ECONOMIC DEVELOPMENT STRATEGIC PLAN
CITY OF FORT WORTH, TEXAS

TECHNICAL REPORT: GUIDANCE ON MARKETING, PROGRAM AREAS, & SITE SELECTION

DECEMBER 2017

TIP strategies
AUSTIN • SEATTLE

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ABOUT THIS WORK

Over the last several decades, Fort Worth has been one of the fastest-growing large cities in the US. Fort Worth has a unique identity and brand that combines its rich cultural heritage with an economy driven by industry-leading employers like Lockheed Martin and American Airlines. The City has made strategic investments in districts from Sundance Square to Alliance, resulting in numerous waves of private sector investment and employment growth. However, all this has been achieved without a comprehensive, citywide approach for economic development. There is no question that Fort Worth is primed for greater economic prosperity. The challenge is not about growth in a general sense, it is about guiding growth that creates the highest overall benefit to the city. To accomplish this, future development will need to be channeled into specific districts, into generating higher income levels and capital investment, strengthening the local tax base, and supporting a more attractive environment for companies and skilled workers.

In response to these challenges, Fort Worth is embarking on its first economic development strategic plan, aimed at enhancing the city's status in the region and nation over the next five years and beyond. Working with TIP Strategies (an economic development consulting firm with office in Austin and Seattle) and their partners (Fregonese Associates, JLL, and Isaac Barchas), the City of Fort Worth has engaged the business community and local stakeholders to create a strategic framework to guide the City’s economic development activities.

This Technical Report was prepared as part of the strategic planning process to offer qualitative insights on Fort Worth’s economic development program. This report presents findings based on perceptions of area real estate brokers and developers, marketing messages and themes from Fort Worth’s economic development partners, and comparisons of Fort Worth’s economic development program vis-à-vis metro area competitor cities and US benchmarks. It also includes a review of how the city stacks up in light of major site selection factors for corporate expansions and relocations. These findings provide a foundation of knowledge that informed the other deliverables produced during the engagement (Volume 1: Competitiveness; Volume 2: Opportunity; and Volume 3: Strategy) and are also intended to provide guidance on internal resource allocation decisions for the City’s economic development program.

Five separate analyses incorporated into this summary are presented as attachments:

A. **Perception Survey.** As part of the planning process, TIP surveyed a targeted group of commercial real estate brokers and developers. Respondents were primarily located in Fort Worth, however, many of those completing the survey were based in other cities in the Dallas-Fort Worth metro area. Questions were focused on views of Fort Worth’s business climate, its appeal as a location for business expansion and relocation projects, and perceptions about the City’s key cultural and industry assets.

B. **Marketing Review.** This analysis looks at the marketing themes promulgated by the City of Fort Worth and other partner organizations. We also compared Fort Worth’s two primary economic development websites (the City of Fort Worth Economic Development Department and the Fort Worth Chamber of Commerce) against the metro area competitor cities and the US benchmark cities.

C. **Organization Gap Analysis.** This matrix visualizes the core functions and support functions for the 31 partner organizations that have the strongest impact on economic development in Fort Worth. This gap analysis informs the implementation matrix, which assigns specific organizations responsible for carrying out each strategy and action in the plan.

D. Organizational Review. This matrix offers a comparison of the resources dedicated to economic development in Fort Worth compared with metro area competitor cities and US benchmarks. We reviewed factors including staff size (total and by function), operating budgets, and major economic development incentive funds.

E. Site Selection Factors. To understand Fort Worth's appeal as a business location, this document compares Fort Worth and Texas with the domestic benchmarks using major site selection factors typically considered by corporations. To supplement these state and metro-area level factors, we analyzed how Fort Worth stacks up within the Dallas-Fort Worth market according to more localized criteria including school district rankings, City incentive programs, and available real estate products. In addition, we used information from confidential discussions with JLL and City of Fort Worth staff concerning several recent economic development prospects. These conversations inform the key findings below, but more importantly, have also been used to inform strategy development for Volume 3.

KEY FINDINGS

A number of key findings emerged from this work. The information presented below combines the results of multiple analyses with insights gained from an extensive stakeholder engagement process and the direct experience of the consulting team in working with prospects. The outcome points to areas where improvements are needed in Fort Worth's site selection process and related marketing and positioning efforts. Where applicable, recommendations for addressing identified issues have been incorporated into the strategic plan (Volume 3).

Fort Worth is losing prospects to other metro area cities. A proactive economic development effort is required to counteract negative perceptions of the city and to increase investment.

Fort Worth currently competes for the same prospects that are choosing to locate in Dallas, Plano, Frisco, Irving, Allen, and McKinney. While most of these prospects could locate in Fort Worth, too many ultimately decide against making an investment in the city. In some cases, a perceived weakness is the deciding factor; perceptions of the quality of Fort Worth ISD and a lack of an effective transportation system were referenced in both the stakeholder survey presented in Volumes 1 and 2 and in the broker perception survey presented in Attachment A. Addressing these perceived weaknesses will be essential to the city's future economic vitality.

However, the planning process suggests the lack of a proactive economic development response is an equally significant factor affecting the City's ability to capture its share of the region's growth. The Dallas-Fort Worth metro area is a highly competitive region. Dallas has a strong City economic development department and the Dallas Regional Chamber is very aggressive. There is no counterpart to this partnership in Fort Worth. The City is also faced with competition from dozens of Dallas-Fort Worth metro area sales tax corporations. In particular, the Type A economic development corporations in Frisco, Allen, and McKinney are extremely effective.

Defining and formalizing roles and responsibilities among the City's economic development partners will help maximize resources and ensure a more consistent and professional site selection experience for prospects.

A critical element of an effective economic development program is a clear delineation of roles and responsibilities. In addition to increasing efficiency, a well-defined process for dealing with prospects can help eliminate confusion, ensure that information requests receive a timely and consistent response, and present a more favorable view of the city. This process should be formalized and the correct path should be evident from every potential entry point, including partner websites.

The organization gap analysis presented in Attachment C demonstrates the diverse set of partner organizations working to grow and strengthen the Fort Worth economy. A close look at the functional areas (both traditional and non-traditional) reveals areas of overlap where several organizations provide similar services and under-served areas. For instance, none of the core economic development partners are currently engaged in significant talent attraction. Currently, only the higher education institutions can claim that role.

The Fort Worth Chamber should expand its role as Fort Worth's leading organization focused on target industry recruitment, including international business development. The Chamber needs to be a player regionally and globally. The City's role should focus on incentives, redevelopment, and development assistance. However, the division of roles and responsibilities is not intended to put each partner in a separate silo. In fact, Volume 3 calls for shared responsibilities between the City and the Chamber for many critical functions (e.g., business retention & expansion and target industry recruitment). The key point is that the roles of each partner must be well understood and delineated.

Fort Worth lags many benchmark communities—both within the region and outside the state—in terms of resource levels allocated to economic development.

The organizational review presented in Attachment D illustrates that the City of Fort Worth has among the lowest staffing levels of economic development personnel compared with the US benchmark cities. The analysis also reveals that funding and staff resources for economic development in Fort Worth falls short of most competitor cities in the Dallas-Fort Worth market, in terms of both operations and incentives. Accordingly, the City should start by streamlining and enhancing the necessary "reactive" part of economic development: responding to prospects. This step should be followed by significant new investments in the "proactive" side of economic development: generating leads and cultivating relationships that lead to new business development opportunities.

Fort Worth lacks specific incentive programs that have been effective in other communities in the region.

In addition to being better resourced, many of Fort Worth's metro area competitor communities have more robust incentive offerings. For example, Plano's property tax-funded economic development incentive program has been very effective. The program is credited with playing a key role in luring Toyota and JP Morgan Chase into the community, which together are expected to result in 10,000 new jobs.

An important focus of the City's economic development strategy must be increasing Fort Worth's competitiveness within the region by introducing new and expanded incentive programs. Consideration should be given to providing incentives for companies that lease office space. This strategy would help the community attract more professional service companies (including tech firms) that would not otherwise qualify for existing tax abatement incentives, because their expansion does not include significant capital investment.

From a corporate site location standpoint, Fort Worth compares favorably against several of the peer metro areas. These factors should inform the City's target marketing messages nationally and internationally.

The review of site selection factors presented in Attachment E offers a strong business case for the city and the Fort Worth MD based on the major factors typically considered in corporate site location decisions. Furthermore, it suggests Fort Worth is a competitive location for business expansion and relocation projects compared with the domestic peer metro areas. Fort Worth fared particularly well on measures related to labor availability and costs. In addition, the city's large supply of land presents a significant advantage.

However, despite the positive comparison at the state-vs-state and metro-vs-metro levels, Fort Worth does not capture its fair share of projects. Focused messaging promoting these attributes could help raise the city's profile outside the state and offer a mechanism for leapfrogging some of the competitive challenges regionally. National and international success could, in turn, help address negative perceptions in the region. This does not mean Fort Worth should ignore the disadvantages it has relative to metro area peers, such as the Type A and B sales tax incentive funds (e.g., Frisco, McKinney) and property tax incentive funds (Plano and Richardson). Instead, Fort Worth's asset base and its favorable site selection factors suggest that marketing should focus on attracting investment and business expansion from national and international companies, rather than concentrating on differentiating the city from other regional players.

The city fares well among brokers on some points relative to its Dallas-Fort Worth metro area competitors according to the perception survey (Attachment A). These points should be emphasized in regional marketing efforts.

Among a range of 17 site selection factors, Fort Worth was rated most highly on cost of living and quality of life. Fort Worth is also perceived as having a relatively strong business climate among the surrounding competitor cities, with two thirds of survey respondents giving the city a favorable rating in this area. However, Plano and Frisco stand out as having the highest regarded business climates. And other aspects of the survey suggest that Fort Worth's development process is viewed unfavorably. Within the Dallas-Fort Worth market, Fort Worth is among the least competitive locations of those rated in terms of key local factors such as K-12 school performance, labor access, and commercial office space availability. Fort Worth also received relatively low marks on the presence of research universities, however, this factor was viewed as the least important among those analyzed.

One area of emphasis that could be explored is raising awareness of Fort Worth's impressive base of industry. For example, Plano and Irving are known for their large corporate and professional facilities. Actively reinforcing such associations can support efforts to attract additional investment of this type. The industries most closely associated with Fort Worth in the perception survey were: aerospace, oil & gas, and real estate & construction. In addition, a concerted effort to connect the city more closely with other sectors could be productive. The industries least associated with Fort Worth were: software/IT, finance & insurance, professional services, and corporate HQs. Marketing and target industry recruitment efforts should be focused on the city's established sectors and emerging opportunities detailed in Volume 2. Strategies should simultaneously strengthen the image already associated with the city (a location for industry), while also creating awareness of new sectors for which the city isn't currently recognized.

The marketing review revealed a lack of consistent messaging related to economic development and little or no internationally focused business development marketing.

Fort Worth lacks a unified economic development message. Each partner organization sends a different message about living and doing business in Fort Worth through their marketing channels. While use of a longhorn is relatively consistent across organizations (and may represent a potential unifying theme), the presence of multiple messages can water down perceptions of an area. Current messaging also does little to convey the city's competitive advantages and, in some cases, relies on variations of the overexposed "great place to live, work, and play" theme. We recommend that the City be more intentional in developing language that clearly communicates the benefits of a Fort Worth location to businesses and talent. Engaging in a more strategic manner with the regional and national real estate community is also critical.

The analysis also reveals that Fort Worth's target industry marketing and recruitment are relatively weak. While the Chamber does highlight the city's primary industries in marketing materials, these materials lack the depth required for a successful target industry recruitment program. Depth refers to more detailed information on the local and regional advantages within each industry (e.g., highlighting specific employers, key occupations, training programs) as well as focusing on specific segments and opportunities within a broader industry. Good examples of target industry marketing messages from the benchmark cities include the Animal Health Corridor in Kansas City and the Metro Denver EDC's industry profiles. The emerging opportunities described in Volume 2: Opportunity provide a good starting point to build out a more focused set of marketing materials for Fort Worth's target industry recruitment efforts.

International business development is nearly nonexistent within Fort Worth. Even a basic item such as listing the major foreign-owned firms and recent FDI projects in Fort Worth is lacking from existing marketing materials. Currently, the Dallas Regional Chamber, DFW International Airport, and Alliance are the only entities in the region focused on international business in a significant way. Raising the profile of Fort Worth as a global business center is a significant opportunity that needs to be addressed. Among the benchmark cities, Nashville and Pittsburgh provide examples of more robust international business development efforts.

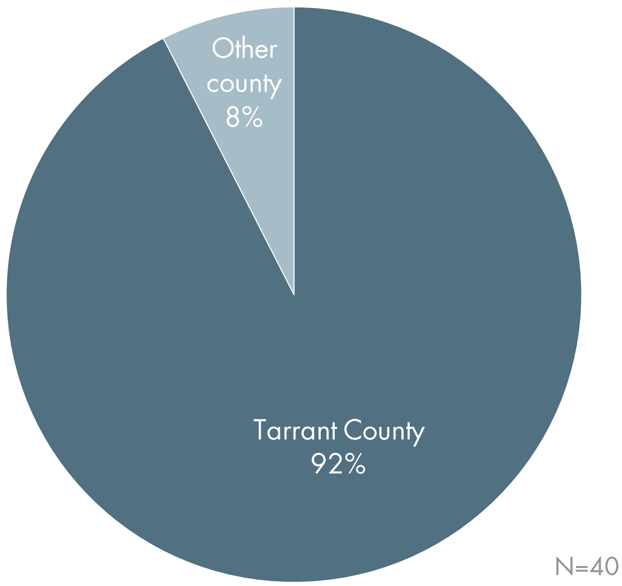
ATTACHMENT A. PERCEPTION SURVEY

TIP Strategies conducted a survey to gauge regional brokers' perceptions of Fort Worth relative to other metro area communities. Forty individuals responded to the survey, which was open from April 28, 2017 through May 27, 2017. Survey results are summarized below.

CONNECTION TO FORT WORTH

FIGURE 1. PRIMARY RESIDENCE IN THE FORT WORTH AREA

COUNTY OF RESIDENCE BY PERCENT



CITY OF RESIDENCE BY NUMBER OF RESPONSES

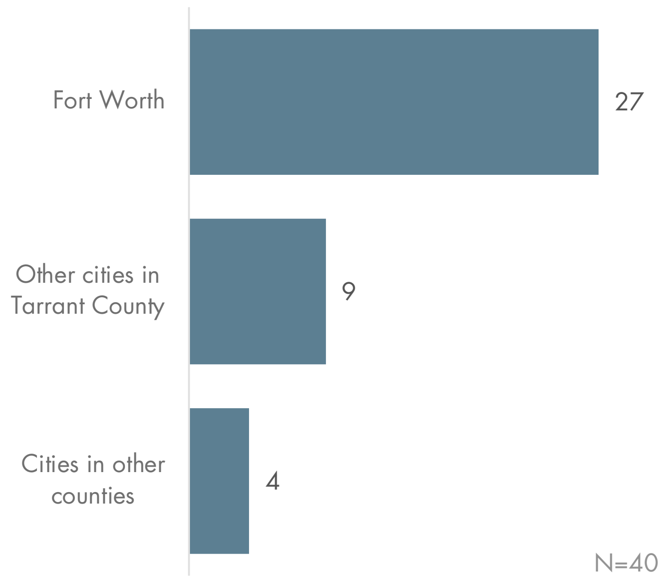


FIGURE 2. LENGTH OF RESIDENCE IN THE FORT WORTH AREA (INCLUDING THE METRO AREA)

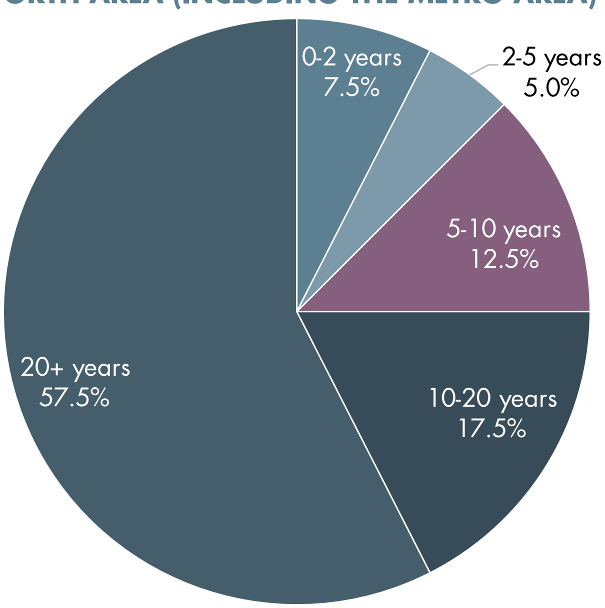
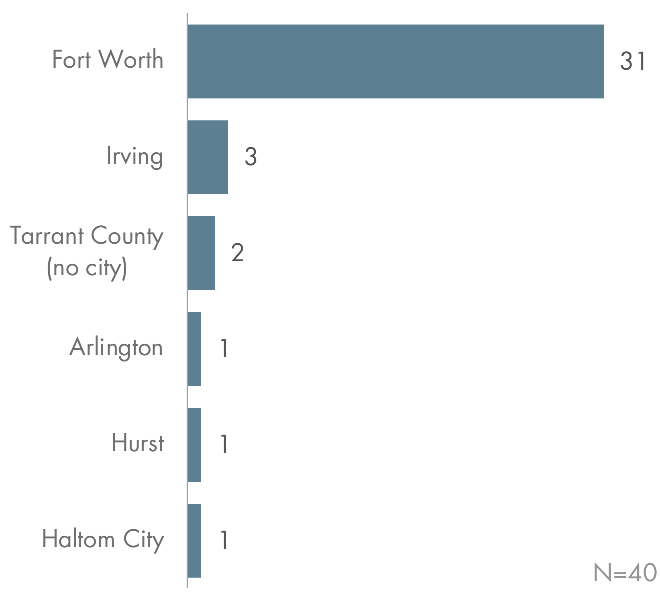


FIGURE 3. PRIMARY LOCATION OF RESPONDENT'S BUSINESS IN THE REGION



GENERAL PERCEPTIONS

FIGURE 4. TIME OF RESPONDENT'S LAST VISIT TO FORT WORTH

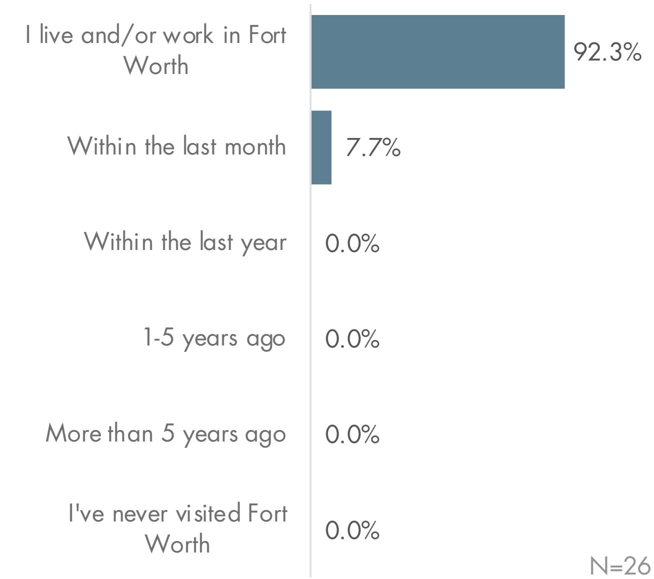


FIGURE 5. PURPOSE OF RESPONDENT'S LAST VISIT*

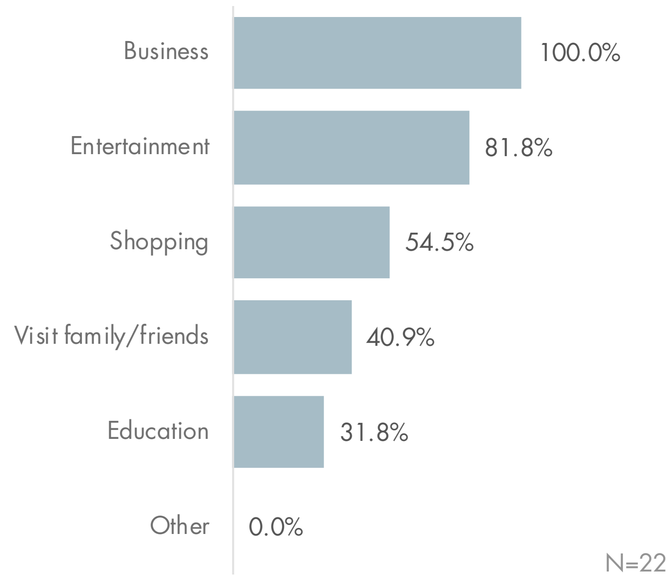


FIGURE 6. WHAT THREE PHRASES OR WORDS COME TO MIND WHEN YOU THINK OF FORT WORTH?

OPEN-ENDED REPONSES

Note: Relative size of words represents frequency of response.
*Respondents were directed to select all categories that applied in the question summarized in Figure 5.

FIGURE 7. INDICATE WHETHER THE FOLLOWING STATEMENTS ARE TRUE OR FALSE.

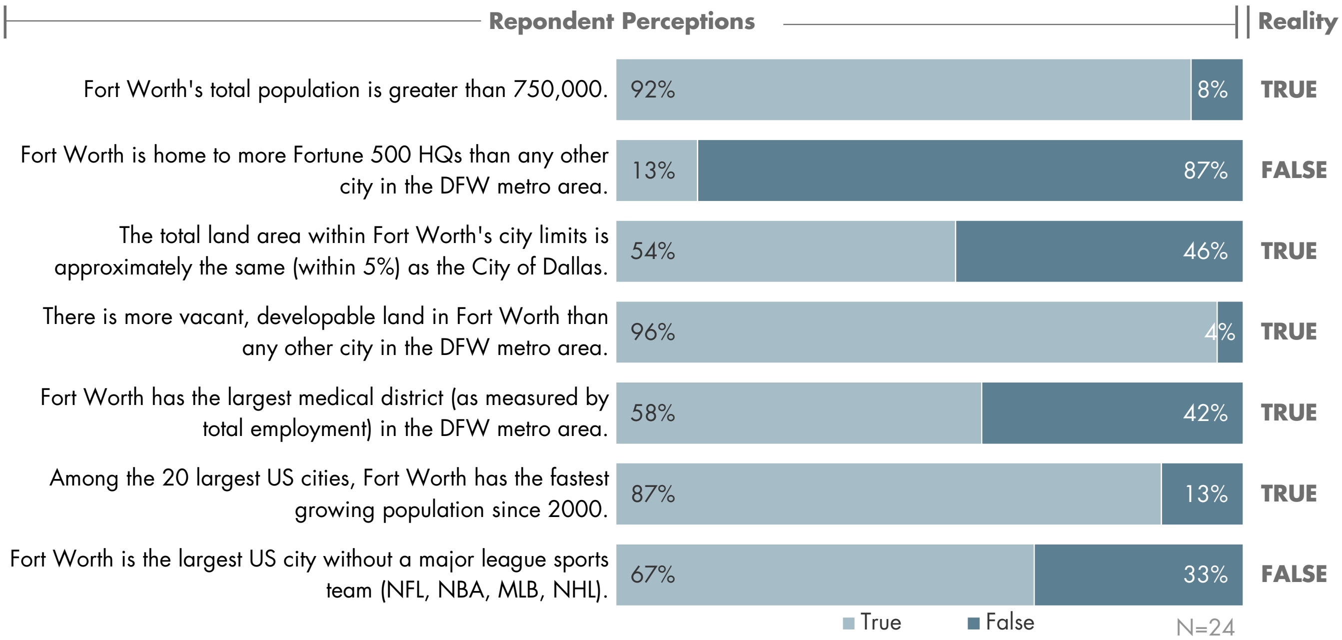


FIGURE 8. WHAT IS THE MOST RECENT NEWS YOU CAN RECALL ABOUT FORT WORTH—WHETHER FROM A BUSINESS OR A LIFESTYLE PERSPECTIVE?

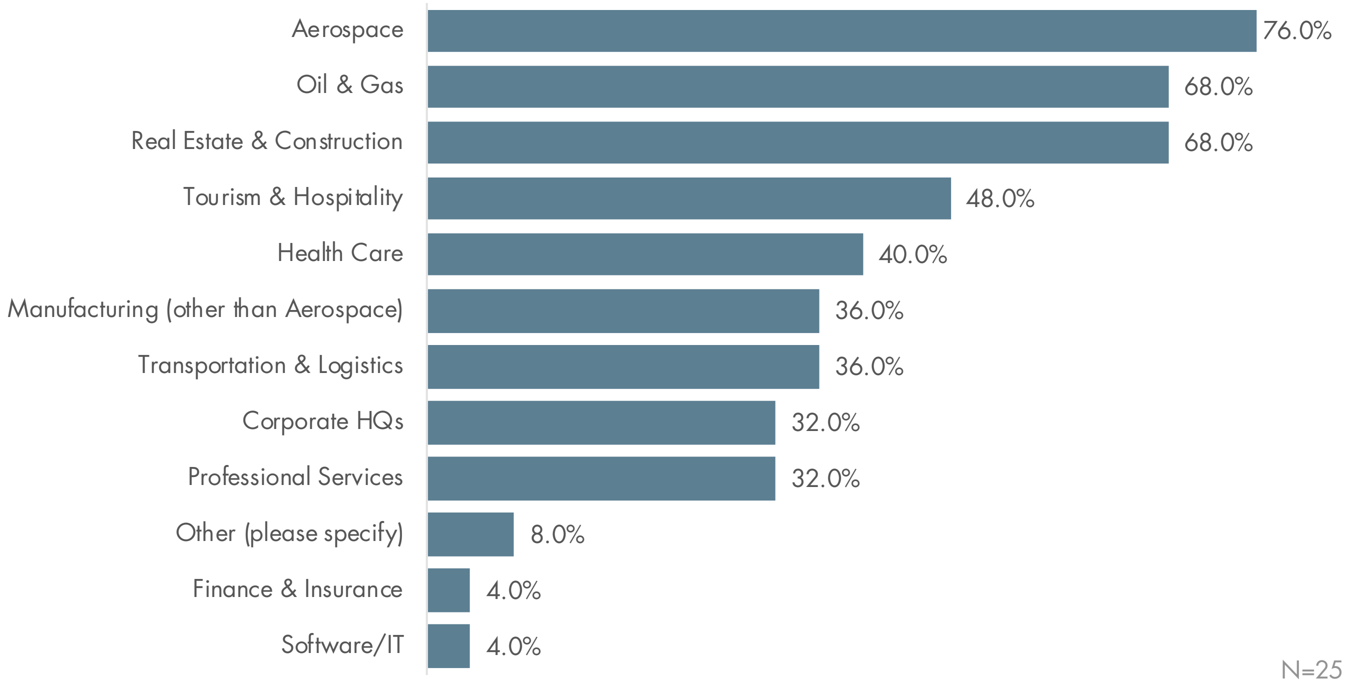
OPEN-ENDED RESPONSES (N=18)

- 500K lease at Mercantile Center
- Creation of Medical School collaboration between UNTHSC and TCU.
- Facebook expansion
- Facebook, general electric, high taxes
- Growth down the Chisholm Trail Pkwy corridor
- Multiple shootings/stabbings (appearance of HIGH crime rate)
- New AA headquarters
- Police issues with the community, expanding the freeways and Top Golf
- Related to development on and around South Main Street.
- Something related to Lockheed Martin
- Southside Redevelopment in progress.
- Stockyards redevelopment
- The F-35 Fighter contract with Lockheed, and the Squadron's training at the NAS JRB. How many military fighter programs can be manufactured and taxied out to a runway, to be met by a fighter pilot who gets into the new F-35's and flies it off to commence his training? ... Answer: Nowhere else I know of.
- Top 4 home sales/prices
- Top ten fastest growing city in the US
- Trying to position the city for the next business cycle.
- Upcoming bond package

Note: Minor corrections were made to spelling and capitalization to improve readability. Minor edits were also made to protect anonymity.

PERCEPTIONS OF ASSETS

FIGURE 9. WHICH OF THE FOLLOWING INDUSTRIES DO YOU ASSOCIATE WITH FORT WORTH? (CHECK ALL THAT APPLY.)



"Other" responses: 1) NAS-FT Worth, 2) The greatest "Industry" Ft. Worth has going for it is the NAS JRB [*Naval Air Station Joint Reserve Base*] and Lockheed Martin, followed closely by The Walsh Ranch and The Ft. Worth Stockyards.

FIGURE 10. WHICH OF THE FOLLOWING ARE LOCATED IN FORT WORTH? (CHECK ALL THAT APPLY.)

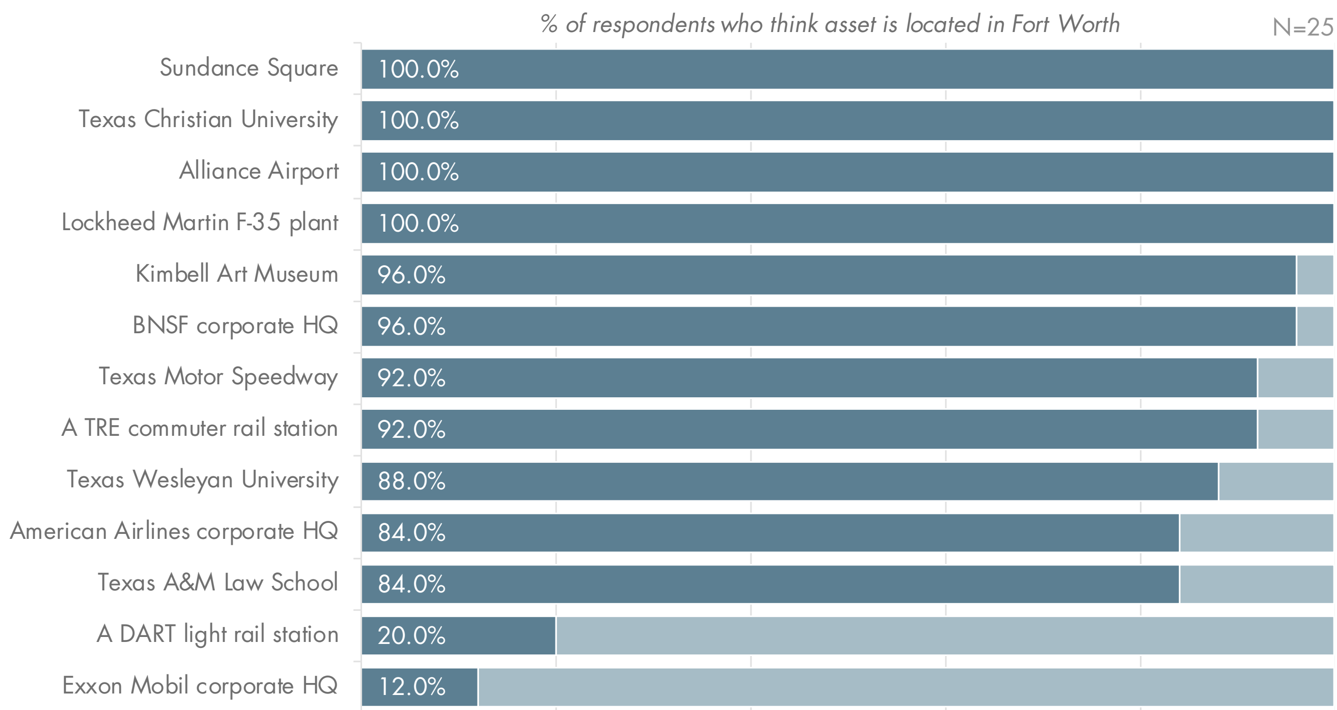


FIGURE 11. INDICATE UP TO THREE ITEMS YOU CONSIDER STRENGTHS AND UP TO THREE ITEMS YOU CONSIDER WEAKNESSES OF THE CITY

OPEN-ENDED RESPONSES (N=25)

The most commonly cited strengths were the city's culture and its pro-development business climate. Commonly cited weaknesses were public school quality, local government red tape, and quality of transportation infrastructure.

STRENGTHS	WEAKNESSES
Cultural District, Sundance Square, Magnolia/South Main development	Lack of attention to development and promotion of East FW; over-development of W 7th area w/o sufficient traffic and parking development; I-30 to I-35N interchange and I-35 traffic in general
Cooperative/can do attitude/culture. Increasing younger population. Unique amenities/attractions	School quality; Economic/educational disparity; A little insular
Culture, fun and friendly atmosphere, great use of outdoor space	Cleanliness and attractiveness of public roads, traffic, code compliance of residential properties
1) The REAL Texas mentality!!! 2) Incredible downtown vibe	Opportunity if Ft Worth keeps the Ft Worth atmosphere and creates a model to keep and attract businesses
Locals with money willing to invest in Fort Worth	Transportation
Room for growth, Family environment, needs better education system	Slow growth, not enough entertainment, needs more affordable condos/town-homes
Culture, personality, atmosphere	Difficult to work with the City, expensive to do business in, flexibility of the city
Culture, Cultural Amenities, Economic Opportunity	Public Education, property tax burden, city responsiveness
Cowtown culture, conservatism among city council leaders, chamber promotes a good business climate, local higher education opportunities	High tax rate, bureaucracy at city hall, slow city approvals for development projects, Mobility - inadequate arterial street infrastructure, new development pays for old neighborhood problems
Population growth, DFW airport, honest	Traffic, taxes, close to Dallas
Business climate, can do attitude, reputation	FWISD schools, red tape in city government
Smaller town feel/pace, lots of job prospects	Not welcoming to meaningful diversity or people without resources
Arts, culture, community	Overspend tax base, fees for everything, staff is obstructionist to normal simple development
More laid back than Dallas; better quality of life	City staff, subdivision regulations, development process
Good quality of life, great colleges, great climate	Older City; not as newly developed
Available developable land	High crime, traffic, lack of downtown residential opportunities
Healthy corporate community, excellent cultural resources, excellent higher ed institutions	Red Tape at City Hall
Arts/ Culture, Size, infrastructure, shopping/ entertainment	Poor transportation esp. no mass transit, outdated, inadequate city development approval infrastructure
Culture, History, Generations	Schools, local government (planning and zoning, specifically), sprawl, ability to attract younger workforce (it's all Dallas)
Atmosphere, positive renown	Close minded, Behind the times, Misunderstanding of livability/mobility for Millennials & Gen X
Population Growth with new jobs being created	High quality jobs for highly educated recent college grads
Friendly, diverse, affordable	Despite the best Mayor in America, Ft. Worth's Bureaucracy at City Hall is the major reason I don't develop there - Life's too Short
Cultural district, stockyards, opportunity	Over regulated, bureaucratic development department
Open to new ideas, try new things	Infrastructure, ease of access to shopping and restaurants, traffic

Note: Minor corrections were made to spelling and capitalization to improve readability.

FORT WORTH SITE SELECTION EXPERIENCE

Respondents were asked whether they are "involved in decisions to relocate, expand, consolidate, or build new facilities for companies" or if they are "involved in the development of property." The 32 respondents involved in these areas (80 percent of the total) were asked about their experiences in Fort Worth.

FIGURE 12. IN THE LAST 5 YEARS, HAVE YOU WORKED WITH THE CITY OF FORT WORTH ON A PROJECT?

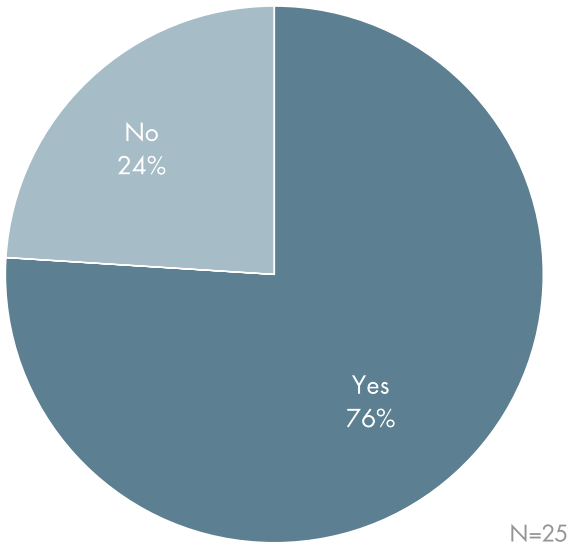


FIGURE 13. DID THE PROJECT ESTABLISH IN FORT WORTH?

See additional detail in Figure 16.

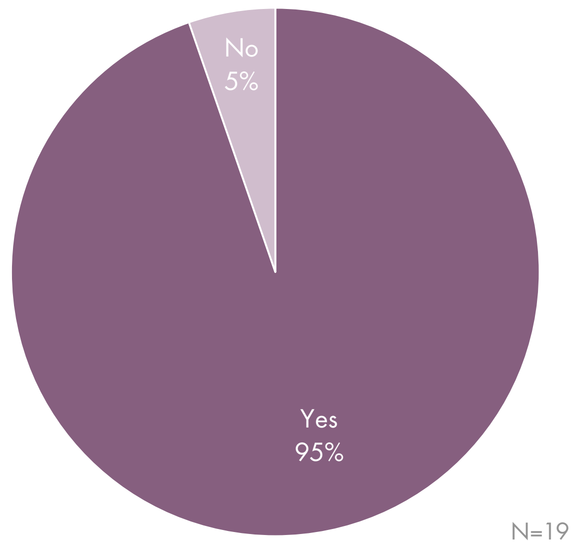


FIGURE 14. WHO WAS YOUR FIRST POINT OF CONTACT IN THE AREA FOR THIS PROJECT?

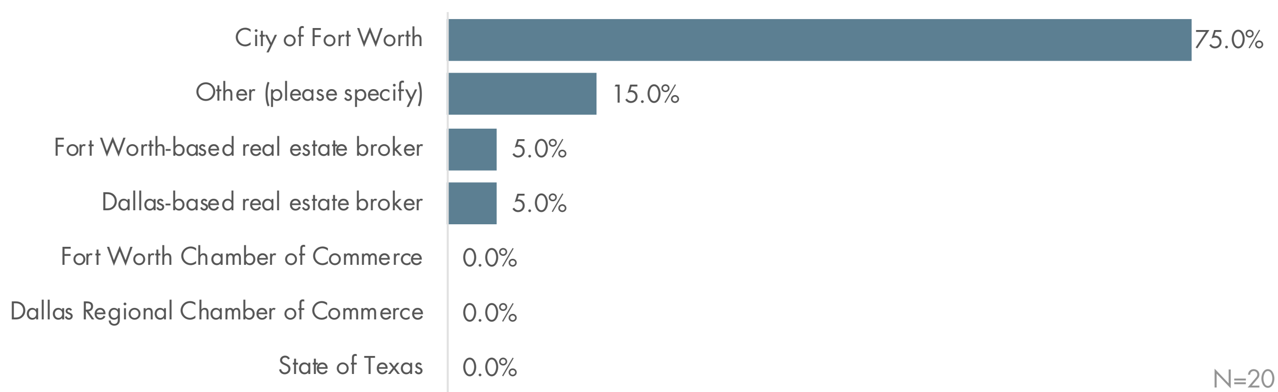


FIGURE 15. AS PART OF THE SITE LOCATION PROCESS, DID YOU CONDUCT ANY SITE VISITS? (CHECK ALL THAT APPLY.)

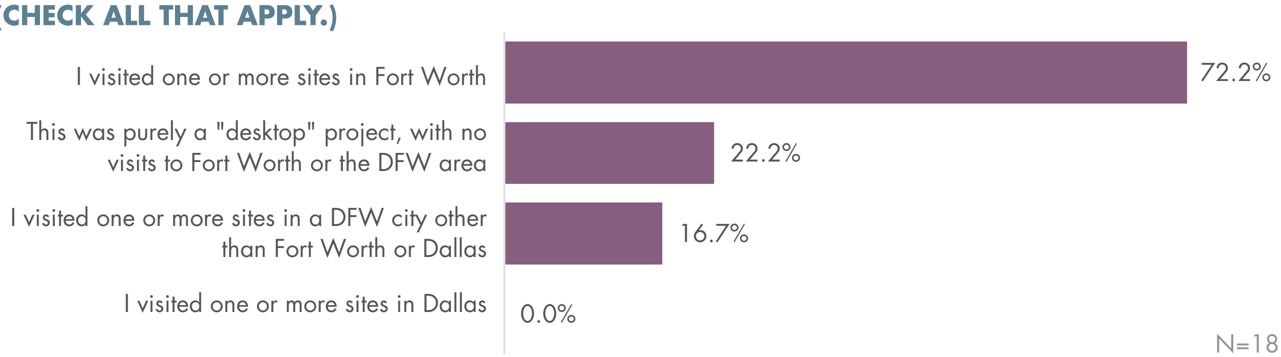


FIGURE 16. REASONS FOR DECISION TO ESTABLISH OR NOT ESTABLISH A PROJECT IN FORT WORTH, INCLUDING ANY STRENGTHS/WEAKNESSES OF THE CITY'S DEVELOPMENT PROCESS
OPEN-ENDED RESPONSES (N=25)

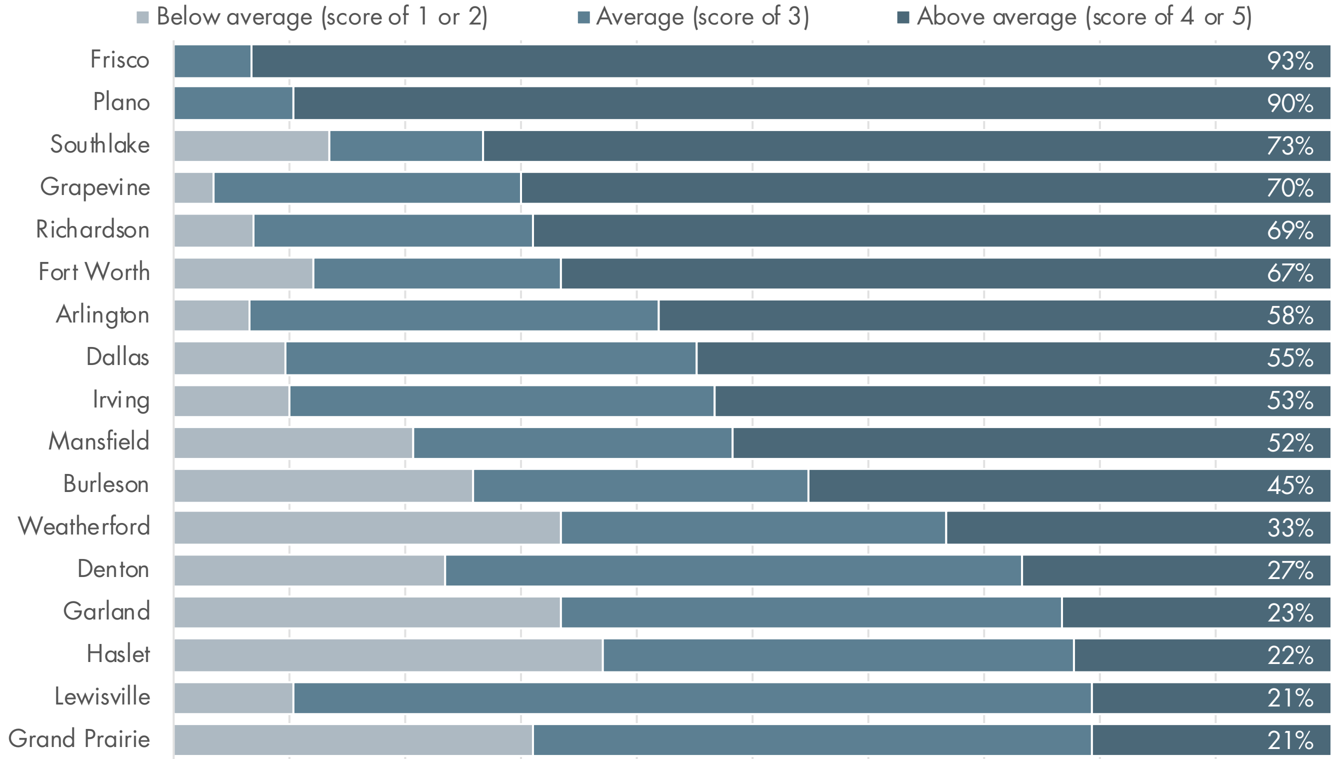
The City's difficult permitting process was cited by several respondents as a factor that prevented projects from happening in Fort Worth. The city's location, available real estate, and a growing population were all cited as positive factors for projects that did locate in Fort Worth.

- Available land.
- City council leaders and city manager's office promote a friendly business climate, but this does not seem to translate to other regulatory staff or additional regulations imposed by staff.
- Close to the Alliance, right off 35W.
- Development costs too high, takes too long to get through the system, have to spend too much money up front before plat is approved to close on the project, profitability of the project was not as high once you add in these factors.
- Fort Worth is a great place to grow your business, if you can get past some of the hurdles that the city has as objections.
- Good labor and real estate options. Lower cost than Dallas.
- Growing and attractive consumer demographics, availability of well-located greenfield sites. Cumbersome, convoluted, and disconnected entitlement process and requirements.
- We don't choose where our clients locate. Our job is to facilitate the construction of commercial buildings in the locations they desire.
- Land ownership.
- Location and demographics - too much red tape in getting projects approved and completed.
- Most city staffs, including Fort Worth, struggle with turnover in the public facing and day to day staff, and therefore have consistency and execution challenges. Plus, this economy is so active, everyone is very busy.
- Permitting process is an ever-moving target and impossible to deal with.
- Projects were directly or indirectly owned by the City of Fort Worth. A major weakness in the development at the city is the permitting process. It is not something that can be fixed by simply throwing more money at it. I have reached out the contact provided for comments/concerns and never received a follow up conversation. I think the management at the permit department is the problem. It is inefficient and unfriendly.
- Proximity to other companies located in the North Fort Worth market.
- Schools - project was in CFW but not FWISD. Access - project is near several freeways and arterials.

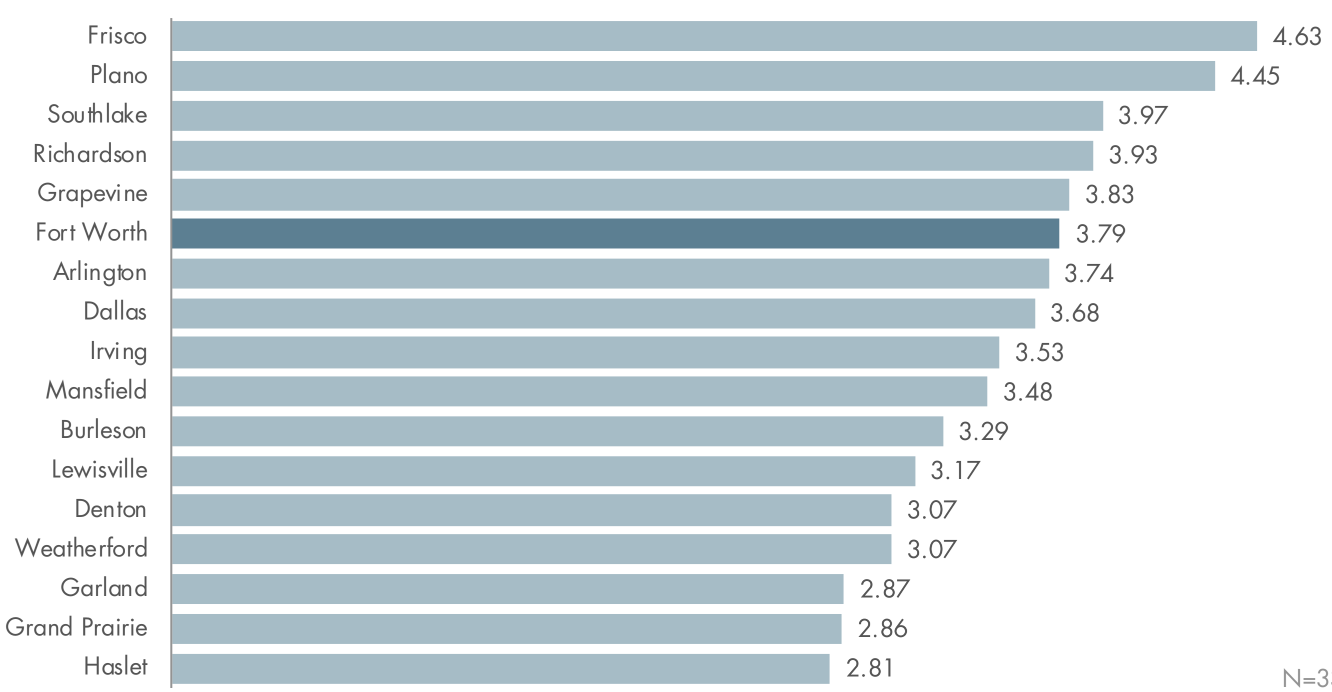
Note: Minor corrections were made to spelling and capitalization to improve readability. Minor edits were also made to protect anonymity.

PERCEPTIONS OF BUSINESS CLIMATE

FIGURE 17. PERCEPTION OF BUSINESS CLIMATE IN SELECT DALLAS-FORT WORTH METRO AREA CITIES
OVERALL PERCEPTION ON A SCALE FROM 1 TO 5, WHERE 1 IS "POOR" AND 5 IS "EXCELLENT."



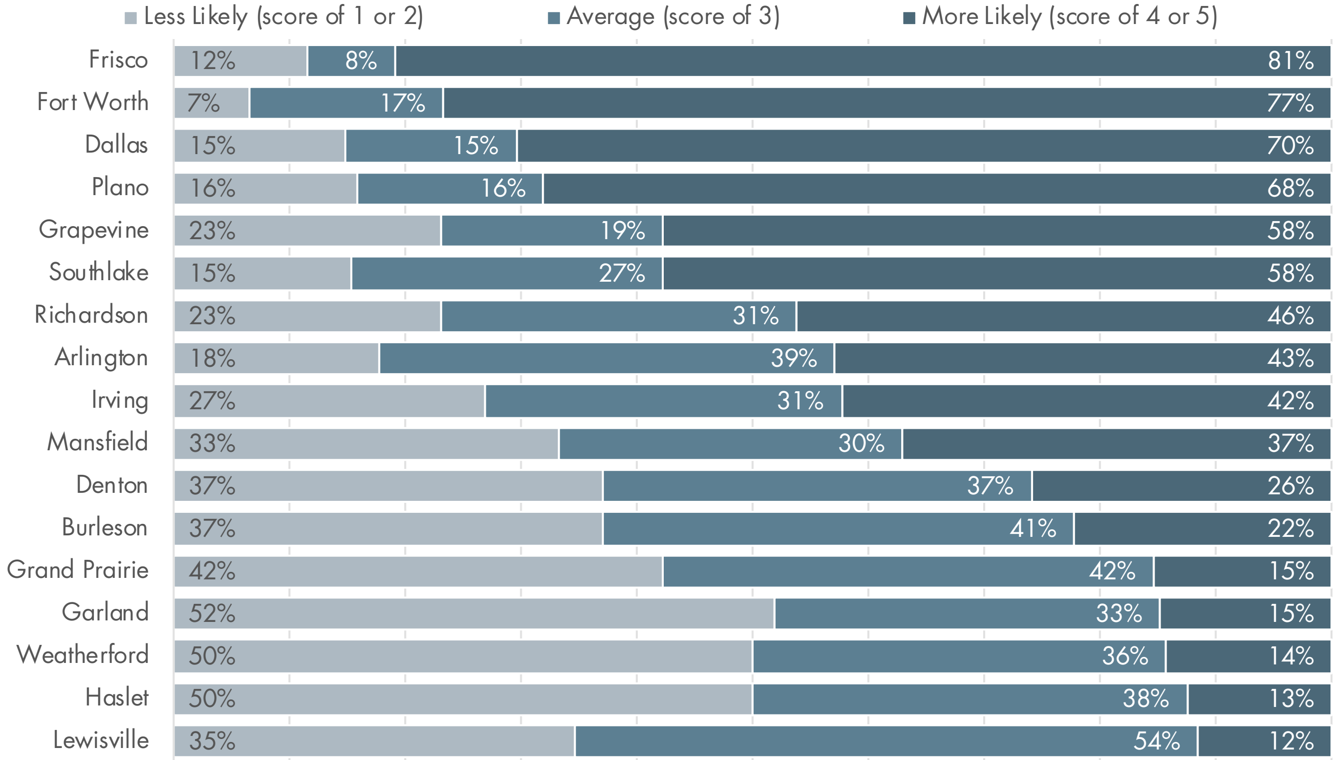
AVERAGE RATING, SCALE OF 1 TO 5



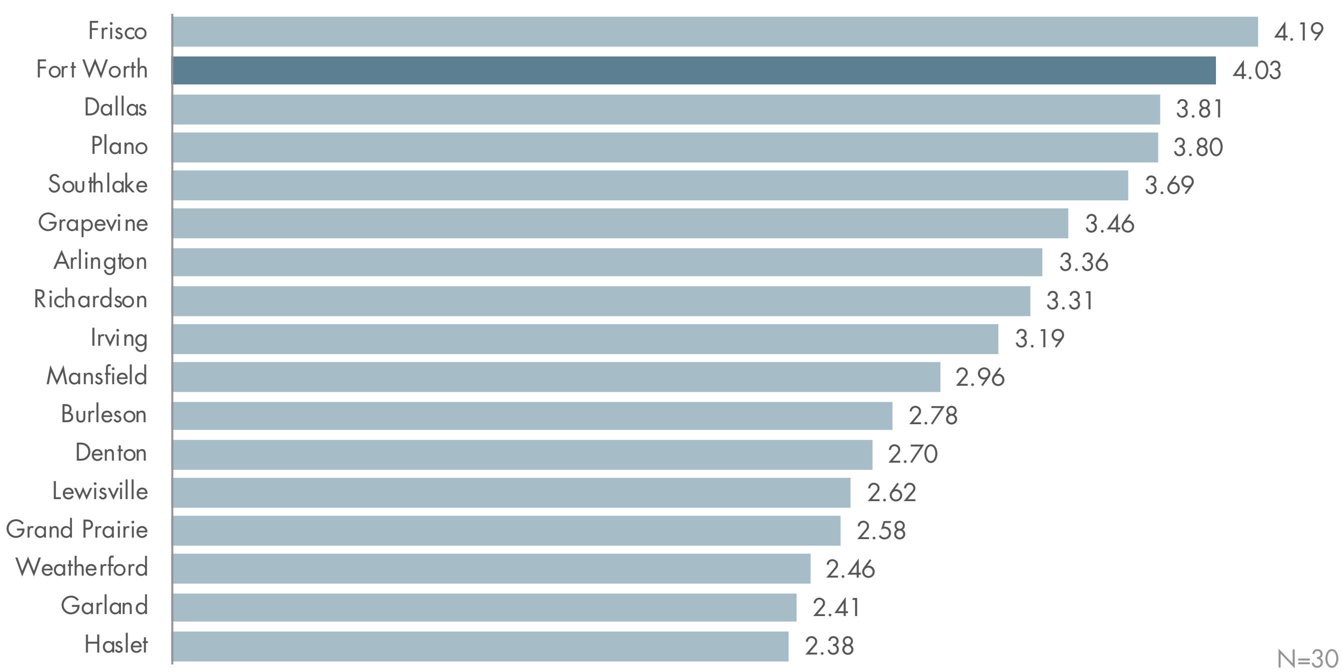
N=33

FIGURE 18. LIKELIHOOD OF RESPONDENT'S CLIENTS CONSIDERING THE FOLLOWING CITIES FOR FUTURE INVESTMENT PROJECTS

RATED ON A SCALE FROM 1 TO 5, WHERE 1 IS "NOT AT ALL LIKELY" AND 5 IS "VERY LIKELY."



AVERAGE RATING, SCALE OF 1 TO 5



N=30

FIGURE 19. IMPORTANCE OF KEY SITE SELECTION FACTORS IN LOCATION DECISIONS FOR RESPONDENT'S CLIENTS

RATED ON A SCALE FROM 1 TO 5, WHERE 1 IS "NOT AT ALL IMPORTANT" AND 5 IS "VERY IMPORTANT."

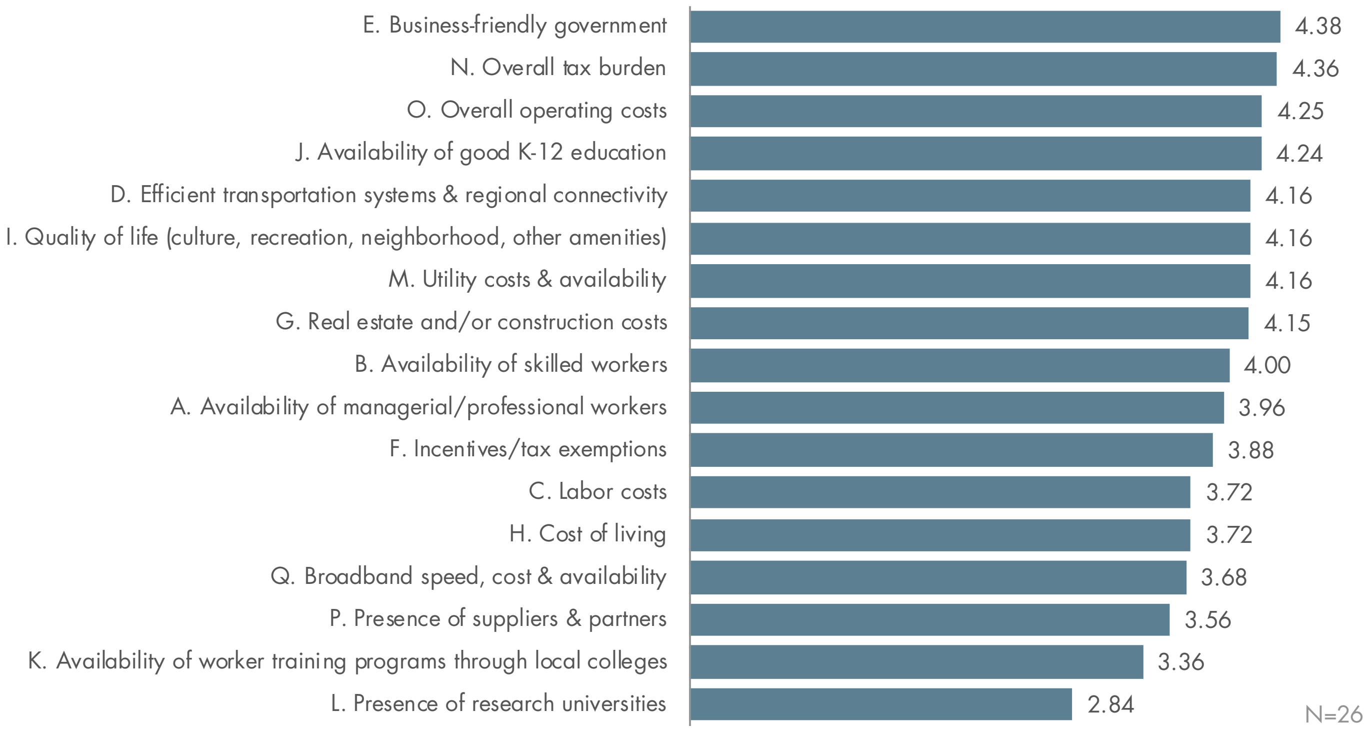


FIGURE 20. PERCEIVED PERFORMANCE OF FORT WORTH ON KEY SITE SELECTION FACTORS

RATED ON A SCALE FROM 1 TO 5, WHERE 1 IS "POOR" AND 5 IS "EXCELLENT."

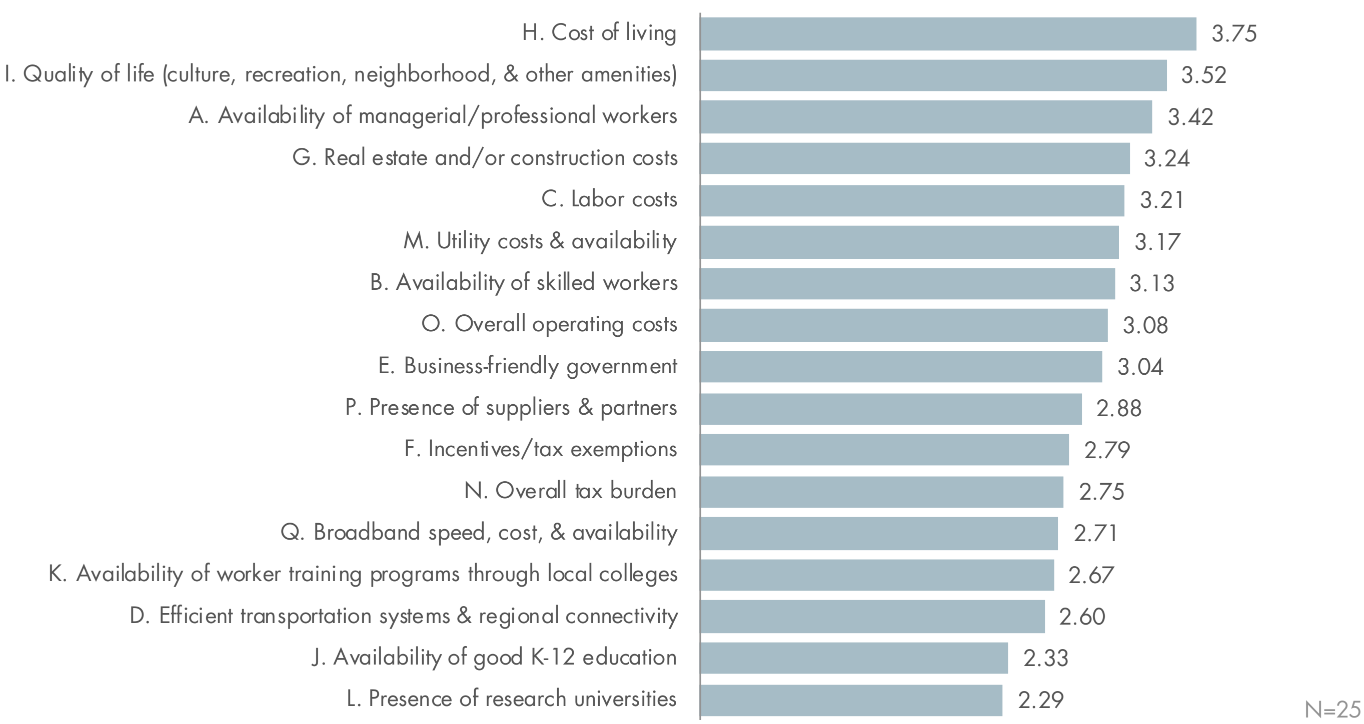
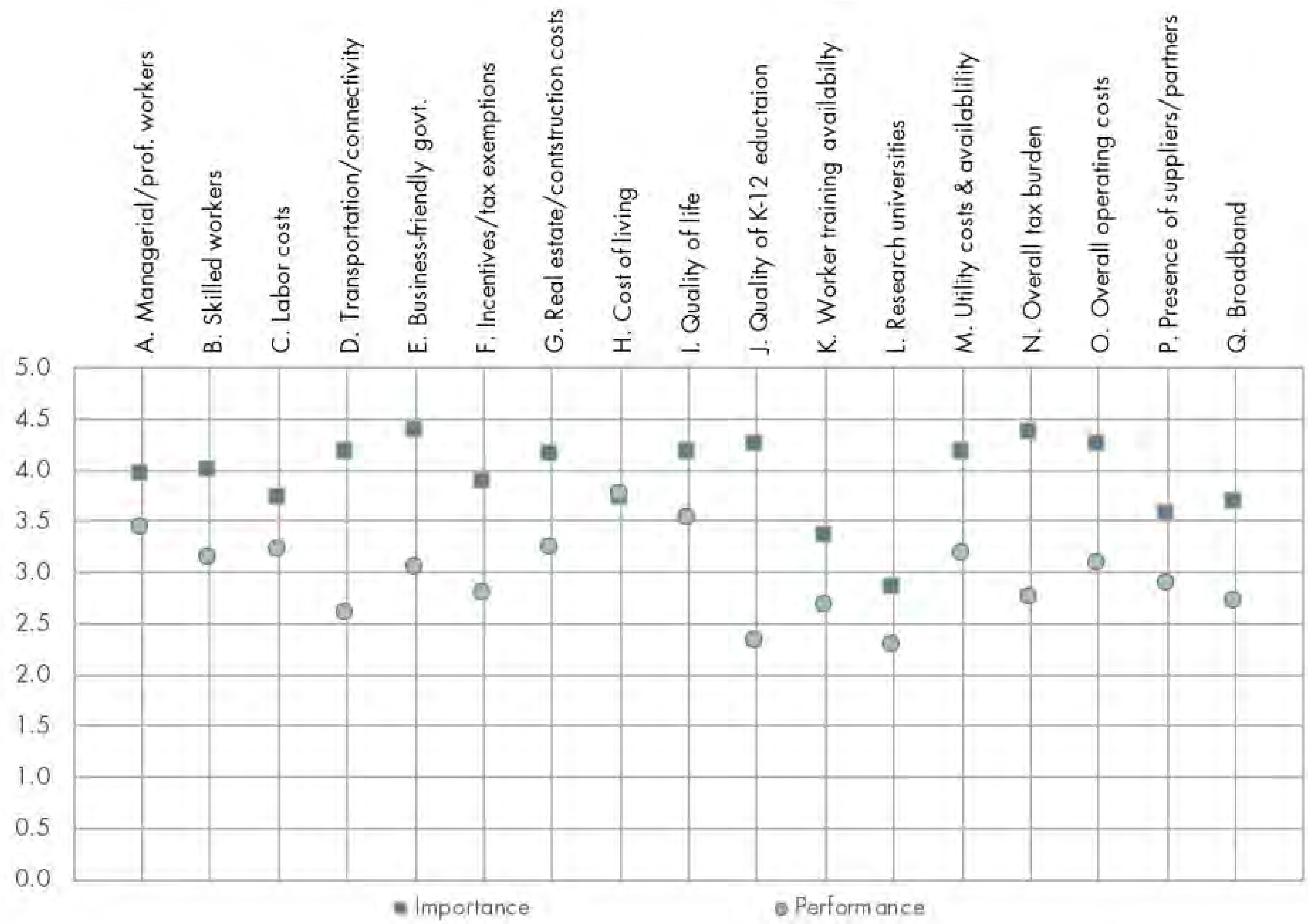


FIGURE 21. COMPARISON OF IMPORTANCE OF SITE SELECTION FACTORS [FIGURE 19] WITH VIEWS OF THE CITY'S PERFORMANCE [FIGURE 20]



N=24 to 26

Note: Respondents were asked to rate the importance of site selection factors on a scale of 1 (Not at all important) to 5 (Very important). The rating of Fort Worth's performance was based on a scale of 1 (Poor) to 5 (Excellent).

FIGURE 22. WHAT IS THE MOST IMPORTANT THING THE CITY OF FORT WORTH CAN DO TO EFFECTIVELY MARKET THE CITY TO EXECUTIVES THAT YOU WORK WITH?

OPEN-ENDED RESPONSE (N=20)

- Be consistent on the branding and marketing - message and frequency. And not just magazine ads and emails and videos. Make an effort for "non-traditional" channels - a viral campaign, a reality show based here, culture/arts push.
- Clearly enunciate the desirable income, age, and education demographics of the current population and of those migrating into the area.
- Combine the local highway and rail agencies; create & execute a plan to finally make a REAL master plan in the Dallas-Fort Worth metro area. FT Worth is not just competing with Dallas. Look at Houston; at least on the highway front (not rail) a plan for the area's highway system. They are building loops 4 and 5 around Houston and Dallas-Fort Worth does not have a REAL loop around either city or both. All of the highways in this area

rely on other highways to complete the transportation avenues in this metro area. On the Rail front, which DART has done a much better job than TRE, on connecting the Cities together. The people are coming to North Texas; the government entities need to realize that because they are 20 years behind in their thinking.

- Ease of movement in the downtown and surrounding areas.
- Emphasize the city is highly sophisticated while also retaining cowboy/down home charm. Make it more friendly to outside businesses by encouraging more diversity.
- Fort Worth has to be more business friendly and not make it so hard to get a development started.
- Have a bigger economic development effort.
- Improve public transportation.
- Lower taxes more competitive incentives.
- Promote availability of local universities/grads. Stress available land, defocus from the "hot" areas and promote the whole city.
- Promote quality of life.
- Pull your head out of the sand and get out of the CBD. Spend some time in the outer suburbs and surrounding communities (including Uptown in Dallas) and understand why so many millennials and Gen X'ers want to live in these areas and spend so much time and money.
- Reduce the staff and adopt the position that everything does not fit in a box and there are exceptions to every ordinance.
- Shake up the bureaucracy that currently exists at city hall... It is very similar to the problems that existed in Ft. Worth back in the 70's, when Ft. Worth had a great mayor and city leaders, but was issuing just over 100 building permits a year, and Ft. Worth's work force was moving into neighboring cities. Then City Manager, formed an over-site committee, that included the three largest developers in town. When the Ft. Worth Water Department and Park Department were dragging out permits ... They had the opportunity to explain their delays to the City Manager. As a result of that 1st. Development Policy Review Committee, developers were better able to design and build large-scale projects in the city. While the Development Policy Review Committee still exists ... it is bureaucratically archaic at best. Too many chiefs from the city & not enough strong check-writers from the development community.
- Streamlined development process.
- Tax Incentives.
- The fact that FW has many prominent locals that give much money to the city. Basses, Fortsons, Williamsons, Moncriefs etc.
- Top notch education system.
- Try to improve FWISD.
- Work on mobility! Need alternative modes of mass transportation that do NOT include a bus.

Note: Minor corrections were made to spelling and capitalization to improve readability. Minor edits were also made to protect anonymity.

ATTACHMENT B. MARKETING REVIEW

INTRODUCTION

Increased globalization and rapid technology growth have made the economic development marketing field more dynamic than ever. The rise of the digital age has given economic development professionals access to an expanded arsenal of tools to reach target audiences while broadening and equalizing the playing field. This evolution has given way to heightened competition among cities, regions, and states. Today's economic developers must be more thoughtful about the ways they employ these tools, the messages they send, and the methods by which they position their community in relation to their peers. Effective marketing for economic development must embrace technology tools (e.g., dynamic and informative websites, targeted social media campaigns) to reach target audiences.

This section provides a review of the current economic development marketing and promotional communications of the City of Fort Worth (City), Fort Worth Chamber (Chamber), and partner organizations. This assessment is based on an evaluation and comparison of the organizations' overarching themes and messages found in their electronic marketing tools and various collateral material. The objective of this analysis is to gauge what changes, if any, should be enacted to Fort Worth's economic development marketing strategy to better engage decision-makers in target industries.

METHODOLOGY

In marketing, perceptions are reality. They drive emotional connection and decision-making. While perceptions are formed by a variety of factors, the themes and messages contained in marketing communications can play an important role in how decision-makers view a community.

The consulting team developed three criteria below to evaluate the City, Chamber, and partner organizations' marketing themes and messages:

A. *Uniqueness:* Do they communicate Fort Worth's one-of-a-kind attributes, image, and identity – and set it apart from the competition?

B. *Consistency:* Are they consistent among all media and points-of-contact with the audience? Do the messages align with those of other economic development-related organizations in the Fort Worth area?

C. *Engagement:* Do they attract, intrigue, and/or educate the intended audience? Do they compel a response?

In the context of this analysis, *themes* refer to central or dominant ideas that are conveyed by an organization's marketing communications, and *messages* refer to the more specific and unified set of communications that are crafted to help reveal these bigger ideas.

REVIEW OF THEMES & MESSAGES

Below is the list of organizations and a review of their respective marketing themes and messages:

CITY OF FORT WORTH

The longhorn logo communicates the unique Fort Worth and Texas culture. There is no tagline or positioning statement. The website seems to act as more of a portal to incentive programs and links to partner organizations than a hub of economic development information. Marketing themes and messages are minimal, the ones that were gleaned are somewhat cliché and overused (e.g. see second and third bullet under messages). The City should develop more descriptive language to briefly introduce the City department and promote the unique assets and advantages of doing business in Fort Worth.

Themes: Authentic Fort Worth/Texas (longhorn logo); all elements that make a great city are offered in Fort Worth (video); governmental (a page on the City's website vs. a stand-alone website or landing page); a gateway to incentive programs and partner organizations.

Messages:

- "What makes a city great?" (video)
- "…large talented labor pool, low cost of living, high quality of life, a business-friendly environment and strong infrastructure — all with easy access to national and international markets."
- "If you are already part of our city, Fort Worth appreciates your investment in our community and we are here to help you grow and prosper."

FORT WORTH CHAMBER OF COMMERCE

The star logo is unique to Texas (Lone Star State). The homepage slides present several strong messages (see below) but there is no overarching tagline or unifying positioning statement to tie them together. The website seems to act as the clearinghouse of economic development information for the community. It is well-organized and very functional. The mission statement contains wording that is used in many communities ("live, work and do business"). The brochure headline is cliché and overused (i.e. "Open for Business"). The website and collateral could do a better job of promoting international business development, given the proximity to DFW.

Themes: Fort Worth is the epitome of success; all elements that make a great city are offered in Fort Worth (video).

Messages:

- "The Future is Here"
- "What Makes a city great?"
- "No. 1 in Texas: Fort Worth is Tops in Texas and Ranked No. 4 in the US for Job Growth"
- "Logistically Speaking: Fort Worth Transportation Assets Attract Investment"
- "Fort Worth: The Texas Success Story Begins Here"
- "…making Fort Worth an excellent place in which to live, work and do business."
- "Fort Worth is Open for Business" (brochure)

FORT WORTH CONVENTION & VISITORS BUREAU (CVB)

The longhorn logo was used here as well, although a slightly different version. Although the font size is small, there is a tagline below the logo that is static on all pages. The marketing themes and messages related to economic development are minimal. It is not clear at first glance what organization this website is representing.

Themes: Cowboys and culture; western heritage; Texas.

Messages:

- "City of Cowboys and Culture"
- "Where the West Begins"
- "…a destination redefined"
- "…one of the premier travel destinations in the nation."

FORT WORTH HISPANIC CHAMBER OF COMMERCE

The longhorn logo was used here as well, although a slightly different version. Marketing themes and messages are minimal, the ones that were gleaned are cliché and overused (e.g. "fostering a vibrant economic environment").

Themes: Member-driven.

Messages:

- "Fostering a vibrant economic environment for members, individuals and the greater Fort Worth area"
- "…a dynamic and progressive source for the ongoing development and promotion of our members' economic growth."

FORT WORTH METROPOLITAN BLACK CHAMBER OF COMMERCE

Marketing themes and messages are minimal, the ones that stood out were cliché and overused (e.g. "…make Fort Worth a better place to work and raise a family.")

Themes: Member-driven.

Messages:

- "To make Fort Worth a better place to work and raise a family."
- "…promote, assist and enhance economic and business development for its members and to create wealth in the communities it serves."
- "Our Business is to Strengthen Your Business"
- "…paving a new economic and business landscape in Fort Worth and Tarrant County..."

DOWNTOWN FORT WORTH, INC.

The homepage slides present several strong images and messages (see below) but there is no overarching tagline or unifying positioning statement to tie them together.

Themes: A welcome mat to downtown Fort Worth; downtown is a destination and the hub of everything Fort Worth has to offer.

Messages:

- "We're glad you're here."
- "Welcome to Downtown."

- "Discover Downtown Fort Worth"
- "The Texas You Want"
- "A City on the Rise"
- "Full of History. Full of Life."
- "Always Looking Forward"
- "Live Downtown"

NEAR SOUTHSIDE, INC.

Marketing themes and messages are minimal.

Themes: Neighborhood development.

Messages:

- "Meet us in the Near Southside."
- "…transforming the district and attracting new residents and businesses."
- "…renowned restaurants and historic landmarks attract visitors from throughout the region."
- "…promote the redevelopment of Fort Worth's Near Southside as a vibrant, urban, mixed-use neighborhood."

SOUTHEAST FORT WORTH, INC.

Marketing messages are variations on the generic "great place to live, work, and play" theme often seen in place-based marketing materials. Incentive programs are also highlighted (mostly city-wide programs).

Themes: Neighborhood development.

Messages:

- "The Greatest Side of the Greatest City."
- "…to become a great place to live, learn, work, play, invest, do business, and shop."

ALLIANCETEXAS

The homepage slides present several strong images and messages (see below) but there is no overarching tagline or unifying positioning statement to tie them together. Homepage does a good job of target industry marketing and has some references to international business development.

Themes: Fort Worth's unique business assets and advantages; business development.

Messages:

- "International reach in the heart of Texas"
- "A World of Possibilities"
- "20 Minutes from DFW Airport"
- "As versatile as your business needs"
- "One first class intermodal yard"
- "A World of Possibilities"
- "Best-in-Class Retailers"
- "Distinctive and master-planned"

SUNDANCE SQUARE

The homepage animation is strong but there is no overarching tagline or unifying positioning statement.

Themes: Downtown is the destination for shopping, dining, and entertainment; Fort Worth has the best downtown in Texas.

Messages:

- "Welcome."
- "Spend the day in Sundance Square"
- "Your Favorite Downtown in Texas"
- "…one of the finest entertainment and shopping districts in the Southwest."

STRATEGIC CONSIDERATIONS

Given the reviews above, the consulting team developed a set of considerations to strengthen Fort Worth's economic development marketing strategy. They are based on the three criteria used to evaluate the marketing themes and messages.

UNIQUENESS

Differentiation is more important than ever, especially considering there are roughly 90,000 local governmental units in the US, many of which are seeking to attract attention from the same relatively small group of industry decision-makers. Clichéd and generic phrases are no longer sufficient for economic developers to market their communities.

Fort Worth offers a wealth of unique assets and advantages to companies seeking a destination for business and investment; however, these unique attributes are not being communicated clearly and consistently across organizations. Fort Worth organizations engaged in economic development should be more intentional about developing language that communicates the distinct benefits of living and doing business in Fort Worth. Most importantly, the city's assets as they relate to target industries must be placed front and center in the community's marketing materials.

CONSISTENCY

There is no unified economic development message among partner organizations. Each organization sends a different message about living and doing business in Fort Worth through their marketing channels. The City and Chamber should convene a working group to develop a united messaging strategy for economic development. Consideration should also be given to creating an economic development graphic that each partner uses on all marketing material according to specified standards to help visually tie the organizations together. The City, CVB, and Hispanic Chamber make consistent use of a longhorn in their logo, and a version of this might be considered.

ENGAGEMENT

The City and Chamber should do a better job of engaging target industry decision-makers in their marketing communications. Marketing aimed at recruitment is very weak. Highly targeted recruitment materials such as Kansas City's Animal Health Corridor or Asheville's craft beer marketing are two good examples of an economic development marketing effort that speaks to specific industries and audiences. Consideration should also be given to providing a description of each organization's role in the economic development process, especially in terms of prospecting and site selection. The videos do a great job of engaging the audience outside of typical messaging.

ECONOMIC DEVELOPMENT WEBSITE COMPARISON

Websites, specifically, play an essential role in the success of economic development organizations. Just like in retail and service industries, the Internet is proving to be a preference for "buyers" of all types of products and should not be overlooked by economic development organizations. A website is often the first point of contact for individuals and businesses looking for economic development support or considering relocating. First impressions are important and the look and feel of a website can either attract a viewer or deter them. What also must be taken into consideration is the attention span of the viewer. How quickly can they find the information they are looking for and does the website stand out against the static of the Internet? Good website design is a balancing act, and should be thoroughly developed as a tool for converting viewers into clients.

Attractive design and a user-friendly interface are the primary factors stimulating a visitor's interest in an organization's site. However, if quantity and quality of content are lacking, no number of bells, whistles, or fancy graphics will make for a rewarding user experience. Ensuring a site isn't just modern and attractive, but offers quality content in an engaging, user-friendly way is essential.

TIP's marketing and design team reviewed the major economic development websites of Fort Worth, its metro area peers, and its domestic benchmarks. The purpose of this review was to provide a snapshot of the effectiveness of each website, through design and content, in engaging and assisting visitors interested in each community from a business development perspective.

The websites of Fort Worth's economic development organizations varied in effectiveness, as did all the metro area and domestic competitors' sites. Based on the criteria used for the review (see table next page), the Chamber's site was more successful than the City's.

METHODOLOGY

The website review was divided into two categories: Dallas-Fort Worth metro area competitor organizations and domestic (US) benchmark organizations. For each category, a matrix shows the performance of the organizations' websites based on select factors. Brief write-ups follow the matrices and provide additional details on any notable elements that could not be communicated in the matrix.

For the matrix, search rankings were based on order of results returned from a Google search using the term "[City] [State] Economic Development." Results appearing with the Google "Ad" designation were excluded, since their positions were the result of paid advertising and not search popularity. If multiple sub-pages of a site appeared consecutively in top search positions, this was noted, as it can help explain lower rankings of other local economic development organizations' sites.

Scores were assigned using a "stoplight" scale to indicate the level of performance on each criterion.

● (green)	Site features quality content in this category, in a well-designed way.
● (yellow)	Site offers this content, but could use improvement in quality, design, or organization of content.
● (red)	Site purports to offer this content, but design is significantly flawed or content is severely lacking.
✕	Content is not offered, or it was poorly located and could not be found in a reasonable amount of time.

The criteria on which the sites were graded are defined as follows:

CRITERIA	DEFINITION
Effective Design	Does the site have a modern look and feel? Does it convey an organized, savvy, professional image, and does it function properly?
Attractive Visuals	Does the site utilize high-quality graphics and photos to convey a positive image and additional information about the community? Depending on the topic area, photos and graphics can often convey what words cannot.
Staff Contact Info	Are quality contact details (multiple methods of contact, staff names and positions) featured in an obvious place on the site?
Social Media	Are social media links and features (e.g. twitter feeds, Instagram galleries, etc.) displayed prominently, and are there several options for engaging with the community?
Responsive Design	Does the site automatically adapt to the user's device and screen size, ensuring a quality experience regardless of how the visitor is viewing the site?
Community Profile	Does the website provide a clear, concise picture of the community; beyond just a complimentary profile, does the site offer data and statistics on the community's quality-of-place assets?
Target Industries	Is a clear list of local target industries featured with supporting data?
Business Resources	Are links to information on business programs, incentives, and other resources easy to find and up to date?
Data & Reports	Does the site provide clear, concise, and updated economic data and reports in a well-organized and easy to access format (e.g., report builders, dashboards, document libraries)?
Site Selection Info	Is site selection information (e.g., property search, site profiles, or external database) available and are the tools easy to navigate?

This review can only provide a snapshot of each organization's website as it existed in June-July 2017. Websites are frequently updated, errors fixed, and search rankings recalculated continuously, therefore the scores provided in this review may quickly become outdated.

METRO AREA COMPETITOR ORGANIZATION WEBSITES

METRO AREA COMPETITOR GRADING MATRIX

ORGANIZATION NAME	SEARCH RANKING	MODERN DESIGN	ATTRACTIVE VISUALS	STAFF CONTACT INFO	SOCIAL MEDIA	RESPONSIVE DESIGN	COMMUNITY PROFILE	TARGET INDUSTRIES	BUSINESS RESOURCES	DATA & REPORTS	SITE SELECTION INFO
City of Arlington	1	🟢	🟡	🟡	🟢	🔴	🟢	🟢	🟢	🟢	🟢
City of Carrollton	1	🔴	🟡	🟢	🟢	🟢	🟡	×	🟡	🟡	🟡
City of Dallas Office of Economic Development	1	🟢	🟢	🟡	🟢	🟢	🟡	🟡	🟢	🟢	🔴
Dallas Regional Chamber	6	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🔴
Denton Economic Development Partnership	1	🟢	🟡	🟢	🟢	×	🟢	🟢	🟢	🟡	🟢
City of Denton	2	🟢	🟢	🟡	🟡	🟢	🟢	×	×	×	×
Fort Worth Chamber (Economic Development Site)	2-3	🟢	🟡	🟢	🟡	×	🟢	🟢	🟢	🟢	🟢
Fort Worth Chamber	2-3*	🟢	🟡	🟢	🟢	×	🟢	×	🟢	×	×
City of Fort Worth	1	×	🟡	🟢	🟡	🟢	🟢	×	🟢	🔴	🟡
Frisco Economic Development Corporation	1	🟢	🟢	🟢	🟢	🟢	🟢	×	🟢	🟡	🟢
Garland Economic Development Partnership	1	🟢	🟡	🟡	×	×	🟢	🟢	🟢	🟡	🟡
Grand Prairie Texas	1	🟡	🟡	🟢	🟡	🟢	🟡	×	🟢	🟡	🟡
Irving-Las Colinas Chamber of Commerce	1	🟡	🟡	🟡	🔴	🔴	🟡	×	🟢	🔴	🟢
Irving, Texas	4	🟡	🟡	🟢	🟡	🟢	🔴	×	🟡	🟡	🟡
Lewisville, Texas Economic Development Corp.	1	🟢	🟡	🔴	×	🟢	🟢	×	🟡	🟢	🟢
McKinney Economic Development Corporation	1	🟡	🟢	🟢	🟡	🟡	🟢	🟢	🟢	🔴	🟢
Mesquite Texas	1	🟡	🟡	🟢	🟢	🔴	🔴	×	🟡	🟡	×
Plano Economic Development	1	🟡	🟡	🟡	🟡	×	🟢	🟢	🟢	🟡	🟢
Richardson Economic Development Partnership	1	🟡	🟡	🟢	🟢	×	🟢	🟢	🟢	🟡	🟢

*The Fort Worth Chamber main site did not appear as a result during the web search, but since it is the host for the Chamber ED site, the ranking is essentially the same as the ED site.

METRO AREA COMPETITOR SITE OVERVIEW

ARLINGTON, TX

City of Arlington

www.arlington-tx.gov/business

The City of Arlington's site has a good cross section of data and information, although some data requires several clicks to locate. Economic data could be made available in a better format. Some links to key areas of data were broken (like workforce and top-10 employers). Site selection information was very thorough. The site is well organized overall, although visually distracting. Some images and graphics were low quality, and parts of the site are beginning to look dated.

CARROLLTON, TX

City of Carrollton

www.cityofcarrollton.com/departments/departments-a-f/economic-development

The City of Carrollton's site offerings are limited, which is not ideal, since the City appears to be the only economic development entity in the area. Some reports are available as downloadable PDFs, but information is limited. Also, the site selection tools, while available, are rudimentary. Overall, the site feels dated and is not clearly organized. The impression is that the City is primarily focused on retail and transit-oriented development.

DALLAS, TX

City of Dallas Office of Economic Development

www.dallasecodev.org

The City of Dallas has a glossy site that clearly communicates that the City is interested in business. Site is very data heavy. Links to data in a variety of categories are prominently displayed (and described) on the homepage. Links to additional resources are offered, as well as an interactive tool to pinpoint data for a specific location. Advertised methods of contact were a generic contact form and general phone number. The user is required to dig to find specific departmental contacts. However, the option to sign up for an account to customize the user experience makes Dallas Economic Development seem slightly more personal.

Dallas Regional Chamber

www.dallaschamber.org

The Dallas Regional Chamber's site is visually interesting, although the navigation takes a moment to get used to. It takes several clicks to get to the main economic development resources, but once you reach them, they are well organized. All the data is contained within extremely well-designed reports in PDF format. The look of the reports is consistent and incorporates a mix of interesting, quality visuals. The data is in-depth and in most cases up-to-date as of the current year. Print publications are even available for order. While the initial advertised method of contact is a generic form, just a few clicks takes you to a robust staff directory that showcases their numerous councils and task forces. Absent was any type of site selection resource (other than reports) showcasing the locations of available real-estate.

DENTON, TX

Denton Economic Development Partnership

www.dentonedp.com

The Denton Economic Development Partnership's home page is beautiful, with simple, flattering visuals. A report builder and site selection information are featured prominently on the home page. Unfortunately, there are formatting/display issues with some of the reports that make them incongruously unprofessional looking. Also, the level of data provided is not particularly deep. Business resources and incentives are obvious, and the Denton Economic Development Partnership makes clear the industries they are interested in attracting. Direct staff contacts can be reached in one click.

City of Denton

www.cityofdenton.com/business/economic-development

The City of Denton's site is mostly a brief overview of City policy and incentives. It provides little information, instead deferring to the Denton Economic Development Partnership site. However, the City's site is modern and fun-looking. Some of the available incentives reports are well designed, others are not. The Denton Economic Development Partnership refers to the City's website for local culture information, and the City does a good job of portraying a quirky upbeat image with plenty of resources for residents and visitors.

FORT WORTH, TX

Fort Worth Chamber (Economic Development Site)

www.fortworthecodev.com

The Fort Worth Chamber economic development site is extremely well organized and user friendly. Links to all important topics are immediately accessible from the homepage, and it is possible to access a thorough overview of Fort Worth's community and business climate through tabbed navigation that doesn't require you to leave the homepage. There were a few fonts that did not display properly in some browsers, and a few navigation and display glitches occurred. Since most of the data is embedded within the site, a report builder would be a welcome feature.

Fort Worth Chamber

www.fortworthchamber.com

The Fort Worth Chamber's site is primarily focused on business members, tourism, and residents. Most of the economic resources are housed in the economic development specific division of the site. The general Chamber site utilizes the same template as the Chamber ED site and, therefore, suffers from the same technical issues. The Chamber's main site did not appear as a result during the web search, but since it is the host for the Chamber ED site, the ranking is essentially the same as the ED site.

City of Fort Worth

www.fortworthtexas.gov/ecodev/

The City of Fort Worth's site seems primarily focused on existing and small businesses. The immediate pop-up requesting email subscription is a little frustrating. The design looks dated, and there is a jarring lack of consistency in layout, graphics, fonts, and navigation among pages and content. The illustrated header uses up valuable real-estate that could be better used to showcase actual images of the community. Some of the linked PDF reports do not display properly and are unreadable.

FRISCO, TX

Frisco Economic Development Corporation

www.friscoedc.com

The Frisco EDC's site is extremely bold, with crisp saturated visuals, video, and a scrolling header touting impressive rankings. The site is organized in a simple way, requiring only one to two clicks to reach most information. While economic and business climate data is on the light side, the Frisco EDC offers powerful site selection tools. The business resource offerings are extensive, including LaunchPad City, a multi-faceted incubator/co-working center. The Frisco site is one of the most visually consistent sites of all the metro area competitor organizations reviewed.

GARLAND, TX

Garland Economic Development Partnership

www.garlandedp.com

The Garland Economic Development Partnership has a simple site that covers the basics. Visually, it conveys little about Garland as a community, opting for illustrations over community photos. This anonymity is compounded by the lack of social media links. A fair amount of data is offered, but it is mostly embedded within the site. No report builder is available and downloadable documents are limited. Besides a simple property search, few interactive tools are offered on the site. While generic contact information is obvious, it took a bit of digging to find staff contacts.

GRAND PRAIRIE, TX

Grand Prairie

www.gptx.org/businesses/economic-development

The City of Grand Prairie's site is not very visually engaging. Resources are just a long list of links. However, the site is well organized and staff contact info is clearly listed in the right-hand column. A fair amount of data and information is available, but no report builder or advanced site selection tools are featured. The site links additional resources which are more heavily involved in economic development.

IRVING, TX

Irving-Las Colinas Chamber of Commerce

www.irvingchamber.com/edc

The Irving-Las Colinas Chamber of Commerce's site is very plain, visually, making it slightly dated and less professional looking than peer sites. The amount of data available is minimal, and no report building function exists. The site does a good job of offering site selection information through a property search and detailed profiles of current projects.

City of Irving

www.cityofirving.org/1324/Economic-Development

The City of Irving's site isn't notably more robust than the Irving chamber. It features attractive visuals and video, but they don't display consistently across browsers. Staff contact info is featured on almost every page with a link to the staff directory. The City site links back to the chamber frequently, which makes one wonder why the City and chamber haven't combined resources in a more formal way, since they each offer only a piece of the economic picture. The City offers some data reports, but they are mostly demographic.

LEWISVILLE, TX

Lewisville Economic Development Corporation

www.ecodevlewisville.com

The City of Lewisville's site is well-designed, with prominent links to economic development information on the front page. The homepage map identifying Lewisville's proximity to other major metros is a nice touch. Scrolling quotes from owners of local business adds a personal touch missing from many other sites. However, social media links and a staff directory were either nonexistent or buried, detracting from the personal feel. The community profile report is well designed and offers a great overview of the cultural and business climate of Lewisville. Additional information is featured in the "profile" section of the site, which can be added to a report builder.

MCKINNEY, TX

McKinney Economic Development Corporation

www.mckinneyedc.com

The McKinney EDC's site is attractive with interesting infographics. Unfortunately, images fail to load in some browsers, and navigation is a little glitchy. Robust site selection tools utilizing Esri mapping technology are easily accessible. The site features attractive, downloadable community profile reports, however there aren't many additional reports to choose from, and links were broken to several.

MESQUITE, TX

Mesquite Texas

www.cityofmesquite.com/1446/Economic-Development

The City of Mesquite's site is very basic with few modern elements. Very few visuals are related to the community. The site's economic development offerings cover the basics but little else. Most reports and data are buried under multiple levels of subpages and then only offered as links to PDFs. The site is not organized with efficiency in mind. Also, several of the mapping resources are Flash based, which can be problematic on certain devices and browsers.

PLANO, TX

Plano Economic Development

www.planotexas.org

Although not the most visually stunning, Plano Economic Development's site does contain a lot of information and is clearly targeting business, with links to areas of major interest boldly displayed on the homepage. There are many reports available throughout the site and in the document library, but there is no report builder or other interactive function that would make them easier to sift through.

RICHARDSON, TX

Richardson Economic Development Partnership

www.telecomcorridor.com

Richardson Economic Development Partnership's site looks a little dated, but is otherwise effective and well organized. Quick access to a plethora of data and information through a single click from the homepage. The site prominently features a report builder, but it isn't user friendly.

DOMESTIC BENCHMARK ORGANIZATION WEBSITES

DOMESTIC BENCHMARK GRADING MATRIX

ORGANIZATION NAME	SEARCH RANKING	MODERN DESIGN	ATTRACTIVE VISUALS	STAFF CONTACT INFO	SOCIAL MEDIA	RESPONSIVE DESIGN	COMMUNITY PROFILE	TARGET INDUSTRIES	BUSINESS RESOURCES	DATA & REPORTS	SITE SELECTION INFO
The City of Columbus	1	Yellow	Yellow	Red	Green	Green	Green	✕	Green	Green	Yellow *
Columbus 2020/The Columbus Region	2	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Denver Office of Economic Development	1	✕	✕	Green	Yellow	Green	Green	Green	Green	Green	✕
Metro Denver Economic Development Corporation	2	Green	Green	Yellow	Green	Green	Yellow	Green	Green	Green	Green
Fort Worth Chamber (Economic Development Site)	2-3	Green	Yellow	Green	Yellow	✕	Green	Green	Green	Green	Green
Fort Worth Chamber	2-3*	Green	Yellow	Green	Green	✕	Green	✕	Green	✕	✕
City of Fort Worth	1	✕	Yellow	Green	Yellow	Green	Green	✕	Green	Red	Yellow
Indy Chamber	3-4	Red	Yellow	Red	Green	✕	Green	Green	Yellow	Green	✕
Indy Partnership	3	Red	Red	Green	✕	Green	Yellow	Yellow	✕	Yellow	Green
Economic Development Corporation of Kansas City	1-2	Yellow	Green	Green	Green	Yellow	Green	✕	Green	Red	Green
Kansas City Area Development Council	4	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Nashville Area Chamber of Commerce	1	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Green	Yellow
Metropolitan Government of Nashville and Davidson County, Tennessee	2-3	Yellow	Red	Green	Green	Yellow	Green	✕	Green	Red	✕
Nashville Area Metropolitan Planning Organization	6	Green	Yellow	Green	Green		✕	✕	✕	Yellow	✕
Greater Nashville Regional Council	7	Red	Red		Red	✕	Yellow	✕	✕	Red	✕
Greater Oklahoma City Partnership	1	Green	Green	Green		Green	Green	Green	Green	Green	Green
The Alliance for Economic Development of Oklahoma City	6	Yellow	Yellow	Green	✕	Green	Red	✕	Yellow	Red	Yellow
City of Phoenix	1-2	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	✕
Greater Phoenix Economic Council	3	Green	Green	Green	Yellow	Green	Yellow	Yellow	Yellow	Yellow	✕
Pittsburgh Regional Alliance	2	Green	Green	Green	Green	Green	Yellow	Green	Red	Green	Green
Urban Redevelopment Authority of Pittsburgh	6	Red	Yellow	Yellow	Red	✕	Yellow	✕	✕	Green	Green

*The link to the Columbus 2020 site selection tool was broken at the time of the review.

DOMESTIC BENCHMARK SITE OVERVIEW

COLUMBUS, OH

The City of Columbus (Economic Development)

www.columbus.gov/development/Economic-Development/

The City of Columbus' site is well organized with detailed city-level information and clear organization. It coordinates well with the regional Columbus 2020 site visually. The City's site also utilizes links well, directing users to additional resources available through Columbus 2020. Strangely, the Economic Development page doesn't list a specific staff contact or even a generic email, just a phone number and address. The link to the Columbus 2020 site selection tool was broken at the time of the review.

Columbus 2020/The Columbus Region

www.columbusregion.com

Columbus 2020 has an attractive, user friendly site that is consistent visually from the web design to the available reports and dashboards. The left-hand navigation is a unique design element, and enables easy-to use menus, allowing the visitor to find most sections directly from the homepage. All pages feature at least a contact email and phone number, while many feature an actual staff contact member with a photo. The inclusion of a "How can we help" button at the top of each page, adds to the welcoming character of this organization. A wealth of regional data and reports are available and accessible in well-designed formats. Like many sites that feature a vast quantity of information, having an interactive tool or report builder would be nice, instead of having to download and view multiple PDFs. One of the few flaws is the lack of clarity in branding. The organization's name is unclear and could lead to confusion. "The Columbus Region" and "Columbus 2020" are used interchangeably. The Columbus 2020 name is more reminiscent of a community visioning or long-range urban planning effort than of an economic development organization.

DENVER, CO

Denver Office of Economic Development

www.denvergov.org/content/denvergov/en/denver-office-of-economic-development.html

The Denver Office of Economic Development's site contains a large quantity of data; however, the site is not well designed visually or well organized. It contains many poor-quality graphics and elements are oddly placed, often seeming out of context in their locations. Too many sub levels require a lot of clicking around to find necessary info. This site is more focused on providing resources than data or reporting.

Metro Denver Economic Development Corporation

www.metrodenver.org

The Metro Denver Economic Development Corporation's site has a simple layout that uses the space efficiently. Even the scrolling header images provide facts and links in addition to offering attractive imagery of the community. The "Data Central" section is an extremely well-organized repository of information. This site is decidedly business and industry oriented and lacks the warmth of a community-oriented site. It could benefit from having contact info more easily accessible.

INDIANAPOLIS, IN

Indy Chamber

www.indychamber.com/economic-development

While the Indy Chamber's site is fairly current in design, it contained broken links and items that would not display on some browsers. Also, many of the graphics appear to be low resolution. The site offers a large quantity of reports, but they are only available as PDF, and often require several clicks to locate. A report builder would be helpful considering the amount of information offered and the navigation required to find it. The site is heavily focused on the region's target industries and offers more than the usual amount of data for them. The Economic Briefings (dashboard-type reports) provide a great overview of the local economy, and are updated monthly. Site selection information doesn't appear to be included nor does a staff directory.

Indy Partnership

www.indypartnership.com

The design choices of the Indy Partnership's site are poor. The visitor is greeted with a giant rotating slideshow of visually inconsistent imagery that fills the entire screen except for a small menu header at the top, wasting valuable screen real estate. The images don't offer captions or titles, so it is unclear what many of them are intended to represent. There is also no visual cue that the visitor should scroll down to view additional content. The bottom of the home page does contain staff contact information as well as some text-heavy profile information about the region (which is hidden in a collapsed section you must expand). The rest of the site content is slow loading and oversized. Most of the data offerings are lists of PDF links or links to content on the Indy Chamber site. The Partnership site does offer a decent site selection tool, but navigating it is difficult on some browsers.

KANSAS CITY, MO

Economic Development Corporation of Kansas City

www.edckc.com

The Economic Development Corporation of Kansas City's site is attractive and well organized. Unfortunately, some elements, especially on the homepage, do not display well in some browsers. The site is consistent in navigation and layout and offers a good mix of photos and infographics. Links to external resources (local employers, educational & training resources, etc.) are plentiful. Powerful site selection tools are included. The site's weakest area is economic data, which appeared extremely limited, with only a few charts and a little text embedded in the site. The Corporations' development teams are unique, as is the large list of entrepreneurship resources.

KANSAS CITY, KS

Kansas City Area Development Council

www.thinkkc.com

The Kansas City Area Development Council's site is both attractive and succeeds in offering a through mix of in-depth information in an attractive, user-friendly way. The blend of high-quality graphics, interactive elements (maps), and video (including a video library) is engaging. The top menu navigation is thorough, allowing the visitor to find sub-pages quickly. Sub-sections are well organized and staff contacts for each department are included toward the bottom of each page. A tidy, user friendly report builder is a welcome addition to the large quantity of information provided on the site. Information about local industries is well supported with data, which is available for download in Excel format. A robust site selection tool is also offered.

NASHVILLE, TN

Nashville Area Chamber of Commerce

www.nashvillechamber.com/economic-development

The Nashville Area Chamber of Commerce's site is glossy with many well-designed reports available. The graphic elements of the site are questionably huge, and users must click through several links to reach information. Once found, the reports offered are high quality, especially the visually compelling "Economic Development Guide." A report builder is available to capture data and maps for local industries, and from community profiles. An Esri site property search applet is included, but the user is prompted to contact a staff member for information beyond that. Information on taxes, incentives, and business resources is limited, prompting the user to contact staff for more information.

Metropolitan Government of Nashville and Davidson County, Tennessee

www.nashville.gov/Mayors-Office/Economic-and-Community-Development.aspx

The economic development sub-section of the City site is limited. Almost no visuals are included, and all information is embedded in a text heavy format. Staff contacts are prominent, but almost nothing is offered in the way of data. The site does offer contact information and links to many business resources.

Nashville Area Metropolitan Planning Organization

www.nashvillempo.org/growth/economic_and_market.aspx

Although the Nashville Area MPO's site is primarily focused on regional transportation planning, it does offer up a fair amount of economic data and in-depth resources with projections of where development is headed in the region. The site is well-organized, but visually unassuming. Unfortunately, some of the maps, graphs and tables featured are quite small, and lack options to enlarge the view. However, the Regional planning section offers a wealth of reports that offer an in-depth picture of the region's future in terms of transportation, land-use, urban design, and other areas of infrastructure development.

Greater Nashville Regional Council

www.gnrc.org/agencies-programs/ecd

This Greater Nashville Regional Council's site is badly in need of an update. It is visually unappealing and navigation is difficult due to a glitchy menu, and unclear categorization. The pages are text heavy, and all useful data is buried in PDF reports on the Publications page. The condition and organization of the site require a significant time investment for a user to locate desired data.

OKLAHOMA CITY, OK

Greater Oklahoma City Partnership

www.greateroklahomacity.com

The Great Oklahoma City Partnership's website uses a common layout, but does so in an attractive, effective way. The navigation is clear, and all sections offer interesting (and often interactive) graphics and a decent amount of information. Several interactive tools are offered, including a GIS-based site selection search and a 'Local Business Intelligence "SizeUp" Tool' which "provides expert regional analysis on advertising strategies, demographics data and business and industry information." Although the Partnership serves a large area, community profiles with contact information, data, and reports are provided for every geography.

The Alliance for Economic Development of Oklahoma City

www.thealliancеokc.org

The Alliance for Economic Development of Oklahoma City's site features a bright unique design; however, it could benefit from utilizing consistently high-quality imagery. Only a small amount of data and information is offered directly on the site, instead it serves as more of a jumping-off point to reach other local organizations and resources.

PHOENIX, AZ

City of Phoenix

www.phoenix.gov/econdev

Phoenix's site is messy and visually distracting. The huge video that automatically plays on arrival is jarring and off-putting. The site's navigation is frustrating. Links to important economic information are relegated to a short menu on the right-hand side. After navigating to a link, the menu disappears, forcing you to hit the back button and view the auto-play video again. Data offerings appear limited at first, and the few charts and graphics embedded in the site are frequently distorted and grainy. There is a "Reports and Maps" section with a fair selection of PDF reports, but the page was difficult to find and it could easily be missed (buried under a link accessible only through a tiny "menu" icon in the top right of the header).

Greater Phoenix Economic Council

www.gpec.org

The Great Phoenix Economic Council has a modern site with large attractive graphics but poor organization. At first, the Council's site appears more visually compelling than informational. All sections provide extremely brief overviews of industries, communities, resources, etc. The entire site seems intended to entice the user to contact the Council directly. Several data intensive reports and a Greater Phoenix Overview brochure are available as a PDFs, but they aren't located in an intuitive place. Instead, they are accessible in a subsection of the "About us" section or in easily overlooked links in the graphic headers.

PITTSBURGH, PA

Pittsburgh Regional Alliance

www.pittsburghregion.org/why/

The Pittsburgh Regional Alliance has an elegantly designed site that covers all the bases. Notably, it offers several interactive tools. These include a report builder with a wide array of data and PittsburghProspector.com, a stand-alone site dedicated to site selection and business and demographic report building. Community profile information is included as a link to a separate "ImaginePittsburgh" site, "a one-of-its-kind portal" that appears to offer quality-of-place information as well as job resources. Other than limited international listings, business resources weren't clearly identified on the site.

Urban Redevelopment Authority of Pittsburgh

www.ura.org/

The Urban Redevelopment Authority is a slightly different development entity than the others reviewed in this section. Nevertheless, they seem distinctly tied to economic development in Pittsburgh. Their site is dated-looking and visually disorganized. Dividing the site into resources specifically for residents, business owners, and developers was helpful. The development site data is well organized, although the quantity of individual PDFs is overwhelming. Some pages are text heavy, while others have little information. The site could benefit greatly from an update and a better method for accessing development data.

ATTACHMENT C. ORGANIZATION GAP ANALYSIS

A strong City/Chamber nucleus is essential for the city's future prosperity, but support from dozens of local and regional partner organizations will be required for Fort Worth to achieve its full potential. We conducted an organizational gap analysis that visualizes the core functions and support functions for the 31 partner organizations (listed below) that have the strongest impact on economic development in Fort Worth. These organizations have been split into two categories: those with economic development as a core part of their mission and those that play critical supporting roles. This gap analysis informs the implementation matrix, which assigns specific organizations responsible for carrying out each strategy and action in the plan.

CORE ECONOMIC DEVELOPMENT PARTNERS

City of Fort Worth
Fort Worth Chamber
Tarrant County
Fort Worth Convention & Visitors Bureau
Fort Worth Hispanic Chamber
Fort Worth Metropolitan Black Chamber
Real Estate Council of Greater Fort Worth
TECH Fort Worth
Fort Worth Business Assistance Center
Oncor
DFW International Airport
Sundance Square
Hillwood
Downtown Fort Worth Inc.
Near Southside Inc.
Trinity River Vision Authority
Southeast Fort Worth Inc.

SUPPORTING PARTNERS

Fort Worth Transportation Authority
Arts Council of Fort Worth
North Central Texas Council of Governments
Tarrant Regional Water District
Workforce Solutions for Tarrant County
Fort Worth ISD
Texas Christian University
Tarrant County College
University of Texas at Arlington
TCU and UNTHSC School of Medicine
UNT Health Science Center
Texas Wesleyan University
Texas A&M Law School
Tarleton State University

The matrix on the following page lists the functional areas where each partner organization currently dedicates staff and resources. We have broken the functional areas into traditional economic development functions and non-traditional functions.

LEGEND
● = Core function
○ = Support function
✓= Organization has economic development as a core part of their mission

		TRADITIONAL											NON-TRADITIONAL				
	ORGANIZATION	BUSINESS ATTRACTION	MARKETING	BRE	ENTREPRENEURSHIP	SMALL BUS. ASSISTANCE	INCENTIVES	RESEARCH & DATA	ADVOCACY & POLICY	INFRASTRUCTURE	SITES	WORKFORCE	TALENT ATTRACTION	PLACEMAKING	TOURISM PROMOTION	K-12 EDUCATION	ARTS PROMOTION
✓	City of Fort Worth	●		●	●	●	●	●		●	●	○		●			
	Arts Council of Fort Worth																●
✓	DFW International Airport	●	●							●	●				●		
✓	Downtown Fort Worth, Inc.	○	●				○				○			●	○		○
✓	Fort Worth Business Assistance Center			○	○	●			○								
✓	Fort Worth Chamber	●	●	○	○	○			●								
✓	Fort Worth Convention & Visitors Bureau		●												●		○
✓	Fort Worth Hispanic Chamber	○				○			●								
✓	Fort Worth Metropolitan Black Chamber	○				○			●								
	Fort Worth Transportation Authority									●	○						
✓	Hillwood	●	●				○				●			○			
	NCTCOG							●		○							
✓	Near Southside, Inc.	○					○				○			●			○
✓	Southeast Fort Worth, Inc.	○									○						
✓	Real Estate Council of Greater Fort Worth								●		○						
✓	Sundance Square	●	●				○				●			●	○		○
✓	Tarrant County	●					●			●	●						
	Tarrant Regional Water District									●							
✓	TECH Fort Worth	○			●												
✓	Trinity River Vision Authority	○					○				●			●			
	Workforce Solutions											●					
	FWISD						○				●	○				●	
	Tarleton State University										●	○	●				
	TCC				○						●	●					
	TCU				○						●	○	●				
	TCU & UNTHSC Medical School										●	○	●				
	Texas A&M Law School										●	○	●				
	Texas Wesleyan University										●	○	●	○			
	UNT Health Sciences Center										●	○	●				
	UTA				○						●	○	●				
✓	Oncor	●								●	○						

ATTACHMENT D. ORGANIZATIONAL REVIEW

To help understand Fort Worth's position relative to its competitors, we reviewed the profiles and functions of the previously identified Dallas-Fort Worth metro area competitor and domestic benchmark economic development organizations. Information on staffing (including staffing relative to each community's population), functional focus areas, and incentives are provided in brief profiles below. Following the profiles are matrices comparing the services each organization provides and highlighting which are major functions (if identifiable). The final section of this attachment provides a list of the organizations' strategic plan documents available online. The information provided in this section was based on public documents available through organization and city websites. Although we attempted to provide as thorough a review as possible, some information is not available or easily accessible.

STAFFING COMPARISONS

METRO AREA COMPETITOR ORGANIZATIONS

Based on available data, economic development staffing levels in Fort Worth and Dallas fall short of those found among much smaller metro area communities. According to this analysis, the Frisco EDC had the highest relative staffing levels, with 8.6 staff members per 100,000 population served. By contrast, the City of Fort Worth's staff-to-population ratio of 1.7 ranks near the bottom third. However, it should be noted that the City's 14.5 staff include functions such as MWBE that are typically not included as part of a city economic development department in most communities. The Fort Worth Chamber's ratio of 3.2 is almost double the City's.

ORGANIZATION	STAFF	POPULATION	STAFF PER 100K POP.
Frisco Economic Development Corporation	14.0	163,656	8.6
Irving-Las Colinas Chamber of Commerce	15.0	238,289	6.3
Denton Economic Development Partnership	8.0	133,808	6.0
City of Denton	6.8	133,808	5.0
Lewisville Area Chamber of Commerce	5.0	104,659	4.8
Lewisville, Texas Economic Development Corporation	4.0	104,659	3.8
Fort Worth Chamber	**27.0**	**854,113**	**3.2**
McKinney Economic Development Corporation	5.0	172,298	2.9
Richardson Economic Development Partnership	3.0	113,347	2.6
Grand Prairie Economic Development	5.0	190,682	2.6
Garland Economic Development Partnership	6.0	234,943	2.6
Irving, Texas	6.0	238,289	2.5
Plano Economic Development	5.0	286,057	1.7
City of Fort Worth	**14.5**	**854,113**	**1.7**
City of Carrollton	2.0	133,351	1.5
Mesquite Texas	2.0	143,736	1.4
Dallas Regional Chamber	53.0	4,793,649	1.1
City of Arlington- Economic Development Department	4.0	392,772	1.0
City of Dallas Office of Economic Development	10.0	1,317,929	0.8
McKinney Community Development Corporation	1.0	172,298	0.6

Source: TIP research.

DOMESTIC BENCHMARK ORGANIZATIONS

When Fort Worth's economic development staffing levels are compared to the domestic benchmark cities, both the City of Fort Worth Economic Development Department and the Fort Worth Chamber fare significantly better than in the Dallas-Fort Worth metro area comparison. However, these comparisons are an imprecise measure at best and must be viewed with caution. The intra-regional comparison was made to organizations whose primary responsibilities and geographies were similar. For the domestic benchmarks, each organization differs in terms of geography served, functional areas, funding source, and organizational structure. In addition, the legal and operational frameworks for economic development vary from state to state. Finally, due to a lack of detail on staffing specific to economic development, total staffing figures were used for some organizations, further complicating comparisons.

With these caveats in mind, the Fort Worth Chamber's staff-to-population ratio of 3.2 places it in the top five among the cities analyzed and translates to relative staffing levels that are more than double that of 12 of the benchmarks. Only three organizations exceed the Chamber's staffing levels, one of which, the Urban Redevelopment Authority of Pittsburgh (URA), is an extreme anomaly. The URA appears to incorporate many divisions (such as housing, finance, compliance, engineering and construction, and real estate) that are typically not under the umbrella of a city's economic development organization. When only economic development staff are considered, the total drops to nine, putting the URA closer the bottom of the list in terms of staff-to-population ratios. The City of Fort Worth falls just two spots behind the Chamber, but has only a little over one-half the staff per 100,000 population of the Chamber.

ORGANIZATION	STAFF	POPULATION	STAFF PER 100K POP.
Urban Redevelopment Authority Of Pittsburgh	90	303,625	29.6
Economic Development Corporation of Kansas City, MO	28	481,420	5.8
City of Phoenix	93	1,615,017	5.8
Denver Office of Economic Development	24	693,060	3.5
Fort Worth Chamber	**27.0**	**854,113**	**3.2**
Nashville Area Chamber of Commerce	47	1,865,298	2.5
City of Fort Worth	**14.5**	**854,113**	**1.7**
The Alliance for Economic Development of Oklahoma City	7	638,367	1.1
Kansas City Area Development Council, KS	23	2,104,509	1.1
Greater Oklahoma City Partnership	15	1,373,211	1.1
Columbus 2020	22	2,041,520	1.1
The City of Columbus	9	860,090	1.0
Metropolitan Gov't of Nashville & Davidson County, TN	4	660,388	0.6
Greater Phoenix Economic Council	25	4,661,537	0.5
Greater Nashville Regional Council	8	1,865,298	0.4
Indy Chamber	8	2,004,230	0.4
Pittsburgh Regional Alliance	8	2,342,299	0.3
Metro Denver Economic Development Corporation	9	2,853,077	0.3
Indy Partnership	4	2,004,230	0.2

Source: TIP research.

ORGANIZATION FUNCTIONS

METRO AREA COMPETITOR ORGANIZATIONS

ORGANIZATION	DATA COLLECTION & PUBLICATION	POLICY & ADVOCACY	TARGET INDUSTRY/BUSINESS RECRUIT.	BRE	INCENTIVES	SITE SELECTION & RELOCATION	INTERNATIONAL OUTREACH	E-SHIP & COMMERCIALIZATION	SMALL BUSINESS DEVELOPMENT	MARKETING & TOURISM	PLACEMAKING & DEVELOPMENT	WORKFORCE DEVELOPMENT	MEMBERSHIP, NETWORKING, & EVENTS
City of Arlington	●	●	●	●	●	●				●			
City of Carrollton	●		●	●		●							●
City of Dallas Office of Economic Dev.	●	●	●	●	●	●	●	●	●	●	●	●	
Dallas Regional Chamber	●	●	●	●	●	●	●	●	●	●			●
Denton Economic Development Partnership	●	●	●	●	●	●	●	●	●	●	●	●	
City of Denton			●	●	●	●		●	●	●		●	●
City of Fort Worth			●	●	●			●	●			●	
Fort Worth Chamber		●	●	●		●	●					●	●
Frisco Economic Development Corp.	●	●	●	●	●	●	●	●	●	●		●	●
Garland Economic Development Partnership	●		●	●	●	●			●	●		●	●
Grand Prairie Texas	●			●	●	●			●	●			
Irving-Las Colinas Chamber of Commerce	●	●	●	●	●	●	●	●	●	●		●	●
Irving, Texas	●			●	●	●			●	●	●		
Lewisville, Texas Economic Development Corp.	●		●	●	●	●					●		●
Lewisville Area Chamber of Commerce		●	●	●	●								●
McKinney Economic Development Corp.	●		●	●	●	●		●				●	
McKinney Community Development Corp.				●						●	●	●	
Mesquite, Texas	●		●	●	●	●			●				
Plano Economic Development	●		●	●	●	●	●		●	●	●	●	
Richardson Economic Dev. Partnership	●		●	●	●	●	●	●	●				

Notes: Highlights indicate the main functions of an organization, if identifiable.

DOMESTIC BENCHMARK ORGANIZATIONS

ORGANIZATION	DATA COLLECTION & PUBLICATION	POLICY & ADVOCACY	TARGET INDUSTRY/BUSINESS RECRUIT.	BRE	INCENTIVES	SITE SELECTION/DEV. & RELOCATION	INTERNATIONAL OUTREACH	E-SHIP & COMMERCIALIZATION	SMALL BUSINESS DEVELOPMENT	MARKETING & TOURISM	PLACEMAKING & DEVELOPMENT	WORKFORCE DEVELOPMENT	MEMBERSHIP, NETWORKING, & EVENTS
The City of Columbus	●		●	●	●	●		●	●	●		●	●
Columbus 2020	●		●	●	●	●	●			●		●	●
Denver Office of Economic Development			●	●	●	●			●		●	●	
Metro Denver Economic Development Corp.	●	●	●	●	●	●	●			●			●
City of Fort Worth			●	●	●			●	●			●	
Fort Worth Chamber		●	●	●		●	●					●	●
Indy Chamber	●	●	●	●	●	●	●			●	●	●	●
Indy Partnership	●		●	●		●				●	●		
Kansas City Area Development Council, KS			●	●	●	●	●			●	●		
Economic Dev. Corp. of Kansas City, MO	●		●	●	●	●	●	●	●	●	●	●	●
Nashville Area Chamber of Commerce	●		●	●	●	●	●	●	●			●	●
Metropolitan Government of Nashville and Davidson County, Tennessee			●	●			●	●	●		●	●	
Nashville Area Metropolitan Planning Org.	●	●								●	●		
Greater Nashville Regional Council										●	●		●
Greater Oklahoma City Partnership	●		●	●	●	●			●				
The Alliance for Economic Development of Oklahoma City		●	●		●	●					●		
City of Phoenix	●		●	●			●	●	●	●		●	
Greater Phoenix Economic Council	●			●		●				●			●
Pittsburgh Regional Alliance	●		●	●		●	●			●			●
Urban Redevelopment Authority of Pittsburgh			●	●	●	●					●		

Notes: Highlights indicate the main functions of an organization, if identifiable.

INCENTIVES

METRO AREA COMPETITOR ORGANIZATIONS

CITY OF ARLINGTON- ECONOMIC DEVELOPMENT DEPARTMENT

www.arlington-tx.gov/business/incentives/

CITY OF CARROLLTON

www.cityofcarrollton.com/business/carrollton-development/incentives/active-economic-incentive-agreements

www.cityofcarrollton.com/departments/departments-a-f/economic-development/incentives

CITY OF DALLAS OFFICE OF ECONOMIC DEVELOPMENT

www.dallasecodev.org/Faq.aspx?QID=106

www.dallasecodev.org/263/Public-Private-Partnership-Program

DALLAS REGIONAL CHAMBER

Unavailable

DENTON ECONOMIC DEVELOPMENT PARTNERSHIP

www.dentonedp.com/available-incentives

CITY OF DENTON

www.cityofdenton.imag-dev.com/CoD/media/City-of-Denton/Business/Economic%20Development/Denton-Incentives-brochure.pdf

CITY OF FORT WORTH

www.fortworthtexas.gov/ecodev

FORT WORTH CHAMBER

www.fortworthecodev.com/fort-worth-overview/incentives

FRISCO ECONOMIC DEVELOPMENT CORPORATION

www.friscoedc.com/incentives

GARLAND ECONOMIC DEVELOPMENT PARTNERSHIP

www.garlandedp.com/real-estate-development/incent.html

GRAND PRAIRIE ECONOMIC DEVELOPMENT

www.gptx.org/businesses/economic-development/incentives-policy

IRVING-LAS COLINAS CHAMBER OF COMMERCE

www.irvingchamber.com/connect/grow-your-business/incentives/

IRVING, TEXAS

www.cityofirving.org/876/Economic-Incentives

LEWISVILLE, TEXAS ECONOMIC DEVELOPMENT CORPORATION

www.ecodevlewisville.com/incentives

LEWISVILLE AREA CHAMBER OF COMMERCE

Unavailable

MCKINNEY ECONOMIC DEVELOPMENT CORPORATION

www.mckinneyedc.com/100/Incentives

MCKINNEY COMMUNITY DEVELOPMENT CORPORATION

Unavailable

MESQUITE TEXAS

www.cityofmesquite.com/1633/Incentive-Policy-and-Application

PLANO ECONOMIC DEVELOPMENT

www.planotexas.org/224/Incentives

www.planotexas.org/DocumentCenter/Home/View/752

RICHARDSON ECONOMIC DEVELOPMENT PARTNERSHIP

www.telecomcorridor.com/site-selection/incentives-1

DOMESTIC BENCHMARK ORGANIZATIONS

THE CITY OF COLUMBUS

Small Business Funding: www.columbus.gov/development/economic-development/Small-Business/

Downtown Business Incentives: www.columbus.gov/development/economic-development/Downtown-Business-Incentives

COLUMBUS 2020

www.columbusregion.com/doing-business/operating-costs/incentives

DENVER OFFICE OF ECONOMIC DEVELOPMENT

www.denvergov.org/content/denvergov/en/denver-office-of-economic-development/build-your-business/incentives.html

METRO DENVER ECONOMIC DEVELOPMENT CORPORATION

www.metrodenver.org/do-business/incentives

INDY CHAMBER

www.indychamber.com/economic-development/why-indianapolis/incentives

INDY PARTNERSHIP

www.indychamber.com/index.php/download_file/view/1606/468/

KANSAS CITY AREA DEVELOPMENT COUNCIL (KANSAS)

www.thinkkc.com/business/taxes-incentives

ECONOMIC DEVELOPMENT CORPORATION OF KANSAS CITY (MISSOURI)

www.edckc.com/category/incentives-and-loans

NASHVILLE AREA CHAMBER OF COMMERCE

www.nashvillechamber.com/economic-development/relocate-or-expand/taxes-incentives

METROPOLITAN GOVERNMENT OF NASHVILLE AND DAVIDSON COUNTY, TENNESSEE

www.nashville.gov/Mayors-Office/Economic-and-Community-Development/Incentives.aspx

GREATER NASHVILLE REGIONAL COUNCIL

Tax Incentives: www.tn.gov/transparenttn/topic/openecd-tax-incentives

Film Incentives: www.tn.gov/transparenttn/topic/openecd-film-incentives

GREATER OKLAHOMA CITY PARTNERSHIP

www.greateroklahomacity.com/subdoingbusiness/incentives/

THE ALLIANCE FOR ECONOMIC DEVELOPMENT OF OKLAHOMA CITY

www.thealliance okc.org/economic-tools

CITY OF PHOENIX

www.phoenix.gov/econdev/Incentives

GREATER PHOENIX ECONOMIC COUNCIL

www.gpec.org/operating-costs-incentives

PITTSBURGH REGIONAL ALLIANCE

www.pittsburghregion.org/wp-content/uploads/2016/08/LocalEconomicDevelopmentPrograms.pdf

URBAN REDEVELOPMENT AUTHORITY OF PITTSBURGH

www.ura.org/business_owners/business_owners.php

STRATEGIC PLAN DOCUMENTS

METRO AREA COMPETITOR ORGANIZATIONS

CITY OF DALLAS OFFICE OF ECONOMIC DEVELOPMENT

GrowSouth: www.dallasgrowsouth.com/category/growsouthplan/

IRVING-LAS COLINAS CHAMBER OF COMMERCE

2015-2018 Strategic Initiatives & KPIS: www.issuu.com/irvingchamber/docs/chamberbooklet2015spreadnobleed

IRVING, TEXAS

Irving Economic Development Strategic Plan (2017-2022): www.cityofirving.org/2656/Economic-Development-Strategic-Plan

LEWISVILLE, TEXAS ECONOMIC DEVELOPMENT CORPORATION

Lewisville 2025: www.cityoflewisville.com/?navid=1170

Lewisville 2025 Annual Report 2017: www.cityoflewisville.com/home/showdocument?id=10496

DOMESTIC BENCHMARK ORGANIZATIONS

COLUMBUS 2020

Columbus 2020 Strategy: www.columbusregion.com/columbus-2020/strategy

CEDS 2014 Update: www.go.columbusregion.com/CEDS-2014

DENVER OFFICE OF ECONOMIC DEVELOPMENT

JumpStart 2017- 2017: www.denvergov.org/content/dam/denvergov/Portals/690/Reports%20and%20Studies/OED%20JumpStart%202017-web.pdf

METRO DENVER ECONOMIC DEVELOPMENT CORPORATION

Toward a More Competitive Colorado, 12th Edition (2016): www.metrodenver.org/research-reports/toward-a-more-competitive-colorado/#

Industry Cluster Study (2016): www.metrodenver.org/research-reports/industry-cluster-study/#

All Research & Reports: www.metrodenver.org/research-reports

INDY CHAMBER

Plan 2020: www.indychamber.com/economic-development/major-initiatives/plan-2020/

Accelerate Indy: www.indychamber.com/index.php/download_file/2841/490/"

NASHVILLE AREA CHAMBER OF COMMERCE

Strengthening the Middle Tennessee Region 2020: Building a Vital Workforce to Sustain Economic Growth and Opportunity (2015): s3.amazonaws.com/nashvillechamber.com/Talent/2015-workforce-study-full.pdf

Partnership 2020 Lead the Way brochure: s3.amazonaws.com/nashvillechamber.com/Economic-Development/P2020-LEAD-the-Way-Brochure-2016.pdf

NASHVILLE AREA METROPOLITAN PLANNING ORGANIZATION

2012-2017 Comprehensive Economic Development Strategy (2016 Update): www.gnrc.org/wp-content/uploads/2011/12/GNRC_CEDS_2016.pdf

ATTACHMENT E. SITE SELECTION FACTORS

Findings from Area Development Magazine's Annual Survey of Corporate Executives help to illustrate how a corporate decision-maker might initially assess site location decisions based on readily available data. This section uses the top 10 factors, based on rankings in the 2016 survey, as the framework for understanding the region's competitive position. Since many of the factors are applicable only at the state or metropolitan area level, the focus of this analysis is on the domestic peer MSAs. This section closes with a review of factors that help to differentiate communities within the region, including school district rankings and labor availability.

AREA DEVELOPMENT TOP 10 FACTORS

Figure 23 shows the top 10 site selection factors as ranked by Area Development's 2016 Annual Survey of Corporate Executives, along with a look at how these factors have changed over a 25-year period. Comparisons across years are complicated by several factors, including the fluctuating composition of the survey respondents, revisions to individual questions, and methodological changes. However, a review of long-term trends illustrates the long-standing role these factors have played in site selection decisions.

FIGURE 23. TOP 10 SITE SELECTION FACTORS (RANKED BY SCORE IN 2016)
WITH COMPARISONS TO SELECTED YEARS

	2016		2015		2010		2000		1990	
	Rank	*Value*	*Rank*	*Value*	*Rank*	*Value*	*Rank*	*Value*	*Rank*	*Value*
Highway accessibility	1	94.4	2	88.0	1	97.3	1	95.9	1	92.3
Availability of skilled labor	2	89.8	1	92.9	7	85.9	3	87.7	6	87.1
Labor costs	3	89.6	6	80.8	2	91.0	2	91.6	2	92.1
Occupancy or construction costs	4	86.0	4	85.4	4	89.8	6	83.0	4	88.5
State and local incentives	5	84.0	9	75.8	5	89.3	5	83.6	3	88.7
Corporate tax rate	6	82.3	7	78.8	6	86.3	4	84.7	N/A	N/A
Tax exemptions	7	79.7	11	74.7	3	90.9	7	81.6	7	85.8
Energy availability and costs	8	78.5	10	75.3	9	82.1	10	77.7	5	88.1
Proximity to major markets	9	78.1	8	76.3	17	66.4	12	76.8	14	74.9
Quality of life*	10	76.4	3	87.6	19	62.1	18	58.8	17	70.6

Source: *Area Development* magazine, Annual Survey of Corporate Executives.
Note: All figures are percentages and are the total of "very important" and "important" ratings. *Quality of life rating for surveys prior to 2015 is the average of rating of nine quality of life factors (climate, housing availability, housing costs, healthcare facilities, ratings of public schools, cultural opportunities, recreational opportunities, colleges and universities in the area, and low crime rate). N/A indicates that data are not available due to changes and additions to the survey.

1. HIGHWAY ACCESSIBILITY

Fort Worth offers excellent highway access to US markets in all directions, as well as international markets in Mexico and Canada. The city lies at the intersection of three US Interstate highways (I-20, I-30, and I-35W) and the two dominant Class I railroads of the Western US: Union Pacific (UP) and Burlington Northern Santa Fe (BNSF).

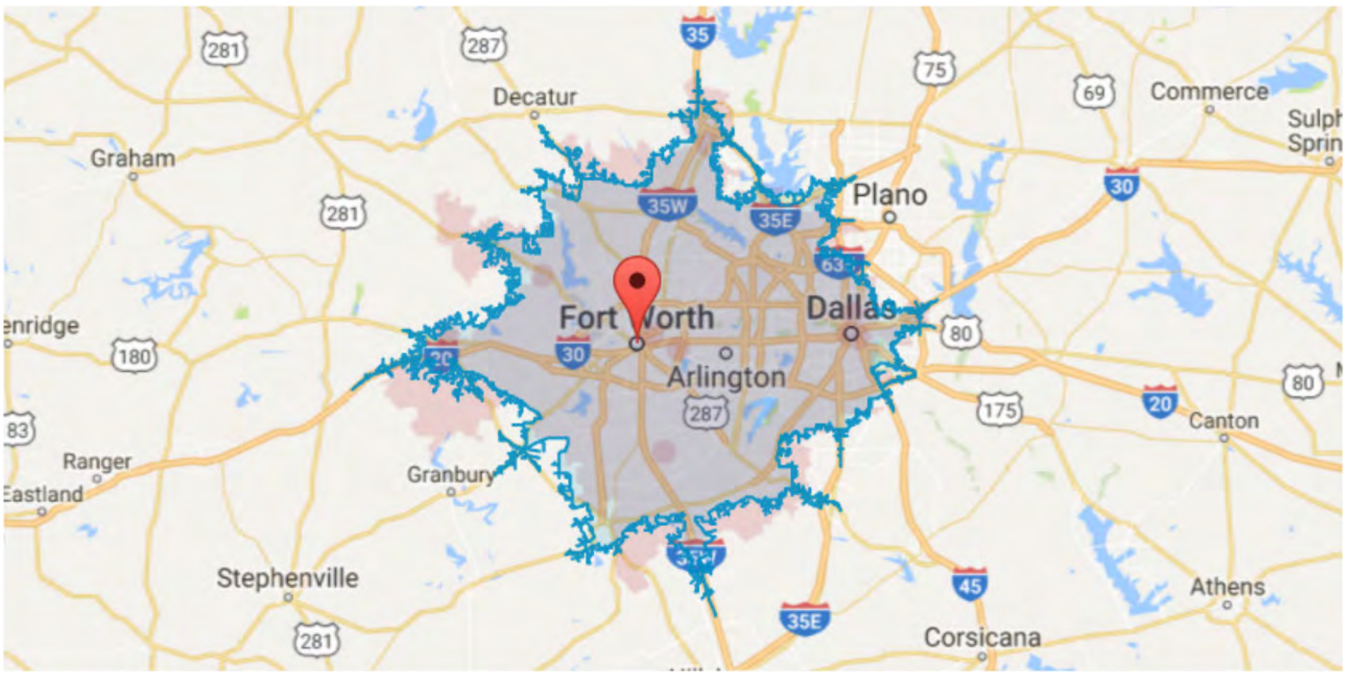
FIGURE 24. HIGHWAY NETWORK

2. LABOR AVAILABILITY

More than 2 million workers live within a 45-minute drive from Fort Worth. This figure surpasses the estimated labor availability of the other domestic benchmarks. In addition to incumbent workers, the city's location within one of the nation's fastest-growing metropolitan area ensures a steady influx of new residents (see Volume 1). Employers also have access to a constant flow of graduates, with institutions in the metro area awarding more than 75,000 degrees and awards for credit during the 2013-2014 academic year, according to data published by the National Center for Education Statistics. (For additional details on awards conferred for credit in the region, see Volume 2.)

FIGURE 25. LABOR ACCESS: FORT WORTH VS. DOMESTIC BENCHMARKS

FORT WORTH 45-MINUTE DRIVE TIME



WORKERS WITHIN 45-MINUTE DRIVE TIME

	ESTIMATED WORKFORCE W/IN 45-MINUTES
Fort Worth, TX	2,041,000
Phoenix, AZ	1,627,000
Denver, CO	1,391,000
Kansas City, MO	956,000
Columbus, OH	849,000
Pittsburgh, PA	848,000
Indianapolis, IN	802,000
Nashville, TN	683,000
Oklahoma City, OK	540,000

Sources: Emsi 2017.2; QCEW, non-QCEW, Self-Employed (Resident Worker data); TIP Strategies.
Note: Figures represent the sum of Emsie's Resident Worker data series for ZIP codes where approximately 50 percent or more of the land area falls within the 45-minute drive time boundary (as delineated by Emsi).

3. LABOR COSTS

As part of its most recent Cost of Doing Business Index, Moody's Analytics compared unit labor costs in 401 metropolitan areas as one component of the overall index. Moody's labor cost index calculates labor compensation per dollar of output for selected industries in each metropolitan area. Labor compensation is measured as wages and salaries per employee, while output is calculated as gross product per employee. These industry-specific labor costs are then compared with costs for the same industries nationally to construct the index. Because it accounts for labor productivity, the resulting unit labor cost index is a more accurate measure of labor costs than compensation alone, according to the Moody's analysis.

Index values compare a metro area's costs to US averages. An index value of 100 is the same as the US as a whole. Values below 100 represent lower cost metro areas, while values above 100 indicate higher cost metro areas. The rank compares each of the 401 metro areas to each other in terms of costs represented by the index values overall and for each component. New York ranks first in the US as the costliest metro area overall and Jacksonville, North Carolina ranks 401 as the least costly metro area. Fort Worth ranks as a relatively low-cost place for doing business compared with the domestic benchmarks. Only Oklahoma City and Nashville provide minor cost savings compared with Fort Worth.

FIGURE 26. MOODY'S COST OF DOING BUSINESS INDEX, JUNE 2016
RELATIVE BUSINESS COST ESTIMATES FOR THE PERIOD FROM 2012 TO 2014

METRO AREA	COST OF DOING BUSINESS		INDEX COMPONENTS: Unit Labor Cost		Energy Cost		State & Local Tax		Office Rent	
	Index Value	*Rank*	*Index Value*	*Rank*	*Index Value*	*Rank*	*Index Value*	*Rank*	*Index Value*	*Rank*
Fort Worth TX	88	204	93	**264**	107	130	65	368	70	165
Indianapolis IN	88	205	96	236	102	158	96	116	62	247
Columbus OH	95	101	99	189	112	110	95	120	75	108
Dallas TX	93	129	100	166	107	130	64	372	77	95
Nashville TN	82	**317**	100	147	93	248	66	355	51	**360**
Pittsburgh PA	96	85	100	145	128	65	93	132	73	128
Oklahoma City OK	86	254	105	82	75	**383**	64	371	62	248
Phoenix AZ	96	90	106	69	107	125	78	281	76	101
Denver CO	96	87	113	16	96	224	63	**384**	78	90
Kansas City MO	93	132	114	12	91	262	77	284	62	252

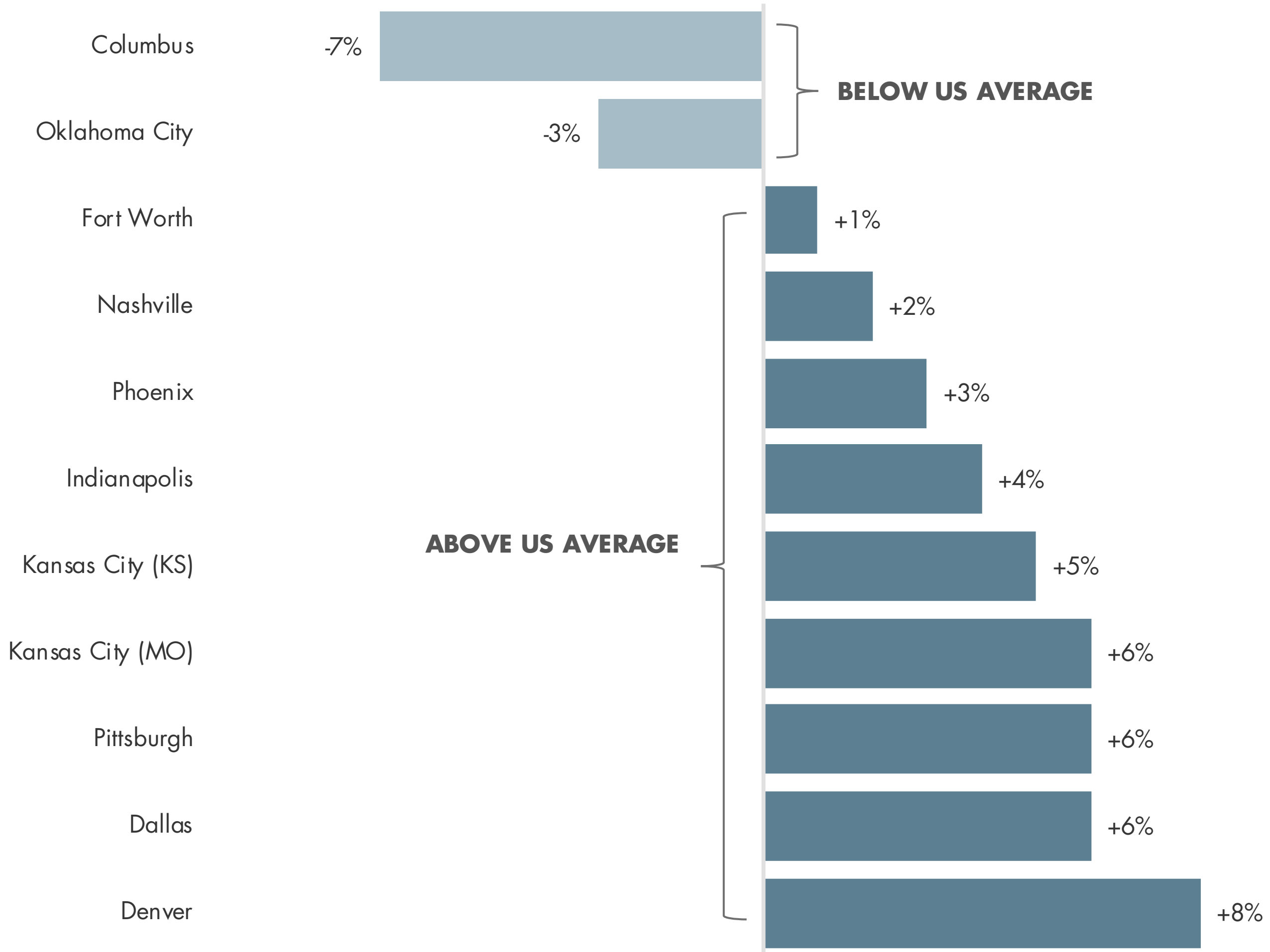
Sources: Moody's Analytics, "U.S. Cost of Doing Business: An Update," Regional Financial Review, June 2017.
Note: The lowest cost ranking (highest number) is bolded for the overall index and for each component.

4. CONSTRUCTION COSTS

Per Craftsman's *2017 National Construction Estimator*, Fort Worth construction costs are only slightly higher than the national average. Fort Worth's adjustment factor of +1 percent is among the lowest of the benchmark metro areas. By contrast, construction costs are significantly above the US average in Dallas. With a local adjustment factor of +6 percent, Dallas has the highest construction costs of the benchmark metro areas. Columbus and Oklahoma City have the lowest costs among the metro areas analyzed, with construction costs averaging 7 percent and 3 percent below national averages, respectively.

FIGURE 27. CONSTRUCTION COST COMPARISON, 2017

ESTIMATED LOCAL ADJUSTMENT FACTOR RELATIVE TO AVERAGE CONSTRUCTION COSTS NATIONALLY



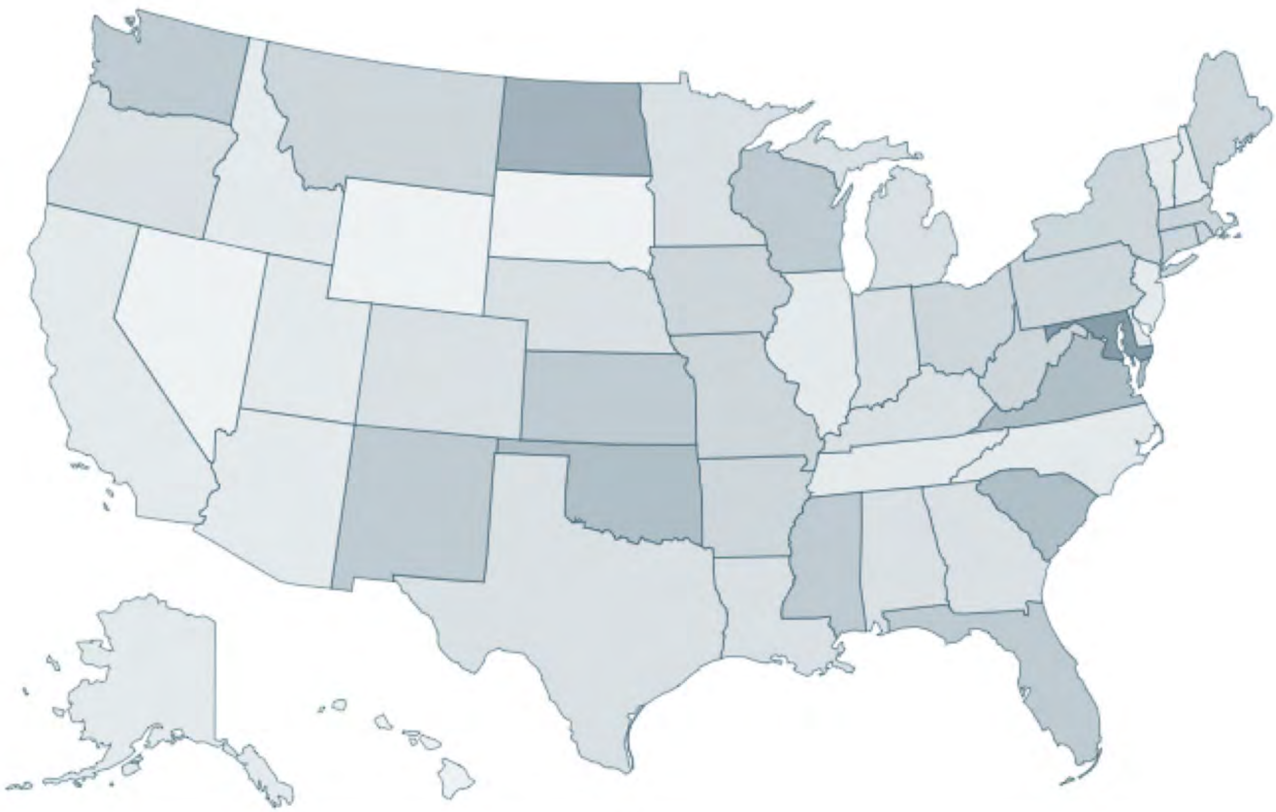
Source: Craftsman *2017 National Construction Cost Estimator*.
Notes: Figures represent the weighted average of factors for labor, material, and equipment.

5. STATE INCENTIVES

Created in 1999 by the Council for Community and Economic Research (C2ER), the State Business Incentives Database features nearly 2,000 programs from all US states and territories. Data are continuously tracked by C2ER using a range of sources, including state agency websites, statutes and codes, budget documents, and interviews with state agency representatives. The entire database is updated on a biannual basis to ensure that information for each program is accurate and complete and to verify that the program is still active.

Per C2ER's research, Texas offers 33 incentives programs, with grant programs accounting for nearly one-half of this figure (16). The state's reliance on grant programs differs from national patterns, which favor tax credits. This difference is understandable, given Texas's lack of a corporate income tax. At the time of the analysis, Maryland had the most incentives in the database, with 79 programs logged by C2ER. Nevada had the lowest—just 15 programs.

FIGURE 28. INCENTIVES PROGRAMS OFFERED BY STATE
DARKER SHADES REPRESENT HIGHER NUMBERS OF PROGRAMS



UNITED STATES
Number of entries: 1,830
Top 5 program types:
1. Tax credit
2. Grant
3. Loan/loan participation
4. Tax exemption
5. Other

TEXAS
Number of entries: 33
Top 5 program types:
1. Grant
2. Loan/loan participation
3. Tax exemption
4. Equity investment
5. Other

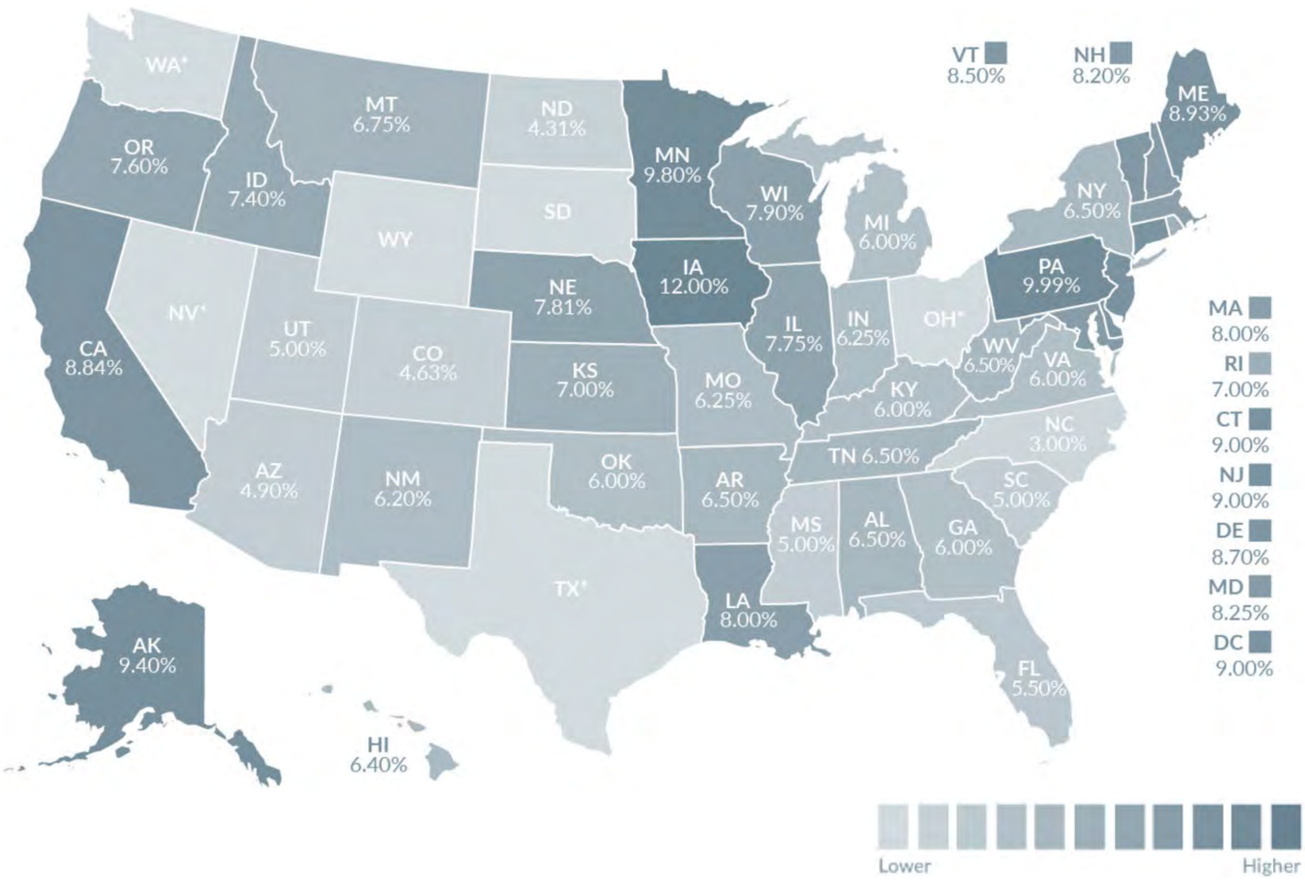
Source: Council for Community and Economic Research (C2ER). Note: Data for US territories is not shown.

6. CORPORATE TAX RATE

According to the latest analysis of corporate income tax rates prepared by the Tax Foundation, top statutory corporate tax rates for 2017 range from a low of 3 percent in North Carolina to a high of 12 percent in Iowa. Texas is one of four states that impose gross receipts taxes instead of corporate income taxes; the others are Nevada, Ohio, and Washington. The Tax Foundation analysis reports that gross receipts taxes are perceived to be more economically harmful than corporate income taxes, however, the two types of tax are not directly comparable.

The Moody's Cost of Doing Business Index presented in Figure 26 (page 48) includes a component that estimates relative tax burden. By this measure, state and local taxes in Fort Worth are among the lowest of the 401 metropolitan areas analyzed. Indianapolis firms face the highest estimated tax burden based on Moody's analysis, with a ranking of 116 on the state and local tax component of the overall index.

FIGURE 29. TOP STATE MARGINAL CORPORATE INCOME TAX RATES IN 2017



Source: Tax Foundation, State Corporate Income Tax Rates and Brackets for 2017.
Note (*): Nevada, Ohio, Texas, and Washington do not have corporate income taxes but do have gross receipts taxes with rates not strictly comparable to corporate income tax rates. Arkansas has a "benefit recapture," by which corporations with more than $100,000 of taxable income pay a flat tax of 6.5% on all income, not just on amounts above the benefit threshold. Connecticut's rate includes a 20% surtax, which effectively increases the rate from 7.5% to 9%. Surtax is required by businesses with at least $100 million in annual gross income. Illinois' rate includes two separate corporate income taxes, one at a 5.25% rate and one at a 2.5% rate. Indiana's tax rate will decrease to 6.0% on July 1, 2017.

7. TAX EXEMPTIONS

As demonstrated by the C2ER State Incentives Database, tax-related incentives are less common in Texas than in other parts of the US. The Texas Governor's office lists the following state-level tax incentives, which include a handful of property and/or sales tax exemptions:

- Value Limitation Tax Credits
- Freeport and Goods-In-Transit Exemption
- Texas Enterprise Zone Program
- Manufacturing Exemptions
- Data Center Exemption
- Research & Development Tax Credit
- Relocation Costs Deduction
- Pollution Control Equipment Incentive
- Solar/Wind-Powered Energy Devices Property Tax Exemption
- Solar Energy Devices Business Franchise Tax Exemption
- Solar Energy Devices Franchise Tax Deduction
- Defense Economic Readjustment Zone Program

A February 2016 analysis by the Urban Institute used the C2ER database discussed previously as the starting point for an analysis of tax incentives for economic development by state. The matrix below shows the findings for the states in which the peer metros are located.

FIGURE 30. STATE TAX INCENTIVES, SELECTED STATES

	JOB CREATION	INVESTMENT CREDIT	ENTERPRISE ZONE	TARGETED TAX CREDITS			
				Agriculture	Technology	Manufacturing	Film
Arizona	●	●				●	
Colorado	●	●	●	●	●	●	●
Indiana	●	●	●		●		
Kansas	●	●		●		●	
Missouri	●	●		●			
Ohio	●	●	●				●
Oklahoma	●	●		●	●	●	●
Pennsylvania	●	●	●				●
Tennessee	●	●				●	●
Texas		●	●				●

Source: Norton Francis, Urban Institute, "State Tax Incentives for Economic Development," February 2016.

8. ENERGY

Data compiled by the US Energy Information Administration (EIA) indicates that Texas's rates are among the lowest in the nation for industrial and commercial users. Of the states in which the domestic benchmark cities are located, only Oklahoma and Nevada have lower average rates for these nonresidential sectors. Texas's favorable rates represent a potential advantage nationally when recruiting large industrial users.

FIGURE 31. AVERAGE PRICE OF ELECTRICITY (CENTS PER KWH) TO ULTIMATE CUSTOMERS BY END-USE SECTOR, MARCH 2016

TEXAS WITH COMPARISONS TO PEER MSA STATE, RANKED BY AVERAGE FOR ALL SECTORS

	RESIDENTIAL		COMMERCIAL		INDUSTRIAL		ALL SECTORS	
	value	*rank*	*value*	*rank*	*value*	*rank*	*value*	*rank*
USA Total	**12.90**	–	**10.48**	–	**6.74**	–	**10.34**	–
Oklahoma	10.54	10	7.50	1	5.24	4	7.82	2
Nevada	12.13	27	7.83	4	5.02	3	8.03	6
Texas	**11.31**	**17**	**8.40**	**6**	**5.37**	**6**	**8.35**	**10**
Missouri	10.43	6	8.40	6	6.34	21	8.91	13
Tennessee	10.63	11	10.28	32	5.94	14	9.37	21
Indiana	11.99	26	10.26	31	7.38	30	9.53	24
Colorado	11.89	25	9.54	18	7.33	29	9.67	26
Ohio	12.35	28	10.07	28	6.72	24	9.72	28
Pennsylvania	14.08	37	9.01	14	6.91	27	10.25	33
Kansas	13.30	34	10.28	32	7.51	32	10.36	34

Source: US Energy Information Administration, Form EIA-826, Monthly Electric Sales and Revenue Report with State Distributions Report (Table 5.6.A. Average Price of Electricity to Ultimate Customers by End-Use Sector). Note: Rankings include the 50 states and the District of Columbia and are color-coded to facilitate comparison: 1–10 ●, 11–20 ●, 21–30 ●, 31–40 ●, 41–51 ●.

Local rates available from Electricity Local (an online search tool compiled from federal data sources), reinforces the City's advantage in this area. Fort Worth's rate was considerably below the US average on all three sectors: residential, commercial, and industrial. Only Pittsburgh and Oklahoma City had lower average industrial rates based on this source.

FIGURE 32. AVERAGE PRICE OF ELECTRICITY (CENTS PER KWH), WITH COMPARISON TO US

FORT WORTH AND DOMESTIC BENCHMARK CITIES, RANKED BY AVERAGE INDUSTRIAL RATES

	RESIDENTIAL		COMMERCIAL		INDUSTRIAL	
	Avg.	*Relative to US*	*Avg.*	*Relative to US*	*Avg.*	*Relative to US*
USA average	**11.88**	–	**10.09**	–	**6.67**	–
Pittsburgh, PA	11.44	↓ 3.70% less	3.72	↓ 63.13% less	1.35	↓ 79.76% less
Oklahoma City, OK	9.76	↓ 17.85% less	7.13	↓ 29.34% less	5.06	↓ 24.14% less
Fort Worth, TX	10.98	↓ 7.58% less	8.16	↓ 19.13% less	5.57	↓ 16.49% less
Denver, CO	11.05	↓ 6.99% less	9.16	↓ 9.22% less	6.04	↓ 9.45% less
Kansas City, MO	10.93	↓ 8.00% less	8.55	↓ 15.26% less	6.43	↓ 3.60% less
Nashville, TN	10.26	↓ 13.64% less	10.32	↑ 2.28% more	6.61	↓ 0.90% less
Indianapolis, IN	9.06	↓ 23.74% less	10.08	↓ 0.10% less	7.36	↑ 10.34% more
Kansas City, KS	11.29	↓ 4.97% less	9.16	↓ 9.22% less	7.51	↑ 12.59% more
Phoenix, AZ	11.96	↑ 0.67% more	10.22	↑ 1.29% more	7.87	↑ 17.99% more
Columbus, OH	12.65	↑ 6.48% more	11.33	↑ 12.29% more	8.45	↑ 26.69% more

Source: Electricity Local based on data from the National Renewable Energy Laboratory's (NREL) Open EI platform (undated), accessed via www.electricitylocal.com. Notes: Rates shown for Dallas and Fort Worth on Electricity Local were identical; only Fort Worth is shown.

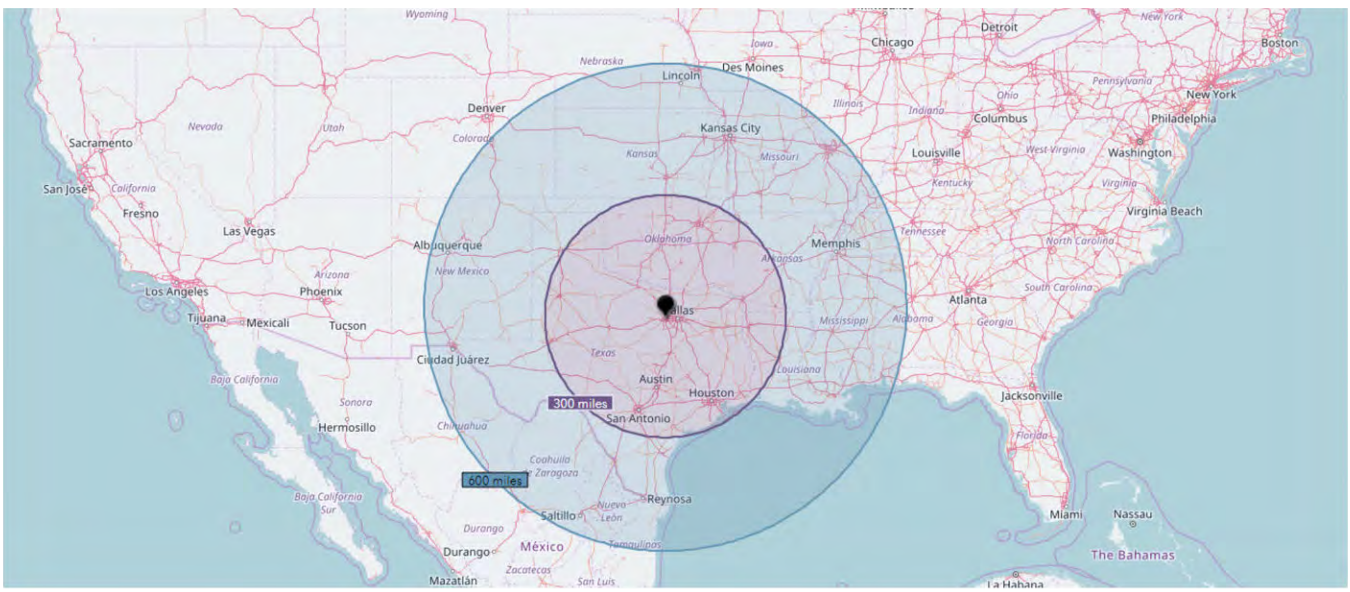
9. MARKET ACCESS

Fort Worth has access to more than 10.6 million US households within one-half-day's drive, including most Texas metropolitan areas, as well as much of Oklahoma and parts of Arkansas and Louisiana. Markets within a one-day drive encompass 22.5 million US households and include cities such as Oklahoma City, Kansas City, St. Louis, and Memphis, and numerous cities in Mexico not captured in these figures (including Monterrey, Chihuahua, and areas along the entire Texas-Mexico border). Adding in the Mexican cities within a one-day drive from Fort Worth would increase the total by another three to four million households.

While Fort Worth falls in the middle of the pack among the domestic benchmarks in terms of the number of households within one-day's drive, it tops the list in terms of the growth experienced by these markets in recent years. Since 2010, the number of households within a 300-mile radius has increased by more than 8 percent, the highest of any benchmark. Likewise, the number of households within a 600-mile radius of Fort Worth (one-day's drive) is also growing rapidly.

FIGURE 33. MARKET ACCESS

AREA WITHIN ½-DAY'S DRIVE (300 MILES) AND ONE-DAY'S DRIVE (600 MILES)



	300-Mile			600-Mile		
	2010 Total Households	2016 Total Households	% Change	2010 Total Households	2016 Total Households	% Change
Fort Worth, TX	**9,929,059**	**10,762,702**	**1.30%**	**21,209,616**	**22,509,772**	**0.96%**
Denver, CO	2,470,083	2,633,059	1.03%	11,514,559	12,223,642	0.96%
Phoenix, AZ	5,054,453	5,358,541	0.94%	24,695,751	26,151,739	0.92%
Oklahoma City, OK	7,647,889	8,083,719	0.89%	15,692,670	16,464,175	0.77%
Nashville, TN	14,863,042	15,406,369	0.58%	34,222,577	35,568,683	0.62%
Kansas City, KS	7,424,816	7,686,122	0.55%	34,200,641	35,545,247	0.62%
Kansas City, MO	7,424,996	7,686,081	0.55%	52,611,180	54,550,158	0.58%
Pittsburgh, PA	23,045,168	23,609,994	0.39%	55,338,437	57,198,870	0.53%
Indianapolis, IN	21,106,083	21,585,853	0.36%	59,449,393	61,327,782	0.50%
Columbus, OH	19,994,356	20,439,973	0.35%	60,149,980	62,055,220	0.50%

Source: Esri.

10. QUALITY OF LIFE

The definition of quality of life is very subjective, with little agreement on the best way to quantify an area's performance on this important indicator. While crime statistics and school rankings are often used to gauge the desirability of a region, there are issues with these metrics. Despite its name, the FBI's Uniform Crime Reports are criticized for lacking consistency in reporting protocols and definitions. Similarly, rankings of public education systems across states are not always an apples-to-apples comparison.

Moreover, when making comparisons across metro areas in different parts of the US, minor differences in crime or K-12 school performance rarely make or break a site location decision. The exceptions are places with notorious crime and/or school challenges that receive national media attention (such as Chicago's crime outbreaks in recent years or Detroit Public Schools' financial challenges). The issue of K-12 school performance will influence where a company decides to locate within a metro area. This issue is addressed in the next section (Dallas-Fort Worth Metro Area Comparisons).

Despite the challenges associated with attempts to measure a community's quality of life, urbanSCALE.com argues that an objective measurement of quality of place does exist: the percentage of individuals who work from home within a given geography. It is worth noting that, while this indicator does a good job of "measuring" quality of life, it does not fit as a site selection factor in the same way as the previous nine of the top 10 factors given its subjective nature. Nonetheless, for this assessment, we have chosen to use a data-driven approach to understand the differences across metro areas.

FIGURE 34. % WORKING AT HOME
FORT WORTH MD VS. PEER METROS

LOCATION	SHARE OF WORKERS AGE 16+
Denver, CO (MSA)	7.3%
Phoenix, AZ (MSA)	5.9%
Dallas, TX (MD)	5.5%
Dallas-Fort Worth, TX (MSA)	5.1%
Kansas City, MO (MSA)	5.1%
Nashville, TN (MSA)	4.8%
USA	4.6%
Pittsburgh, PA (MSA)	4.5%
Columbus, OH (MSA)	4.4%
Fort Worth, TX (MD)	4.3%
Indianapolis, IN (MSA)	4.1%
Oklahoma City, OK (MSA)	3.5%

Source: ACS, Census Bureau, 2015, 1-yr estimates.
Note: Choice of indicator based on urbanSCALE.com blog post, *"Finally, a Single Data Point for Measuring Your City's Quality of Place,"* July 13, 2015. Written by John Karras, urbanSCALE.com founder and TIP Strategies consultant.

This argument asserts that if a person can work from any location (and presumably, live in any location), why would they not pick the best location? Based on this assumption, the quality of life in an area can be judged by this one data point. The percentage of individuals who work from home demonstrates how individuals "vote with their feet." The higher the percentage of at-home workers, the greater the quality of a place. The Fort Worth Metropolitan Division lags the nation slightly on this indicator and outperforms only Indianapolis and Oklahoma City among the domestic benchmarks. By contrast, rates in the Dallas Metropolitan Division exceed the nation. But Denver stands out among the pack as the having a much higher share of workers choosing to live and work from home.

Home prices can also serve as a measure of the demand to live in a particular place, although housing costs reflect several factors. Using this framework, cities with the highest-priced housing would be deemed to be among the most desirable. The assumption is that people who pay more for housing choose to do so because they gain more value from living in the area, despite the costs, than from living in a different area with more affordable housing costs. Data from the National Association of Realtors on the median sales price of existing homes suggest the Dallas-Fort Worth metro area is among the more desirable locations within the peer group.

Based on this measure, Denver is the clear "quality of life" winner, with median home sales prices that are 65 percent higher than the second-ranked market (Phoenix).

FIGURE 35. MEDIAN SALES PRICE OF EXISTING SINGLE-FAMILY HOMES (IN THOUSANDS)
DALLAS-FORT WORTH MSA COMPARED TO DOMESTIC BENCHMARKS (RANKED BY 2017.I PRICES)

	ANNUAL			QUARTERLY *(Not Seasonally Adjusted)*					%Chg.
METROPOLITAN AREA	2014	2015	2016 r	2016.I	2016.II	2016.III	2016.IV r	2017.I p	**Q1-Q1**
Denver, CO	$310.2	$353.6	$384.3	$369.0	$394.4	$386.8	$381.6	$396.1	7.3%
Phoenix, AZ	$198.5	$216.4	$232.7	$223.1	$234.7	$235.3	$235.6	$237.9	6.6%
Dallas-Fort Worth, TX	$188.3	$207.2	$227.1	$210.1	$232.2	$230.5	$230.6	$236.5	12.6%
Nashville, TN	$183.0	$204.2	$224.5	$204.7	$227.0	$230.0	$231.4	$232.2	13.4%
Kansas City, MO-KS	$158.8	$170.4	$181.3	$163.3	$188.6	$188.0	$179.2	$179.0	9.6%
Columbus, OH	$156.3	$164.7	$175.5	$160.7	$181.7	$181.6	$171.3	$170.7	6.2%
Indianapolis, IN	$144.6	$153.2	$159.8	$146.9	$164.3	$164.1	$159.5	$159.2	8.4%
Oklahoma City, OK	$150.3	$149.6	$150.8	$141.0	$154.9	$154.8	$152.3	$144.8	2.7%

Source: National Association of REALTORS® p = preliminary; r = revised.
Note: Metropolitan statistical areas (MSA) as defined by the US Office of Management and Budget though in some areas an exact match is not possible from the available data. MSAs include the named central city and surrounding areas and may not match local reporting due to differences in specification. Data were not available for Pittsburgh.

DALLAS-FORT WORTH METRO AREA COMPARISONS

National corporate expansion and relocation decisions begin with a comparison of states and metro areas to identify a "short list" of viable regions where an investment makes the most sense. For example, a corporation seeking to relocate its HQ from California to avoid high taxes does not begin by comparing Fort Worth to Plano. The decision maker would start by comparing Texas to Arizona and Phoenix to Dallas-Fort Worth. Once the Dallas-Fort Worth metro area has been identified as the preferred location, or has been selected as one of a few preferred locations, local comparisons of cities and specific sites can take place. In light of these realities, many of the top site selection factors identified in the Area Development survey are applicable only at the state or metro area level. Others, like highway access, can only be fully evaluated within the context of a specific site. As such, they tell us little about Fort Worth's competitive position in the Dallas-Fort Worth metro area. This section provides a comparison of Fort Worth with the regional competitors on several factors that influence investment decisions within a larger region. One critical factor not reviewed below is the availability of incentives. This issue is addressed in the organizational review in Attachment C.

SCHOOL RANKINGS

Although perceptions of school quality are not typically a critical factor in choosing *between* regions, they can have a tremendous bearing on corporate investment decisions *within* a region. This is particularly true for companies or industries for which the recruitment and retention of workers is paramount. In these site location decisions, close attention is paid to the performance of the primary K-12 school district serving a community. A worker relocating his or her family from Chicago to accept a new job in Fort Worth is more likely to look first at Fort Worth ISD as an indicator of the city's school quality than Eagle Mountain-Saginaw ISD. The same can be said of Dallas, Irving, and other cities served by multiple districts. For this reason, the primary school district serving each of the competitor communities is used for comparative purposes. While there is no general agreement on the best measure, standardized test scores are used in the analysis as they provide a common data point for evaluating relative performance across districts and communities. Fort Worth ISD has the lowest performance among the competitor cities, followed by Irving and Dallas. Frisco ISD is the highest performing district, followed by Plano and McKinney.

FIGURE 36. SCHOOL RANKINGS: PRIMARY DISTRICT IN EACH FORT WORTH COMPETITOR CITY
INCLUDES DISTRICTS FOR WHICH STANDARDIZED SCORES WERE REPORTED

			SCHOOLDIGGER RANK/RATINGS				
DISTRICTS	GRADES	CITY	2016 Score	2016 Rank	2016 Rating	2015 Rank	Change 2015-16
Frisco ISD	PK, K-12	Frisco	0.873	50	★★★★★	37	+13
Plano ISD	PK, K-12	Plano	0.795	116	★★★★	99	+17
McKinney ISD	PK, K-12	McKinney	0.688	250	★★★★	245	+5
Richardson ISD	PK, K-12	Richardson	0.613	348	★★★	413	+65
Denton ISD	PK, K-12	Denton	0.608	360	★★★	436	+76
Carrollton-Farmers Branch ISD	PK, K-12	Carrollton	0.564	419	★★★	351	+68
Grand Prairie ISD	PK, K-12	Grand Prairie	0.462	555	★★	626	+71
Garland ISD	PK, K-12	Garland	0.451	568	★★	555	+13
Mesquite ISD	PK, K-12	Mesquite	0.406	626	★★	545	+81
Arlington ISD	PK, K-12	Arlington	0.392	639	★★	691	+52
Dallas ISD	PK, K-12	Dallas	0.333	715	★	755	+40
Irving ISD	PK, K-12	Irving	0.285	768	★	753	+15
Fort Worth ISD	PK, K-12	Fort Worth	0.263	782	★	780	+2

Source: Compiled by TIP Strategies via Schooldigger.com (last updated October 6, 2016).
Notes: Schooldigger calculates school rankings based on test scores released by the Texas Education Agency (TEA). Districts for which standardized test scores were not reported by TEA are excluded. Stars are assigned based on the distribution of school districts in the state: 5 stars= 90th percentile, 4 stars = 70th to 90th percentile, 3 stars = 50th to 70th percentile, 2 stars = 30th to 50th percentile, 1 star = 10th to 30th percentile, no stars = 10th percentile and below.

FIGURE 37. COMPLETE SCHOOL RANKINGS: ALL SCHOOL DISTRICTS IN FORT WORTH COMPETITOR CITIES

INCLUDES DISTRICTS FOR WHICH STANDARDIZED SCORES WERE REPORTED

			SCHOOLDIGGER RANK/RATINGS				
DISTRICTS	GRADES	CITY	2016 Score	2016 Rank	2016 Rating	2015 Rank	Change 2015-16
Highland Park ISD	PK, K-12	Dallas	0.990	2	★★★★★	2	+0
Fort Worth Academy of Fine Arts	3-12	Fort Worth	0.961	9	★★★★★	8	-1
Leadership Prep School	K-7	Frisco	0.933	16	★★★★★	12	-4
Frisco ISD	PK, K-12	Frisco	0.873	50	★★★★★	37	-13
Arlington Classics Academy	K-8	Arlington	0.801	110	★★★★	75	-35
Plano ISD	PK, K-12	Plano	0.795	116	★★★★	99	-17
Keller ISD	PK, KG-12	Keller	0.727	197	★★★★	194	-3
Uplift Education - North Hills Prep.	K-12	Dallas	0.717	208	★★★★	196	-12
St Anthony School	K-8	Dallas	0.706	225	★★★★	260	+35
Texas School of The Arts	K-8	Fort Worth	0.705	227	★★★★	242	+15
McKinney ISD	PK, K-12	McKinney	0.688	250	★★★★	245	-5
Northwest ISD	PK, KG-12	Justin	0.683	256	★★★★	244	-12
Hurst-Euless-Bedford ISD	PK, KG-12	Bedford	0.682	259	★★★★	193	-66
White Settlement ISD	PK, KG-12	White Settlement	0.618	339	★★★	404	+65
Richardson ISD	PK, K-12	Richardson	0.613	348	★★★	413	+65
Denton ISD	PK, K-12	Denton	0.608	360	★★★	436	+76
Chapel Hill Academy	PK, K-5	Fort Worth	0.606	363	★★★	583	+220
Inspired Vision Academy	PK, K-11	Dallas	0.566	418	★★★	504	+86
Carrollton-Farmers Branch ISD	PK, K-12	Carrollton	0.564	419	★★★	351	-68
Eagle Mt-Saginaw ISD	PK, K-12	Fort Worth	0.554	431	★★★	501	+70
Texas College Preparatory Academies	PK, K-12	Lewisville	0.544	448	★★★	398	-50
Manara Academy	K-8	Irving	0.543	450	★★★	247	-203
East Fort Worth Montessori Academy	PK, K-5	Fort Worth	0.477	539	★★	824	+285
Nova Academy (Southeast)	K-8	Dallas	0.465	553	★★	612	+59
Grand Prairie ISD	PK, K-12	Grand Prairie	0.462	555	★★	626	+71
International Leadership of Texas (ILT)	K-11	Richardson	0.458	560	★★	589	+29
Garland ISD	PK, K-12	Garland	0.451	568	★★	555	-13
Cityscape Schools	PK, K-5	Dallas	0.422	604	★★	924	+320
Mesquite ISD	PK, K-12	Mesquite	0.406	626	★★	545	-81
Arlington ISD	PK, K-12	Arlington	0.392	639	★★	691	+52
Everman ISD	PK, KG-12	Everman	0.374	664	★★	741	+77
Crowley ISD	PK, KG-12	Crowley	0.333	714	★	730	+16
Dallas ISD	PK, K-12	Dallas	0.333	715	★	755	+40
Premier High Schools	6-12	Lewisville	0.313	739	★	739	+0
Trinity Basin Preparatory	PK, K-8	Dallas	0.297	760	★	839	+79

continued, next page

FIGURE 37. COMPLETE SCHOOL RANKINGS: ALL SCHOOL DISTRICTS IN FORT WORTH COMPETITOR CITIES (CONTINUED)
INCLUDES DISTRICTS FOR WHICH STANDARDIZED SCORES WERE REPORTED

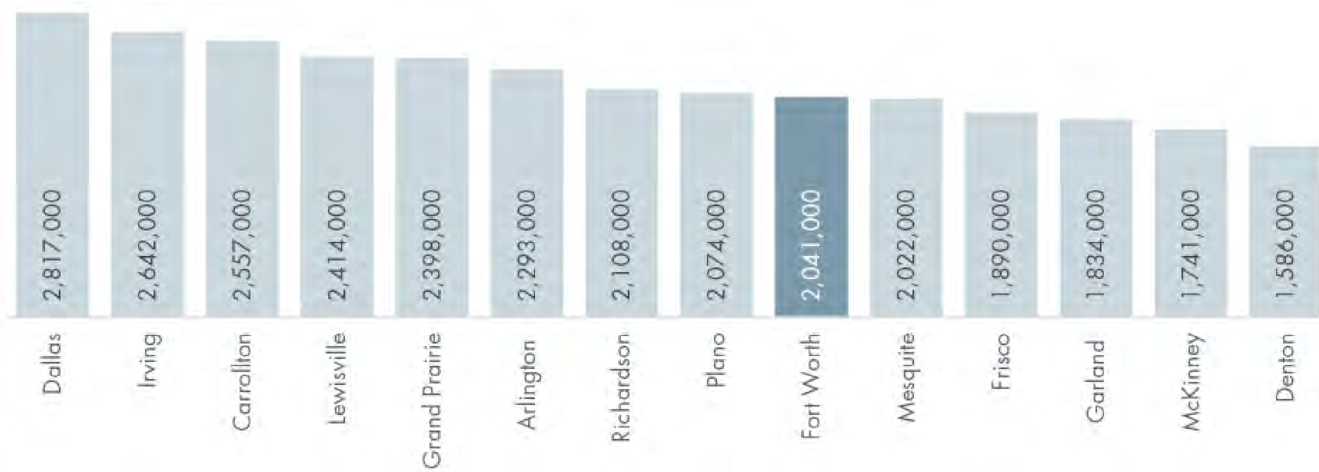
DISTRICTS	GRADES	CITY	SCHOOLDIGGER RANK/RATINGS				
			2016 Score	*2016 Rank*	*2016 Rating*	*2015 Rank*	*Change 2015-16*
Irving ISD	PK, K-12	Irving	0.285	768	★	753	-15
Castleberry ISD	PK, K-12	Fort Worth	0.277	774	★	846	+72
Fort Worth ISD	PK, K-12	Fort Worth	0.263	782	★	780	-2
La Academia De Estrellas	PK, K-8	Dallas	0.219	824	★	830	+6
Legacy Preparatory	K-9	Dallas	0.182	857		900	+43
A W Brown-Fellowship L'ship Academy	PK, K-8	Dallas	0.164	868		771	-97
Kipp Dallas-Fort Worth	PK, K-8	Dallas	0.153	875		590	+285
Gateway Charter Academy	PK, K-12	Dallas	0.120	902		883	-19
Texans Can Academies	9-12	Dallas	0.071	920		944	+24
Academy of Dallas	PK, K-8	Dallas	0.071	921		940	+19
Winfree Academy Charter Schools	9-12	Irving	0.063	923		939	+16
Evolution Academy Charter School	9-12	Richardson	0.059	924		(n/a)	(n/a)
Academy for Academic Excellence	6-12	Dallas	0.025	928		946	+18

Source: Compiled by TIP Strategies via Schooldigger.com (last updated October 6, 2016).
Notes: Schooldigger calculates school rankings based on test scores released by the Texas Education Agency (TEA). Districts for which standardized test scores were not reported by TEA are excluded. Stars are assigned based on the distribution of school districts in the state: 5 stars= 90th percentile, 4 stars = 70th to 90th percentile, 3 stars = 50th to 70th percentile, 2 stars = 30th to 50th percentile, 1 star = 10th to 30th percentile, no stars = 10th percentile and below. Shaded districts include those located entirely or partly within the Fort Worth city limits.

LABOR FORCE ACCESS

Forty-five-minute drive-time regions were created for each of the Dallas-Fort Worth metro area peers and the domestic benchmarks. Dallas had the highest number of workers within this distance among the cities analyzed, followed by mid-cities communities (Irving, Grand Prairie, and Arlington) and North Dallas cities (Carrollton, Lewisville, Richardson, and Plano). While Fort Worth was surpassed on this indicator by more than half the competitors in the region, the size of the potential labor pool for Fort Worth was significantly larger than any of the domestic benchmarks.

FIGURE 38. AVAILABLE LABOR: FORT WORTH VS. COMPETITOR CITIES
ESTIMATED NUMBER OF WORKERS WITHIN A 45-MINUTE DRIVE



Sources: Emsi 2017.2; QCEW, non-QCEW, Self-Employed (Resident Worker data); TIP Strategies.
Note: Figures represent the sum of Emsi's Resident Worker data series for ZIP codes where approximately 50 percent or more of the land area falls within the 45-minute drive time boundary (as delineated by Emsi).

REAL ESTATE AVAILABILITY

As discussed in Volume 1, Fort Worth's vast reserves of vacant properties and redevelopment sites provides the city a distinct advantage. Estimates from the North Central Texas Council of Governments reveal that Fort Worth's vacant developable land (over 70,000 acres) exceeds every other city in the Dallas-Fort Worth metro area. Fort Worth has more than twice the area of vacant land of Dallas (less than 30,000 acres) and has more developable acreage than the four largest cities in Collin County combined (Frisco, McKinney, Plano, and Allen).

Yet despite the wealth of available land, the city has not captured its share of new development, particularly in terms of commercial office construction. As of the end of the first quarter of 2017, more than 6.4 million square feet of office space was under construction in the Far North Dallas submarket, a narrowly contained area that extends from the north side of the LBJ Freeway (in Dallas) up to and beyond the Sam Rayburn Tollway (in Frisco) and includes the north/south corridors along the Dallas North Tollway and Preston Road. By comparison, fewer than 500,000 square feet of construction was underway for the same period in Fort Worth. The city fares better in terms of industrial development, which is more balanced across the metro area. JLL's North Fort Worth submarket was second only to the South Dallas market in terms of the square footage of industrial projects currently under construction (as of Q1 2017).

FIGURE 39. LAND USE (PERCENT OF TOTAL)
DALLAS-FORT WORTH METRO AREA CITIES WITH POPULATIONS OF 100,000+

	% Vacant	% Single family	% Infrastructure	% Commercial/Industrial	% Dedicated open	% Institutional	% Water	% Multi-family	% Other residential	% Under construction
Denton	46.4%	14.0%	10.8%	6.0%	7.9%	3.9%	0.9%	1.7%	7.5%	1.0%
Frisco	44.9%	19.4%	14.3%	6.4%	7.2%	3.7%	0.8%	1.1%	2.1%	0.2%
McKinney	40.0%	19.6%	14.7%	6.4%	10.0%	4.1%	1.1%	1.7%	2.0%	0.4%
Fort Worth	31.9%	19.6%	19.1%	10.9%	9.1%	3.3%	2.8%	1.8%	1.2%	0.4%
Mesquite	29.8%	26.5%	20.7%	9.2%	5.9%	4.9%	0.4%	2.3%	0.3%	0.0%
Allen	25.6%	30.7%	19.6%	8.1%	9.6%	4.3%	0.3%	1.5%	0.1%	0.2%
Grand Prairie	17.4%	17.5%	15.5%	12.4%	19.8%	2.4%	11.6%	1.9%	1.4%	0.1%
Garland	13.0%	33.8%	22.6%	13.0%	8.5%	4.8%	0.5%	3.3%	0.1%	0.4%
Irving	12.1%	17.7%	28.7%	18.1%	11.4%	4.0%	1.7%	5.6%	0.4%	0.3%
Dallas	11.9%	23.6%	20.5%	11.5%	12.5%	3.3%	12.0%	4.2%	0.4%	0.1%
Plano	11.0%	32.2%	21.8%	14.2%	10.5%	4.8%	0.5%	4.5%	0.5%	0.0%
Lewisville	10.6%	12.8%	18.1%	12.1%	22.7%	2.8%	15.3%	3.7%	1.6%	0.2%
Arlington	9.9%	33.0%	20.8%	11.3%	10.9%	5.2%	3.6%	3.9%	1.3%	0.1%
Richardson	7.0%	33.3%	23.1%	16.3%	10.0%	5.4%	0.4%	3.9%	0.3%	0.2%
Carrollton	6.4%	24.6%	21.7%	18.4%	18.2%	3.6%	2.5%	4.1%	0.1%	0.3%

Source: North Central Texas Council of Governments.

FIGURE 40. DALLAS-FORT WORTH OFFICE MARKET OVERVIEW BY SUBMARKET, 2017 Q1

Submarket	Under Constr. (SF)	Inventory (SF)	Construction Rate	Vacancy Rate (%)	Asking Rent ($)
Far North Dallas	6,443,100	57,743,297	11.2%	13.5%	$27.55
Uptown/Turtle Creek	1,295,323	14,664,921	8.8%	10.5%	$37.46
Las Colinas	987,395	39,587,092	2.5%	13.4%	$24.09
Mid-Cities	892,627	40,406,416	2.2%	12.4%	$21.71
Richardson/Plano	812,701	40,835,578	2.0%	15.0%	$24.20
Dallas CBD	353,637	33,581,393	1.1%	22.5%	$25.67
East Dallas	293,921	13,763,001	2.1%	10.6%	$23.44
Ft Worth CBD	280,489	11,806,524	2.4%	10.3%	$25.05
Preston Center	183,589	5,885,416	3.1%	8.4%	$36.24
Lewisville/Denton	167,104	12,977,935	1.3%	7.5%	$22.16
Stemmons Freeway	72,630	14,945,132	0.5%	23.3%	$15.78
South Ft Worth	66,236	19,742,816	0.3%	8.0%	$23.09
North Fort Worth	42,003	6,551,118	0.6%	6.2%	$20.62
Southwest Dallas	6,300	7,231,323	0.1%	7.8%	$17.28
Central Expressway	0	15,154,527	0.0%	10.1%	$26.88
LBJ Freeway	0	22,594,714	0.0%	22.3%	$22.00
Northeast Ft Worth	0	5,400,765	0.0%	34.1%	$19.18
Dallas/Fort Worth Total	**11,897,055**	**362,873,968**	**3.3%**	**14.3%**	**$24.52**

FIGURE 41. DALLAS-FORT WORTH INDUSTRIAL MARKET OVERVIEW BY SUBMARKET, 2017 Q1

Submarket	Under Constr. (SF)	Inventory (SF)	Construction Rate	Vacancy Rate (%)	Asking Rent ($)
South Dallas Ind	5,050,321	93,378,550	5.4%	9.1%	$8.47
North Ft Worth Ind	4,783,589	88,270,104	5.4%	7.1%	$4.40
Great SW/Arlington Ind	3,512,032	105,927,076	3.3%	8.1%	$4.52
Northwest Dallas Ind	2,690,553	108,423,645	2.5%	5.8%	$6.05
Northeast Dallas Ind	2,358,886	114,139,487	2.1%	6.1%	$6.02
DFW Airport Ind	2,210,346	73,149,630	3.0%	5.5%	$5.62
South Stemmons Ind	534,233	133,966,547	0.4%	6.4%	$6.17
East Dallas Ind	351,860	50,434,697	0.7%	5.5%	$4.28
South Ft Worth Ind	197,500	89,003,219	0.2%	3.7%	$5.59
Dallas/Fort Worth Total	**21,689,320**	**856,692,955**	**2.5%**	**6.5%**	**$5.61**

Sources (both charts this page): CoStar, JLL.

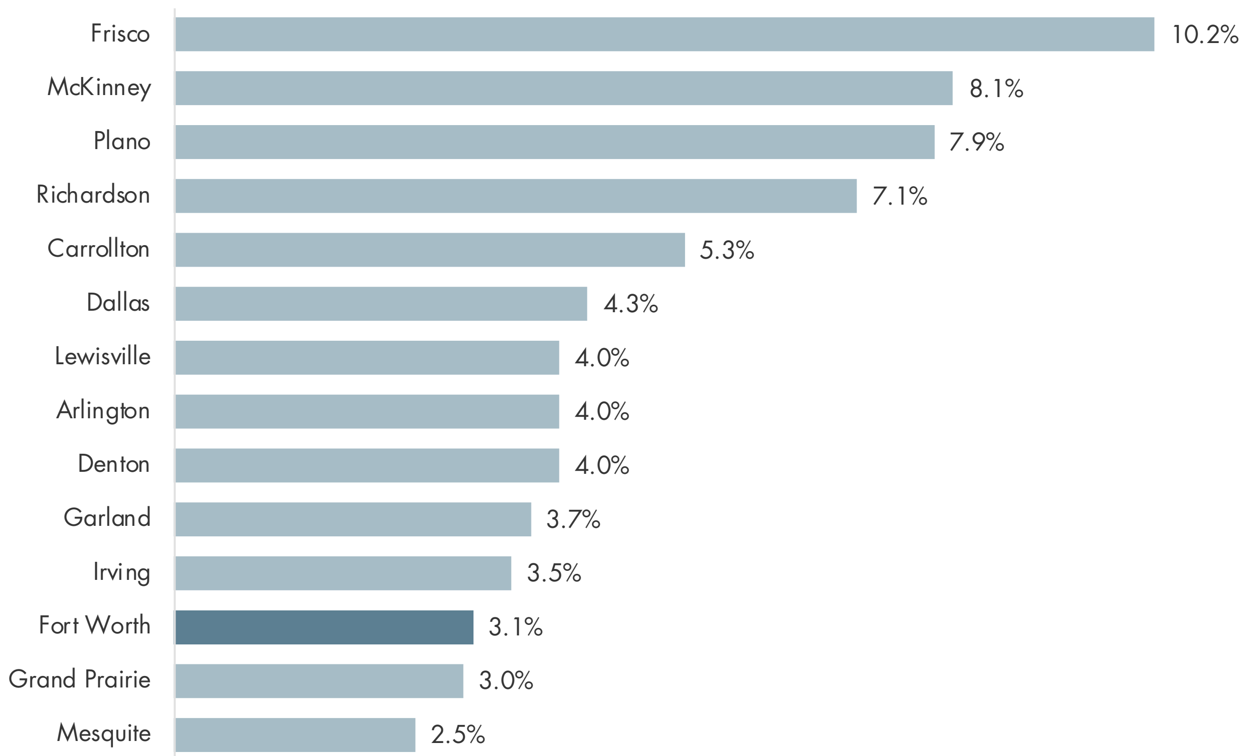
PERCENT WORKING FROM HOME

As discussed previously, an argument can be made for using the percent of people working at home as a proxy for the desirability of an area. Several North Dallas suburban communities rank highly on this measure among the metro area competitors analyzed. Topping the list is Frisco, where roughly one in ten workers indicated that they worked from home in 2015.

At the opposite end of the spectrum, just over 3 percent of Fort Worth's workforce worked from home during the same period. Mesquite had the lowest percentage (2.5 percent) roughly one-half the national average of 4.6 percent.

FIGURE 42. PERCENT WORKING AT HOME

CITY OF FORT WORTH COMPARED TO METRO AREA COMPETITORS, SHARE OF WORKERS AGE 16+



Source: ACS, Census Bureau, 2015, 1-yr estimates.
Note: Choice of indicator based on urbanSCALE.com blog post, *"Finally, a Single Data Point for Measuring Your City's Quality of Place,"* July 13, 2015. Written by John Karras, urbanSCALE.com founder and TIP Strategies consultant.

GOAL 1. ESTABLISH FORT WORTH'S COMPETITIVE EDGE.	Responsible Partners (suggested lead in **bold**)	Timeframe Ongoing	 Year 1 (2018)	 Years 2-3 (2019-2020)	 Years 4-5 (2021-2022)
Initiative 1.1. Brand & Image. Elevate the profile of Fort Worth at the regional, national, and international levels.					
1.1.1 Create a Fort Worth Real Estate Working Group.	**CFW, REC**, Chamber, Sundance, Hillwood, area real estate brokers and developers		■		
1.1.2. Launch a national strategy for generating attention and interest for Fort Worth among major real estate development and commercial brokerage firms.					
1.1.2.1. Host a national conference of real estate brokers and developers.	**CFW, REC**, Chamber, Sundance, Hillwood, area real estate brokers and developers			■	
1.1.2.2. Hold a major real estate competition focused on a specific project in Fort Worth, similar to the Commercial Real Estate Development Association (NAIOP) University Challenge.	**CFW, REC**, Chamber, Sundance, Hillwood, area real estate brokers and developers			■	
1.1.2.3. Host a CoreNet Global event in Fort Worth.	**CFW, REC**, Chamber, CVB, Sundance, Hillwood, area real estate brokers and developers				■
1.1.2.4. Host the annual meeting of the Urban Land Institute (ULI) in Fort Worth.	**CFW, REC**, Chamber, CVB, Sundance, Hillwood, area real estate brokers and developers				■
1.1.3. Launch a real estate-focused foreign direct investment (FDI) strategy to build awareness of Fort Worth among global real estate investors.					
1.1.3.1. Leverage Hillwood, Sundance Square, and DFW International Airport's connections with international investors and business executives to build this strategy.	**CFW, REC**, DFW, Chamber, Sundance, Hillwood, area real estate brokers and developers	■	■		
1.1.3.2. Host a symposium focused on real estate capital markets, bringing in major institutional real estate investment firms and capital management firms from across the world.	**CFW, REC**, DFW, Chamber, CVB, Sundance, Hillwood, area real estate brokers and developers, area private equity firms	■	■		
1.1.4. Engage local chapters of real estate organizations, such as ULI or NAIOP, to host a design competition featuring a location in Fort Worth.					
1.1.4.1. Work with the Real Estate Council of Greater Fort Worth to continue events like the Panther Den urban design competition (an event that engages young and emerging professionals in the area real estate industry) and to create new events that put a spotlight on Fort Worth as a location for commercial real estate development.	**REC**, CFW, Chamber, area real estate brokers and developers	■			
1.1.4.2. Competitors would form interdisciplinary teams with members from a variety of fields, such as architecture, planning, and real estate, and would propose ideas that are set within real-life constraints.	**REC**, CFW, Chamber, area real estate brokers and developers		■		
1.1.4.3. Members of the real estate community in the Dallas-Fort Worth metro area could get involved by helping to select a site, judge the competition, or host professional development events in association with the competition.	**REC**, CFW, Chamber, area real estate brokers and developers		■		
1.1.5. Work closely with Fort Worth ISD, TCC, Tarrant County, and other public-sector entities in the community to identify underutilized properties and position them for public-private redevelopment.	**CFW**, FWISD, TCC, Tarrant County, REC, area real estate brokers and developers	■			
1.1.5.1. Fort Worth ISD is currently evaluating its portfolio of non-academic properties (including its headquarters office near the West Seventh Street district) for potential redevelopment partnerships.	CFW, **FWISD**, REC, area real estate brokers and developers		■		
1.1.5.2. Work with the ISD to ensure that the economic development potential of these properties is prioritized as part of any sale or redevelopment plans.	**CFW**, FWISD, REC, area real estate brokers and developers	■			
1.1.6. Identify and pursue Fort Worth expansion of regional trade associations, professional groups, and other special interest groups that are currently based in Dallas, but are meant to serve the entire metro area.					
1.1.6.1. Start by inviting Dallas-based regional associations to host meetings in Fort Worth.	CFW, **Chamber**	■			
1.1.6.2. Encourage the creation of Fort Worth chapters of regional associations to serve Tarrant County and surrounding areas.	CFW, **Chamber**	■			
Initiative 1.2. Marketing & Target Industry Recruitment. Attract new investments and businesses into the community, focusing on target industries that align with Fort Worth's assets					
1.2.1. Design marketing materials around Fort Worth's target industries.	**Chamber**, CFW		■		
1.2.2. Enhance the Fort Worth economic development program's online presence to communicate desired messages to target audiences.					
1.2.2.1. Create a new City of Fort Worth Economic Development Department website. Redesign the site so that it features two simple categories: the City's specific functions related to economic development and a prominent redirect link to the Fort Worth Chamber's economic development website, clearly defining the Chamber's site as the community's primary online portal for economic development prospects, site location consultants, commercial real estate brokers, and other business decision-makers.	**CFW**, Chamber		■		
1.2.2.2. Add new features and information onto the Chamber's economic development website.	**Chamber**, CFW, area businesses		■		
1.2.2.3. Coordinate regularly with partners to maintain consistent messages and marketing themes.	**Chamber**, CFW, other partners	■			
1.2.2.4. Actively manage other online sources with city information, such as Fort Worth's Wikipedia page, to ensure they depict an accurate and positive image of the city as a business location.	**CFW**, Chamber	■			
1.2.3. Adopt creative and highly targeted marketing tactics.					
1.2.3.1. Launch new initiatives to partner with DFW International Airport to market Fort Worth as a business and talent destination.	**Chamber**, CFW, DFW			■	
1.2.3.2. Launch a quarterly direct mail campaign to real estate brokers and/or "A" leads that contains a locally made product that ties in with their industry or a relevant community asset.	**Chamber**, CFW			■	
1.2.3.3. Generate leads for economic development prospects from non-traditional sources (e.g., Google Alerts, lease expiration data).	**Chamber**, CFW	■			
1.2.4. Capitalize on one of the most fertile business recruitment environments in America: the Dallas-Fort Worth metro area.					
1.2.4.1. Take a more aggressive stance toward the recruitment of high-profile corporate and regional HQs.	**Chamber**, CFW	■			
1.2.4.2. Position Fort Worth as a desirable landing spot for emerging companies in the region.	**Chamber**, CFW, TECHFW	■			
1.2.4.3. Create a detailed package of promotional materials aimed at Fort Worth commercial real estate brokers, describing the attractive environment in Fort Worth for business relocation.	**Chamber**, CFW, REC		■		
1.2.4.4. Promote Fort Worth as the metro area's young, up-and-coming location for high-growth startups, tech firms, and young talent.	**Chamber**, CFW, REC, TECHFW, DFWI, NSI, TRVA, Sundance	■			
1.2.5. Work through existing Fort Worth companies to recruit new expansion projects.					
1.2.5.1. Target out-of-market HQs of companies with a major Fort Worth presence.	**Chamber**, CFW, area businesses	■			
1.2.5.2. Partner with Fort Worth's major employers to pursue supply-chain businesses. Start with industries that already have an existing cluster of suppliers and service providers (aerospace, transportation, oil & gas).	**Chamber**, CFW, area businesses	■			
1.2.5.3. Focus on HQ relocations of major corporations within industries that already have a strong Fort Worth presence such as manufacturing and transportation.	**Chamber**, CFW, area businesses	■			
1.2.6. Business recruitment efforts should be location-specific.					
1.2.6.1. Chamber marketing materials should promote and highlight Fort Worth's urban core (downtown, Near Southside, Cultural District, the East Side, and surrounding urban districts).	**Chamber**, CFW, DFWI, Sundance, NSI, SEFWI		■		
1.2.7. Support Alliance's business recruitment strategy. Elevate the role of City support when projects have strong spillover impacts for the city as a whole.					
1.2.7.1. Extend incentives for business recruitment projects in Alliance, while encouraging economic benefits to the city as a whole. These benefits should take the form of high-wage jobs and additional business investments in other parts of the city.	**CFW**, Hillwood	■			
1.2.8. Establish stronger linkages between Fort Worth's tourism and event promotion efforts and its business recruitment activities.					
1.2.8.1. Work closely with the Fort Worth Convention & Visitor's Bureau (CVB) to create strategies for targeted conferences and events that bring in business executives within the city's target industries.	**Chamber**, CVB, CFW	■			
1.2.8.2. Put in place venue-specific strategies for leveraging Fort Worth's major event spaces for target industry recruitment. Work with the CVB to identify and pursue events/conferences that bring business decision-makers into Fort Worth within the city's target industries.	**Chamber**, CVB, CFW, major Fort Worth event venue operators (TCU, TCC, TWU, Alliance)		■		

1.2.8.3. Encourage regional collaboration between the Fort Worth CVB, the Arlington CVB, the Irving CVB, the Dallas CVB, and other tourism promotion groups in the metro area aimed at targeting high-profile international events and conferences that would raise the profile of the entire Dallas-Fort Worth metro area.	Chamber, **CVB**, CFW, regional CVBs	■			
1.2.9. Establish the Chamber as taking the lead role in marketing Fort Worth and the entire Dallas-Fort Worth metro area as part of international business development efforts.					
1.2.9.1. Build a robust understanding of the city's current foreign-owned firms, major foreign direct investments (over time and in recent years), and domestic companies with a global footprint.	**Chamber**, CFW, area international businesses		■		
1.2.9.2. Continue working closely with the Chamber, DFW International Airport, the Dallas Regional Chamber, and the City of Dallas to promote the entire region as a hub for foreign direct investment and expansion/relocation of multinational corporations.	**Chamber**, CFW, DFW, Dallas Regional Chamber, City of Dallas	■			
1.2.9.3. Expand relationships with Fort Worth-based corporations that have an existing international presence, including foreign-owned companies and domestic firms looking to expand their footprint in the global marketplace.	**Chamber**, CFW, area international businesses	■			
1.2.9.4. Strengthen Fort Worth's appeal for international talent and businesses by broadening local foreign language training programs, expanding the presence and activities of international chambers of commerce in Fort Worth, and developing stronger import/export assistance programs.	**Chamber**, CFW, area international businesses	■			
Initiative 1.3. Business Retention & Expansion (BRE). Improve the competitiveness of existing businesses and help them remain and grow in the community.					
1.3.1. Redesign Fort Worth's BRE program to better address the needs of major employers and key industries.					
1.3.1.1. Establish a set of filtering mechanisms to identify target companies as part of the BRE program.	**Chamber**, CFW		■		
1.3.1.2. Coordinate BRE efforts between organizations to fully leverage available resources and relationships and to exchange vital information. This should focus on the Chamber and City relationships (including the Mayor's office), but should also extend to the local business relationships maintained by the Fort Worth Hispanic Chamber (FWHC) and the Fort Worth Metropolitan Black Chamber (FWMBC).	**Chamber**, CFW, HC, MBC	■			
1.3.2. Use Customer Relations Management (CRM) software between the City and the Chamber to better monitor business issues and concerns.					
1.3.2.1. The City and Chamber should use a CRM to track all leads and prospects, including compliance of companies receiving incentives.	CFW, Chamber	■			
1.3.2.2. Explore shared use of technology tools and programs for managing BRE visits and other aspects of Fort Worth's economic development program.	CFW, Chamber	■			
1.3.3. Protect industrial areas from encroachment. Through zoning, work with CFW Planning Department to ensure major current and future employment nodes and districts are protected from incompatible development and					
1.3.3.1. Start with protection efforts aimed directly at maintaining the appropriate land use and zoning regulations in and around the city's three airports (Alliance, Meacham, Spinks) and Naval Air Station Joint Reserve Base (NAS-JRB) Fort Worth.	**CFW**, city airports, NAS-JRB, Chamber	■			
1.3.3.2. Ensure protection for other significant industrial districts with concentrations of manufacturing, transportation, and warehousing businesses that generate heavy truck traffic.	**CFW**, Chamber	■			
1.3.3.3. Work with the real estate community to preserve strategically located sites within emerging employment/business districts (i.e. Chisholm Trail Parkway, Walsh Ranch) to allow and encourage future development of high-value, high density employment nodes.	**CFW**, Chamber, REC	■			
Initiative 1.4. Workforce & Industry Partnerships. Expand collaboration between employers and training providers to address the needs of local industries and build a pipeline of talent to fuel future business growth.					
1.4.1. Expand existing employer-led sector partnerships and create new efforts focused on Fort Worth's target industries to address critical workforce issues facing employers.					
1.4.1.1. Increase Fort Worth's commitment to the DFW Aerospace Consortium's existing programs and promote a greater emphasis on design, R&D, and technology-related skills.	CFW, **Chamber**, WS, TCC		■		
1.4.1.2. Reactivate the North Texas Supply Chain Council and play a leadership role in moving the partnership toward addressing the major innovations and disruptions facing the transportation & logistics sector over the next three to five years.	CFW, **Chamber**, WS, TCC			■	■
1.4.1.3. Actively engage in the other regional industry/workforce partnerships convened by the DFW Regional Workforce Leadership Council: technology, healthcare, and infrastructure.	CFW, **Chamber**, WS, TCC	■			
1.4.2. Launch a new talent initiative [FIND IT. FORT WORTH.] to support employers in their talent recruitment efforts.					
1.4.2.1. Focus the messaging and promotional materials on specific industries, occupations, and employer needs. Also, structure messages to convey Fort Worth's newest and most exciting amenities for talent attraction.	**Chamber**, CFW, area employers			■	
1.4.2.2. Create a talent portal to provide targeted information about employment opportunities, networking events/groups, and information to assist professionals relocating from outside of the region.	**Chamber**, CFW, area employers			■	
1.4.2.3. Work with regional higher education institutions to attract talent from outside the area.	**Chamber**, CFW, area employers	■			
1.4.2.4. Take the FIND IT. FORT WORTH. initiative on the road to provide opportunities for employers to conduct joint marketing efforts aimed at specific pools of talent.	**Chamber**, CFW, area employers			■	■
1.4.3. Engage a broader cross-section of Fort Worth's population in workforce development initiatives.					
1.4.3.1. Encourage more of Fort Worth's existing population to enter the workforce.	Chamber, CFW, **WS**, TCC, HC, MBC	■			
1.4.3.2. Work with young professionals, minority groups, and other underrepresented population groups to better connect them to existing professional development and networking opportunities.	Chamber, CFW, **WS**, TCC, HC, MBC, SteerFW	■			
1.4.3.3. Address significant barriers to entry and re-entry into the workforce through strategies like providing child care through traditional and non-traditional approaches. Encourage major employers, Workforce Solutions, TCC, FWISD, and other partners to develop collaborative childcare models where multiple employers jointly fund and support a childcare facility. Organize a social innovation challenge around childcare and other issues that prevent people from entering the workforce (such as transportation, housing, or criminal records). Invite teams to submit ideas for addressing the challenges through social enterprise. Hold a pitch competition for these ideas, judged by a panel of experts, to choose winners with implementable ideas that could help address workforce barriers. Award grants to winners to help accelerate their ideas to market. Connect these teams with incubator space and other entrepreneurial support resources.	**SteerFW**, Chamber, CFW, WS, TCC, FWISD, major employers			■	
1.4.4. Expand partnerships between Tarrant County Workforce Solutions, K-12 schools, TCC, adult education providers, and other institutions to strengthen the skills of Fort Worth's emerging workforce.					
1.4.4.1. Support the workforce development efforts of the Tarrant County consortium of career and technical education (CTE) directors from ISDs across the county.	Chamber, CFW, WS, TCC, HC, MBC, **FWISD**, TC, area K-12 schools, adult education providers	■			
1.4.4.2. Work with Fort Worth ISD and other area K-12 educational institutions to incorporate more entrepreneurship and business-related coursework (such as Junior Achievement) into their academic programs.	Chamber, CFW, WS, TCC, HC, MBC, **FWISD**, TC, area K-12 schools, adult education providers	■			
1.4.4.3. Encourage Fort Worth ISD and other area K-12 educational institutions to expand their STEM-focused programs at all grade levels. This should include new curriculum and training to match the future workforce needs of target industries.	Chamber, CFW, WS, TCC, HC, MBC, **FWISD**, TC, area K-12 schools, adult education providers	■			

GOAL 2: BECOME A HUB FOR CREATIVE BUSINESSES.	Responsible Partners (suggested lead in **bold**)	Timeframe Ongoing	 Year 1 (2018)	 Years 2-3 (2019-2020)	 Years 4-5 (2021-2022)
Initiative 2.1. Near Southside Medical Innovation District. Enhance and expand the Near Southside's role as a medical innovation district and position it to become the most livable medical district in the US.					
2.1.1. Formally designate the Near Southside as a "medical innovation district."					
2.1.1.1. Formalize additional public investments that enhance walkability and pedestrian connectivity. Include support for broadband that creates a sense of extended connectivity across all devices, both wired and wireless.	**CFW**, NSI, TCU & UNTHSC Med School		■		
2.1.1.2. Create incentives for talent recruitment (e.g., a nationally recognized life sciences researcher) that would advance the district and attract additional research staff.	**CFW**, NSI, TCU & UNTHSC Med School		■		
2.1.1.3. Invite the Brookings Institution and the Project for Public Spaces (PPS) to evaluate the Near Southside as part of their Bass Initiative on Innovation and Placemaking. Use this to generate national attention about the district and to uncover strategies for accelerating its development.	**CFW**, NSI, TCU & UNTHSC Med School		■		
2.1.2. Invest additional resources into the Near Southside, committing to further enhancements.					
2.1.2.1. Continue encouraging the growth of urban residential developments in the district.	**CFW**, NSI, REC	■			
2.1.2.2. Avoid national chains or big-box retailers; instead promote the district as a hub for local, unique small businesses.	**CFW**, NSI, REC	■			
2.1.2.3. Position Magnolia Avenue as both "hip and authentic" – an urban corridor that attracts new investment (akin to South Congress Avenue in Austin).	**CFW**, NSI, REC	■			
2.1.3. Establish a task force to coordinate future public, private, and nonprofit investments associated with the new TCU-UNTHSC School of Medicine and other medical facilities in the Near Southside to support the district's development as a hub for medical innovation.					
2.1.3.1. Research the possibility of using the location near JPS Health to house new state-of-the-art facilities for the TCU-UNTHSC School of Medicine. Evaluate other real estate options within the center of the Near Southside for this purpose.	**CFW**, NSI, TCU & UNTHSC Med School, JPS Health, REC		■		
2.1.3.2. Include innovation, medical talent, and business attraction in the discussions about how to coordinate investments.	**CFW**, NSI, TCU & UNTHSC Med School, JPS Health, REC, TECHFW, Chamber		■		
2.1.3.3. The task force should include CEO-level leadership from the following organizations: TCU-UNTHSC School of Medicine, TECH Fort Worth, Near Southside Inc., Downtown Fort Worth Inc., TCU, TCC, other medical institutions, the Fort Worth Life Sciences Coalition, and other relevant groups.	**CFW,** NSI, TCU & UNTHSC Med School, JPS Health, REC, TECHFW, Chamber, DFWI, TCU, TCC, Fort Worth Life Sciences Coalition, other medical institutions		■		
2.1.4. Create a citywide Internal Review Board (IRB) through a collaboration of medical institutions in Fort Worth.	UNTHSC, **TCU & UNTHSC Med School**, area medical institutions			■	
2.1.5. Develop an inventory of wet lab space in the Dallas-Fort Worth metro area to inform the market potential for additional wet lab space in the Near Southside. Near Southside Inc., TECH Fort Worth, and other partners could help fund this study.	NSI, **TECHFW**, area medical institutions, REC		■		
2.1.6. Capitalize on the demand for medical office space in the Near Southside to develop joint commercial office projects that include a combination of medical office space and standard Class A commercial office space.	**NSI**, REC, area real estate brokers and developers	■			
Initiative 2.2. Entrepreneurship. Build on the dynamic environment that embraces and fuels high-growth business in Fort Worth. Ensure that expanding startups see the city as hospitable to their continuing growth.					
2.2.1. Expand the reach of local entrepreneur networking events and create new opportunities for face-to-face connection among the city's startup and tech communities.					
2.2.1.1. Elevate the role of TECH Fort Worth as a connector/convener to address the need for better and more frequent networking opportunities aimed at entrepreneurs, young professionals, and tech workers.	**TECHFW**, Chamber	■			
2.2.1.2. Design reverse-pitch competitions to engage major corporations and other organizations in Fort Worth with needs for innovation.	**TECHFW**, Chamber	■			
2.2.1.3. Pursue specific tactics to enhance entrepreneur networking in Fort Worth, such as an online calendar of networking events, hosted by TECH Fort Worth.	**TECHFW**, Chamber	■			
2.2.1.4. Build stronger connections between Fort Worth's startup/tech community and local and regional higher education institutions.	**TECHFW**, Chamber, TCU, UTA, TCC, TWU, TSU, A&M Law, UNT, UTD	■			
2.2.2. Expand access to capital in Fort Worth for high-growth companies.					
2.2.2.1. Further leverage the city's high net-worth individuals to create a venture capital fund in Fort Worth.	**TECHFW**, Chamber				■
2.2.2.2. Engage the city's private equity and family wealth management/investment offices to explore the potential for developing a larger industry cluster and/or focus area for wealth management.	**TECHFW**, Chamber			■	
2.2.2.3. Continue supporting the success of Cowtown Angels.	**TECHFW**, Chamber	■			
2.2.3. Provide the real estate space desired by tech firms and creative workers.					
2.2.3.1. Expand the co-working space options available in Fort Worth.	**TECHFW**, CFW, Chamber, REC, DFWI, NSI, Sundance	■			
2.2.3.2. Market Fort Worth's urban core to national players (e.g., WeWork).	TECHFW, CFW, Chamber, REC, **DFWI,** NSI, Sundance	■			
2.2.3.3. Reinvigorate the over 600,000 square feet T&P Warehouse building on the south end of downtown as a bold new co-working space. Position it as a hub for regional, domestic, and international co-working companies.	TECHFW, **CFW**, DFWI, Chamber				■
2.2.3.4. In addition to providing office space demanded by tech firms, work with the real estate community to create additional flex space for high-growth firms with a need for small-scale manufacturing and warehouse space.	TECHFW, **CFW**, Chamber, REC			■	
2.2.4. Position TECH Fort Worth as a lead player in the MassChallenge Texas expansion into the Dallas-Fort Worth	**TECHFW**, CFW, Chamber	■			
Initiative 2.3. Broader Promotion of the Arts. Expand the connection between the arts community and tech entrepreneurs as well as established businesses.					
2.3.1. Raise the profile of the Main Street Fort Worth Arts Festival to make it an event with national and international visibility. Re-envision the festival to explore the linkage between graphic arts and software gaming.	**DFWI**, CVB, ACFW, Chamber, CFW			■	
2.3.2. Use the Arts Council of Fort Worth as a vehicle for the attraction of artists, graphic designers, and related creative individuals.	**ACFW**, CFW, Chamber	■			
2.3.3. Leverage the City's involvement on the Council to engage major employers in support of the arts.	**ACFW**, CFW, major employers	■			
2.3.4. Provide additional support (including funding) to Fort Worth Film Commission.	**CFW**, CVB, ACFW			■	
Initiative 2.4. Establish a "Futures Forum" at the City. Create a formal working group, led by the mayor, that addresses city issues from a "futures perspective." Implicit in this initiative is the recognition that major public					
2.4.1. Create a Futures Forum for the City of Fort Worth, modeled on Fort Collins.	**CFW**		■		
2.4.2. Use the Futures Forum to address purchasing options. Identify major capital expenditures anticipated by the City and invite tech companies to offer non-traditional solutions.	**CFW**			■	
2.4.3. Draw upon the City Initiatives for Technology, Innovation, and Entrepreneurship (CITIE) as a resource to inform the city's long-range investment decisions.	**CFW**			■	

GOAL 3: ENSURE COMMUNITY VITALITY.	Responsible Partners (suggested lead in **bold**)	Timeframe Ongoing	Year 1 (2018)	Years 2-3 (2019-2020)	Years 4-5 (2021-2022)
Initiative 3.1. Downtown Fort Worth. Accelerate downtown Fort Worth's emergence as the premier mixed-use business district in Texas.					
3.1.1. Rapidly increase the density of residential development in downtown Fort Worth and surrounding urban districts.					
3.1.1.1. Set specific targets for new housing units in the urban core.	**CFW**, DFWI, Sundance, NSI, TRVA	■			
3.1.1.2. Create incentives to encourage high-density residential development in downtown and surrounding districts (e.g., Panther Island, Near Southside).	**CFW**, DFWI, Sundance, NSI, TRVA		■		
3.1.2. Encourage higher education expansions in downtown Fort Worth through the continued growth of existing downtown institutions (TCC, UTA, and Texas A&M Law School).					
3.1.2.1. Encourage other Fort Worth and regional higher education institutions to establish a presence in the downtown. This would include TCU, TWU, Tarleton State University, and even the University of North Texas.	CFW, TCU, TCC, TSU, UTA, UNT, A&M Law	■			
3.1.3. Facilitate collaboration between Fort Worth's two major anchor districts: downtown and Alliance.					
3.1.3.1. Focus on enhancing business partnerships among firms within both districts.	**Chamber**, CFW, CDFWI, Sundance, Hillwood	■			
3.1.3.2. Encourage greater collaboration between the lead-generation and business development activities in the two zones. Focus on partnerships between Alliance and Sundance Square on major prospect visits (e.g., Facebook) as well as international business missions (inbound and outbound).	**Chamber**, CFW, DFWI, Sundance, Hillwood	■			
3.1.3.3. Explore the creation of City incentive programs to facilitate greater collaboration and new business investment in the two areas.	Chamber, **CFW**, DFWI, Sundance, Hillwood		■		
3.1.3.4. Promote downtown as a location for specific functions related to Alliance firms (e.g., a downtown design center for IKEA).	**Chamber**, CFW, DFWI, Sundance, Hillwood	■			
3.1.4. Identify specific locations for downtown business attraction and future redevelopment.					
3.1.4.1. Focus on the following specific sites and types of sites: TCC's Radio Shack campus, the six downtown XTO properties, the &P Warehouse building and adjacent properties along the CBD portion of the Lancaster Avenue corridor, surface parking lots, and underutilized and well-positioned government-owned properties.	CFW, **DFWI**, Sundance, Chamber	■			
3.1.4.2. Work with downtown landowners to understand site potential for business attraction.	CFW, **DFWI,** Sundance, Chamber	■			
3.1.5. Encourage business expansion and relocation from within Fort Worth to the downtown area.					
3.1.5.1. Create a pilot project to encourage tech workers to relocate to downtown Fort Worth from other office locations in the city.	CFW, Chamber, **DFWI**, local employers, TECHFW		■	■	
3.1.6. Promote downtown Fort Worth and surrounding urban districts as a test bed for "smart city" projects and forward-looking civic innovation.					
3.1.6.1. Launch a Request for Expressions of Interest (RFEI) marketed to leading transportation innovation firms to begin positioning downtown Fort Worth as the first "driverless" downtown district in the US.	**CFW**, DFWI, NSI, TRVA, Sundance, Oncor, TECHFW, Chamber		■		
3.1.6.2. Partner with innovative Fort Worth and regional companies to explore ways to test and deploy new technologies in the downtown district. This should include local telecom providers (e.g., AT&T, Verizon) and energy providers (e.g., Oncor, CoServe).	**CFW**, DFWI, NSI, TRVA, Sundance, Oncor, TECHFW, Chamber, area companies		■		
3.1.6.3. Promote the use of PoE (Power over Ethernet) technology developed in partnership with Cisco Systems for the downtown Marriott Autograph Collection hotel (developed by Sinclair Holdings LLC) as a pioneering approach toward optimizing building operations such as interior and exterior lighting and other building systems.	**CFW**, DFWI, NSI, TRVA, Sundance, Oncor, TECHFW, Chamber		■		
3.1.7. Encourage high-density, mixed-use corridor development to strengthen the linkages between downtown Fort Worth and surrounding urban districts.					
3.1.7.1. Make key infrastructure investments to enhance the transportation connections (including pedestrian and bike modes) between Sundance Square and the following areas: the Cultural District, Near Southside, the 41-acre Butler Place housing redevelopment project just east of downtown, and Panther Island.	**CFW**, DFWI, NSI, TRVA, Sundance	■			
3.1.7.2. Evaluate and revise zoning and land use regulations to allow and encourage dense mixed-use development (office, hotel, retail/restaurant, and residential) along key corridors radiating out from downtown Fort Worth.	**CFW**, DFWI, NSI, TRVA, Sundance	■			
3.1.8. Expand the use of "tactical urbanism" methods for activating empty spaces and underutilized properties in downtown and surrounding parts of the urban core.					
3.1.8.1. Host alley fairs, PARK(ing) Day events (temporarily turning an on-street parking spot into a public space), and other events to raise the profile of downtown as the city's center of gravity. Focus on lesser-known or underutilized areas of downtown to build a stronger sense of awareness around the possibilities for new development or business growth in distinct sub-districts within downtown.	CFW, **DFWI**, NSI, TRVA, Sundance, CVB	■			
3.1.8.2. Bring in the Project for Public Spaces, the Better Block Project, and other groups with experience implementing tactical urbanism projects for a forum/event to showcase and discuss opportunities for enhancing downtown Fort Worth's urban appeal through creative tactics.	CFW, **DFWI**, NSI, TRVA, Sundance, CVB			■	
3.1.9. Work closely with the Trinity River Vision Authority to position Panther Island as one of the premier urban mixed-use residential districts in the US.					
3.1.9.1. Encourage rapid growth of high-density residential development in Panther Island.	**CFW**, TRVA	■			
3.1.9.2. Over time, as the district's population base grows, pursue business development within the district.	**CFW**, TRVA, Chamber			■	■
3.1.9.3. Support the addition of amenities, including retail and restaurant space, as the residential base within the district grows large enough to generate its own demand for commercial development.	**CFW**, TRVA, Chamber			■	■
3.1.9.4. Preserve key sites within Panther Island for future corporate HQ locations. Begin working in the near future (in 2018 and 2019) to create business plans for specific sites in Panther Island that would be ideal for future commercial office development.	**CFW**, TRVA, Chamber	■	■	■	
3.1.10. Leverage Fort Worth's downtown tourism assets for broader economic growth.					
3.1.10.1. Expand the downtown hotel base to generate a higher level of activity, investment, and business development potential. Based on the goals of this plan, set specific targets for new hotel rooms in the urban core.	**CFW**, CVB, DFWI, Sundance	■			
3.1.10.2. Commission a CBD and citywide hotel market study to provide a detailed understanding of the market opportunities for additional hotel development. Draw upon findings from the 2014 Hunden Strategic Partners' hotel and convention center feasibility study. If the market study indicates stronger levels of demand than the specific numbers of additional hotel rooms in the urban core laid out above, increase those targets to respond to market demand.	CFW, **CVB**			■	
3.1.10.3. Encourage the development of new boutique hotels in the city's urban core to enhance the appeal of downtown and surrounding districts.	**CFW**, CVB, DFWI, Sundance, NSI, TRVA	■			
Initiative 3.2. Neighborhood Alignment. Align neighborhood assets (people, businesses, and real estate) to benefit from and support citywide economic growth.					
3.2.1. Focus City investments along specific corridors and at nodes of existing business activity.					
3.2.1.1. Apply an internal due-diligence process in advance of any major City-led investments intended to revitalize specific neighborhoods.	**CFW**	■			
3.2.1.2. Investments that enhance the economic potential of a target area (such as an Urban Village) include broadband internet investments in under-served portions of the city, streetscape improvements that enhance a corridor's appeal for pedestrians and cyclists, and storefront/facade improvements for buildings along a commercial street.	**CFW**	■			
3.2.2.2. Work with the FWHC and the FWMBC and other partners (such as TWU and TCC) to launch a proactive marketing initiative that dispels the misperceptions and exaggerations about challenged neighborhoods in Fort Worth, especially on the East Side.	CFW, **HC, MBC**, TWU, TCC, REC	■			
3.2.2. Encourage substantial new housing investment and development in the city's under-served neighborhoods.					
3.2.2.1. Provide developer incentives for the creation of new high-quality housing stock on vacant properties.	**CFW**, REC			■	■
3.2.2.2. Work with the FWHC and the FWMBC and other partners (such as TWU and TCC) to launch a proactive marketing initiative that dispels the misperceptions and exaggerations about challenged neighborhoods in Fort Worth, especially on the East Side.	**CFW**, REC, HC, MBC, TWU, TCC, Chamber, SEFWI			■	■
3.2.3. Use City-owned land and other publicly owned properties (such as FWISD and TCC properties) as a redevelopment tool to encourage investment in specific neighborhoods.					
3.2.3.1. Pursue public/private development offerings through an RFEI (Request for Expressions of Interest) process that gauges demand and tests ideas from area developers for potential redevelopment of specific sites such as Fort Worth ISD's properties near Farrington Field and the ISD's headquarters site near the Cultural District.	**CFW**, FWISD, TCC, TC, REC			■	■
3.2.4. Address transportation needs to better integrate neighborhoods with major employment nodes.					
3.2.4.1. Encourage collaboration between transportation providers, major employers, and other partners to enhance transportation options that connect residents with employment opportunities.	**CFW**, Chamber, FWTA, major employers	■			
3.2.4.2. Consider City takeover of TXDOT roads to facilitate re-design, "complete streets" re-configurations, and take other measures to make major arterial corridors more attractive for redevelopment as mixed-use commercial corridors.	**CFW**		■	■	
3.2.5. Engage local foundations to target specific geographies for economic development.					
3.2.5.1. Host a "Neighborhood Vitality" forum inviting Fort Worth-based foundations and national foundations to discuss options for how philanthropic groups engage in economic development and community development initiatives. Invite representatives from the McKnight Foundation in Minneapolis, the van Beuren Charitable Foundation in Newport, Rhode Island, and other foundations with a track record of investing in local economic development.	**CFW**, CVB, local foundations			■	
3.2.5.2. Leverage higher education assets to provide research, expertise, and other technical assistance.	**CFW**, local foundations, UTA, TCC, TCU, TWU	■			
3.2.5.3. Involve UTA's urban planning master's and PhD programs and the UTA Institute of Urban Studies. Involve TCU's MBA and undergraduate entrepreneurship programs and its Center for Urban Studies. Involve Texas Wesleyan's business programs. Involve TCC as well.	**CFW**, local foundations, UTA, TCC, TCU, TWU	■			
3.2.6. Continue to partner with anchor institutions such as Texas Wesleyan University to spark new investment and development in challenged neighborhoods and corridors with potential for additional commercial and					
3.2.6.1. Work with Texas Wesleyan University to encourage new private sector investment on and adjacent to their campus.	**CFW**, TWU, SEFWI, REC	■			
Initiative 3.3. Small Business Support. Restructure small business assistance based on a communitywide audit.					
3.3.1. Conduct an audit of the small business support mechanisms available in Fort Worth.					
3.3.1.1. Evaluate how small businesses access the resources and support they need.	**CFW**, BAC		■		
3.3.1.2. Assess the ability of Fort Worth's small business support providers to serve the needs of local businesses.	**CFW**, BAC		■		
3.3.1.3. The audit should consider the advantages of moving the City's Office of Business Diversity into the Purchasing Department.	**CFW**, BAC		■		

3.3.1.4. The audit should also evaluate how the FWHC and the FWMBC can further support small business development throughout the city's neighborhoods.	**CFW**, BAC, HC, MBC		■		
3.3.2. Re-focus the role of the BAC to serve as the primary connector/convener to address the need for support mechanisms aimed at small business startups, minority owned firms, and locally-serving businesses.	**BAC**, CFW, TECHFW, Chamber, HC, MBC		■		
3.3.3. Leverage churches and other under-utilized buildings as shared space for co-working, small business development, workforce training, networking, and other purposes that support economic and workforce development within the city's neighborhoods.	**BAC**, CFW, HC, MBC, WS, TCC	■			
3.3.4. Showcase the success of La Gran Plaza, an under-appreciated minority-business success story and quality-of-life asset in Fort Worth.	**BAC**, CFW, HC, MBC, Chamber, REC	■			
3.3.4.1. Use this as a model for other development projects in under-served neighborhoods in the city. Cultivate relationships with minority-focused real estate developers and investors with a track record of creating projects that provide retail and services to under-served populations in urban markets.	**BAC**, CFW, HC, MBC, Chamber, REC	■			
3.3.5. Establish a citywide revolving loan fund to provide "gap" financing for small business expansions, startups, and relocations.					
3.3.5.1. To assist in capitalizing the fund, the City should pursue grants from the Economic Development Administration (EDA), the Department of Housing and Urban Development (HUD), and Community Development Block Grant (CDBG) program funds.	**BAC**, CFW			■	

TOOLS & RESOURCES	**Responsible Partners** (suggested lead in **bold**)	Ongoing	Timeframe Year 1 (2018)	Years 2-3 (2019-2020)	Years 4-5 (2021-2022)
Initiative 4.1. Economic Development Bond Package. Design a citywide bond package to enhance Fort Worth's economic competitiveness through investments in livability, Smart City infrastructure, and business					
4.1.1. Focus the largest share of bond resources on livability investments.					
4.1.1.1. Invest in new trails improvements along Trinity River; connections to Lake Worth and Airfield Falls, Panther Island, Gateway Park in East Fort Worth, Lake Arlington; and other pedestrian and bike amenities.	**CFW**			■	■
4.1.1.2. Create a range of new family- and kid-centric amenities ranging from splash pads and playscapes to rock-climbing walls and science/discovery museums.	**CFW**			■	■
4.1.1.3. Invest in the enhancement of existing parks, ballfields, streetscapes, and other public amenities.	**CFW**			■	■
4.1.2. Focus the second-largest share of bond resources on "Smart City" infrastructure investments.					
4.1.2.1. Create a fully connected traffic signal network (like the Frisco model) to enable the city's signals to communicate with autonomous vehicles.	**CFW**			■	■
4.1.2.2. Invest in communications technology infrastructure, in partnership with private sector service providers, in locations where tech firms and entrepreneurs are most concentrated.	**CFW**			■	■
4.1.3. Focus the third-largest share of bond resources on business development investments.					
4.1.3.1. Allocate funding for infrastructure, real estate space, and other enabling investments to accelerate private sector investment in the Near Southside Medical Innovation District.	**CFW**			■	■
4.1.3.2. Designate funding for infrastructure and real estate space to support the target industry recruitment efforts described in this plan.	**CFW**			■	■
4.1.3.3. Provide funding for specific redevelopment projects with citywide economic benefits.	**CFW**			■	■
4.1.3.4. Include funding for new convention center/event space in downtown Fort Worth.	**CFW**			■	■
4.1.4. Form an economic development bond package working group to build out the details under the three major categories for a major public bond package: 1) livability; 2) Smart City investments; and 3) business development. This group should be led and driven by the City Council.	**CFW**, representatives from core economic development partners		■		
Initiative 4.2. Citywide Incentive Program. Create new incentive tools to encourage business growth within target industries and to facilitate development and redevelopment in designated districts.					
4.2.1. Establish an economic development fund similar to those of Plano and Richardson (through property taxes), and seek creative uses for natural resource extraction revenues.					
4.2.1.1. Allocate a small portion of the City's property tax for an economic development incentive fund.	**CFW**			■	
4.2.1.2. Explore the potential to create another source of funds for economic development using gas-well revenue from Barnett Shale activity within the municipal boundaries of Fort Worth. Use the financial structure of the Arlington Tomorrow Foundation as an example of diverting gas well revenue.	**CFW**		■		
4.2.2. Revise the City tax abatement policy to ensure that future abatements help advance the goals of this plan. Minimize or reduce requirements that make Fort Worth less competitive in comparison with other cities in the					
4.2.2.1. For every tax abatement and other standard incentive awarded to businesses investment and expansion in Fort Worth, establish a requirement for the business to make an effort to establish an "upstream" (high-value input, technology, R&D) function in Fort Worth's urban core.	**CFW**, Chamber			■	
4.2.2.2. Establish clear and simple guidelines for the use of City tax abatements.	**CFW**, Chamber		■		
4.2.3. Create a new incentive program for specific corporate relocations and expansions occupying existing space.					
4.2.3.1. This program should be targeted at technology firms, other professional service firms, and corporate/regional HQs that are not making substantial capital investments.	**CFW**, Chamber, REC, TECHFW		■		
4.2.4. Establish incentive guidelines for public investments that are not typically considered incentives, but function as indirect incentives. This would include infrastructure extensions (roads, water/wastewater, electric, and other utilities) necessary for a new facility.	**CFW**, Chamber, REC		■		
Initiative 4.3. Organizational Alignment. Clarify the roles and responsibilities of Fort Worth's economic development partners; build a shared framework for decision making and ongoing collaboration.					
4.3.1. Commit to a City/Chamber relationship as the core of Fort Worth's economic development program, based on the minimum staffing requirements outlined above, to implement the core economic development functions of this plan.	**CFW**, Chamber		■		
4.3.2. Restructure the City Economic Development Department so that its mission is driven by the goals outlined in this plan.	**CFW**		■		
4.3.2.1. Reposition City funding toward more resources for TECH Fort Worth.	**CFW**, TECHFW			■	
4.3.3. Invest in data subscriptions and analysis tools to support the research and marketing functions of Fort Worth's economic development program.					
4.3.3.1. Provide the research team with subscriptions to national data providers with demographic, economic, and workforce data (e.g., Emsi Developer Deluxe, Esri Community Analyst).	**CFW**, Chamber	■			
4.3.3.2. Use analysis, mapping, and data visualization tools to enhance research, marketing, and responses to RFPs from economic development prospects.	**CFW**, Chamber	■			
4.3.4. Pursue strategic regional collaboration that benefits Fort Worth's economic development potential.					
4.3.4.1. Work closely with NCTCOG to put Fort Worth's growth targets and projections into future plans, models, and federal transportation funding programs.	**CFW**, NCTCOG	■			
4.3.4.2. Seek out logical areas where it would be beneficial to work in concert with the Dallas Regional Chamber (such as international business recruitment) and/or other local economic development organizations.	CFW, **Chamber**, Dallas Regional Chamber, other regional organizations	■			
4.3.4.3. Encourage collaboration between the Fort Worth CVB and other regional CVBs (e.g., Arlington, Irving, Dallas) to promote large-scale events and conferences would benefit the entire region.	**CVB**, regional CVBs, CFW, Chamber	■			

Glossary of Organizations

Abbreviation	Organization
ACFW	Arts Council of Fort Worth
CFW	City of Fort Worth
DFW	DFW International Airport
DFWI	Downtown Fort Worth, Inc.
BAC	Fort Worth Business Assistance Center
Chamber	Fort Worth Chamber
CVB	Fort Worth Convention & Visitors Bureau
HC	Fort Worth Hispanic Chamber
FWISD	Fort Worth Independent School District
MBC	Fort Worth Metropolitan Black Chamber
FWTA	Fort Worth Transportation Authority
Hillwood	Hillwood
NSI	Near Southside, Inc.
NCTCOG	North Central Texas Council of Governments
Oncor	Oncor
REC	Real Estate Council of Greater Fort Worth
SEFWI	Southeast Fort Worth, Inc.
Sundance	Sundance Square
TSU	Tarleton State University
TC	Tarrant County
TCC	Tarrant County College
TRWD	Tarrant Regional Water District
TECHFW	TECH Fort Worth
A&M Law	Texas A&M Law School
TCU	Texas Christian University
TCU & UNTHSC Med Scho	Texas Christian University & University of North Texas Health Science Center School of Medicine
TWU	Texas Wesleyan University
TRVA	Trinity River Vision Authority
UNTHSC	University of North Texas Health Science Center
UTA	University of Texas at Arlington
WS	Workforce Solutions