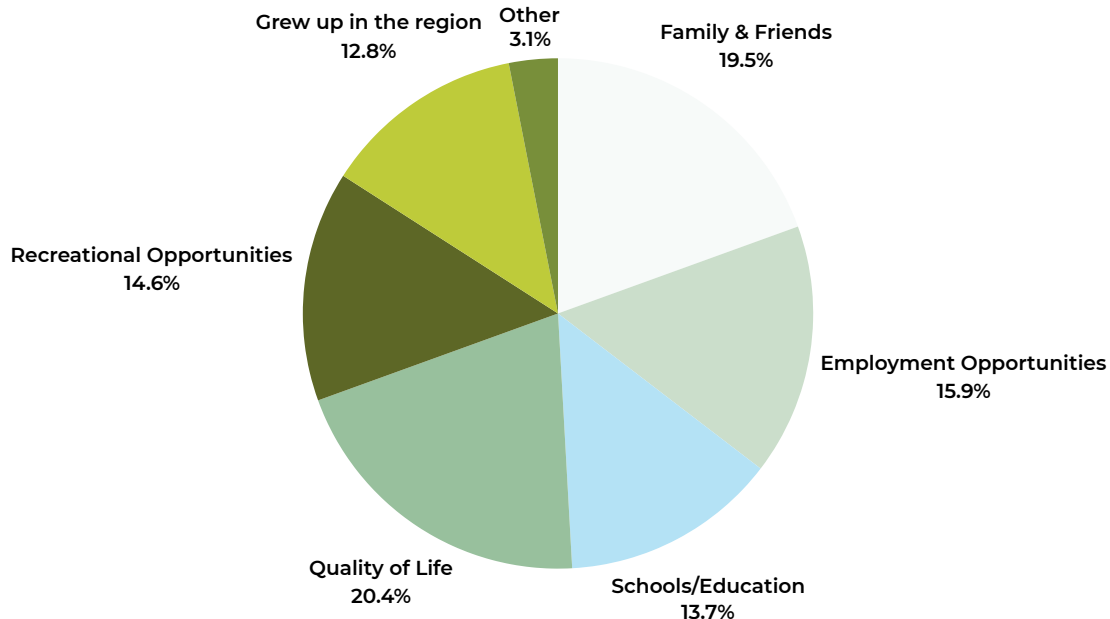
Message from our Community

Community Survey Spring 2023

What do you enjoy about your community?



Why do you live within the 10-county SMOG CEDS region? (Select all that apply)



CHALLENGES & OPPORTUNITIES

The SMCOG area has gained a comprehensive understanding of its challenges and opportunities through a community engagement survey and event. The collaborative spirit that permeates the region, involving local chambers of commerce, county-level governments, and even state-level entities, has established a model for achieving economic development in Southwest Missouri.

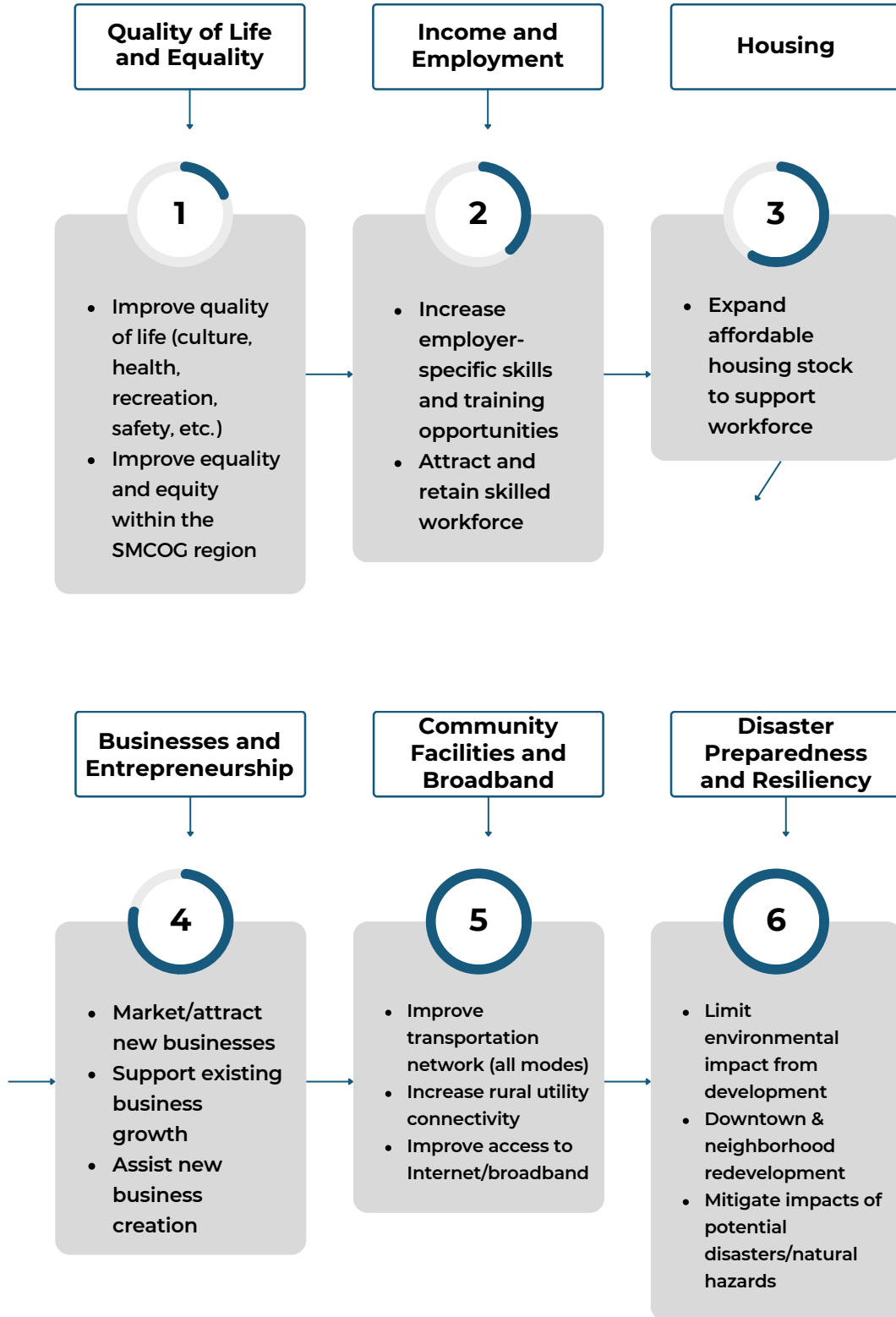
The initial public survey brought attention to the most urgent challenges. The survey covered eight categories: Quality of Life, Income and Employment, Housing, Businesses and Entrepreneurship, Broadband, Community Facilities, Environment, and Equality. The table below presents the identified focus areas and their corresponding priorities.

In your opinion, what are the top regional economic strengths, characteristics, and competitive advantages?



What are the top regional weaknesses?

CHALLENGES



Message from our Community

Community Survey Spring 2023



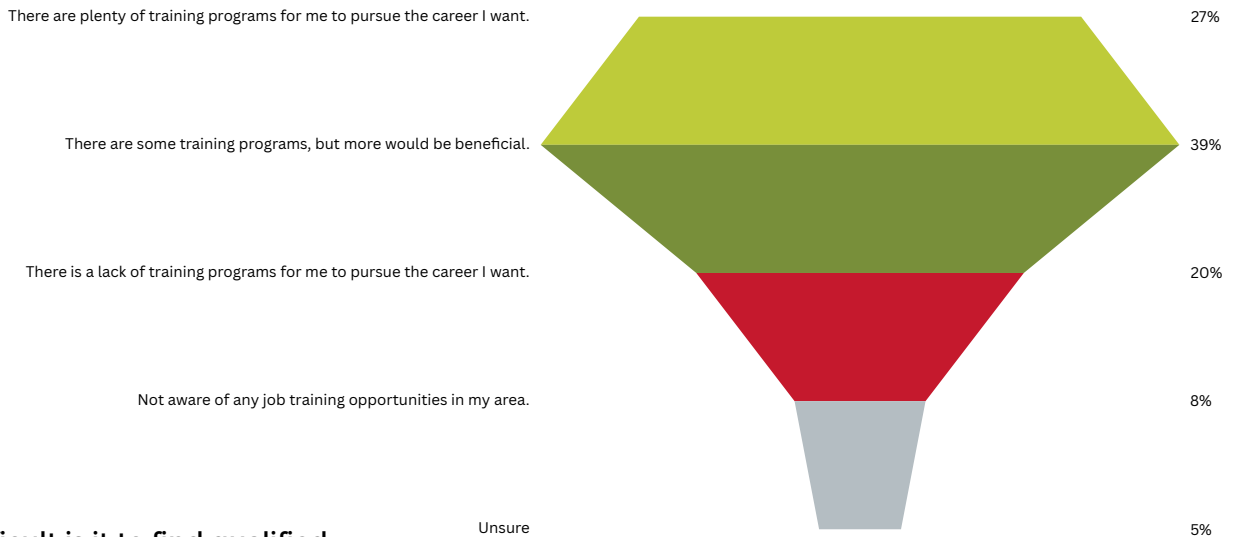
Why do you live within the 10-county
SMCOG CEDS region?

Skilled Workforce

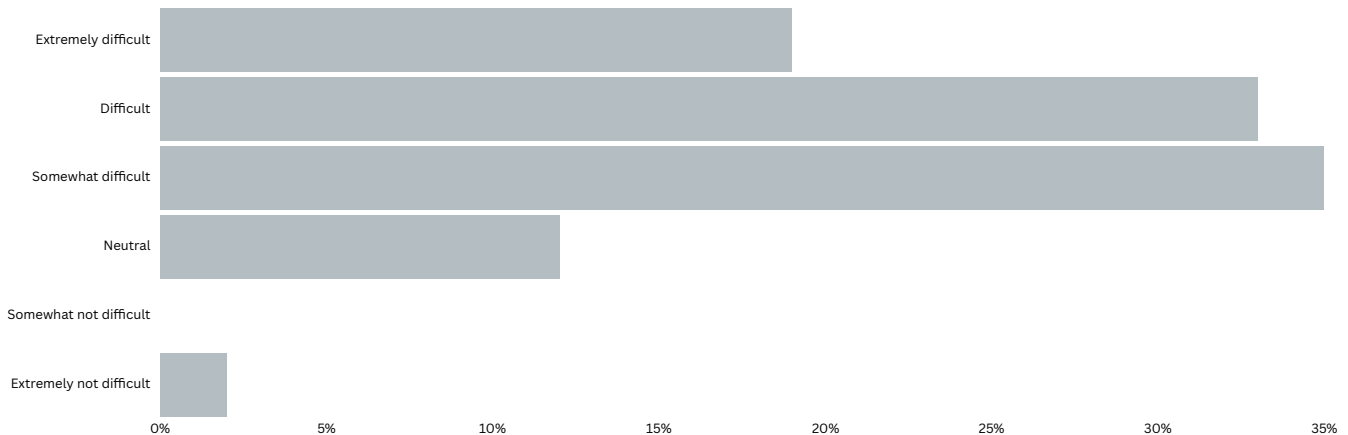
Workforce development emerged as a major concern across all counties, largely due to a shortage of skilled workers in the area. The healthcare and manufacturing industries, in particular, have a significant number of job openings but struggle to find qualified candidates. Another issue affecting the workforce is drug use, as many individuals who could otherwise be qualified for jobs fail drug tests, leading to unemployment and unfilled positions. Additionally, there is a disconnect between K-12 education and the promotion of skilled labor opportunities. Rather than emphasizing technical training to fill the region's job vacancies, students are often encouraged to pursue college, which detracts from the available vocational jobs.

In response to these challenges, many communities have implemented the "GO CAPS!" program, which highlights career options for high school seniors in both technical trades and degree-required professions.

How would you describe the availability of job training opportunities in your career field in the region? (Meaning access to training opportunities)



How difficult is it to find qualified workers for your business?





70%

of Respondents assist
with hiring decisions

Message from our Community

Community Survey Spring 2023

Why do you believe it is difficult to find qualified workers?
(Answers Summarized)

WAGES AND BENEFITS (10 COMMENTS)

- Government pays people NOT to work!
- Employees either need more than we can pay or they do not want to do the work.
- Skill set, age of applicant, finance to afford additional employees.
- Unwillingness to work, poor benefits.
- Rate of pay we offer.
- Not a large pool of workers to receive applicants from.
- Other cities can offer higher wages, even if it comes with a higher cost of living.
- No motivation from workers to be loyal to the company.
- Low wages in a competitive market.
- Pay.
- Lack of competitive wages.

SKILL AND EDUCATION GAP (7 COMMENTS)

- Lack of skills training for high school graduates.
- Lack of educated labor, housing costs, and a real desire to be in our region.
- Many of the positions we are looking to fill take specialized training and significant background checks.
- Not many to choose from or not qualified.
- Lack of qualified talent industry-specific.
- Specific skills and needs.
- Experience.

WORKFORCE AVAILABILITY AND DEMOGRAPHICS (7 COMMENTS)

- Availability of other jobs and competitive wages/schedules.
- There simply isn't enough of them in our region.
- More jobs than workers currently.
- No one wants to work for the wages offered.
- Limited talent pool.
- Inverted labor curve with more leaving the workforce than entering.
- Small town, not a lot of businesses, limited room for advancement.

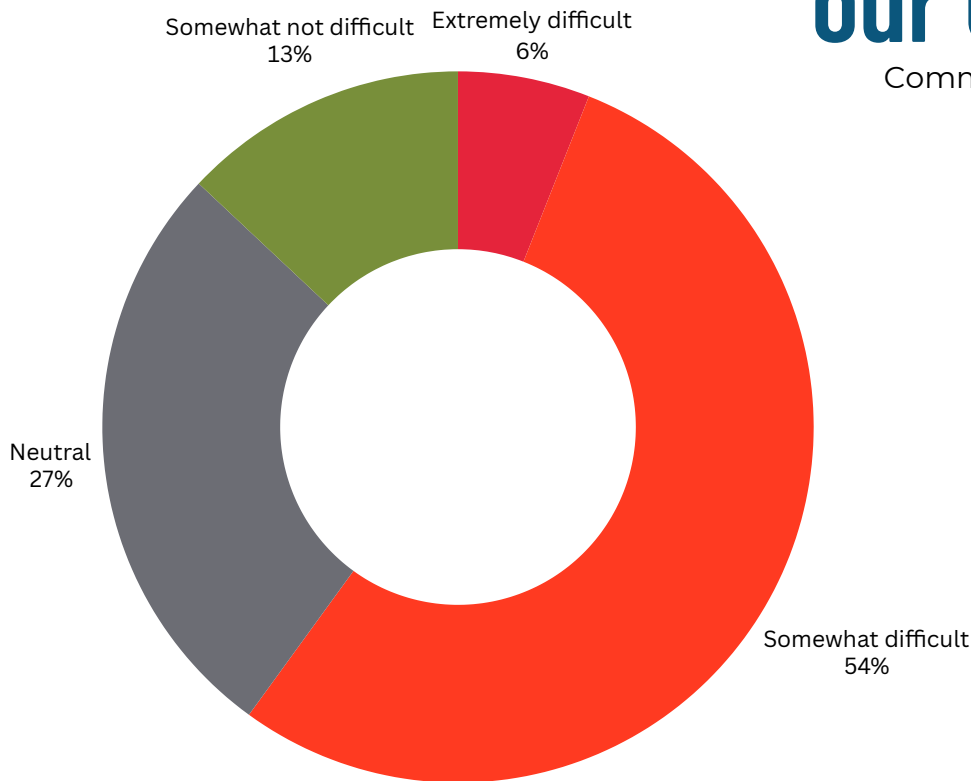
WORK ENVIRONMENT AND LOCATION (6 COMMENTS)

- Many apply from out-of-town but cannot relocate close.
- Not everyone wants to live in this area.
- Work environment, competitive wages and benefits packages, availability of affordable housing close to business.
- Our particular industry relies on a lot of on-the-job training.
- Desire for management job responsibilities immediately.
- Specialized field.

Message from our Community

Community Survey Spring 2023

How difficult is it to retain qualified workers for your business?



Why do you believe it is difficult to retain qualified workers? (Answers Summarized)

ATTITUDES AND PREFERENCES (6 COMMENTS)

- Most don't want to work full-time or at all. They don't care.
- Social entitlement attitude.
- People do not want to work; they want to work from home.
- Want management job responsibilities immediately.
- Preference for living in other areas.
- Desire to work from home instead of in an office.

LOCAL FACTORS (4 COMMENTS)

- Not a large pool of workers to receive applicants from. Most of our employees are from surrounding communities that are 20 mins to an hour away.
- Urbana is a small town, not a lot of businesses, not a lot of room for advancement in the few businesses we do have in town.
- Our main hires are truck drivers and operators local contractors pay more.
- Lack of competitive wages, lack of affordable housing in the area around my business.

OTHER FACTORS (2 COMMENTS)

- Availability of public assistance reduces the number of people interested in entering the workforce.
- Whole world is short-staffed.



11%

Of respondents were either a business owner or entrepreneur

Why do you believe it is difficult to retain qualified workers?
(Answers Summarized)

PAY AND COMPENSATION (14 COMMENTS)

- Rising wage rates at competitors.
- They feel they can make a better wage at a different company.
- Big cities pay more.
- Can't afford to pay more than other, bigger businesses.
- Wage wars and growth opportunities offered by other employers.
- Constantly escalating pay.
- As a local government with a very small budget, we can't afford to be competitive on wages.
- Availability of other jobs.
- Good employees can sometimes be 'cherry-picked' from other companies with higher pay or better benefits package.
- Lack of a desire to work for wages.
- Leave for better-paying jobs.
- Competitive marketplace.
- Competitive wage environment.
- Lack of competitive wages and concerns about affordable housing.

WORK ENVIRONMENT AND BENEFITS (11 COMMENTS)

- Young people always believe the grass is greener somewhere else.
- They want to work at home, don't have a work ethic.
- Training of young workers who move on.
- Offer health and retirement benefits to older employees is more costly.
- Workplace culture and staying engaged with employees are important to retain them.
- Flexibility of schedules and other benefits (outside of pay).
- Generational differences about the meaning of work and work-life balance.
- Corporate culture, working conditions, pay, and benefits.
- Social stress.
- Retaining good employees with flexible schedules and autonomy.
- Concerns about the attack on personal freedoms in certain communities.

Message from our Community

Community Survey Spring 2023

CAREER ADVANCEMENT AND OPPORTUNITIES (5 COMMENTS)

- Most of our workers get tired of the drive and can make similar pay without having to drive so far.
- Lack of education that incorporates experience and application.
- Especially in law enforcement, we seem to be a stepping stone for larger entities that pay more.
- Other opportunities for employment and career growth.
- Other entities try to draw our good employees away to work for them.

SKILL SET AND QUALIFICATIONS (3 COMMENTS)

- They are not motivated nor have the skill set to become more qualified.
- Very few in the industry.
- Lack of qualified workers.

JOB MARKET AND COMPETITION (3 COMMENTS)

- Intense competition, remote work also plays a factor.
- Competition for the same workers driving wages.
- Other entities are facing the same issues of finding qualified workers.

EMPLOYEE ATTITUDES AND CHANGES (3 COMMENTS)

- Employees change of interest.
- Lack of desire to work for wages.
- If they are good at their job, they will decide to leave or travel to make more money and advance within their fields.

Regional Economic Cooperation

Promoting economic development and supporting the growth of businesses is a constant priority for the region. This involves attracting new investments and companies from outside the area, as well as fostering the expansion of existing businesses. To address this challenge, collaborative economic development partnerships have been established among counties, such as the Taney County Partnership and Show Me Christian County.

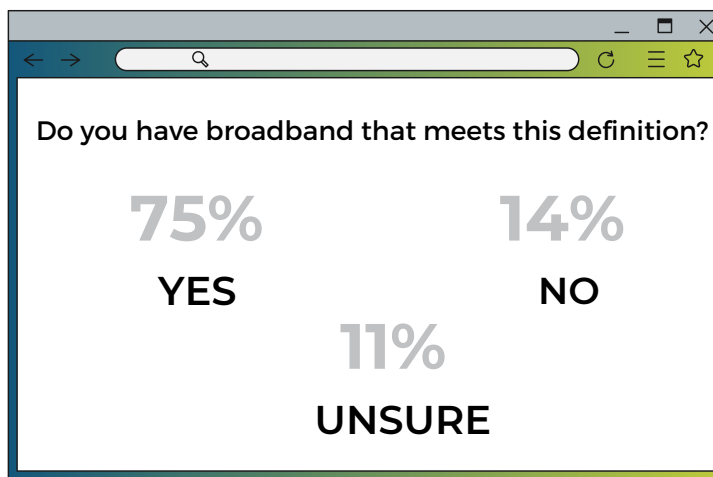


Additionally, organizations like the Community Foundation of the Ozarks are actively involved in driving economic growth. However, a key area for improvement is enhancing the communication about available funding sources and assisting communities, chambers of commerce, and businesses in navigating the process of applying for and managing grants. SMCOG has recognized this need and is placing increased emphasis on supporting these efforts moving forward.

Utilities & Infrastructure

Infrastructure development emerged as a significant concern, particularly among smaller and rural communities. Two primary issues were highlighted: the need for expanded natural gas services and the lack of broadband access. Limited broadband connectivity poses challenges for both commercial and residential growth, while the absence of natural gas can impede industrial development. Several communities face the hurdle of either limited interest from utility companies in expanding these services or the high costs associated with implementation, making it impractical for commercial and residential use. In response, some municipalities have explored the possibility of requiring developers to establish infrastructure as a prerequisite for construction, although no such measures have been put into practice thus far. Additionally, affordable housing remains a concern, especially in the outlying rural areas, where the repercussions of the recession continue to impact the housing market.

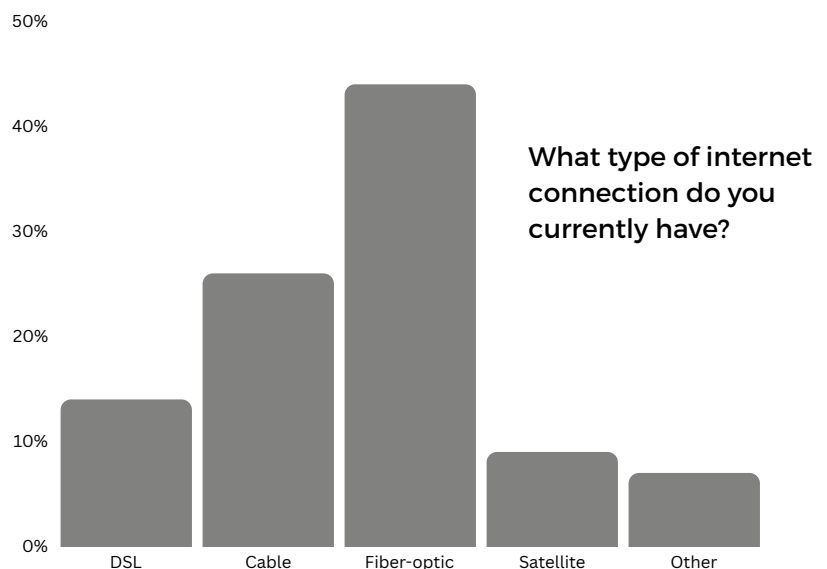
According to the FCC, broadband is defined as internet connections that provide download speeds of at least 25 Mbps (megabits per second) and upload speeds of at least 3 Mbps, which is not conducted through a cellular phone.



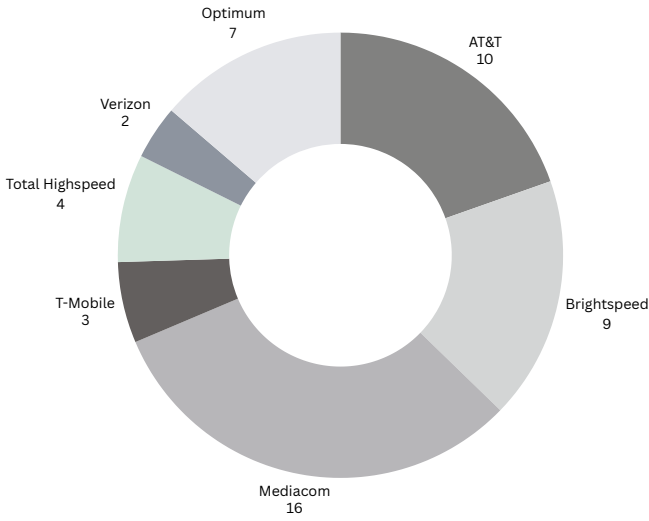
Survey results indicate that the region is facing challenges in providing accessible broadband services. According to the survey, 25% of respondents either do not have access to broadband or are uncertain about the services they can avail.



35%
Of respondents claim to only have access to one provider or unsure of other providers



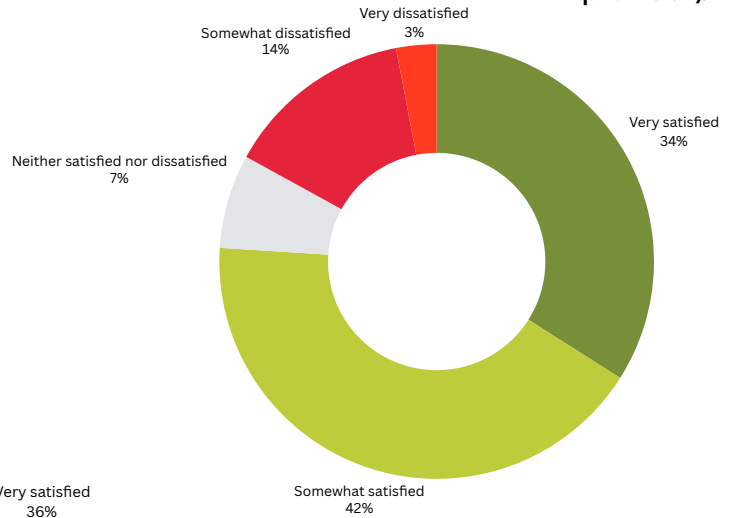
What is your current internet service provider (ISP)?



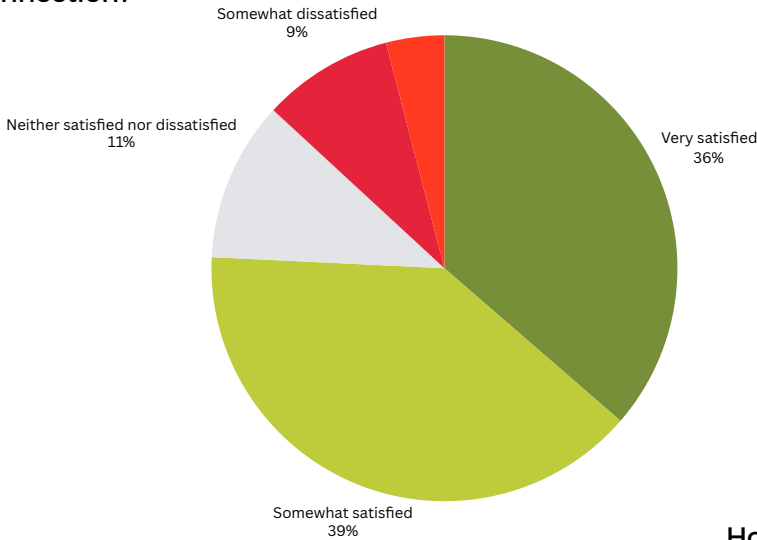
Message from our Community

Community Survey Spring 2023

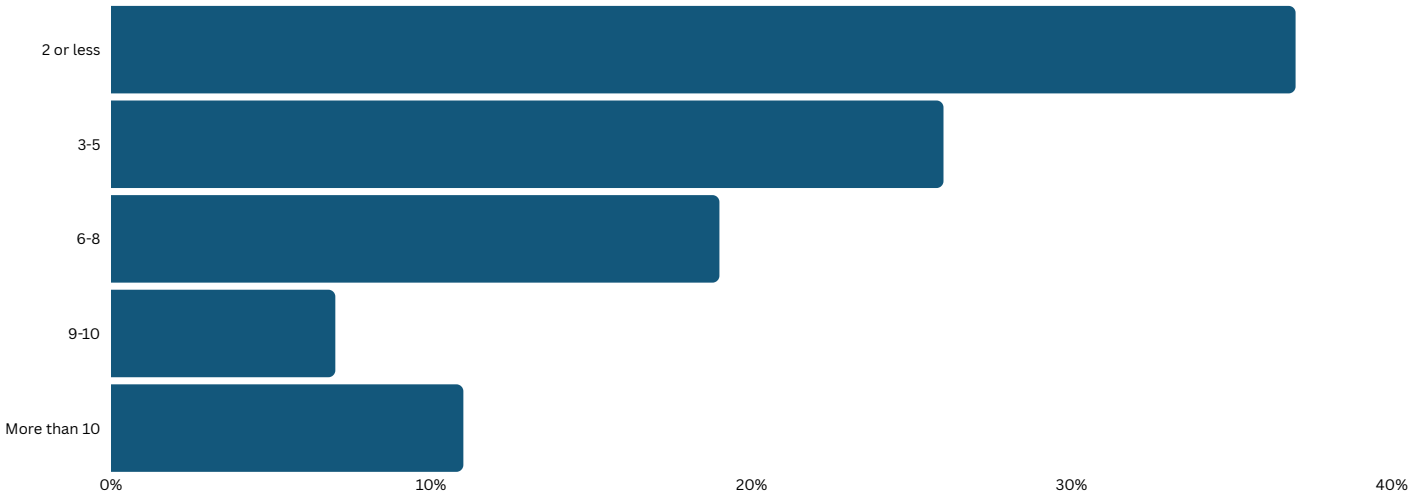
How satisfied are you with the reliability of your internet connection? (Reliability, meaning service is consistently available and able to perform at or near speeds promised by your internet service provider).



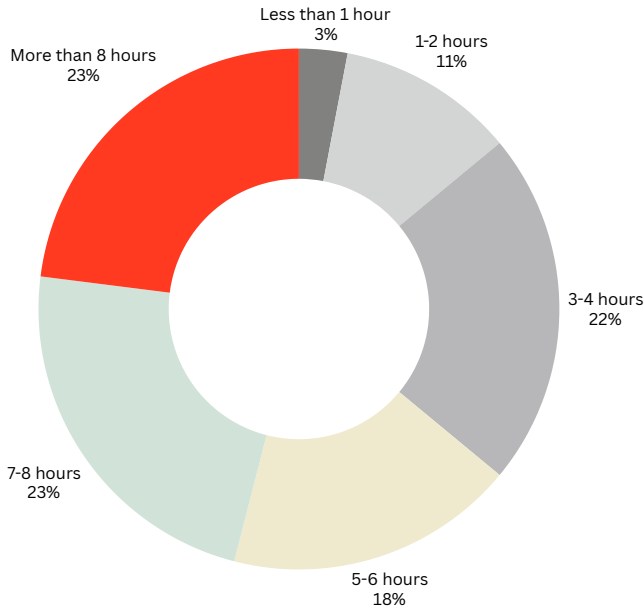
How satisfied are you with the speed of your internet connection?



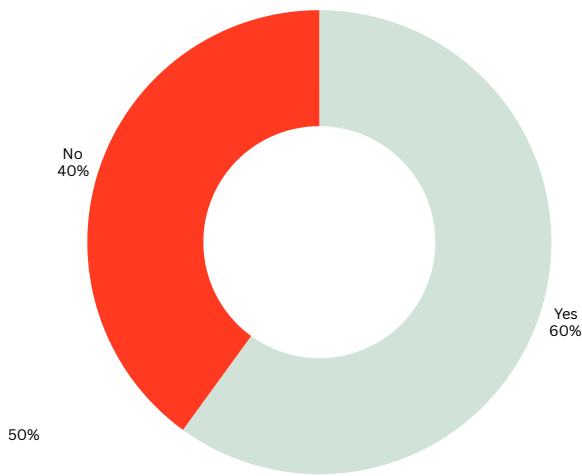
How often do you experience internet outages or disruptions, within a 12-month period?



How much time do you spend online per day on average across all devices (including mobile phones, tablets, and desktops/laptops)?

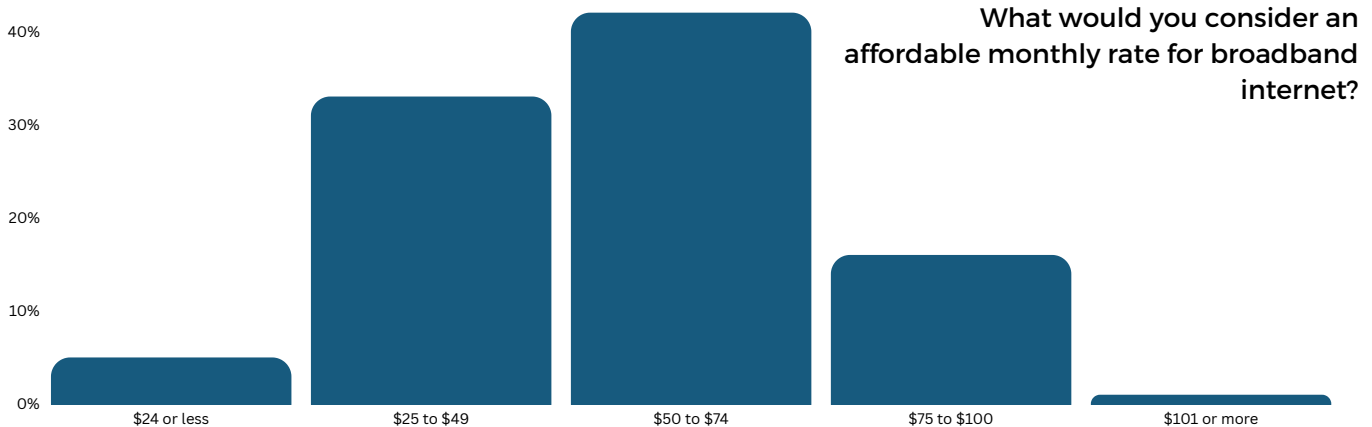
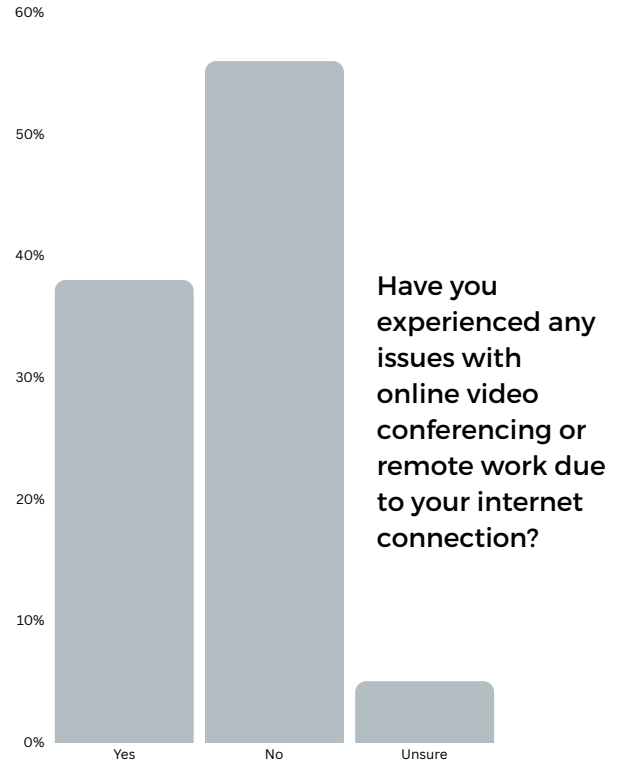


Would you consider your current broadband services in your region affordable? (Affordable can be defined as allowing you to live a moderate lifestyle while having access to your preferred internet speed)



Message from our Community

Community Survey Spring 2023





Message from our Community

Community Survey Spring 2023

How would you describe your access and usability to community facilities? (Parks, trails, community centers, senior centers, aquatic centers, museums, etc.) (Answers Summarized)

OVERALL POSITIVE ACCESS AND USABILITY (29 COMMENTS)

- Very strong
- Good
- Adequate
- Sufficient
- Great
- Extremely accessible
- Fair
- Multiple community facilities in the region
- Accessible
- Nice
- Very accessible
- Great variety of parks and community facilities
- All public facilities are easily accessible
- Outstanding
- Ample
- Solid
- Fair

SPECIFIC FACILITY LIMITATIONS (5 COMMENTS)

- Not available in this town
- Very few local parks and trails, no aquatic center, need for a community center
- Limited access to community centers and museums
- Lack of trails and public access points to water bodies
- Lack of trails accessible into neighborhoods

MIXED ACCESS AND USABILITY (4 COMMENTS)

- Okay, would like more museums and aquatic areas
- Average, need upgrades
- Poor, limited community facilities in the area
- Convenient access for those with personal transportation, but lack of access for individuals/families without personal transportation

SPECIFIC POSITIVE EXAMPLES (4 COMMENTS)

- Many available right here in my little town
- Love the community amenities throughout the region, frequenting trails and parks in different cities
- Really great access, easy access to greenway trails, parks, and other community facilities
- Frequent users of parks and trails, occasional use of community centers, aquatic centers, and museums

ACCESSIBILITY IMPROVEMENTS AND INTERCONNECTIVITY (2 COMMENTS)

- More interconnectivity would be beneficial
- Need improvements in pedestrian safety, crosswalks, and accessibility of parks and trails within neighborhoods

LACK OF SPECIFIC FACILITIES (2 COMMENTS)

- Don't have any
- Parks in Christian County are not great, but other facilities like trails and centers are available

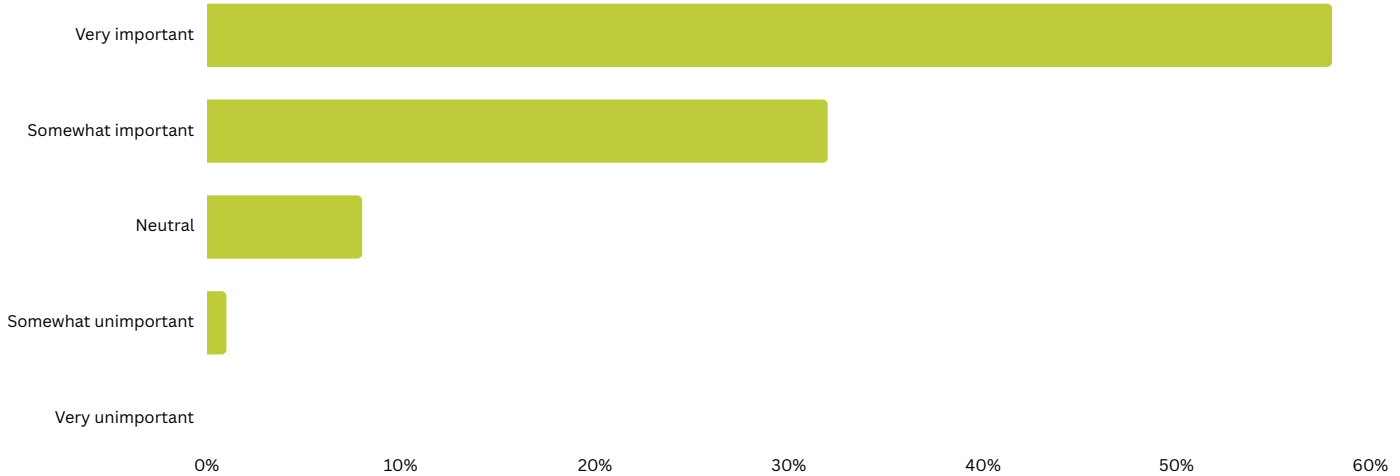
MIXED/GENERAL FEEDBACK (2 COMMENTS)

- Don't use senior centers
- Local facilities are adequate, private companies are higher quality

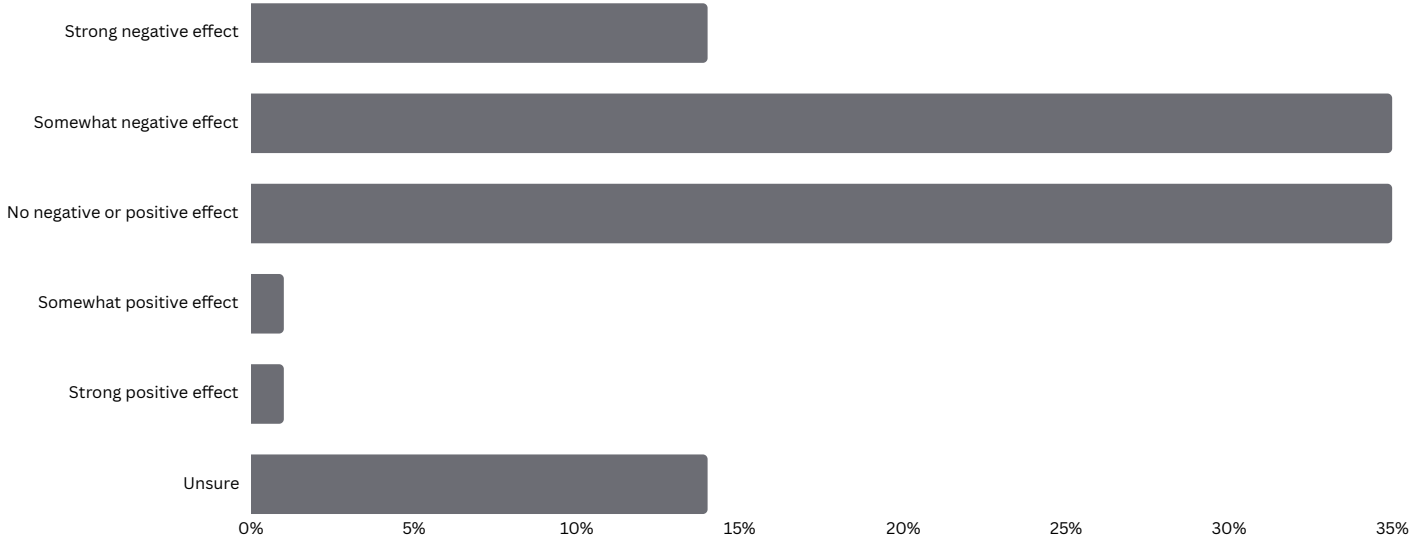
Disaster Preparedness & Resiliency

Sustainability and disaster resiliency is something that all communities in the region are aware of. Many municipalities are seeing slow or stagnant growth, commercially and residentially, and recognize that the cultural value of living in their cities needed to be improved to retain skilled workers and competitively ranged wages for the region. Furthermore, flooding impacts many communities on a yearly basis, which highlights the importance of disaster preparedness and the costly implications of non-resiliency. In recognition of the improvements that updated stormwater management systems offer in terms of flood management, and the updated requirements from the Missouri Department of Natural Resources, several smaller communities in the area are pursuing updates to their systems. Many municipalities have also taken steps to build storm shelters and prevent development within floodplains to prevent/mitigate the impacts of any future disasters. As a facilitator of the Regional Homeland Security Oversight Committee for Missouri's Region D, SMOG is poised to help in coordinating disaster response and actively works with communities to maintain a list of deployable assets in the region, as well as contracting with every county to provide hazard mitigation planning services, including preparation and updates of county hazard mitigation plans (with the exception of Greene County).

How important is the natural environment when considering new development in your community?



Over the next 10 years, what effect do you think climate change will have on your community's economy and quality of life?



COUNTY ANALYSIS

Barry County

As another economic and industrial hub in the region besides Springfield, Barry County significantly contributes to the region. Efco has been a major employer for the region, with almost 1,600 employees. Monett Metals, Jack Henry, and Tyson also provide employment for the region. In response to its high levels of industrial employment, Barry County has successfully recertified as a work-ready county. Monett has been working to improve its labor pool, which currently faces issues such as a lack of skills and drug use, through several ways: cooperating with Crowder College to provide technical/trade training to high school students, incorporating the "GO CAPS!" program into curriculum, hosting career fairs in conjunction with a revamped ad campaign for the city, and continuing the Monett Development Corporation to coordinate state incentives for industry. A major issue for Monett and many other municipalities in the region is the lack of housing. Since the recession, the region has seen the effects of construction on housing in outer-lying communities, which has aided in the housing crisis we are seeing today. Cassville has been continuing to work with SREP to coordinate economic development since some jobs have been lost to foreign relocation of industries. In recognition of the loss of industry, Cassville has begun a push to become a technological hub, coordinating with Barry County Electric to provide 1 GB fiber Internet to every household in Cassville.

Some notable development includes:

- In February 2023, Barry County broke ground for a new county jail, which will cost \$17 million
- Opportunity for increased tourist development along Table Rock Lake

Christian County

Christian County has made significant strides in terms of economic development, particularly in its northern region where there has been a notable increase in manufacturing and industrial jobs. The county has also achieved work-ready certification and has made substantial investments in infrastructure, focusing on improving roadways and water systems.

In a recent development, the city of Ozark has been awarded ARPA funds to support the expansion of the Chadwick Flyer Trail, which will enhance recreational opportunities in the area. Moreover, several school districts in the county have joined the "Go CAPS!" program, aiming to connect local youth with high-paying blue-collar employment opportunities available within the county.

Furthermore, sports tourism has been on the rise in Christian County. Notably, the Volleyball Beach Ozark complex has been established, serving as one of the largest beach volleyball facilities in the region. Overall, Christian County has experienced significant progress in economic development, with a focus on job growth, infrastructure improvement, recreational enhancements, and educational initiatives to connect students with promising career prospects.

Some notable development includes:

- The city of Ozark is being awarded ARPA funds to support Chadwick Flyer Trail Expansion.
- Shook Farms broke ground on luxury guest ranch in Sparta, Missouri.
- Continued support of Missouri One-Start

Dade County

Dade County, which has considerable untapped potential, is starting to experience a renewed influx of investment. Certain municipalities, like Lockwood, have initiated infrastructure improvement projects as part of their efforts. Lockwood has recently adopted a comprehensive plan that will serve as a roadmap for future growth and development in the city.

Moreover, there is an increasing interest in financing retail development in Greenfield's square, indicating a growing recognition of the area's economic prospects.

Dade County also holds significant untapped potential in Stockton Lake, a popular destination attracting over 1 million visitors annually. The lake offers a range of outdoor recreational activities, including hiking, fishing, swimming, and hunting, which further contribute to the area's attractiveness and potential for growth.

Overall, Dade County is beginning to witness a resurgence of investment and development, with a focus on enhancing infrastructure, leveraging retail opportunities, and capitalizing on the natural assets the region has to offer.

Some notable development includes:

- Lockwood adopting their new comprehensive plan in 2022
- High levels of train traffic via BNSF with well-maintained railroad crossings

Dallas County

Dallas County, including the city of Buffalo, has made notable advancements in its efforts to enhance economic development, despite having a limited number of municipalities. The county, primarily known for its agricultural sector, has witnessed significant employment opportunities through various agriculture manufacturing facilities. It has also obtained ag-certification from the Missouri Farmers Care organization, underscoring its commitment to the agricultural industry.

Recognizing the economic potential associated with its proximity to Lucas Oil Speedway and Bennett Springs, Buffalo has been actively working towards making the area more appealing to residents and augmenting its workforce. This endeavor is facilitated by initiatives spearheaded by the Downtown Association, the existing economic development committee, and the Dallas County Community Foundation. Moreover, the city intends to hire an economic development coordinator dedicated to marketing the existing opportunities in Buffalo.

Significant investments are being made in the improvement of transportation infrastructure, particularly Highways 32 and 65. This is evident through ongoing partnerships, as well as donations and investments from the city, county, and private business owners. These endeavors aim to enhance connectivity and accessibility within the region.

The city of Urbana has also been proactively seeking increased investment in commercial and industrial development, further contributing to the economic growth of the county. Furthermore, in collaboration with the National Fish Passage, efforts are being made to enhance road infrastructure, flood management, and habitat preservation for the Niangua darter. This includes the replacement of several low-water crossings with improved bridges through cooperative funding.

Some notable developments include:

- \$5 million investment by the Durham Company, an electrical utility distribution company, for a new manufacturing plant
- Large community hiring events throughout the county

Greene County

Greene County has experienced remarkable and consistent growth over the past few years, making it one of the primary catalysts for economic development in the region. The Springfield metropolitan area, in particular, has garnered significant attention and investment. The Springfield Area Chamber of Commerce is committed to fostering workforce development by providing continued funding for programs such as the Fast Track Workforce Incentive program, "GO CAPS!", Missouri One State, and federal workforce training initiatives.

The city of Springfield itself is undergoing various development projects, with key areas of focus including the Grant Avenue Corridor, Downtown, Commercial Street, and Boonville Corridor. These areas play a crucial role in attracting investors, developers, and residents of all age groups to the region.

Strafford has also experienced substantial growth as an industrial and commercial center, particularly along Route 125 and the railroad to the west of midtown. This development encompasses industrial and heavy commercial sectors, taking advantage of its proximity to the Springfield market, direct access to I-44, and railroad frontage.

Apart from municipal support, several organizations and non-profits are actively involved in the economic development of the region. Notably, the Community Foundation of the Ozarks' Northwest Project focuses on addressing income inequality issues in City Council Zone 1 in Springfield. The region has also made significant investments in infrastructure, working in coordination with metropolitan planning organizations like the Ozark Transportation Organization. These efforts have facilitated enhanced collaboration with MoDOT (Missouri Department of Transportation) to identify and prioritize crucial transportation projects.

Some notable developments include:

- Adoption of the ForwardSGF plan for the City of Springfield
- City Utilities was selected for \$10M grant from the Pipeline and Hazardous Materials Safety Administration, a division of the U.S. Department of Transportation to update its pipeline infrastructure north of Chestnut Expressway to I-44.

Lawrence County

Situated along Interstate 44, Lawrence County is strategically positioned for economic development. The county has achieved work-force ready certification, indicating its preparedness to meet the demands of the labor market. In 2016, in collaboration with WIB and Barry County, Lawrence County conducted a labor shed study, providing valuable insights into the local workforce.

Mount Vernon, the county seat in Lawrence County, serves as a vital healthcare hub, boasting three nursing homes and a VA clinic. These facilities collectively employ over 200 individuals, contributing to the local economy. The city's Chamber and Economic Development Council (EDC) have established a successful partnership, as evident from the impressive attendance of nearly 100,000 people at the annual "Apple Butter Makin' Days" event held on Mount Vernon square in 2020.

Aurora, located along Highway 39, acts as a gateway to the scenic Roaring River State Park, offering a prime opportunity for tourism promotion. With a stable retail environment and an industrial site that has only 10 acres of available space remaining, Aurora is actively seeking avenues for growth and development.

Some notable developments include:

- Tourism opportunities draw many people each year through communities in Lawrence County
- Developable land along I-44 as an opportunity for growth to include the additions of:
 - A 73 acre travel center along I-44 expected to create an additional 110 jobs;
 - New County Health Department;
 - Law Enforcement Center including a jail and 911 response center

Polk County

The communities in Polk County are making significant strides towards becoming an economic powerhouse in the region. As of April 2022, Polk County has successfully maintained its Work-Ready certification, demonstrating its commitment to a skilled workforce. The county has achieved 30% of its goals, indicating progress towards meeting the requirements of the certification.

Bolivar, the county seat in Polk County, is actively working to enhance its appeal for industrial development. Through collaborative efforts with the county, Bolivar has obtained recertification as a Work-Ready community. This achievement showcases their dedication to fostering a skilled labor pool to attract businesses.

In addition, Bolivar has successfully facilitated developer's agreements with the city and local developers, further promoting economic growth. These agreements aim to streamline the development process and create favorable conditions for businesses to establish themselves in the area.

A notable development in Polk County is the expansion of Missouri Prime Beef Packers in Pleasant Hope. This expansion involved a significant investment of \$10 million and has resulted in the creation of nearly 300 jobs. The plant is now capable of processing 500 heads of cattle per day, contributing to the local economy and providing employment opportunities for the community.

Some notable developments include:

- Polk county and city of Bolivar became recertified as Work-Ready
- \$10M expansion of Missouri Prime Beef Packers

Stone County

As a tourist destination for its natural resources, Stone County and its municipalities are poised for significant development. Indian Point is one of its single largest resort developments, with over 10 million dollars invested. In addition, the county has continued to see an influx of new retail opportunities. Branson West, notably, has completed its draft comprehensive plan and is looking to adopt it soon. Additionally, The Table Rock Lake Chamber of Commerce is embarking on an aggressive 5-year economic development strategic plan for the county which focuses on business growth and recruitment, workforce housing and more. Reeds Spring School District is constructing a new, state-of-the-art career and technical center to better serve the region and its 11 sending schools.

Some notable developments include:

- Silver Dollar City announces new summer festival
- Silver Dollar City to purchase land to expand and develop workforce housing
- \$400,000 investment from Roundhouse Services and Storage LLC for a new building

Taney County

Taney County serves as a major tourist destination for the southwest Missouri region. With an economic development organization, the Taney County Partnership (TCP), coordinating efforts across the county, over \$600 million has been committed to ongoing development and redevelopment. Ozarks Technical Community College has expanded its educational services. As of 2022, The College of the Ozarks is ranked #4 for colleges in the Midwest, #1 in best value schools, and #1 in best undergraduate teaching degree, according to US News. The Branson Airport will be expanding their airlines in August 2023 by introducing Sun Country Airlines connecting the SMCOG region to Minneapolis-St. Paul International Airport. Additionally, in 2022, Branson Airport was awarded \$500,000 for the Small Community Air Service Development Program Grant. To improve the connection between public education and existing employment opportunities, the Lodging Association is continuing to provide training, seminars, and expositions to improve understanding of the hotel industry in the area.

Some notable developments include:

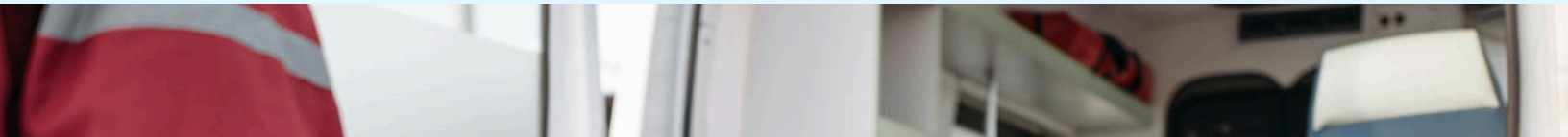
- Branson Airport will be expanding their current carriers by adding Sun Country Airlines
- Aquarium at the Boardwalk Development in Branson with the opportunity to see 250 different animal species in 400,000 gallons of saltwater
- Imagine Hotels & Resorts Property opening in 2026 with 100,000 sq. ft. of indoor themed waterpark, 450 guest rooms and cabins, and 5-7 themed restaurants

Webster County

Webster County has seen a consistent and significant overhaul in the last few years for economic expansion. The county recently recertified as Work-Ready in June 2021 with 50% of maintaining goals completed. Ozarks Technical Community College offers four courses in a new hybrid format for residents. Niangua and Rogersville have both invested heavily in their infrastructure, including road, water, wastewater, electricity, and internet provisions.

Some notable developments include:

- Extensive redevelopment of utility and transportation infrastructure by municipalities
- Ozark Technical Community College expansion of hybrid classes.
- Webster County recertified as Work-Ready in June 2021
- County supporting local governments with grant funding for comprehensive planning including the cities of Seymour, Fordland, Niangua and the Village of Diggins
- Over the last three years, the economic impact of five new economic development industrial projects in Webster County has resulted in the creation of 420 new direct jobs, plus 413 indirect jobs added to the local economy. These new jobs have resulted in \$54.8 million in additional earnings and \$2.6 million in new local tax revenues.



EVALUATION FRAMEWORK



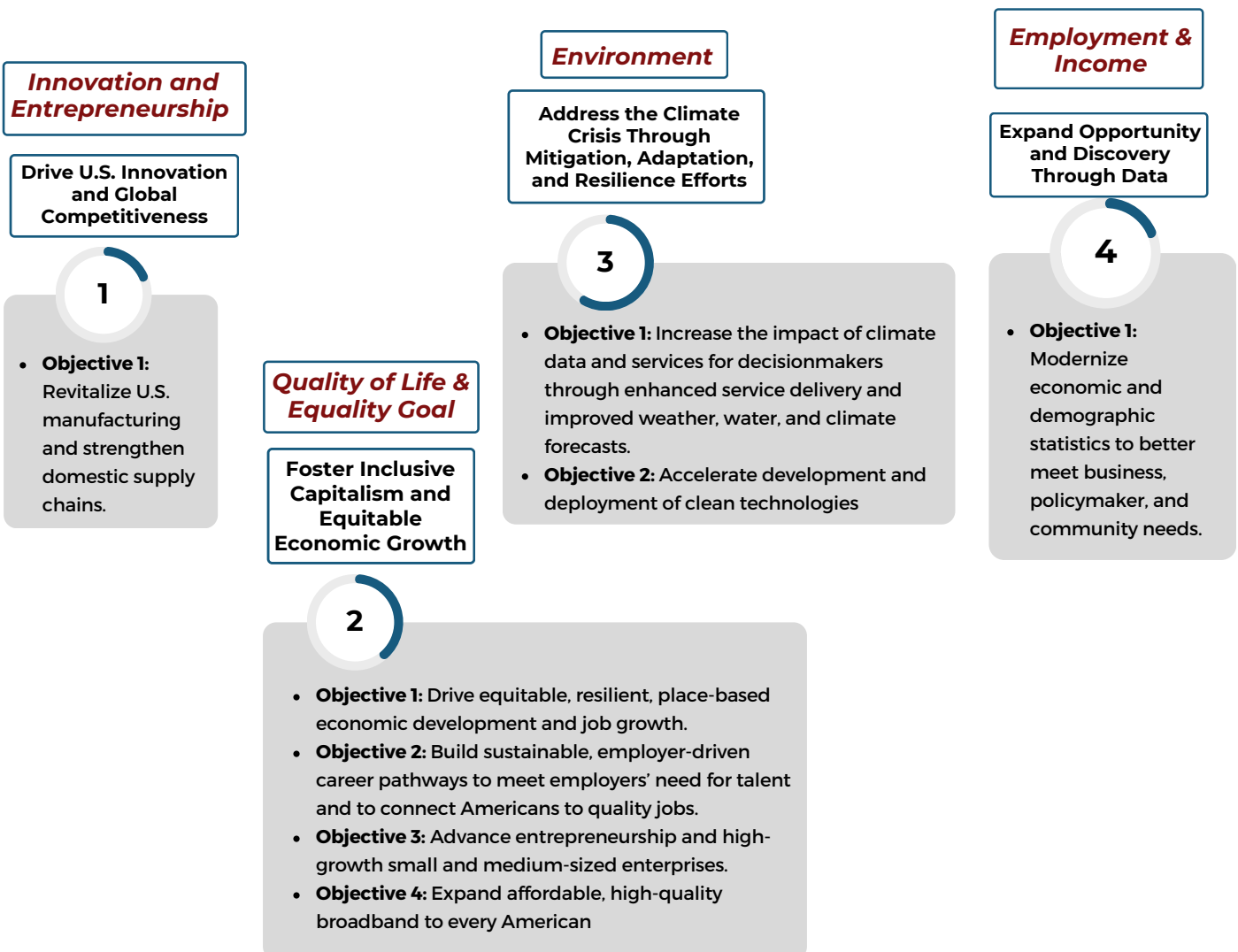
IMPLEMENTATION

IMPORTANT INITIATIVES

Various initiatives at the federal, state, and local levels, driven by both the public and private sectors, are significantly impacting the economic development efforts in the SMCOG region. To gain a comprehensive understanding of the area, it is essential to consider these initiatives and their influence on the region's economic prosperity.

FEDERAL INITIATIVES

The U.S. Department of Commerce's FY 2022-2026 Strategic Plan is a significant federal initiative that plays a crucial role in the economic prosperity of the United States. This multi-agency plan takes a comprehensive approach to promote economic growth and opportunity for all communities. The plan's alignment with the needs of the SMCOG region makes it a valuable resource for developing the strategy. The table below presents the goals and objectives from the Department's strategic plan that directly relate to or have an impact on the goals of this strategy.



EDA INVESTMENT PRIORITIES

The EDA evaluates economic development projects applying for grant funding based on the following criteria:

- Their degree of alignment with the EDA’s investment priorities.
- How effectively it addresses the creation and/or retention of high-quality jobs.
- Documentation that the applicant can or will leverage other resources, both public and private.
- Demonstration of the applicant’s capacity to commence the proposed project promptly, use funds quickly and effectively, and provide a clear scope of work that includes a description of specific, measurable project outputs.

The EDA’s investment priorities present a framework by which they ensure their grant funding’s contribution to local efforts that allow businesses to succeed and enable regional economies to prosper and become more resilient. Grant applicant proposals are evaluated based on their adherence to the following priorities:

1 Equity: Economic development planning or implementation projects that advance equity across America through investments that directly benefit 1) one or more traditionally underserved populations, including but not limited to women, Black, Latino, and Indigenous and Native American persons, Asian Americans, and Pacific Islanders or 2) underserved communities within geographies that have been systemically and/or systematically denied a full opportunity to participate in aspects of economic prosperity such as Tribal Lands, Persistent Poverty Counties, and rural areas with demonstrated, historical underservice.

2 Recovery & Resilience: Economic development planning or implementation projects that build economic resilience to and long-term recovery from economic shocks, like those experienced by coal and power plant communities, or other communities impacted by the decline of an important industry or a natural disaster, that may benefit from economic diversification-focused resilience.

3 Workforce Development: Economic development planning or implementation projects that support workforce education and skills training activities directly connected to the hiring and skills needs of the business community and that result in well-paying, quality jobs.

4 Manufacturing: Economic development planning or implementation projects that encourage job creation, business expansion, technology and capital upgrades, and productivity growth in manufacturing, including efforts that contribute to the competitiveness and growth of domestic suppliers or to the domestic production of innovative, high-value products and production technologies.

5 Technology-Based Economic Development: Economic development planning or implementation projects that foster regional knowledge ecosystems that support entrepreneurs and startups, including the commercialization of new technologies, that are creating technology-driven businesses and high-skilled, well-paying jobs of the future.

6 Environmentally Sustainable Development: Economic development planning or implementation projects that help address the climate crisis including through the development and implementation of green products, green processes, including green infrastructure, green buildings, and green places, including an emphasis on density in the vicinity of the development.

7 Exports & Foreign Direct Investment: Economic development planning or implementation projects that enhance or build community assets to support growth in US exports or increased foreign direct investment.

STATE INITIATIVES

The Missouri Department of Economic Development (DED) is a crucial partner for SMCOG, offering valuable guidance and support to the region. The Strategic Initiative for Economic Growth was introduced in 2011 and continues to serve as a roadmap for Missouri's economic development. This initiative involves collaboration among business, labor, higher education, and economic development stakeholders statewide to establish a path for building a sustainable, 21st-century growth economy in Missouri. The table below showcases the goals and objectives outlined in the Department's initiative that align with or influence the goals of this strategy.

Strategy 1 - Missouri will attract, develop and retain a workforce with the education and skills to succeed in a 21st-Century economy.

1

- **Tactic 1.3:** Partner with the state's colleges and universities to ensure students remain in Missouri after graduation.
- **Tactic 1.4:** Develop optimized and coordinated cluster-based career-training pipelines, protocols and assessments.
- **Tactic 1.5:** Provide a streamlined workforce training incentive for expansion and relocation prospects coordinated through Missouri's community college network.

Strategy 2 - Missouri will support its local developers in the retention and expansion of existing businesses and employers.

2

- **Tactic 2.2:** Develop a statewide business retention and expansion plan utilizing best practices that provides consistency of approach with enough flexibility to meet unique local and regional needs.
- **Tactic 2.3:** Develop a program to provide rural officials and practitioners with development of skill set that would enable them to better work with businesses to retain and expand employment.

Strategy 3 - Missouri will develop a culture that encourages small and minority business development and entrepreneurship

3

- **Tactic 7.2:** Integrate entrepreneurship training into state K-12 and higher educational curricula.
- **Tactic 7.3:** Develop a program to assist rural communities with the development and growth of retail businesses.
- **Tactic 7.4:** Provide small-business-development instruction as a component of displaced and state-sponsored worker training.

Strategy 4 - Missouri will provide infrastructure necessary for companies and communities to be successful.

4

- **Tactic 8.1:** Market, leverage and enhance existing efforts and tools, specifically Missouri's statewide broadband initiative and the Missouri Certified Sites Program.
- **Tactic 8.2:** Develop a state-funded Authority with broad statutory powers to support high-impact infrastructure projects.
- **Tactic 8.3:** Support local capacity-building by assisting Missouri communities with the development of strategic vision plans.

LOCAL INITIATIVES

Although there are several economic partnerships in the SMCOG region, the Springfield Business Development Corporation (SBDC) and Springfield Regional Economic Partnership (SREP), both operating under the Springfield Chamber of Commerce, are the most representative of the region's needs, goals, and objectives as they cover the same ten-county planning area as SMCOG. The SBDC's 2019 annual report serves as a comprehensive document that assesses economic conditions and provides an action plan for improving the region. With a focus on regional development and Springfield as a central hub, the report significantly contributes to the region's economic development efforts and closely aligns with the CEDS processes, goals, and objectives.

In addition to the SBDC and SREP, the Taney County Partnership (TCP) and Christian County Strategic Plan also provide valuable guidance for future economic activities in their respective areas. The TCP's Key Areas of Focus, supported by the 2019-2022 Action Plan, address the most critical needs of its communities and align well with the CEDS goals. This demonstrates potential areas of collaboration between the TCP and SMCOG.

- Business Retention & Expansion
- Small Business Entrepreneurial Development
- Workforce Development
- Business/Industry Attraction & Marketing
- Project Management

Furthermore, the 2013 Economic Development Strategic Plan for Christian County outlines for three goals for the county, with the emphasis placed as the document does:

- Implement market-drive approaches
- Strengthen and build upon community partnerships
- Secure additional funding resources
- Improve outreach and engagement strategies by increasing awareness

During the process of setting goals and objectives, it has been recognized that one of the crucial roles of SMCOG is to collaborate with existing economic development partners and programs in the region. By actively promoting and coordinating with the services provided by the Workforce Development Board (WDB), SMCOG can significantly enhance the effectiveness and reach of services offered to the region. This collaboration will lead to improved efficiency and a broader impact on economic development efforts.

STRATEGIC DIRECTION

ACTION PLAN AND PERFORMANCE MEASURES

The **Strategic Direction** defines the region's vision of economic growth, stability, and resilience and establishes the guidelines and strategies to achieve it. The goals, objectives, and strategies of the **Action Plan** stem from insights from the SWOT analysis and feedback from community members and stakeholders. Performance and implementation of the action plan will be tracked over the next five years and used to benchmark the region's progress in building a resilient and prosperous economy.

Performance Measures in this section will be used to gauge the strategic direction's impact on the region's economy and identify areas of improvement in future additions of the CEDS. These economic indicators will be frequently monitored and used to analyze the region's progress during the next CEDS update in 2029.

ACTION PLAN

GOAL TOPICS

- ▶ STANDARD OF LIVING
- ▶ HOUSING
- ▶ QUALITY OF PLACE
- ▶ WORKFORCE DEVELOPMENT
- ▶ ECONOMIC RESILIENCE
- ▶ INNOVATION
- ▶ ENVIRONMENTAL RESILIENCE
- ▶ TRANSPORTATION
- ▶ UTILITIES & PUBLIC SERVICES

Goal 1: Deliver programs and resources that enhance the health, safety, and overall well-being of residents of all socioeconomic backgrounds.

The 10-county SMOG region is home to a population with a diversity of social and economic backgrounds and circumstances. Owing to its low cost of living, many residents can afford a comfortable lifestyle for them and their family despite earning a household income lower than what is typical for the state and nation. However, many groups and communities within the region are left vulnerable to economic shocks. Following the COVID-19 pandemic, rapid inflation increases disproportionately affected rural and low-income households across the nation (Chakrabarti, 2023). As Southwest Missourians cope with rising prices, steps must be taken to ensure that essential goods and services remain affordable and attainable.

Objective 1: Foster and retain strong coordination between municipal agencies and non-profit community development organizations.

The region has amassed a substantial network of community development organizations that serve to enhance the quality of life for residents from all walks of life; these organizations prove to be an invaluable tool for alleviating the effects of economic distress on the community's most vulnerable individuals and families. Because of their unique capabilities and capacities, synergy between municipalities and community leaders is necessary to delivering the most effective aid to distressed communities.

Strategies:

1. Connect county health departments with non-profits seeking to provide health information and services such as safety tests and health screenings to low-income families and individuals.
2. Collaborate with public safety agencies and organizations to enhance the region's preparedness and readiness to respond to and mitigate public safety threats.
3. Partner with community development organizations, non-profits, and government entities on efforts to address food insecurity.

Objective 2: Utilize federal and state programs targeting the effects of poverty within disadvantaged communities and social groups.

Funding for community building activities and programming is regularly granted to municipal governments, quasi-governmental entities, and non-profit organizations through federal and state grants and lending programs. While some awards are competitive and stand a chance of going towards other communities, many are non-competitive and require only sufficient coordination with the administering agency to receive a substantial amount of funding.

Strategies:

1. Establish reliable lines of communication between disadvantaged communities, community organizations, and municipalities.
2. Inform municipalities and regional organizations of federal and state programs and funding opportunities through regular communication.
3. Identify areas of "economic distress" eligible for assistance from EDA programs (e.g., Economic Adjustment Assistance)
4. Assist rural communities in the application for US Department of Agriculture (USDA) Rural Development and HUD programs.
5. Assess and address the presence of "food deserts" and food insecurity among economically distressed areas.

Objective 3: Improve access to licensed, professional childcare for families of all socioeconomic backgrounds and life circumstances.

Access to childcare has a significant effect on parents', particularly mothers, quality of life and economic determinants, namely their ability to participate in the workforce. Parents seeking non-relative childcare can often encounter extensive waitlists and may pursue unlicensed and unregulated childcare options. If no reliable childcare is available, the parent may have to sacrifice time from work to care for their child/children or may choose not to work at all. Licensed childcare providers with availability vary in their affordability, leaving many lower income parents with an inability to afford such care.

Strategies:

1. Assist parents and childcare providers in applying for assistance from the Child Care Development Fund (CCDF)
2. Create a talent pipeline for qualified childcare professionals by connecting childcare providers with workforce development services and educational institutions.
3. Incentivize parent-friendly policies and work environments, implementing flexible and predictable work schedules.
4. Consult with Childcare Resource & Referral agencies (CCR&R) and childcare advocacy organizations to determine best practices and maintain close lines of communication.
5. Re-imagine land use and zoning regulations to serve the development of childcare facilities.

Goal 2: Develop an affordable and attainable housing market capable of accommodating current residents and an incoming labor force.

Housing has a significant impact on the local economy from multiple perspectives. Adequate housing must be available to sustain the growth of the local labor force, based on projected in-migration and natural population growth. Simply stated, if employers wish to employ more workers, such workers need a place to live within the community. Residential development is a key aspect to municipal land use planning and has a symbiotic relationship with commercial, industrial, and agricultural areas. Finally, residential development, its characteristics and location, contributes a great sum to the local tax base. The goal is to provide a housing market where residents have access to housing options affordable to their income level.

Objective 1: Support the construction of housing at diverse price points to meet the demands of the expanding workforce.

Since the aftermath of the COVID-19 pandemic, housing construction has lagged behind demand, resulting in rising sales prices and incongruity between household income levels and home values. The greatest deficit of housing units in Springfield, for instance, is for families and individuals above 80% area median income (AMI); prospective buyers who can afford higher value homes, those that are not available in the market, are instead turning to homes that are well below their housing budget but are more readily available. Under these circumstances, households below 80% AMI are priced out of the market and unable to purchase homes appropriate to their income. To improve the attainability of housing, options must be constructed across a wide range of price points.

Strategies:

1. Conduct a housing market and supply assessment to determine the optimum mix of housing types and affordability levels.
2. Leverage the efforts of local Community Development Corporations (CDC) and non-profit organizations to develop place-oriented housing solutions.
3. Encourage land use and zoning policies that enable diverse housing types and densities within neighborhoods.
4. Enable the active reuse of dilapidated and vacant units and lots through municipal land acquisition mechanisms such as Land Banks.

Objective 2: Promote financial assistance programs for housing related costs and expenses.

Supply and demand of housing units is only a part of the housing affordability equation; financial expenses associated with owning or renting a house also contribute to the unit's overall affordability. Expenses such as homeowners' insurance, utilities, interest rates, repair costs, and maintenance costs have all seen considerable increases in the past few years. Such increases especially impact lower income households, which historically spend a greater proportion of their income towards housing and housing related expenses. For these and other households, there exists resources at the local, state, and federal levels to alleviate the financial pressure of such expenditures. Word of such resources must be effectively communicated to households in need and, where such resources are not present, programs must be developed to fill in the gaps.

Strategies:

1. Connect homeowners and prospective homebuyers with creative and affordable finance options
2. Assist low-income renters in applying for local, state, and federal rent assistance programs
3. Increase awareness of home repair and maintenance resources for low-income homeowners
4. Create housing resource database portal accessible to renters and owners across the region.
5. Pursue accountability measures for negligent and absent landlords and rental property managers.
6. Engage community development organizations and non-profits in collaborative efforts to design effective housing programs and policies.

Objective 3: Reinforce and streamline the region's residential development pipeline.

Housing supply has been severely limited by setbacks and pauses in the residential development process, from regulatory barriers to supply chain disturbances and labor shortages. Developers and construction firms in the region have expressed frustrations with the lack of skilled labor available to meet the demand for residential construction. Single and multi-family construction involves a host of specialized trades, several of which are in short supply in the workforce, especially in more isolated rural areas. Lengthy permitting processes have also hampered the speed of development; while a necessary step to ensuring the best and highest land use through the community, alternative mechanisms to the traditional permit review process can be explored to expedite residential development.

Strategies:

1. Expand the talent pool of capable residential construction contractors and subcontractors.
2. Ensure the efficient and cost-effective flow of construction materials through the local supply chain.
3. Streamline residential construction permitting processes.
4. Align the region's building codes to meet a unified standard that facilitates development.

Goal 3: Sustain a vibrant and active sense of place across the region attractive to current and prospective residents as well as visitors.

An important factor in attracting labor force talent, generating tourism activity, and maintaining the local tax base, “sense of place” is integral to the appeal and marketability of the region. Southwest Missouri is a region rich in culture and natural resources, and it has historically capitalized on this reputation to promote its growth and development. Tourism hot spots such as Taney and Stone Counties have thrived on the natural beauty of their setting within the Ozarks. Municipalities with long and storied history have turned their past into cultural resources that present their communities in a unique way and provide a sense of unity. Developing and preserving the region’s sense of place begins with protecting these natural and cultural assets, which many community organizations have been eagerly strived to do.

Objective 1: Use local cultural assets and community organizations to develop unique and engaging experiences and activities.

There exists a plethora of organizations dedicated to promoting the cultural assets of the region including its history, artists, folklore, architecture, and more. Collaboration between these organizations, businesses, and local government has resulted in the creation of several long running, community wide events and activities that engage the public, promote tourism, and stimulate economic activity. These synergies should be encouraged further, and similar activities should be planned across the entire region.

Strategies:

1. Promote thriving festivals, weekend youth activities, and summer youth activities.
2. Increase comprehensive planning service utilization within the region, emphasizing the inclusion of strategies to address community sense of place.
3. Identify and protect sites of substantial cultural significance.
4. Foster new events and community activities that engage both residents and visitors.

Objective 2: Revitalize downtowns and neighborhoods in urban and rural communities.

Due to long-term urban decline and recent effects of the shift to remote work following the COVID-19 pandemic, downtown areas, main streets, and town squares across the region have struggled to maintain a sustainable level of economic activity. It has since been the mission of municipalities, community organizations, and economic developers to revitalize struggling commercial and residential areas. These efforts improve the quality of life of residents, increase economic activity for businesses, and attract new residents and talent.

Strategies:

1. Promote partnership with downtown and community betterment programs.
2. Encourage land use and comprehensive planning service utilization.
3. Encourage enforcement of municipal and county zoning and building codes.
4. Assist municipalities in the application for the EPA's Brownfields Program to assess, clean up and sustainably reuse derelict and polluted land.
5. Facilitate the establishment of official downtown, main street, and neighborhood associations.

Objective 3: Leverage the region's tourism resources and infrastructure to further community interests.

The 10-county region is home to some of Missouri's most prolific tourist attractions and serves as a hub for travel and leisure within the Ozarks. With such a reputation, organizations, local governments, and other stakeholders have developed a robust framework to catalyze the region's tourism assets, providing services such as marketing, workforce training and administration, site planning, and networking opportunities.

Strategies:

1. Connect marketing efforts to strengthen the region's external marketing capabilities.
2. Ensure local facilities meet the needs of potential tourists, visitors, and meeting groups.
3. Leverage major events and community milestones to bolster economic activity.

Goal 4: Enhance, support, and grow a knowledgeable and skilled workforce capable of meeting the needs of emerging businesses and industries.

For Southwest Missouri's employers and industries to grow and expand, the workforce needs the skills and talent to overcome and adapt in a changing economic environment. Regional efforts must focus on building and sustaining a robust workforce development pipeline that connects workers to the education and training sought by employers across a wide range of industry sectors. While some may come from outside the region, the greatest source of talent is found within the region's hardworking and locally minded labor pool.

Objective 1: Actively align the efforts of the region's talent development pipeline with the needs of employers.

Southwest Missouri is fortunate to have access to a host of robust and well-funded educational institutions alongside an active workforce development community. However, the challenge of creating an effective talent development pipeline lies, in part, with maintaining cohesion between the many mechanisms that train and educate labor and the labor demands of the market.

Strategies:

1. Connect businesses in region to local and state workforce development programs.
2. Promote and enhance Workforce Development Board (WDB) services
3. Encourage and support enrollment in post-high school graduation into technical programs and apprenticeship positions.
4. Collaborate with university and technical college services to offer targeted, industry specific talent development programs.
5. Foster greater employment pathways for the region's nontraditional workforce and talent pool (e.g., at risk youth, those without a high school diploma or equivalent, formerly incarcerated individuals).
6. Identify the skills local employers need and work with workforce development organizations and educational institutions to meet those demands.

Objective 2: Attract out-of-region talent capable of meeting employer demand and contributing to the region's economy.

As current businesses expand and new businesses arise, the demand for talent with specialized skillsets will rise. Where the talent pool of the region is unable to meet this demand, attracting talent from outside the state or country may be necessary to facilitate industrial growth. Since the onset of the COVID-19 pandemic, remote work has seen a considerable increase and is now an enticing option for employees and employers alike. However, the detachment of labor from the tax base is an adverse consequence, posing challenges to communities seeking to grow their economic base and encourage investment in local development. While the allure of remote employment is undeniable, steps to attract resident workers should be prioritized to maximize community investment and tax base capture.

Strategies:

1. Promote talent incentive funding and relocation cost recovery services for businesses in the region in coordination with the WDB, local governments, non-profit entities, and workforce development organizations.
2. Research grant opportunities for relocation assistance and student loan repayment programs for regional businesses.
3. Align marketing efforts for talent attraction across the region to meet local industry demand.

Goal 5: Maintain a diversified industry portfolio that contributes to economic resilience.

Regional economies with diverse and varied industrial portfolios are less vulnerable to the effects of sector specific downturns. Fostering a mix of industries strengthens the region's ability to adapt to nationwide and global industrial trends while also promoting collaboration between sectors. To develop such sectoral variety, support is needed for both local businesses and those from outside the region.

Objective 1: Attract a diverse array of new businesses that complement the region's current industry clusters.

Southwest Missouri's industrial strongholds, namely healthcare, transportation, and manufacturing, benefit from symbiotic relationships with other industrial sectors. Complementary businesses can improve productivity and innovation through collaboration and joint ventures, leading to greater overall competitiveness. To create the optimal mix of industries, the region will need to seek out and attract established enterprises and rising small businesses from outside the region, especially those for which there are no local business equivalent. Businesses should expect a welcoming and responsive economic support network eager to assist them in their relocation or expansion into the region.

Strategies:

1. Leverage statewide resources to support communities in business attraction methods.
2. Assist in identifying sites ready for commercial and industrial development.
3. Support local Business Retention and Expansion (BRE) programs offered by local EDOs and state-level agencies.
4. Support new business creation programs.

Objective 2: Support the growth of existing local small-businesses, startups, and established enterprises.

Southwest Missouri has spent generations cultivating a supportive and constructive business environment, leading to the creation and expansion of countless local enterprises, many of which are now recognized on a national level. The prosperity of these businesses and the industries in which they operate are core to the economic strength and stability of the region, and regional efforts should reflect this sentiment. Development organizations and other community stakeholders should welcome businesses seeking to strengthen their investment in the region and support their continued expansion through guidance and encouragement.

Strategies:

1. Encourage membership in local resource providers and utilize services.
2. Offer land use and planning services to enhance site-readiness throughout the region.
3. Highlight local small business successes through periodic media publications and recognition events.
4. Connect businesses to existing support organizations and available resources.

Objective 3: Create an inclusive and accessible business environment for entrepreneurs, business leaders, and talent of all backgrounds.

Despite being an important part of the fabric of the community, many social groups remain underrepresented in business leadership across the nation, state, and region. Such groups include women, persons of color, LGBTQIA+ individuals, migrants, and members of rural communities. Individuals from these groups have historically been the target of discriminatory business practices and excluded from the broader business community. The inclusion of business leaders from a variety of backgrounds and perspectives promotes innovation, bolsters talent attraction, strengthens competition, and encourages ethical business leadership, all of which lead to a more resilient and sustainable business environment.

Strategies:

1. Connect with minority and women owned businesses and advocacy groups to discuss methods and policies to address unequal representation in the entrepreneurial community.
2. Support entrepreneurial services designed to foster the participation of individuals from all socioeconomic backgrounds in the regional economy.

Goal 6. Promote initiatives to elevate local investment in evolving, high-growth industry sectors.

As advances in technology shape trends in business and industry, Southwest Missouri should adapt its economic development priorities to meet the needs of a rapidly changing industrial landscape. High-growth, technology-based businesses and occupations offer higher wages, greater employment opportunity, and enhanced innovation, leading to a more resilient and competitive regional economy. The field of tech-based industries, however, requires a different approach in their development than more traditional sectors, and the region must ensure that the necessary frameworks and infrastructure are in place to support them.

Objective 1: Support and expand the region's dynamic, richly networked innovation and entrepreneurship ecosystem.

Regional efforts to establish a formal tech-based entrepreneurial ecosystem are already well underway, but effort is still needed to fully integrate such networks and resources into established ESOs and EDOs. Economic and community development organizations must focus on providing a chain of value-added programs accessible to high-growth businesses at various stages of growth, from fledgling startups to well-established enterprises.

Strategies:

1. Leverage local innovation resources and support organizations (e.g., business incubators, Innovate SOMO) and expand their efforts to reach a critical mass of aspiring entrepreneurs.
2. Align institutional R&D agendas and commercialization services with industry needs through industry-academic partnerships.

Objective 2: Enrich the region's innovation and STEM talent pipeline.

Tech-based businesses and occupations require talent with specialized skills in a wide variety of advanced disciplines, most notably among science, technology, engineering, and mathematics (STEM) fields. Moreover, business leaders in these fields require education and guidance in entrepreneurship. A local talent pool suitable for high-growth, tech-based industries and occupations can be cultivated through targeted professional development programs.

Strategies:

1. Promote secondary and post-secondary entrepreneurial education programs (e.g., GO CAPS, Codefi Youth Coding League, Code Lab).
2. Expand small business workshops offered by ESOs and local EDOs to include topics relating to high-growth industry activities.

Objective 3: Connect promising small businesses and startups with pre-seed, seed, and later stage funding opportunities.

Funding is a very common barrier in the successful launch and growth of small businesses and startups, especially those operating in high-growth industries. Most startups typically accrue funding from a variety of sources, often a combination business loans, equity financing, grant awards, or personal funds. Without these initial funding opportunities, few businesses in high-growth sectors would survive to produce a feasible product, let alone expand operations and commercialize. To create a business environment suitable for high-growth industry, the region must facilitate a critical mass of funding opportunities across a multitude of sources.

Strategies:

1. Sponsor a regional startup competition with non-dilutive grant award prizes.
2. Promote institutional guidance for federal research and commercialization grants (e.g., SBIR/STTR).
3. Assemble an official network of angel investors interested in investing in local startups and entrepreneurs.
4. Broadcast the region's opportunity for tech innovation and investment through a national and international marketing campaign.
5. Market the availability of low interest loans through the SMCOG Revolving Loan Fund (RLF) and Small Business Administration (SBA) loan programs.
6. Support Innovate SOMO Funds and connect promising startups with Innovate SOMO and their venture investment funds and network.
7. Support investor education programs and resources to assist those interested in understanding the needs of new businesses and early-stage investment opportunities.

Goal 7: Bolster resilience to environmental hazards and economic shocks.

Southwest Missouri's economic health and prosperity is largely dependent upon its ability to recover from major disruptions. The region has endured a litany of disasters, both natural and economic, and mounted many recovery efforts as a result. To establish economic resilience, the region must effectively anticipate its risk, evaluate how certain risks can impact economic assets, and build its capacity to respond and react when such events occur.

Objective 1: Mitigate impacts of potential disasters and natural hazards on residents, businesses, and critical infrastructure.

As natural hazards grow more and more severe over time, greater precautions are becoming necessary to adequately mitigate the damage caused to property, infrastructure, and economic stability. While the region has diligently engaged in hazard mitigation planning, long-term expectations and preparedness should be adjusted to match the current escalation of severe weather events.

Strategies:

1. Encourage regular hazard mitigation planning within the region.
2. Identify and contact communities without stormwater and floodplain management plans to offer planning services.
3. Inform agriculturally dependent communities on the potential shifts in commercial agriculture trends that result from a changing climate and develop strategies to address them.
4. Assess the current housing stock's ability to withstand increasingly severe weather events.
5. Develop a region-wide Climate Adaptation Plan addressing weather and climate trends and their impacts on businesses, industries, and communities.
6. Evaluate the implementation of contemporary building codes and their impact on the region-wide development.
7. Leverage state and federal resources for weatherization efforts.

Objective 2: Protect the security and quality of the region's natural resources.

The natural beauty and bounty of the Ozarks is a key component of the long-standing economic stability and prosperity of the region. In addition to being an important cultural landmark, the Ozarks and the region's other surrounding natural resources are a key asset for tourism, agriculture, and extractive industries. To ensure the region's long-term economic health and physical well-being, Southwest Missouri's natural resources must be diligently monitored and protected from man-made externalities.

Strategies:

1. Coordinate with local, state, and federal agencies on efforts to ensure access to safe and affordable natural resources.
2. Encourage responsible land use zoning to prevent development on naturally occurring forests and prime agricultural land.
3. Leverage state and federal resources for remediation efforts.

Objective 3: Strengthen the region's ability to recover from unexpected economic disruptions.

Economic disruptions can result from a variety of events or conditions: downturns and shifts in the national or global economy impacting demand for local product or consumer spending; downturns in industries that constitute a critical component in the regional economy; external shocks stemming from specific events, isolated to the specific region. Isolated incidents of economic disruption can involve the closure of a major economic facility, such as a factory, university, or military base, or the exit of a major business and employer. These events and trends are practically impossible to predict in the long-term, but their impact can be mitigated by establishing region-wide networks of community leaders that are responsive to shifting economic trends and capable of delivering actionable, real-time solutions to present threats.

Strategies:

1. Reinforce collaboration between municipalities and the region's economic resource network.
2. Enhance the ability of businesses and labor to adapt to shifts in technology and industry or occupational trends.
3. Identify clear lines of communication and authority capable of implementing mitigation efforts in reaction to immediate economic risks.

Goal 8: Develop and uphold a transportation network that meets the needs of residents, businesses, and visitors.

Southwest Missouri prides itself on its heritage as a hub for transportation and trans-national travel, and the region's businesses and residents continue to rely on its robust transportation network to this day. The transportation network is a key contributor to the region's economic vitality and plays an important role in determining the future of its growth and development. While businesses across all industry sectors benefit from an effective transportation network, two of the region's key industries, transportation and tourism, see the greatest direct impacts. Expanding the network and its capabilities can be achieved through effective planning, inclusive communication, and collaboration with transportation agencies.

Objective 1: Enhance mobility across the region through accessible and reliable transportation.

Without adequate access to reliable transportation, workers have fewer employment opportunities and their ability to participate in the local economy is limited. This is especially true in rural areas, where local employment opportunities are scarcer, commuting distances are longer, and access to alternative transportation options are limited. Equitable employment opportunity relies on an accessible and reliable transportation network that meets the needs of all manner of workers.

Strategies:

1. Expand the reach and service hours of public transit services across the region.
2. Increase transportation planning service utilization within the region.
3. Continue updating the regional transportation needs list and participate in SMCOG and OTO prioritization processes.
4. Expand the region's network of electric vehicle charging stations.
5. Increase connectivity between rural and urban communities.
6. Implement transit expansion priorities generated from transportation planning efforts.
7. Remove transportation barriers to economic and workforce participation.

Objective 2: Maintain the quality and connectivity of transportation corridors within the region that are vital to the nation's supply chain logistics.

Maintaining the current transportation network infrastructure preserves the region's reputation, promotes economic activity, and ensures the efficient movement of goods, customers, and labor. Road quality, its construction and connectivity, has a direct impact on the region's level of economic activity that can exacerbate other economic outcomes. Roadway maintenance should remain a high priority for the region's economic development, especially along major travel corridors that facilitate both tourism and freight activity.

Strategies:

1. Support the continued expansion of the Springfield-Branson National Airport according to the Airport Master Plan.
2. Support improvements to rail infrastructure running through the region as identified by state and federal transportation agencies.
3. Support road improvements and maintenance along major freight corridors as identified in the SMCOG Regional Transportation Plan (RTP) and MODOT Long Range Transportation Plan (LRTP).
4. Offer planning services and resources for all regional airports, with a particular focus on those near developed or soon-to-be developed areas.
5. Enhance transportation infrastructure to support industrial and commercial expansion.

Objective 3: Promote safe and well-connected pedestrian and cycling infrastructure.

In the region's automobile-focused transportation system, bicycle and pedestrian infrastructure has been overlooked and neglected. Safe and reliable bicycle and pedestrian infrastructure creates a vibrant sense of place that residents and visitors are enthusiastic to engage with, simultaneously enhancing the quality of life for residents and spurring activity for local businesses. The boosts in economic activity are accompanied by cost-saving benefits of multimodal infrastructure, namely efficient land use practices and reduced road maintenance expenses.

Strategies:

1. Encourage active participation in SMCOG Transportation Advisory Committee (TAC) among municipalities and community development organizations.
2. Improve infrastructure along important pedestrian corridors as identified in the region's transportation plans and transportation safety plans.
3. Encourage the development of transit oriented and mixed-use developments through targeted land use policy
4. Collaborate with Ozark Greenways, municipalities, and other state and local agencies to facilitate further improvements to the region's trail network.

Goal 9: Strengthen the capacity of utilities to meet the industrial, commercial, and residential demands of projected economic expansion.

Reliable public utilities are crucial to the efficiency of local business operations and quality of life for residents. As communities and industries grow, the capabilities of local utility services are a primary limiting factor in the feasibility of their expansion. Therefore, the capacity and preparedness of local utility providers to meet residential, commercial, and industrial demand remains a top priority in maintaining the economic growth of the region.

Objective 1: Scale the capacity of water and wastewater infrastructure to match the projected demands of residents and businesses.

While a number of businesses and residential areas rely on private wells and septic systems for their water and sewage needs, many rely on the services of public water and wastewater infrastructure. The safety and security of these systems is vital to the well-being of residents and continued viability of local businesses. Ongoing monitoring and improvements to water and wastewater infrastructure as growth continues should remain a top priority for the region.

Strategies:

1. Develop on-site wastewater management grant and loan programs.
2. Work with regional and state partners to identify and meet unique infrastructure needs and demands.
3. Plan for the long-term safety and capacity of the region's drinking water.
4. Plan for the long-term capacity of water used for industrial, commercial, and agricultural uses and support ongoing efforts to acquire rights and access to water sources.

Objective 2: Assess the projected demand for energy based on current use trends and adjust capacity using a variety of reliable sources.

As the region's economy grows, so too does its energy consumption. Utility companies not only have to contend with the pace of ordinary residential, commercial, and industrial consumption, but also the introduction and expansion of energy-intensive, technology-based operations. The region must fulfill the growing demand using a variety of energy sources, both renewable and non-renewable, to produce an energy system that is both sustainable and resilient.

Strategies:

1. Explore options for energy source diversification, new energy generation, and efficient energy transmission.
2. Pursue funding for communities reliant on energy from coal power plants to alleviate economic distress caused by switching to more sustainable energy sources.

Objective 3: Improve urban and rural access to faster internet/broadband speeds.

As technology continues to spread into all facets of business and lifestyle, the demand for high-speed internet grows. While high-speed fiber internet infrastructure has expanded in urban areas, rural areas remain largely underserved by internet service providers. If the region seeks to strengthen its capacity for tech in business, high-speed broadband infrastructure needs to be accessible across the region, including rural areas.

Strategies:

1. Capture state and federal broadband deployment funds for the region

Goal 1: Deliver programs and resources that enhance the health, safety, and overall well-being of residents of all socioeconomic backgrounds.

Objective		Strategy	
1.1	Foster and retain strong coordination between municipal agencies and non-profit community development organizations.	1.1.1	Connect county health departments with non-profits seeking to provide health information and services such as safety tests and health screenings to low-income families and individuals.
		1.1.2	Collaborate with public safety agencies and organizations to enhance the region's preparedness and readiness to respond to and mitigate public safety threats.
		1.1.3	Partner with community development organizations, non-profits, and government entities on efforts to address food insecurity.
1.2	Utilize federal and state programs targeting the effects of poverty within disadvantaged communities and social groups.	1.2.1	Establish reliable lines of communication between disadvantaged communities, community organizations, and municipalities.
		1.2.2	Inform municipalities and regional organizations of federal and state programs and funding opportunities through regular communication.
		1.2.3	Identify areas of "economic distress" eligible for assistance from EDA programs (e.g., Economic Adjustment Assistance).
		1.2.4	Assist rural communities in the application for US Department of Agriculture (USDA) rural development programs.
		1.2.5	Assess and address the presence of "food deserts" and food insecurity among economically distressed areas.
1.3	Improve access to licensed, professional childcare for families of all socioeconomic backgrounds and life circumstances.	1.3.1	Assist parents and child care providers in applying for assistance from the Child Care Development Fund (CCDF).
		1.3.2	Create a talent pipeline for qualified childcare professionals by connecting child care providers with workforce development services and educational institutions.
		1.3.3	Incentivize parent-friendly policies and work environments, implementing flexible and predictable work schedules.
		1.3.4	Consult with Child Care Resource & Referral agencies (CCR&R) and childcare advocacy organizations to determine best practices and maintain close lines of communication.
		1.3.5	Re-imagine land use and zoning regulations to serve the development of childcare facilities.

Goal 2: Develop an affordable and attainable housing market capable of accommodating current residents and an incoming labor force.

Objective		Strategy	
2.1	Support the construction of housing at diverse price points to meet the demands of the expanding workforce.	2.1.1	Conduct a housing market and supply assessment to determine the optimum mix of housing types and affordability levels
		2.1.2	Leverage the efforts of local Community Development Corporations (CDC) and non-profit organizations to develop place-oriented housing solutions.
		2.1.3	Encourage land use and zoning policies that enable diverse housing types and densities within neighborhoods.
		2.1.4	Enable the active reuse of dilapidated and vacant units and lots through municipal land acquisition mechanisms. (e.g., land banks).
2.2	Promote financial assistance programs for housing related costs and expenses.	2.2.1	Connect homeowners and prospective homebuyers with creative and affordable finance options.
		2.2.2	Assist low-income renters in applying for local, state, and federal rent assistance programs.
		2.2.3	Increase awareness of home repair and maintenance resources for low-income homeowners.
		2.2.4	Create housing resource database portal accessible to renters and owners across the region.
		2.2.5	Pursue accountability measures for negligent and absent landlords and rental property managers.
		2.2.6	Engage community development organizations and non-profits in collaborative efforts to design effective housing programs and policies.
2.3	Reinforce and streamline the region's residential development process and construction pipeline.	2.3.1	Expand the talent pool of capable residential construction contractors and subcontractors.
		2.3.2	Ensure the efficient and cost-effective flow of construction materials through the local supply chain.
		2.3.3	Streamline residential construction permitting processes.
		2.3.4	Align the region's building codes to meet a unified standard that facilitates development.

Goal 3: Sustain a vibrant and active sense of place across the region attractive to current and prospective residents as well as visitors.

Objective		Strategy	
3.1	Use local cultural assets and community organizations to develop unique and engaging experiences and activities.	3.1.1	Promote thriving festivals, weekend youth activities, and summer youth activities.
		3.1.2	Increase comprehensive planning service utilization within the region, emphasizing the inclusion of strategies to address community sense of place.
		3.1.3	Identify and protect sites of substantial cultural significance.
		3.1.4	Foster new events and community activities that engage both residents and visitors.
3.2	Revitalize downtowns and neighborhoods in urban and rural communities.	3.2.1	Promote partnership with downtown and community betterment programs.
		3.2.2	Encourage land use and comprehensive planning service utilization.
		3.2.3	Encourage enforcement of municipal and county zoning and building codes.
		3.2.4	Assist municipalities in the application for the EPA's Brownfields Program to assess, clean up and sustainably reuse derelict and polluted land.
		3.2.5	Facilitate the establishment of official downtown, main street, and neighborhood associations.
3.3	Leverage the region's tourism resources and infrastructure to further community interests.	3.3.1	Connect marketing efforts to strengthen the region's external marketing capabilities.
		3.3.2	Ensure local facilities meet the needs of potential tourists, visitors, and meeting groups.
		3.3.3	Leverage major events and community milestones to bolster economic activity.

Goal 4: Enhance, support, and grow a knowledgeable and skilled workforce capable of meeting the needs of emerging businesses and industries

Objective		Strategy	
4.1	Actively align the efforts of the region's talent development pipeline with the needs of employers.	4.1.1	Connect businesses in region to local and state workforce development programs.
		4.1.2	Promote and enhance Workforce Development Board (WDB) services
		4.1.3	Encourage and support enrollment in post-high school graduation into technical programs and apprenticeship positions.
		4.1.4	Collaborate with university and technical college services to offer targeted, industry specific talent development programs.
		4.1.5	Foster greater employment pathways for the region's nontraditional workforce and talent pool (e.g., at risk youth, those without a high school diploma or equivalent, formerly incarcerated individuals).
		4.1.6	Identify the skills local employers need and work with workforce development organizations and educational institutions to meet those demands.
4.2	Attract out-of-region talent capable of meeting employer demand and contributing to the region's economy.	4.2.1	Promote talent incentive funding and relocation cost recovery services for businesses in the region in coordination with the WDB, local governments, non-profit entities, and workforce development organizations.
		4.2.2	Research grant opportunities for relocation assistance and student loan repayment programs for regional businesses.
		4.2.3	Align marketing efforts for talent attraction across the region to meet local industry demand.

Goal 5: Maintain a diversified industry portfolio that contributes to economic resilience.

Objective		Strategy	
5.1	Attract a diverse array of new businesses that complement the region's current industry clusters.	5.1.1	Leverage statewide resources to support communities in business attraction methods.
		5.1.2	Assist in identifying sites ready for commercial and industrial development.
		5.1.3	Support local Business Retention and Expansion (BRE) programs offered by local EDOs and state-level agencies.
		5.1.4	Support new business creation programs.
5.2	Support the growth of existing local small-businesses, startups, and established enterprises.	5.2.1	Encourage membership in local resource providers and utilize services.
		5.2.2	Offer land use and planning services to enhance site-readiness throughout the region.
		5.2.3	Highlight local small business successes through periodic media publications and recognition events.
		5.2.4	Connect businesses to existing support organizations and available resources.
5.3	Create an inclusive and accessible business environment for entrepreneurs, business leaders, and talent of all backgrounds.	5.3.1	Connect with minority and women owned businesses and advocacy groups to discuss methods and policies to address unequal representation in the entrepreneurial community.
		5.3.2	Support entrepreneurial services designed to foster the participation of individuals from all socioeconomic backgrounds in the regional economy.

Goal 6: Promote initiatives to elevate local investment in evolving, high-growth industry sectors.

Objective		Strategy	
6.1	Support and expand the region's dynamic, richly networked innovation and entrepreneurship ecosystem.	6.1.1	Leverage local innovation resources and support organizations (e.g., business incubators, Innovate SOMO) and expand their efforts to reach a critical mass of aspiring entrepreneurs.
		6.1.2	Align institutional R&D agendas and commercialization services with industry needs through industry-academic partnerships.
6.2	Enrich the region's innovation and tech focused talent pipeline.	6.2.1	Promote secondary and post-secondary entrepreneurial education programs (e.g., GO CAPS, Codefi Youth Coding League, Code Lab).
		6.2.2	Expand small business workshops offered by entrepreneurial support organizations (ESO) and local economic development organizations (EDO).
6.3	Connect promising small businesses and startups with pre-seed, seed, and later stage funding opportunities.	6.3.1	Sponsor a regional startup competition with non-dilutive grant award prizes.
		6.3.2	Promote institutional guidance for federal research and commercialization grants (e.g., SBIR/STTR).
		6.3.3	Assemble an official network of angel investors interested in investing in local startups and entrepreneurs.
		6.3.4	Broadcast the region's opportunity for tech innovation and investment through a national and international marketing campaign.
		6.3.5	Market the availability of low interest loans through the SMCOG Revolving Loan Fund (RLF) and Small Business Administration (SBA) loan programs.
		6.3.6	Support Innovate SOMO Funds and connect promising startups with Innovate SOMO and their venture investment funds and network.
		6.3.7	Support investor education programs and resources to assist those interested in understanding the needs of new businesses and early-stage investment opportunities.

Goal 7: Bolster resilience to environmental hazards and economic shocks.

Objective		Strategy	
7.1	Mitigate impacts of potential disasters and natural hazards on residents, businesses, and critical infrastructure.	7.1.1	Encourage regular hazard mitigation planning within the region.
		7.1.2	Identify and contact communities without storm water and floodplain management plans to offer planning services.
		7.1.3	Inform agriculturally dependent communities on the potential shifts in commercial agriculture trends that result from a changing climate and develop strategies to address them.
		7.1.4	Assess the current housing stock's ability to withstand increasingly severe weather events.
		7.1.5	Develop a region-wide Climate Adaptation Plan addressing weather and climate trends and their impacts on businesses, industries, and communities.
		7.1.6	Evaluate the implementation of contemporary building codes and their impact on the region-wide development.
		7.1.7	Leverage state and federal resources for weatherization efforts.
7.2	Protect the security and quality of the region's natural resources.	7.2.1	Coordinate with local, state, and federal agencies on efforts to ensure access to safe and affordable natural resources.
		7.2.2	Encourage responsible land use zoning to prevent development on naturally occurring forests and prime agricultural land.
		7.2.3	Leverage state and federal resources for remediation efforts.
7.3	Strengthen the region's ability to recover from unexpected economic disruptions.	7.3.1	Reinforce collaboration between municipalities and the region's economic resource framework.
		7.3.2	Enhance the ability of businesses and labor to adapt to shifts in technology and industry or occupational trends.
		7.3.3	Identify clear lines of communication and authority capable of implementing mitigation efforts in reaction to immediate economic risks.

Goal 8: Develop and uphold a transportation network that meets the needs of residents, businesses, and visitors.

Objective		Strategy	
8.1	Enhance mobility across the region through accessible and reliable transportation.	8.1.1	Expand the reach and service hours of public transit services across the region.
		8.1.2	Increase transportation planning service utilization within the region.
		8.1.3	Continue updating the regional transportation needs list and participate in SMCOG and OTO prioritization processes.
		8.1.4	Expand the region's network of electric vehicle charging stations.
		8.1.5	Increase connectivity between rural and urban communities.
		8.1.6	Implement transit expansion priorities generated from transportation planning efforts.
		8.1.7	Remove transportation barriers to economic and workforce participation.
8.2	Maintain the quality and connectivity of transportation corridors within the region that are vital to the nation's supply chain logistics.	8.2.1	Support the continued expansion of the Springfield-Branson National Airport according to the Airport Master Plan.
		8.2.2	Support improvements to rail infrastructure running through the region as identified by state and federal transportation agencies.
		8.2.3	Support road improvements and maintenance along major freight corridors as identified in the SMCOG Regional Transportation Plan (RTP) and MODOT Long Range Transportation Plan (LRTP).
		8.2.4	Offer planning services and resources for all regional airports, with a particular focus on those near developed or soon-to-be developed areas.
		8.2.5	Enhance transportation infrastructure to support industrial and commercial expansion.
8.3	Promote safe and well-connected pedestrian and cycling infrastructure.	8.3.1	Encourage active participation in SMCOG Transportation Advisory Committee (TAC) among municipalities and community development organizations.
		8.3.2	Improve infrastructure along important pedestrian corridors as identified in the region's transportation plans and transportation safety plans.
		8.3.3	Encourage the development of transit oriented and mixed-use developments through targeted land use policy
		8.3.4	Collaborate with Ozark Greenways, municipalities, and other state and local agencies to facilitate further improvements to the region's trail network.

Goal 9: Strengthen the capacity of utilities to meet the industrial, commercial, and residential demands of projected economic expansion.

Objective		Strategy	
9.1	Scale the capacity of water and wastewater infrastructure to match the projected demands of residents and businesses.	9.1.1	Develop on-site wastewater management grant and loan programs.
		9.1.2	Work with regional and state partners to identify and meet unique infrastructure needs and demands.
		9.1.3	Plan for the long-term safety and capacity of the region's drinking water.
		9.1.4	Plan for the long-term capacity of water used for industrial, commercial, and agricultural uses and support ongoing efforts to acquire rights and access to water sources.
9.2	Assess the projected demand for energy based on current use trends and adjust capacity using a variety of reliable sources.	9.2.1	Explore options for energy source diversification, new energy generation, and efficient energy transmission.
		9.2.2	Pursue funding for communities reliant on energy from coal power plants to alleviate economic distress caused by switching to more sustainable energy sources.
9.3	Improve urban and rural access to faster internet/broadband speeds.	9.3.1	Capture state and federal broadband deployment funds for the region.

PERFORMANCE MEASURES

PROGRESS & KEY INSIGHTS

Reporting performance can include details such as indicators identified, data collected and activities accomplished. Clear and concrete performance goals make it easier to generate relevant, consistent and comparable data over time.

SMCOG acknowledges that the CEDS document is a working document which requires continued efforts to carry out the plan for economic development in the region. In order to enhance accountability and effectiveness, staff will regularly convene meetings with the CEDS committee and SMCOG Board to assess the performance of the action plan and the relevance of goals and objectives. Any necessary adjustments or additions to the CEDS and its processes will be made in accordance with the CEDS committee.

To evaluate the effectiveness of the CEDS, the following and similar information will be measured annually, as mandated by the Economic Development Administration. These may include measurements such as:

- Job creation and retention
- Business investment and expansion
- Infrastructure development
- Workforce development and training initiatives
- Collaboration and partnership efforts
- Implementation of strategic projects and programs
- Progress towards meeting identified goals and objectives

These measurements will provide valuable insights into the impact and success of the CEDS in driving economic development within the region.

Measure	Key Indicator	Outcome
Economic Expansion	Population Growth	<ul style="list-style-type: none"> • Population grew 3.7% (23,022 residents) between 2017 and 2022. • Population is expected to increase 4% (26,545 residents) to 697,116 by 2029.
Income	Real Median Household Income & Earnings Per Job	<ul style="list-style-type: none"> • The real median household income rose 10.2% (\$5,339) between 2017 and 2022. • Average earnings per job increased 30.2% (\$13,853) between 2017 and 2023.

Source: American Community Survey 5 Year Estimates, 2017 - 2022; Lightcast, 2024

PERFORMANCE MEASURES

PROGRESS & KEY INSIGHTS

Measure	Key Indicator	Outcome
Equity	Poverty Disparity Among Historically Disadvantaged Communities & Social Groups	<ul style="list-style-type: none"> Females had higher rates of poverty (15.5%) than males (15.5%) in 2022. White residents had the lowest rate of poverty (13.7%) in 2022 while African American residents (27.9%), residents of some other race (24.0%), and residents of Hispanic or Latino origin (22.8%) have the highest rate of poverty. The three counties with the largest rural population, Dade, Dallas, and Barry, have poverty rates (17.0%, 20.6%, and 18.5% respectively) greater than the regional average (14.5%)
Industry Trends	Five Fastest Growing Industries	<ul style="list-style-type: none"> The five industry sectors experiencing the highest growth between 2017 and 2024 were Resource Extraction (NAICS 21; 20%), Transportation (NAICS 48; 20%), Construction (NAICS 23; 19%), Manufacturing (NAICS 31; 17%), and Real Estate (NAICS 53; 16%).
Entrepreneurship	Number of Business Establishments	<ul style="list-style-type: none"> The number of payrolled business establishments increased 17.3% (2,996) between 2017 and 2023.
Resiliency	Industrial and Occupational Diversity	<ul style="list-style-type: none"> In 2023, Springfield Metro Area ranked 203 of the nation's 384 metropolitan areas in terms of its industry diversity. In 2023, Springfield Metro Area ranked 258 of the nation's 384 metropolitan areas in terms of its occupation diversity.
Opportunity	Job Growth & Unemployment Rate	<ul style="list-style-type: none"> Jobs grew 6.1% (17,868) between 2017 and 2022. Unemployment decreased from 6.62% in 2017 to 4.88% in 2022.
Workforce Housing	Housing Vacancy	<ul style="list-style-type: none"> Vacant housing units decreased from 14.4% in 2017 to 11.3% in 2022.

Source: American Community Survey 5 Year Estimates, 2017 - 2022; Lightcast, 2024

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APPENDIX

Population Projection

POPULATION PROJECTION						
County	2010	2020	Change '10 – '20	% Change	Projected 2030	Projected 2040
Barry	35,597	34,534	-1063	-2.99%	35,138	35,505
Christian	77,422	88,842	11,420	14.75%	107,628	125,366
Dade	7,883	7,569	-314	-3.98%	7,427	7,261
Dallas	16,777	17,071	294	1.75%	17,882	18,620
Greene	275,174	298,915	23,741	8.63%	329,604	359,303
Lawrence	38,634	38,001	-633	-1.64%	39,924	41,484
Polk	31,137	31,519	382	1.23%	34,369	36,681
Stone	32,202	31,076	-1,126	-3.50%	32,888	34,282
Taney	51,675	56,066	4,391	8.50%	65,227	73,709
Webster	36,202	39,085	2,883	7.96%	43,398	47,509
SMCOG Region	602,703	642,678	39,975	6.63%	713,397	779,721
Missouri	5,988,927	6,154,913	165,986	2.77%	6,318,126	6,359,970
Arkansas	2,915,918	3,011,524	95,606	3.28%	3,155,798	3,217,535
Kansas	2,853,118	2,937,880	84,762	2.97%	3,011,782	3,032,653
Oklahoma	3,751,351	3,959,353	208,002	5.54%	4,253,604	4,439,038

Source: 2010 and 2020 Census; University of Virginia Weldon Cooper Center, Demographics Research Group

APPENDIX

MINORITY POPULATIONS

Minority Populations									
Jurisdiction	Black/ African American	American Indian/ Alaskan Native	Asian	Native Hawaiian/ Pacific Islander	Two or More Races	Total Minorities	% Total Population	Hispanic or Latino	% Total Population
Barry	106	453	811	73	2,743	5,879	17.02%	3,333	9.65%
Christian	616	539	647	72	6,080	8,926	10.05%	3,012	3.39%
Dade	36	50	24	-	381	581	7.02%	135	1.78%
Dallas	43	100	25	19	934	1,759	10.90%	320	1.87%
Greene	10,233	2,140	6,250	407	22,643	48,170	16.11%	14,392	4.81%
Lawrence	135	415	176	40	2,738	4,864	12.8%	2,987	7.86%
Polk	247	212	191	6	1,672	2,466	7.82%	791	2.51%
Stone	85	220	115	20	1,805	2,502	8.05%	782	2.52%
Taney	851	487	617	197	4,266	8,347	14.89%	4,329	7.72%
Webster	203	273	141	10	2,006	2,907	7.46	790	2.02%
SMCOG	12,558	4,899	8,937	844	45,268	86,351	13.44%	30,871	4.80%
Missouri	699,840	30,518	133,337	9,730	413,171	1,414,578	22.98%	303,068	4.92%
USA	41,104,200	3,727,135	19,886,049	689,966	33,848,943	53,734,992	16.21%	62,080,044	18.73%

Source: 2020 United States Decennial Census

APPENDIX

LABOR FORCE STATISTICS TABLE

Labor Force Statistics Table								
	2010				2020			
County	Labor Force	Employed	Unemployed	Unemp. Rate	Labor Force	Employed	Unemployed	Unemp. Rate
Barry	16,679	15,232	1,447	8.68%	15,464	14,927	514	3.32%
Christian	38,997	36,692	2,305	5.91%	44,234	42,642	1,592	3.60%
Dade	3,445	3,124	321	9.32%	3,417	3,118	299	8.75%
Dallas	7,712	7,033	679	8.80%	6,417	6,151	266	4.15%
Greene	142,444	132,829	9,615	6.75%	146,508	140,567	5,941	4.06%
Lawrence	18,225	16,780	1,445	7.93%	18,109	16,704	1,405	7.76%
Polk	13,599	12,293	1,306	9.60%	14,771	14,403	368	2.49%
Stone	14,835	13,265	1,570	10.58%	13,435	12,398	1,037	7.72%
Taney	25,414	23,519	1,895	7.46%	27,141	25,910	1,231	4.54%
Webster	16,206	15,165	1,041	6.42%	16,873	16,014	859	5.09%
SMCOG	297,556	275,932	21,624	7.27%	306,369	292,834	13,512	4.41%
<i>Source: 2010 and 2020 US Census</i>								

APPENDIX

TIMBERLAND & FOREST COVERAGE

County	County area in acres	Timberland acres 2021	Forest acres 2021	Timberland %	Forest %
Barry	506,129	95,067	105,322	19%	21%
Christian	360,836	76,389	76,389	21%	21%
Dade	324,002	27,657	27,657	9%	9%
Dallas	347,421	70,595	70,595	20%	20%
Greene	433,841	72,156	72,156	17%	17%
Lawrence	392,560	37,009	37,009	9%	9%
Polk	411,143	69,617	69,617	17%	17%
Stone	326,793	87,470	90,121	27%	28%
Taney	417,008	105,923	113,602	25%	27%
Webster	380,007	89,242	89,242	23%	23%

PRIME FARMLAND

Classifications	Barry	Christian	Dade	Dallas	Greene	Lawrence	Polk	Stone	Taney	Webster
All areas are prime farmland	13.72%	17.87%	39.24%	42.50%	40.21%	45.92%	41.48%	5.99%	19.65%	20.96%
Farmland of statewide importance	10.32%	12.68%	2.79%	17.18%	4.13%	4.37%	10.59%	8.01%	3.18%	23.27%
Not prime farmland	74.31%	69.45%	52.60%	36.96%	53.64%	46.08%	43.92%	86.00%	77.17%	54.28%
Prime farmland if drained	1.66%	0.00%	5.37%	3.37%	2.02%	3.64%	4.01%	0.00%	0.00%	1.50%

APPENDIX

TOP INDUSTRY SECTORS

Rank	Employment	(Number of Jobs 2023)	Production	(Gross Regional Production 2022)	Wages	(Average Annual Earnings 2023)
1	Local Government	26,611	Local Government	\$ 1.72 Billion	Petroleum and Coal Products Manufacturing	\$443,601
2	Food Services and Drinking Places	25,730	Merchant Wholesalers, Durable Goods	\$1.70 Billion	Pipeline Transportation	\$154,409
3	Hospitals	17,829	Hospitals	\$1.51 Billion	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	\$131,872
4	Administrative and Support Services	13,866	Ambulatory Health Care Services	\$1.48 Billion	Utilities	\$129,854
5	Ambulatory Health Care Services	12,898	Professional, Scientific, and Technical Services	\$1.47 Billion	Management of Companies and Enterprises	\$104,122

APPENDIX

TOP EMPLOYERS 2023

Company	Employees
CoxHealth	12,164
Mercy Hospital Springfield	8,202
Springfield Public Schools	3,694
Bass Pro Shops	3,127
Missouri State University	2,760
O'Reilly Auto Parts (HQ)	2,307
Citizens Memorial Healthcare	2,025
Jack Henry & Associates, Inc.	1,853
SRC Holdings (HQ)	1,500
Prime, Inc. (HQ)	1,301
Burrell Behavioral Health	1,218
Ozarks Technical Community College	1,191
EFCO (HQ)	1,170
Chase Card Services	1,120
Lowe's	1,010
The Arc of the Ozarks	959
City Utilities of Springfield	955
American National Property & Casualty Co.	954
Kraft Heinz Company	950
TTEC Holdings Inc.	942
Expedia, Inc.	940
T-Mobile USA	850
Nixa R-II School District	820
Ozark R-VI School District	819