NWNMCOG

JOYCE PLANNING
& DEVELOPMENT

NORTHWEST NEW MEXICO COUNCIL OF GOVERNMENTS

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

DECEMBER 2025

NWNMCOG

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INTRODUCTION

The Comprehensive Economic Development Strategy (CEDS) for 2025-2030 has grown out of a Taking Stock workshop with NWNMCOG staff in November, 2023, when we realized that our economy was at an inflection point. We could build on the work that had gone before, but incremental changes were not going to generate significant economic growth. For the new CEDS for 2025-2030 we needed a game-changer.

Since then, dozens of public and private individuals have stepped forward to help us change the game. We consulted business and industry leaders as well as apprentices in the skilled trades. We talked to elected officials, tribal and community leaders, educators, artists, and subject matter experts. A summary of the planning process and engagement activities is provided in Appendix A.

The NWNMCOG would like particularly to recognize and thank:

- Michael Sage, CEcD, for his leadership in producing the 2021 CEDS that provided the jumping off point and conceptual throughline for the process we used to develop this new CEDS;
- Harvard Growth Lab for our Summer 2025 intern Mr. Yiwei Wang who leveled up our data game with sophisticated analysis and taught us that the problems we face in our region are not that different from the problems people are facing in his home town in rural China and that everywhere in the world young people are worried about the future;
- RAND for consultations with Mr. Rick Garvey and Mr. Dmitry Khodyakov at the RAND Survey Research Group who schooled us on consensus building through new applications of the Delphi process and introduced us to the concept of the Vignettes which would become central to our thinking about how to develop the regional economy;
- Mr. Jon Decker, Ms. Rose Eason, Mr. Tommy Haws, Mr. Richard Kontz, Ms. Mytegia Lee, and Mr. Alvin Thompson who generously sat for in-depth interviews to help us understand how things work in small business management, housing, finance, financial literacy, the conservation economy, and the creative industries;
- The 170 people from all over the region who gave us their best thinking in response to the Prosperity Survey, including the 58 people who let us know they were interested in working with us on implementing the CEDS Strategy;

- Mx. Ciaran Lithgow, Ms. Denise Aten, and Mr. Curtis Sanders of Bohannan Huston, Inc., who produced the design and illustrations for the CEDS with tireless patience and creativity;
- And finally, the NWNMCOG Board of Directors whose service as the CEDS Strategy Committee helped steer us in a new direction:

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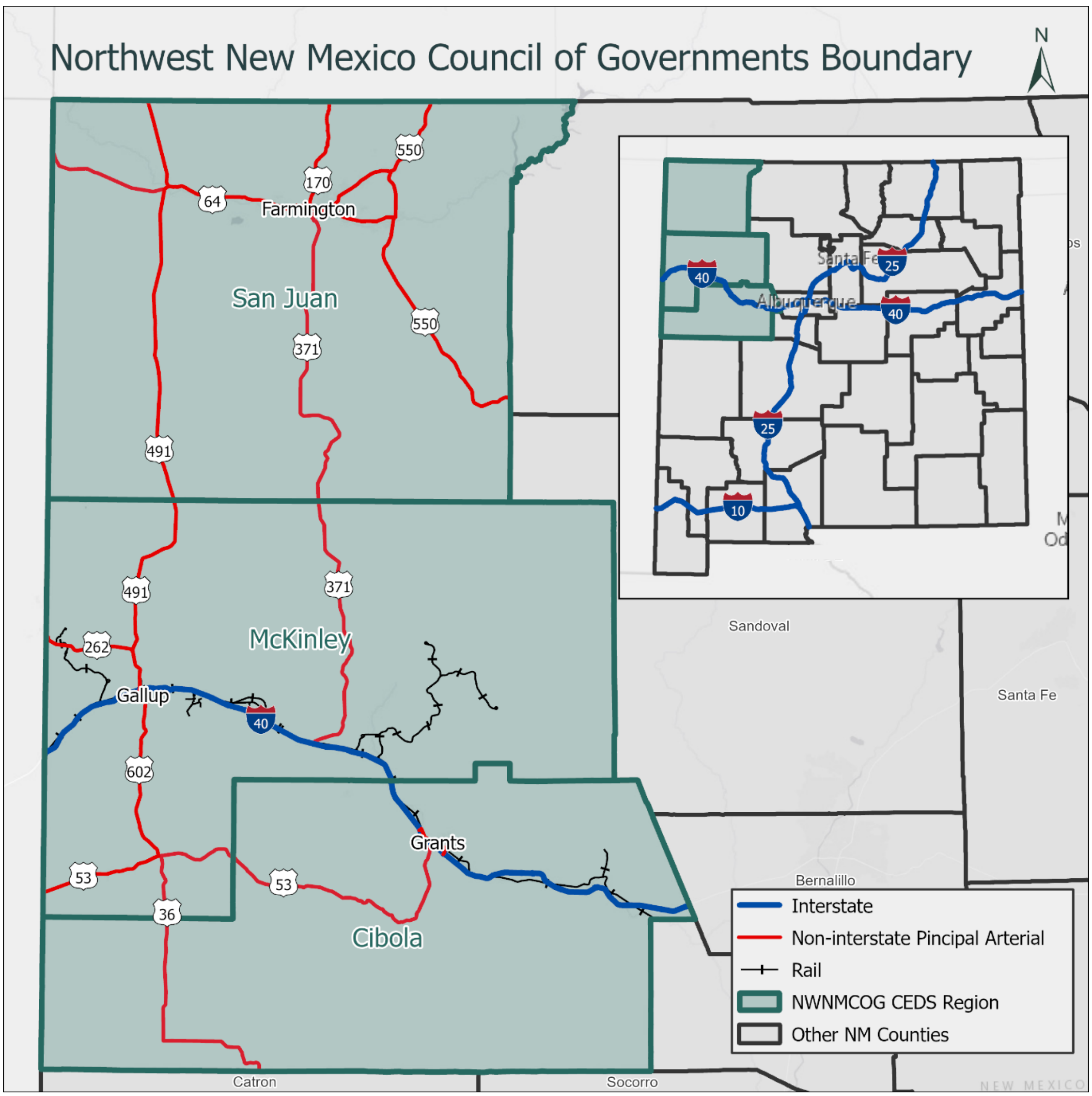
CHAPTER 1
SUMMARY BACKGROUND

INTRODUCTION

Located in the Four Corners area of the United States adjacent to Colorado, Utah, and Arizona, the northwest New Mexico region on encompasses 15,533 square miles of high plateau lands comprising three counties, each of which is about the size of Connecticut.



Over half the region's land base is Indian Country, defined in 18 USC § 1151 and 40 CFR § 171.3 as "all land within the limits of any Indian reservation."

THE LAND

The region's varied terrain consists of plateaus and high desert mesas with rock outcroppings, mountain ranges, forested and woodland areas, canyons, valleys, and arroyos. Key topographical features of the region include the Shiprock volcanic uplift in San Juan County, Church Rock outside Gallup, the Zuni Mountains in McKinley and Cibola counties, and Mount Taylor in Cibola County.

Table 1: **Northwest New Mexico Regional Land Base**

Geography	Square Miles
San Juan County	5,536
McKinley County	5,455
Cibola County	4,542
Connecticut	5,543

Source: U.S. Census Bureau

In the north, metropolitan Farmington is located at the confluence of three rivers where the valleys of the La Plata, San Juan and Animas Rivers come together in the Middle San Juan Watershed. Irrigated farmlands in the San Juan River Valley produce major crops of alfalfa and corn as well as small amounts of a variety of grains, beets, potatoes, hay, orchard crops and vineyards. San Juan County's natural resources include significant reserves of oil and natural gas.

New Mexico ranks second in the United States in known uranium reserves, and the richest uranium deposits in New Mexico are located in the world-class Grants Mineral Belt between Gallup in McKinley County and Laguna in Cibola County. McKinley and Cibola have some ranching and agriculture, and livestock graze on open range throughout the region.

THE PEOPLE

The most consistent long-term change in regional demographics has been the shrinking of the population in both the short term and the long term, although the rate of population loss may be escalating. Between 2007 and 2022, the rate of decline was 1.05% (217,435/219,747), while the more recent rate of decline between 2020 and 2024 was 2.3% (216,448/221/620).

Table 2: **Annual Estimates of Resident Population for Counties in New Mexico: April 1, 2020 to July 1, 2024**

	2020	2024
Cibola County	27,052	26,686
McKinley County	72,897	68,945
San Juan County	121,671	120,817
Northwest New Mexico Region	**221,620**	**216,448**

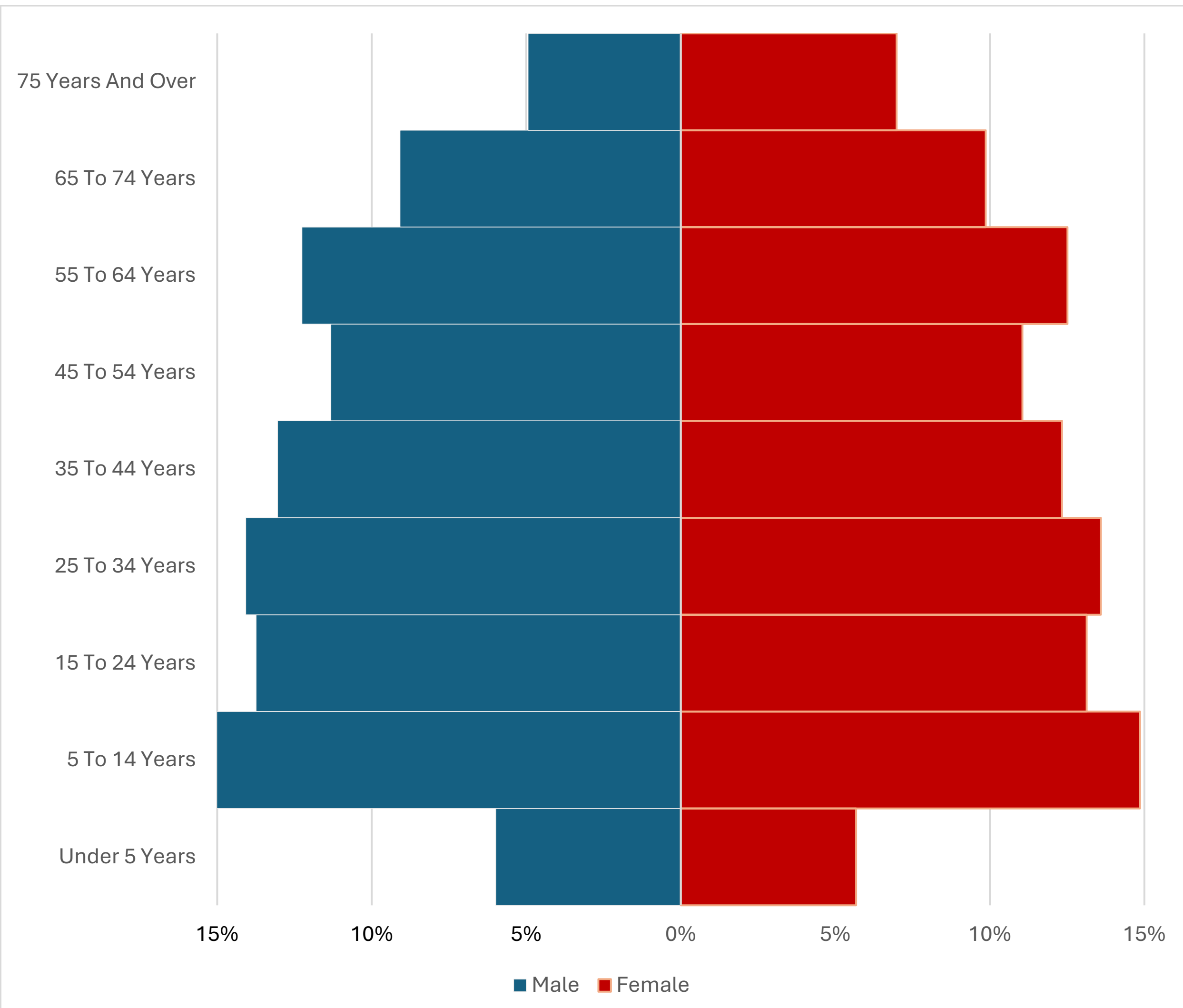
Source: U.S. Census Bureau, March 2025, Population Estimates Program, U.S. Dept. of Commerce, 4/1/20 Estimate Base

The overall long-term population loss in our region is consistent with a notable decline in global population growth:

> We're seeing a decline in birth rates everywhere around the world. There are no exceptions or very very few exceptions. . . . Fertility rates are either flatlining at their replacement rate, which is 2.1 children per woman, or they have fallen below the replacement rate and those populations are aging and starting to actually decline. The decline is enormous. 36 countries are losing population right now, every year. About 30 countries are going to lose half their population over the course of this century (Shackelford and Ibbitson, 2023).

The age breakdown for northwest New Mexico shows that our region's low birth rate is consistent with global trends:

Figure 1: **Population by Sex & Age in the NWNMCOG Region**



Source: ACS 5-Year (2019-2023) A02002: Sex by Age

WHAT HAVE WE DONE?

At the beginning of the 21st Century we were doing pretty well. Between 2001 and 2008, our regional population grew by almost 2%, our labor market grew by 15%, and we had a track record of adding about 1,500 jobs a year (NWNMCOG CEDS, 2009-2013).

Then came the Market Crash of 2008.

The U.S. economy entered a recession. The economic contraction worsened and ultimately became deep enough and protracted enough to acquire the label "the Great Recession." "While the U.S. economy bottomed out in the middle of 2009, the recovery in the years immediately following was by some measures unusually slow (Weinberg)."

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGIES

Over the decades, the NWNMCOG region has undertaken a multitude of projects and initiatives intended to create economic growth and well-being for the people. Our Comprehensive Economic Development Strategy for 2004-2008 contained 169 individual projects. For the 2009-2013 CEDS we set a dozen strategic objectives and outlined over 100 projects. The most recent CEDS for 2000-2025 established seven goal areas and 21 strategies.

Then, just as we were starting to implement the new economic development strategies, the COVID-19 Pandemic hit us hard (Table 3).

Table 3: **All Time COVID Deaths by County**

Region	COVID Deaths
Cibola County	218
McKinley County	667
San Juan County	871
Northwest New Mexico	**1,756**

Source: USAFacts

EVALUATION OF 2021 CEDS

NWNMCOG completed a process and outcome evaluation of the 2021 CEDS using a survey of regional Economic Development Organizations to produce qualitative data on achievements and quantitative data from the U.S. Census and New Mexico State University (NMSU) Arrowhead Center Base Industry Studies to measure progress relative to the baselines.

The process evaluation found fifteen highlighted regional achievements that brought in $214,000,000 for investments in projects targeted primarily to infrastructure including improvements to broadband (3), industrial parks (3), transportation and logistics systems (5), and downtown revitalization (1). Other projects focused on tourism, training for green energy jobs, and planning for a regional community development corporation.

The six evaluation baselines targeted reducing poverty, increasing income and educational attainment, and creating 5,000 jobs. Outcomes were mixed and included small gains in median household income offset by losses in per capita income and sustained poverty. High school graduation rates improved, while educational attainment at the B.A. level was mixed, and during the evaluation time frame the region lost 2,109 jobs.

Figure 2: **Outcomes Compared to 2021 CEDS Baselines**

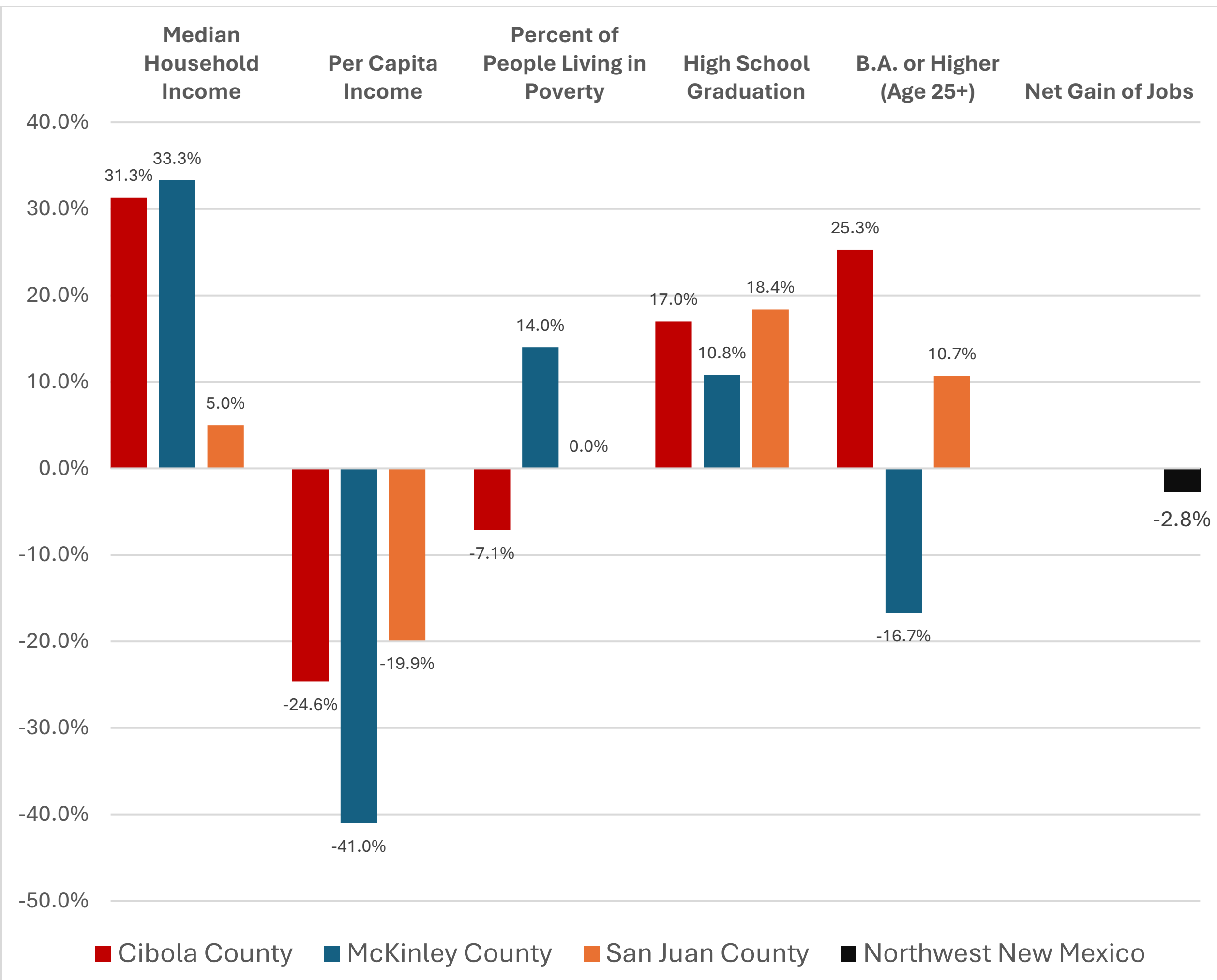


Table 4: **Outcomes of 2021 CEDS**

Measure	**2021 Baseline**	**Update**
Median Household Income	2015 - 2019 San Juan - $50,518 McKinley - $33,384 Cibola - $39,413	2019-2023 San Juan - $53,020 McKinley - $44,496 Cibola - $51,765
Per Capita Personal Income	2019 Regional Baseline $33,183	2019-2023 San Juan - $26,583 McKinley - $19,580 Cibola - $25,032
Percent of People living in Poverty	2019 San Juan - 19.9% McKinley - 30.1% Cibola - 25.5%	2024 San Juan - 19.9% McKinley - 34.3% Cibola - 23.7%
Educational Attainment - High School Graduation	2014 -- 73%	2019-2023 San Juan - 86.4% McKinley - 80.9% Cibola - 85.4%
Educational Attainment - B.A. or Higher of Persons age 25+	2014 15%	2019-2023 San Juan - 16.6% McKinley - 12.5% Cibola - 18.8%
Net Gain of 5,000 Jobs to Offset Loss of 5,000 jobs 2008-2010	2019 75,250 Jobs	2023 73,141 jobs

Source: All baseline data are from CEDS 2021; Update Data are from U.S. Census and New Mexico State University, Arrowhead Base Industry Studies.

STAKEHOLDER, AGENCY & PUBLIC PARTICIPATION

Beginning in January 2024, a CEDS Process Committee was established to lead a new strategic planning process based on research and analysis with broad public and private input. The Committee set direction, provided guidance, shaped and oversaw the economic analysis, and monitored implementation of the CEDS development process throughout 2024-2025. The Committee was led by NWNMCOG staff augmented with input and advice from outside consultants, business and industry leaders, private citizens, and a variety of stakeholders who served as a sounding board and provided subject matter expertise.

Throughout the process, we engaged stakeholders and community members in interviews, a survey was distributed to relevant agencies, stakeholders, and the general public. Respondents were asked to rank nine categories of "Best Bets" in order of priority for which ones were most likely to least likely to produce economic growth and prosperity. Notice was sent via email and advertised online to encourage engagement. Contacts included regional government agencies, economic development organizations, tribal organizations and governments, and more (over 500 unique contacts).

On November 20th, 2025, a draft of the CEDS was posted on the project website, theprospeirtycollaborative.com, for public review. Notice was sent via email and advertised online to encourage review and comment on the draft CEDS. There were four public comments, which were considered and addressed in the final CEDS, as appropriate.

Additional information on the planning and engagement process, including a full list of comments on the CEDS public review draft and discussion of how they were addressed, can be found in Appendix A.

STATE AND NATIONAL CONTEXT

Several national indices can provide a broad context for how the region is doing compared to other regions, states, and national averages in terms of the relationships between the population and the economy, the workforce and the labor market, and how the region stacks up compared to other Economic Development Districts or clusters based on a variety of factors.

TOP STATES FOR BUSINESS

The NWNMCOG undertakes regional economic development in the context of New Mexico, and New Mexico is not doing well. In a 2025 study of state competitiveness for business, New

Mexico overall ranked 44th of 50 states, with grades in 10 categories mostly ranging from C to D- (four C or C-, two D+ and two D-). New Mexico received a B- on Cost of Doing Business and an F on Access to Capital (topstates.cnbc.com).

In this 19th year of the study, CNBC uses publicly available data, mostly federal government databases, to analyze 135 metrics in 10 categories: economy, infrastructure, workforce, cost of doing business, business friendliness, quality of life, technology & innovation, education, access to capital, and cost of living (Scott Cohn, "How we are choosing America's Top States for Business in 2025," June 11, 2025).

INNOVATION INDEX

The Innovation Index at statsamerica.org measures the regional Economic Development District's (NWNMCOG) capacity for innovation and competitiveness in five categories: Human Capital and Knowledge Creation, Business Dynamics, Business Profile, Employment and Productivity, and Economic Well-Being.

In the 2025 report, the NWNMCOG ranked 373 of 393 EDDs across the country and did not do well in comparison to the other EDDs in the Four Corners Region:

- Southwest Colorado - 80
- Southeast Utah - 222
- Northern Arizona - 117
- NWNMCOG - 373

Key findings included a low level of positive outcomes from existing economic activity and a low standard of living as measured by residential internet connectivity and income.

NATIONAL ECONOMIC RESILIENCE DATA EXPLORER (NERDE)

The Argonne National Laboratory data tool (NERDE) provides rankings using indices to measure Human Capital, Financial Strength, Infrastructure, Industry, Institutions and Partnerships. Using these scales, the three counties in the region ranked below or well below national averages on all but a few scales. Cibola ranked above national average on Institutions and Partnerships. San Juan ranked above national average on Industry. McKinley ranked below or well below national average on all five scales.

CENTER ON RURAL INNOVATION ECONOMIC DEVELOPMENT TOOL

The Center for Rural Innovation (CORI), a national non-profit organization focused on technology-based economic development, utilizes their Economic Development Tool (EDT) to develop a detailed analysis of a variety of factors with trends over time. Their report notes key takeaways for the northwest New Mexico region:

- Regional population is shrinking
- Business growth is in decline
- Educational attainment lags the nation
- Tradable services employment in a knowledge-driven economy (finance, technology) is below national average
- Broadband is inadequate
- Private investment is active but low
- Rent affordability is an issue

CLUSTER ANALYSIS

Although the findings of Michael Porter's Cluster Mapping Project are no longer available, Benjamin Peck created an algorithm to analyze county-level datasets on poverty, population, unemployment, income, and education from USDA's Economic Research Service plus U.S. Census data on percent in poverty (medium.com/geekculture). Peck used Federal Information Processing Standards (FIPS) codes to merge various data into a single dataset and applied his algorithm to define six clusters ("Understanding US Regions Through Cluster Analysis," September 1, 2021). The three counties in northwest New Mexico fell into two of Peck's clusters.

CLUSTER 5: RUST COUNTIES

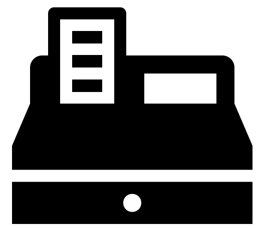
Peck found that both San Juan and Cibola fell into this cluster of counties "not doing as well as they used to be doing." These counties were in former manufacturing areas that had lost their principal industries and failed to recover. They were losing population, and the remaining population was "underemployed, slightly educated, below average on every other metric, and lowest of all clusters on natural increase. Things were bad in Cluster 5, but not as bad as in Cluster 6."

CLUSTER 6: HISTORICALLY DEPRIVED

McKinley County was in Peck's Cluster 6. These counties were rural and concentrated in a few distinct areas: in the South in the epicenter of American slavery, in the West on American Indian Reservations with their history of discrimination and poverty, and in the Appalachians in former coal country. These counties were in "extremely rough shape," afflicted with deep cycles of profound intergenerational poverty, below average in every metric, exceptionally below average on most with the lowest net migration, education, employment and income.

HOW THE REGIONAL ECONOMY WORKS

The regional economy is valued at about $8 billion, and it has been relatively stable since 2020, with a net gain of less than a tenth of a percent (.08%) over the four years between 2020 and 2023. Changes in GDP at county level varied from a net loss of 6.59% in McKinley to a net loss of 1.17% in Cibola to a net gain of 3.35% in San Juan.



SECTOR ANALYSIS

We completed an analysis of the regional economy using U.S. Census data to investigate the 20 industry sectors defined by the North American Industry Classification System (NAICS). For each two-digit NAICS Code sector we found the dollars contributed to the GDP and percentage of GDP, the number of business establishments, the number of jobs and percentage of jobs, and the Location Quotient (LQ).

LQ is a measure of how concentrated an industry is in the regional economy compared to the national average. An LQ greater than 1.0 indicates that the region has a higher concentration in that sector than the national economy, which suggests a competitive edge in that sector.

A complete breakdown of our analysis by two-digit NAICS Codes is provided below on the following page.

Based on GDP data analyzed by the two-digit NAICS code sectors, the two largest NAICS sectors by far were Government (28.3%) and Mining, Oil and Gas (17.28%). Sectors that contributed more than 5% of the GDP were Retail; Real Estate, Rental & Leasing; Healthcare; and Accommodation & Food Service.

Table 5: **2023 NWNM Economic Data by 2-Digit NAICS Code**

2-Digit NAICS Code	GDP	% of GDP	# of Establishments	# of Jobs	% of Jobs	LQ
11 Agriculture, forestry, fishing and hunting	44,496,000	0.57%	30	236	0.32%	0.385
21 Mining, quarrying, and oil and gas extraction	1,433,857,000	17.30%	165	4,408	6.03%	36.29
22 Utilities	291,096,000	3.50%	30	538	0.74%	5.323
23 Construction	308,324,000	3.70%	376	4,511	6.17%	0.972
31-33 Manufacturing	197,650,000	2.40%	104	1,693	2.31%	1.152
42 Wholesale trade	211,122,000	2.67%	216	2,094	2.96%	0.693
44-45 Retail trade	569,286,000	6.90%	655	9,989	13.66%	2.111
48-49 Transportation and warehousing	263,720,000	3.20%	142	1,304	1.78%	0.98
51 Information	26,708,000	0.30%	65	292	0.40%	0.218
52 Finance and insurance	155,666,000	1.90%	219	1,091	1.49%	0.35
53 Real estate and rental and leasing	833,976,000	10.10%	169	556	0.76%	0.206
54 Professional, scientific, and technical services	112,925,000	1.40%	325	1,123	1.54%	0.133
55 Management of companies and enterprises	14,745,000	0.20%	29	173	0.24%	0.406
56 Administrative and support and waste management and remediation services	63,656,000	0.80%	223	2,003	2.74%	0.666
61 Educational services	24,126,000	0.30%	39	586	0.80%	0.883
62 Health care and social assistance	642,482,000	7.80%	791	11,597	15.86%	1.296
71 Arts, entertainment, and recreation	36,320,000	0.40%	39	508	0.70%	0.727
72 Accommodation and food services	293,113,000	3.50%	388	7,810	10.68%	3.797
81 Other services (except public administration)	178,700,000	2.20%	315	1,685	2.30%	0.359
92 Public administration	2,353,277,000	28.40%	N/A	20,938	28.63%	1.978
Total	**8,055,245,000**	**97.54%**	**4,320**	**73135**	**100.11%**	**N/A**

Source: US Census Bureau

NAICS sectors that contributed between 3% and 5% of the GDP were Utilities, Construction, and Transportation & Warehousing. With a contribution of less than 3% to the GDP, Arts, Entertainment & Recreation alone would be screened out as a main economic interest, but when combined with Accommodation and Food Service as a measure of "Tourism," the combined sectors contributed 3.97% of the GDP.

Analysis of the Location Quotients identified seven sectors with emerging growth potential:

- Mining, Quarrying, and Oil and Gas, LQ 36.29
- Utilities LQ 5.323
- Accommodation and Food Service, LQ 3.797
- Retail Trade, LQ 2.111
- Public Administration, LQ 1.978
- Healthcare and Social Assistance, LQ 1.296
- Manufacturing, LQ 1.152

BUSINESS

The U.S. Census defines a business "establishment" as a single location where business occurs and a "firm" as a business operating at more than one location. Employer establishments include at least one employee, while non-employer establishments have no employees and can be self-employed individuals or sole proprietors.

Table 6: **Regional Businesses in 2022**

	San Juan County	**Cibola County**	**McKinley County**
Employer Establishments	2,483	282	950
Non-Employer Establishments	5,780	1,117	2,983
All Employer Firms	1,952	262	626

Source: US Census QuickFacts

Although the number of business establishments has declined over the long term (2010-2022, per CORI EDT), between 2019 and 2024, business applications increased by 63% in the region.

Table 7: **County Level Business Applications**

	Number of Applications 2024	**Change Rate (2019-2024)**
Cibola County	129	158%
McKinley County	263	54.71%
San Juan County	926	56.68%
Region	**1,318**	**62.52%**

Source: U.S. Census Business Formation Statistics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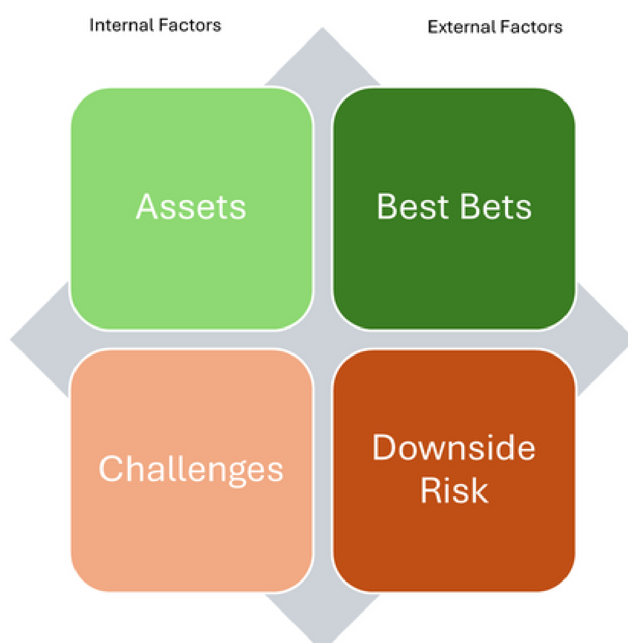
CHAPTER 2
ABCD ANALYSIS

INTRODUCTION

When we began our work on the 2025-2030 CEDS we recognized the need for a rigorous appraisal of the region's economic and community development strengths, weaknesses, opportunities, and threats (SWOT), but our previous experience with the SWOT paradigm had led us to focus too much on our weaknesses and threats. We wanted to reframe the in-depth analysis of our competitive position in the state, national and global economies to be based more on the principles of asset-based community development to build optimism into the structure of our economic development plan.

We created the ABCD formula as a lens through which to look at Assets, Best Bets, Challenges, and Downside Risks, on the theory that valuing what we already have would be more likely to attract investment than focusing on what we don't have or what might bring us down.



Our sources for the assessment of our ABCDs included a broad literature review, an analysis of the 2021 CEDS, an Update Survey of regional economic development organizations, and research into the data and statistical background to corroborate our findings. To refine our thinking, we conducted a series of staff workshops questioning our assumptions and testing our conclusions.

Although the Assets and Challenges of the ABCD approach are all interconnected, for the purposes of our analysis we looked at them as separate building blocks to develop a logical throughline for our economic development strategy.

ASSETS

An inventory of top twenty resources seemed to bear out our initial assumption that we had more to work with than we thought. We refined the resources into a solid set of thirteen strong assets we could depend on to make an affirmative case for investment in northwest New Mexico.

AGRICULTURE AND LOCAL FOOD SYSTEMS

The agriculture sector includes farming and food distribution systems as well as forestry, fishing, and hunting. A relatively small part of the overall economy, in 2023 the Agriculture sector employed over 200 people and contributed $44 million to the GDP.

In San Juan County, the Navajo Agricultural Products Industry (NAPI) is a 110,000-acre farm employing 296 people. The *foodagriculturecollaborative.org* is a Navajo and Hopi alliance to foster growth in the food/agriculture economy on the Navajo Nation. Navajo Tech has an award-winning Culinary Arts program.

In Cibola County, vibrant farming communities in Grants-Milan, Acoma, Laguna, Ramah, El Morro, and Fence Lake supply produce to Grants and Gallup. The Grants Farmers Market expansion was supported by USDA and local nonprofits to increase access to locally grown food and provide vendor training. A large-scale composting project in development in McKinley and Cibola Counties will benefit the environment, the economy, and the health of the people. Lock Street Eats is a Food Truck Park in Farmington.

FOOD HUBS

The Northwest New Mexico Food Hub Development initiative is part of a broader effort under the Food, Hunger and Agriculture Program led by the New Mexico Economic Development Department to support local reinvestment and value chain development by strengthening regional food systems, particularly in rural and underserved communities.

The Harvest Food Hub (HFH) serves the Farmington area. San Juan College is constructing a test kitchen at the Harvest Food Hub. The Frontier Food Hub (FFH) in Silver City distributes food to schools, food pantries, and underserved communities including Gallup-McKinley County schools and a McKinley County senior center.

CONSTRUCTION

Well established general contractors in all three counties have the ability to build anything we need to build without bringing in outside companies. We have the necessary competence and expertise to complete projects ranging from a small-scale residential remodel to a large new multi-million-dollar commercial building complex.

San Juan County hired a Broadband point person and held annual Broadband summits. As a result, Broadband redundancy was established collaboratively between several providers to minimize the impact of local internet outages. Broadband expansion into industrial parks, businesses, homes, and schools in the region has been funded using targeted public works grants and support from providers like Continental Divide Electric Cooperative in Cibola and McKinley Counties. Further expansion to improve reliability and redundancy is expected.

EDUCATION AND WORKFORCE DEVELOPMENT

The regional public education system includes eight K-12 school districts and five colleges and universities, contributing a substantial percentage of the $2 million Public Administration sector. Federal Impact Aid legislation has been critical for all three counties to help ensure equitable funding for schools serving Native American students and those on federal lands.

Targeted high school curricula, internship and career programs aligned with regional workforce needs create pathways from education to employment with local businesses and tribal enterprises in sectors like tourism, healthcare, energy, and skilled trades. Dual Credit programs at Gallup-McKinley County Schools with University of New Mexico Gallup branch and Shiprock Central Consolidated Schools with San Juan College allow high school students to earn college credits while completing high school.

HIGHER EDUCATION RESOURCES

- STEM-based Navajo Technical University
- Center for Advanced Manufacturing ("the Lab") at Navajo Tech
- Diné College Shiprock and Newcomb campuses in San Juan County and Crownpoint campus in McKinley County
- University of New Mexico branch campus in Gallup
- New Mexico State University branch campus in Grants
- San Juan College
- School of Energy at San Juan College
- Proximity to Sandia and Los Alamos National labs for internships and training

San Juan College collaborates with Four Corners Economic Development and the Enterprise Center to seek out entrepreneurs and offer resources, guidance, and services to support new businesses in the area. The ACT Work-Ready Community Certification for San Juan County validates workforce skills and improves employer confidence in local talent (workreadycommunities.org).

> Inter-institutional collaborations between San Juan College, UNM-Gallup, Navajo Tech, and tribal education departments have focused on shared curriculum development, credit transfer agreements, and joint workforce training programs.

Navajo Tech has expanded offerings in cybersecurity, veterinary technology, and construction trades, integrating cultural relevance and workforce readiness. Digital upskilling and remote work training programs through Navajo Tech, San Juan College, University of New Mexico-Gallup, and New Mexico Workforce Connection include digital literacy and orientation to freelancing platforms (e.g. Upwork, Fiverr) to train entrepreneurs for remote work and online businesses.

WORKFORCE DEVELOPMENT

The Northern Local Workforce Development Board serves a ten-county region including Cibola, San Juan and McKinley. National Career Readiness Certificate (NCRC) assessments can be integrated into training programs to provide industry-recognized certifications, especially in healthcare, energy, and construction.

New Mexico Youth Conservation Corps (YCC) funds multiple programs in all three counties, employing youth in trail building, park restoration, and environmental education. AmeriCorps operates through local nonprofits and tribal colleges, offering service-learning opportunities.

The Gallup-McKinley County School district has moved into the design development phase of the McKinley Tech High School construction project expected to open a new 80,000-square-foot facility in Spring 2027. The new school will serve up to 780 students from throughout the district with instruction not available at their home schools from experts in automotive and construction fields, culinary arts, and a cyber academy (Gallup Sun, 2025).

The Southwest Indian Foundation Industrial Workforce Program (IWP) trains industrial workers and mechanics and facilitates placement into relevant in-demand jobs in the local economy (industrialworkforceprogram.com).

The SoloWork Program was a flagship initiative of the Cibola Communities Economic Development Foundation that provided training and certification for remote work, a coworking space and internet access, and job placement with remote-friendly employers. The aim was to provide a fully curated remote work force for out-of-state employers.

Although the pilot program ended, it succeeded in proof of concept with many lessons learned and developed a successful model to help workers in customer service, tech support and digital service transition from traditional site-dependent jobs to location-neutral options.

ENERGY INDUSTRIES

The Energy sector includes mining, quarrying, and oil and gas extraction. The sector employs more than 4,000 people and produces over 17% of the regional GDP. Historically, the oil and gas industry has been the backbone of the regional economy, and the export capacity continues to support growth in the GDP. Quarrying operations are ongoing in Cibola and McKinley Counties. There is potential for expansion into quarrying of dimension stone in all three counties.

San Juan College was designated a Center of Excellence in Renewable Energy and Industrial Technology, offering specialized training in solar, wind, and energy efficiency technologies such as carbon capture and carbon sequestration.

ENTREPRENEURIAL SPIRIT

One of the outstanding human assets of the region's labor force is the entrepreneurial spirit of the people. S. Michael Camp studied entrepreneurship in regions all over America and developed an "Entrepreneurship Index" combining metrics such as the average annual change in new firm births and the percent of firms growing rapidly. Using his averaged weighted index, Camp found that Farmington ranked #6 and Gallup ranked #22 on entrepreneurship compared to hundreds of municipalities, large and small, all over the United States.

> Camp's analysis of the disaggregated individual measures of entrepreneurship found that both Gallup and Farmington did even better than their indexed rankings on some individual metrics, coming in at #2, above the 99th percentile, on some of the measures.

Camp-rated entrepreneurship and the commercialization of new ideas as some of the most important keys to economic growth:

> In today's increasingly competitive markets, the creation of economic value can only be sustained as firms, large and small, young and old, increase their capacity to generate new marketable ideas, rapidly commercialize those ideas, and adjust their competitive offering to changing market conditions. This entrepreneurial spirit, whether observed in the creation of new or the growth of established firms, keeps industries vibrant and maintains the health and prosperity of regions. Commercialization is key to capturing the economic value embedded in innovation (Camp, 2005).

HEALTHCARE INDUSTRY

The healthcare industry is the second largest employer in the region, providing high-paying jobs with good benefits for almost 12,000 people. Hospitals and community clinics in all three counties contribute close to 8% of the regional Gross Domestic Product.

In response to the pandemic, telehealth services and mobile clinics were expanded in rural and tribal areas. Partnerships with UNM-Gallup, San Juan College, and Navajo Tech have produced scholarships and career pathway programs leading to skilled jobs in the healthcare field.

INDUSTRIAL PARKS

Industrial Parks in all three counties provide prime sites for development:

- Milan Industrial Park
- McKinley County Business Park
- Prewitt Industrial Park
- San Juan County Industrial Park
- Four Corners Airport Industrial Park (in development)

Greater Gallup Economic Development Corporation is partnering with Four Corners Economic Development Organization in a contract with a site selector to jointly market McKinley and San Juan Counties to prospective companies within the two organization's respective target industries. Development of Milan Industrial Park is the #1 priority for Cibola County Economic Development Foundation for 2025. Behind-the-meter is a way to get mega power for projects all three counties.

MAINSTREET PROGRAMS

All three counties have accredited MainStreet programs, and Pueblo of Zuni Pueblo has the first accredited Native American MainStreet program in the country:

- Zuni Pueblo MainStreet
- Historic Downtown Farmington MainStreet
- Gallup MainStreet Arts and Cultural District
- Gallup Business Improvement District (BID)
- Grants MainStreet

Downtown revitalization initiatives in the region have produced two catalytic placemaking projects: Complete Streets in Farmington and Coal Avenue Commons in Gallup. All three counties have branding initiatives and carry out "Buy Local" campaigns promoted by Chambers of Commerce to support local markets.

REGIONAL DEVELOPMENT CORPORATION

The NWNMCOG Board of Directors has adopted Articles of Incorporation and Bylaws for a regional development corporation (RDC) envisioned as a non-profit intermediary to manage an Empowerment Fund to coordinate regional policy advocacy, support asset-building initiatives, and provide microloans and seed capital for entrepreneurs. Pilot projects such as financial literacy and credit counseling programs and regional housing and infrastructure planning served as proof of concept for the RDC's potential role.

NWNMCOG and stakeholder partners from tribal governments, local municipalities, and EDOs continue to seek seed funding to formalize partnerships and governance structures to align the RDC's mission with broader state and federal economic development priorities.

REGIONAL RETAIL SHOPPING HUB

The region's proximity to an underserved and largely Native American population provides a market for retail and service industries for an estimated 200,000 people in northwest New Mexico and northeast Arizona. Over 600 retail establishments in the region provide nearly 10,000 jobs.

The City of Farmington became one of the first in the state to pass a retail LEDA ordinance. City of Gallup currently is revising local LEDA policies and an application is in development with extensive input and technical assistance from the Greater Gallup Economic Development Corporation.

SAFESHORING

Safeshoring is defined as "locating into areas of the USA relatively free from catastrophic weather events and dangers of hurricane, earthquake, and tornado disasters to reduce natural disaster and business disruption risks (Williams, 2025)." Safeshoring can be understood in the context of other terms related to global free trade such as Offshoring (locating outside America to reduce costs) and Reshoring (bringing base processes back to the USA). With its low risk of weather events in comparison to other locations, northwest New Mexico offers an attractive alternative both for companies considering Reshoring their operations and for foreign direct investment (FDI). McKinley County in particular can take advantage of this asset:

> "Based on a March 23, 2023, Forbes Magazine article by Brenda Richardson and a CoreLogic report on the 'Safest Places to Live' that details the least risky places to live from a natural disaster perspective, the least risky county in the United States is—drum roll please—McKinley County, New Mexico."
>
> – Evan Williams, 2025

TRAIL OF THE ANCIENTS

The Trail of the Ancients (TOTA), a federal and state designated Scenic Byway and All American Road that includes the Ancient Way Arts Trail, runs through all three counties and embodies the region's rich scenic beauty, archeological, historic, cultural, natural, and recreational assets and resources.

National parks and the national monument system, varied opportunities for outdoor recreation, boating and fishing on the river corridors, indigenous culture, arts and crafts, and world heritage sites such as Chaco Canyon have supported tourism and recreation as mainstays of the regional economy for decades. The New Mexico tourism website features 18 historic hotels, bed and breakfasts, resorts, inns, and campgrounds in northwest New Mexico. Development and marketing of the TOTA could spark a range of projects targeted to advancing tourism as a major economic driver.

Figure 3: **Trail of the Ancients in Northwest New Mexico**

TRANSPORTATION AND LOGISTICS ASSETS

A multi-faceted transportation network positions the region to serve as a major hub for national and global trade and commerce. Transportation-related assets include strategic east-west transcontinental corridors such as Interstate 40 and the BNSF railroad. Regional north-south transportation systems include four-laned U.S. Highway 491 linking Gallup with Shiprock and Farmington and New Mexico State Highway 602 connecting Gallup and Zuni.

U.S. 64 crosses northern San Juan County from east to west. U.S. 550 enters the region from the southeast as a four-lane highway from I-25 at Bernalillo and extends from Farmington northward through Aztec and into southwest Colorado. Airports in all three counties transport passengers and cargo.

Trucking, rail and intermodal/transloading connections are important to McKinley County's logistics economy:

- 4,580 trucks per day on I-40
- 100+ trains per day through Gallup
- Dozens of south-north truck runs per day between Gallup and Farmington/San Juan Basin

The I-40 east-west trade corridor brings freight through the region from the seaports of Los Angeles and Long Beach, California, and Houston, Texas. The major truck stop hubs at I-40 Exits 16 and 26 are ideally positioned to accommodate truckers required to stop due to their 11-hour service limits.

FOUR CORNERS FREIGHT RAIL LINE

The goal of the Four Corners Freight Rail Project is to construct a 100-mile freight rail spur connecting San Juan County and the Navajo Nation in the Four Corners region to the BNSF Southern Transcontinental railway along the I-40 corridor in McKinley County.

When completed, the project would integrate the region into the national freight network, support the energy transition, reduce greenhouse gas emissions compared to trucking, and enhance tribal and rural participation in the economy.

The idea for a US 491 utilities corridor started with Navajo Gallup Water Supply Pipeline (NGWSP), evolved with the four-laning of US 491, and now could include rail and utilities.

TRADEPORT AMERICA

Tradeport America is a Greater Gallup Economic Development Corporation (GGEDC) project to develop an inland trade port and logistics hub utilizing *Gallup Energy Logistics Park* (BNSF certified site with access to rail line) and adjacent *McKinley County Business Park* (4 sites available) to attract businesses associated with the community's transportation and logistics assets.

Tradeport America has deep roots in northwest New Mexico. More than a thousand years ago, the region surrounding Chaco Canyon in McKinley County served as an ancient trading center. Archeologists have found scarlet macaw feathers and bones at Chaco indicating the birds were imported from thousands of miles away in southern Mexico and Central and South America to be used in ceremonies and for trade. Their presence in northwest New Mexico along with evidence of seashells, copper bells, and products like cacao indicate long-distance trade networks central to a complex culture. "The rearing and exchange of scarlet macaws in the first millennium AD may have motivated some of the earliest economic foundations of the prehistoric societies of the North American Southwest and Mesoamerica" (Wu, 2018).

CHALLENGES

We based our assessment of Challenges on a literature review and the Update Survey of Economic Development Organizations in the region. We concluded that our biggest challenge is reversing the downward momentum that has been pulling our region in the wrong direction for decades. Our population is shrinking, our Gross Domestic Product is eroding, and over the past four years we have lost over 2,000 jobs.

A more detailed assessment of specific Challenges resulted in a list of 122 areas of vulnerability closely intertwined with the Assets we had identified. We found underlying connections and patterns that enabled us to narrow this list down to seven clusters of correlated Challenges.

Table 8: **Example of Regional Downward Trends, 2007-2022**

	2007	2022
Gross Receipts	$10,836,107,234	$8,950,753,401
Total Regional Population	219,747	217,435

Source: U.S. Census; New Mexico Economic Development Department

EDUCATION AND TRAINING

We are falling short in basic education. Reading proficiency scores across our eight public school districts for the 2023-2024 school year ranged from a low of 20% to a high of 38%, but in this poor showing we are not alone:

> The past decade may rank as one of the worst in the history of American education. We are now seeing what the lost decade has wrought. Test scores from the National Assessment of Educational Progress released this year show that 33% to 40% of American school children are reading at a level that is "below basic" -- meaning that they struggle to follow the order of events in a passage or even to summarize its main idea (Kahloon, 2025).

Detailed data on educational proficiency in Math, Reading, and Science for the 2023-2024 school year by school district and on high school graduation rates and educational attainment at B.A. level or higher are provided in Tables B4 and B5, Appendix B.

The workforce in all three counties is not well-aligned with local employer needs and emerging industries. We are lacking in locally-available specific training programs to prepare workers for highly specialized positions in skilled trades such as electrical, plumbing, and welding.

INFRASTRUCTURE

The Economic Development Capacity Index (EDCI) at the National Economic Resilience Data Explorer (NERDE, Argonne National Laboratory) ranks infrastructure using 17 indicators to create an index of infrastructure capacity to support economic development. The Infrastructure index includes factors such as transportation, energy reliability, land and water quality. Of the 17 EDCI indicators, 14 are negative factors such as air pollution, bridges in poor condition, Brownfield Sites, and Superfund classifications. Only three of the indicators are positive, and two of these measure Broadband access and download speed.

The EDCI ranked Cibola County and McKinley County infrastructure as "Low," meaning capacity is well below the national average. San Juan County ranked as "Limited," meaning slightly below the national average.

BROADBAND INFRASTRUCTURE

Despite significant investments in Broadband expansion, the region is not competitive in the digital economy. Internet access remains low in comparison to New Mexico and the USA. Equitable Broadband access in rural and tribal areas remains elusive. County-level data on households with Broadband subscriptions are provided in Table B1, Appendix B.

We are not alone in finding that a significant investment has not resulted in better internet access. The United States Government Accountability Office (GAO) has found the same pattern at the national level:

> Access to broadband is critical for employment, education, health care, and other daily activities. Yet millions of Americans lack broadband access, despite at least $44 billion in federal investment over the past decade across myriad programs managed by different agencies (Von Ah, 2025).

VARIOUS JURISDICTIONS

The political subdivisions of the region include three counties, seven incorporated municipalities, 77 rural towns and villages, and five sovereign Tribal Nations of Acoma Pueblo, Laguna Pueblo, Zuni Pueblo, Ute Mountain Ute Tribe, and the Navajo Nation. The Navajo Nation itself is subdivided into 110 Chapters, 50 of which are located wholly or partially in the region. According to the Navajo Nation Code: Title 26, "Navajo Nation Local Governance Act," the Navajo Nation Chapters have many of the powers and responsibilities of local governing bodies, and each has jurisdiction over its own procedures and regulations.

In 2004, the New Mexico state legislature established local government status for the state's Land Grant communities, recognizing La Merced del Pueblo de Cebolleta and Santa Rosa de Cubero Land Grant communities in Cibola County as two additional self-governing political subdivisions of the state.

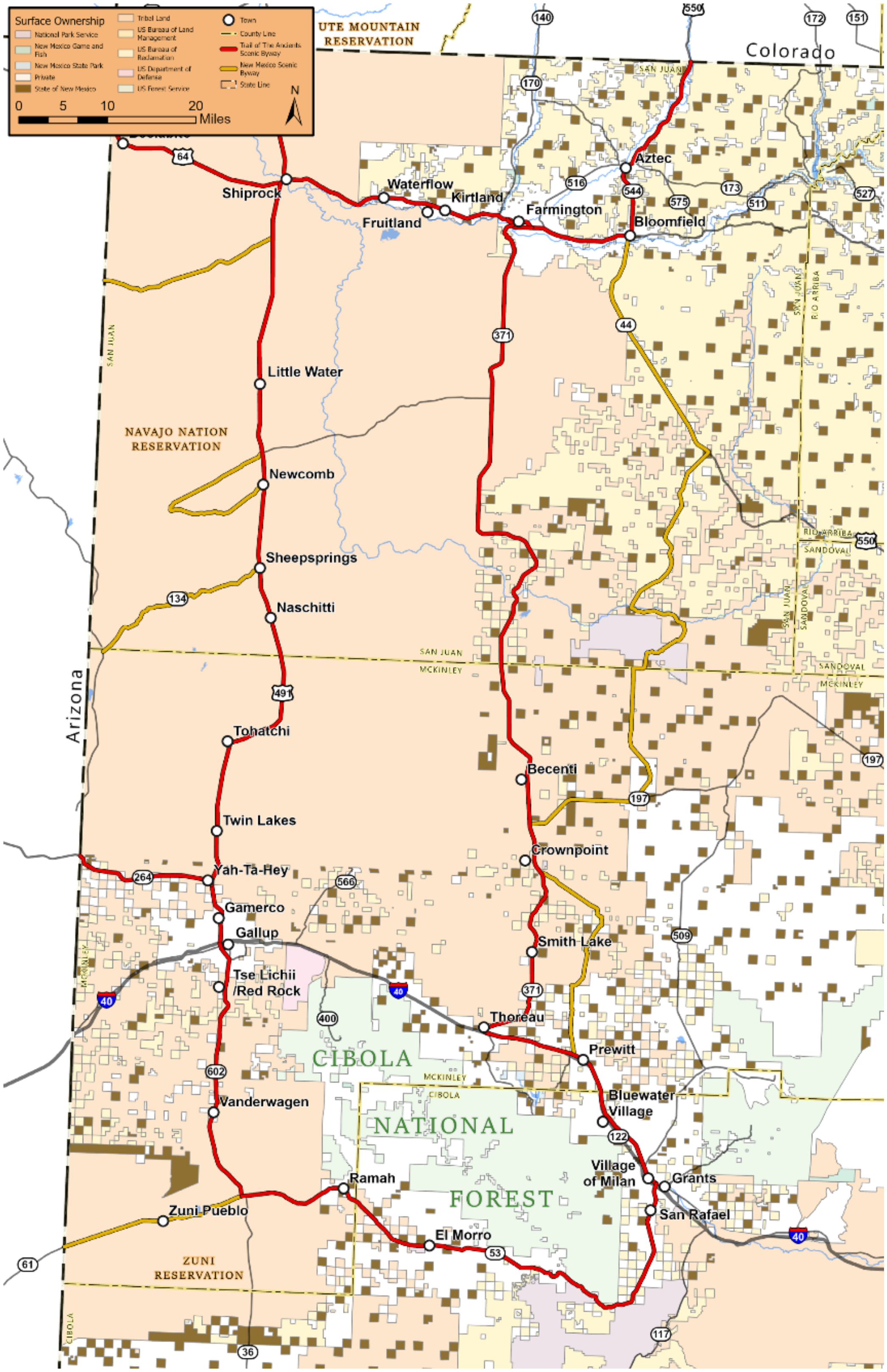
This complex web of jurisdictions creates multiple economic frameworks resulting in formidable obstacles to the flow of private investment. Regulatory complexities limit entrepreneurship and innovation and serve as a barrier to business permitting and development.

Land ownership patterns are equally complex. At the federal level, the Bureau of Indian affairs (BIA), Bureau of Land Management (BLM), and the U.S. Forest Service, National Park Service, and National Fish & Wildlife Service all play significant roles in land use and other issues. The State of New Mexico is another land-holder in the region.

The practice of "Checkerboarding" has divided some of the land base in all three counties into dozens of small square tracts with jurisdiction divvied up between tribal, federal, state, and county jurisdictions along with some trust lands and fee lands and about 22% deeded lands held by private owners.

[map on following page]

Figure 4: **Surface Ownership in the Region**



SAN JUAN COUNTY

The Navajo Nation has jurisdiction over about 60% of the land area of western San Juan County, and the Ute Mountain Ute Tribe has jurisdiction over a portion of land along the Colorado border (San Juan County Growth Management Plan, 2018). Three Navajo agencies, Northern, Fort Defiance, and Eastern, exist at least in part within the boundaries of San Juan County and oversee sixteen (16) Navajo Chapters.

MCKINLEY COUNTY

Almost a third (32) of the Navajo Chapters are located wholly within the boundaries of McKinley County, and two more Chapters are partially located in McKinley County with jurisdictions crossing into Arizona or San Juan County. Another indigenous sovereign nation, Pueblo of Zuni, governs 723 square miles of the McKinley County land base.

Applied together with relevant city, county, state, and federal formalities, the resulting procedures and regulations can serve as a barrier to many forms of development:

> For example, an average road improvement (e.g., resurfacing, grading, drainage) project in a rural community typically involves 3.7 jurisdictions, including U.S. Dept. of the Interior's (DOI) Bureau of Indian Affairs (BIA), U.S. Dept. of Agriculture (USDA) Forest Service, the county, the private landowners, respective tribal governments, and/or State of New Mexico Dept. of Transportation ("Vision 2020," McKinley County Comprehensive Plan for 2020-2045).

CIBOLA COUNTY

Almost 70% of Cibola County is in federal, state, and Pueblo or Navajo ownership, with less than a third of the land base in private hands. Controlling federal agencies include the National Forest Service, National Park Service, and the Bureau of Land Management (BLM) (Cibola County Comprehensive Plan, January, 2015).

Indigenous sovereign nations with jurisdiction over portions of the Cibola County land base include Pueblo of Acoma, Pueblo of Laguna, Pueblo of Zuni, and the Ramah Navajo and Tohajilee Navajo Chapters.

ACCESS TO CAPITAL

Access to finance is seen as a big problem, with banks perceived as reluctant to lend. A report to the NWNMCOG Board of Directors on the NWNMCOG Revolving Loan Fund (RLF) program revealed that about half of the eight applicants for $715,000 in loans were denied for reasons that included:

- negative cash flow
- negative net worth
- behind on tax payments
- excessive cash withdrawals
- officer loans
- excessive debt
- insufficient cash on hand

Obstacles to closing included lack of collateral, inadequate collateral, existing loans and/or liens, issues with financials including tax returns and interim financial statements, and lack of succession planning for retirement or transfer of ownership (Sage, 2024).

In a July, 2025, NWNMCOG interview, a Gallup-area Navajo business owner reported that low financial literacy is an obstacle for many loan seekers, and there is a huge need for financial literacy and capacity building programs. Small entrepreneurs may not have the necessary upfront investment to get a loan, and they may lack access to structured technical assistance and mentorship programs to help them prepare the detailed business plans and financial statements that banks require.

COLLABORATION

Respondents to the Update Survey referred to a legacy of inter-community competition and mistrust, lack of commitment to longer term more regional strategies and partnerships, fragmented coordination, and a need for greater inclusion in community and economic development planning processes.

The Economic Development Capacity Index (EDCI) at NERDE measures 10 indicators to create an index of Institutions and Partnerships measuring public and private entities that support and facilitate economic development, entrepreneurship, and innovation through collaborative networks. All the indicators are positive and include factors such as cultural centers, non-profit organizations, libraries, colleges and universities, economic development organizations, and membership in an EDA Economic Development District (EDD).

On this index, Cibola County was ranked "Elevated," meaning capacity is above the national average. However, the Cibola County Economic Development Foundation (CCEDF) has struggled with a recent reorganization effort which has had a negative impact on economic development.

McKinley County ranked "Moderate," meaning capacity is close to the national average. San Juan County ranked lowest with "Limited" capacity slightly below the national average.

JOB MARKET

A 2025 NWNMCOG study compared the Labor Force to available jobs by county and region and found significant deficits:

Table 9: **Job Deficits by County and Region in 2024**

	San Juan County	McKinley County	Cibola County
Labor Force	49,939	23,296	9,179
Jobs	46,471	19,444	7,220
Jobs Needed for Full Employment of Labor Force by County	3,468	3,852	1,959
Jobs Needed for Full Employment of Regional Labor Force	9,279		

Source: New Mexico Department of Workforce Solutions, Economic Research; U.S. Census, Bureau of Labor Statistics

As defined by the New Mexico Dept. of Workforce Solutions, the Labor Force includes both employed and unemployed persons, defining "unemployed" as registered for unemployment. The U.S. Census includes in the Job category both full-time and part-time jobs and both paid employees and self-employed people. For the U.S. Census, working at least one hour a week for pay is considered employment.

HEALTHCARE

Indicators of poor quality of life could include disproportionate levels of social distress such as alcohol abuse and addiction and domestic violence. And yet disadvantaged populations in our communities face increasing obstacles to access healthcare for these and other issues. All three of our counties currently have received the Health Professional Shortage Area designation with identified gaps in critical services for primary care, dental care, and mental health care.

We are not alone in facing this Challenge. "The majority of New Mexicans are having a harder time finding health care, especially in rural areas (Lieu and Proper, 2025). The shortage of healthcare professionals has been exacerbated by skyrocketing premiums for medical malpractice insurance since 2019. "Malpractice insurance in New Mexico surged in recent years with the second highest increases in the nation" (Mowahed, 2025). The American Medical Association (AMA) has found that fifteen other states reported double-digit percentage increases in malpractice premiums (Mills, 2025), indicating this is a problem across the nation.

HOUSING

Housing shortages in our region and lack of affordable housing for the workforce are seen as major barriers to economic growth. According to U.S, Census QuickFacts for 2019-2023, compared to New Mexico, owner-occupied housing units in the region tend to have lower median value, and households tend to be more crowded. Regional housing data are provided in Table B2, Appendix B.

The region lacks housing options of all types from low to medium to over 55+, along with mixed-income housing developments near job centers and transportation corridors. We do not have a regional housing strategy to plan for the right mix of housing in the right locations to meet needs.

The regional housing shortage is not unique. The U.S. Chamber of Commerce estimated the economic impact of the housing shortage in New Mexico at $1,522,219,918 in lost economic output (GDP loss 2008-2025), $710,919,133 less in personal income, and 12,273 jobs not generated (Hoover, 2025). The U.S. Chamber found that the housing shortage is a serious problem at the national level:

> The U.S. housing market is severely strained due to a fundamental imbalance between supply and demand. A severe shortage of over 4.7 million homes has created cascading economic and social challenges, from skyrocketing prices to reduced workforce mobility (Hoover, 2025).

QUALITY OF LIFE

The Center on Rural Innovation (CORI) uses aggregated values averaged over the region's three counties to rank quality of life in the region. For these rankings, CORI uses a "broad range of local factors that make an area a nice place to live" to measure how livable and sustainable a community really is (Weinstein, et al, 2023).

Using these aggregated values, CORI ranked our region on the 35th percentile compared to counties throughout the country. This very low estimated quality of life reflects a lack of satisfaction of current residents and low attractiveness of the area to potential residents.

POVERTY

Both McKinley and Cibola Counties meet the definition for Area of Persistent Poverty. An area is considered in persistent poverty if it had a poverty rate of 20.0% or higher during the three-decade period from 1989 to 2015-2019. County-level percentages of people in poverty are provided in Table B3, Appendix B.

> Research suggests people living in high poverty areas experience significant barriers to well-being whether or not they're poor themselves. The longer poverty exists in an area, the more likely the community lacks adequate infrastructure and support services (Benson et al, census.gov).

Hunger and food insecurity remain problems in the region. McKinley County is #1 in food insecurity and #1 in child hunger in New Mexico.

BEST BETS AND DOWNSIDE RISKS

Based on research and analysis, an environmental scan, and a review of the literature on economic development best practices, we created a list of seventeen (17) potential Vignettes that could serve as focal points for our economic development strategy. We evaluated the potential of these Vignettes based on a review of our interconnected Assets and Challenges. We found underlying patterns and made connections and discovered combinations of mutually reinforcing industries. As a result of this process, we created nine new Vignettes, each with its own set of Downside Risks.

These nine Vignettes became the Best Bets of the Prosperity Survey that 170 people from throughout the region voted on to identify our Moonshot strategy. With concurrence from the NWNMCOG Board of Directors/Strategy Committee these nine Best Bet Vignettes are presented here, together with our assessment of the related Downside Risks.

The biggest Downside Risk to our Moonshot strategy is uncertainty in the planning environment. The game-changing aftereffects of the COVID-19 pandemic, industry and supply chain shifts, and dramatic changes in the global economy have meant investors hesitate to make big bets and businesses reassess expansion projects. Major plans are on hold as we adapt to an ever-evolving "new normal." Local governments fall back on day-to-day tactics and deal with issues as they come.

Will advancements in artificial intelligence (AI) unlock the opportunities of tomorrow or destroy the jobs we rely on today? Will the emergence of hybrid and remote work disrupt the way we do business? Everybody has an opinion. Nobody really knows what will happen to the world's economies over the next year, let alone the next five years.

> "Our challenge in creating a Comprehensive Economic Development Strategy for northwest New Mexico for 2009-2013 is to find a way to remain strong in an era of uncertainty."
>
> NWNMCOG CEDS, 2013

But uncertainty is always part of the equation.

ADVANCED MANUFACTURING & TRANSPORTATION

Prosperity Survey Best Bet

Although Manufacturing accounts for less than 3% of GDP and jobs, the sector brings in outside dollars, has a significant competitive advantage for the region, and has potential for growth based on Industrial Park facilities in all three counties, although some of the Industrial Parks may require infrastructure investments to support marketing these assets as shovel-ready sites.

The manufacturing sector includes jewelry and craft items made by hand, products made by assembling components, and products made using power-driven machines to transform raw materials. In partnership with Navajo Technical University, the region could grow its own advanced manufacturing cluster as well. The region could recruit new manufacturing plants and factories by leveraging major transportation and logistics assets including transcontinental east-west interstate road and rail systems, regional north-south roads, and airports in all three counties to transport passengers and cargo.

At present, Transportation accounts for less than 3% of GDP and jobs, but the sector has significant potential for future development based on master plans in the works for the Four Corners Freight Rail Project and the Tradeport America intermodal logistics hub to connect the region to global markets.

Assessment of Downside Risks

Downside risks in the Transportation sector include roads and bridges in need of maintenance and repair throughout the region and railway crossings that impede community connectivity in Cibola and McKinley Counties.

Yes, our industrial parks are essential to attract new manufacturing enterprises, but industrial development in the region has produced some threats to the environment, including air quality impairment and contaminated rivers and groundwater. We may not have the workforce we need to support target industry growth. Housing shortages are a major barrier to economic growth, and the region does not have a comprehensive housing strategy.

Yes, we have world-class transportation assets, but the region's roadway infrastructure includes close to 2,000 miles of county roads, more than half of which are unpaved. Many of the region's 78 bridges are obsolete one-lane structures. The three counties expect to pave a combined estimate of about 44 miles of new road per year and may be able to rehabilitate or rebuild about four bridges every few years.

CONSERVATION ECONOMY

Prosperity Survey Best Bet

This sector includes sustainable agriculture and food systems, eco-tourism, environmental quality, conservation and restoration programs.

Agriculture accounts for less than 1% of GDP and jobs in the regional economy, but has growth potential for farms and ranches, forestry, hunting and fishing, greenhouses and nurseries, Food Hubs and food distribution activities. Large restoration projects are being implemented from Fort Wingate to uranium legacy site cleanup that targeted workforce training programs could be deployed to employ local workforce for these employment opportunities. A solid waste, recycling, and composting circular economy could be leveraged around McKinley Paper and assets in Thoreau and Prewitt.

Assessment of Downside Risks

Climate change, drought, water shortages, and labor shortages are downside risks. Higher temperatures related to climate change result in declining crop yields. Changes in snow cover and water supplies coupled with challenges accessing water threaten agricultural initiatives. Farmers in the El Morro area struggle to get their produce to markets in Cibola and McKinley counties without an expensive refrigerated truck.

CONSTRUCTION

Prosperity Survey Best Bet

The $308 million regional Construction industry provides over 4,500 jobs in subdividing land, preparing sites, constructing new buildings, and additions, alterations, maintenance and repairs to existing structures as well as engineering transportation and utility systems. The regional needs for infrastructure upgrades and housing developments present opportunities for the industry. High school level workforce development programs such as internships and Career Pathways help students move from entry-level roles to higher-skilled positions especially in construction and the skilled trades.

Assessment of Downside Risk

National trends indicate two major Downside Risks to the construction industries: sharply escalating construction costs and a shortage of skilled workers.

According to the U.S. Bureau of Labor Statistics via FRED, costs of construction and costs of building materials and supplies have risen dramatically since 2020 (fred.stlouisfed.org). The

National Association of Home Builders (NAHB) most recent Cost of Construction Survey also found inflating costs to be a major factor in limiting home building:

> The latest finding marks a record high for construction costs since the inception of the series in 1998 and the fifth instance where construction costs represented over 60% of the total sales price. Broad inflation in the global economy since 2022 -- particularly in building material prices -- is largely to blame for the increased construction costs (NAHB, 2025).

The steel industry in particular has been impacted by new tariffs:

> The US construction industry is entering a period of profound uncertainty in 2025, shaped by the far-reaching impact of new tariffs, persistent inflation, and a complex interplay of sectoral strengths and weaknesses (Steel Industry News, 2025).

A recent RAND study found that the U.S. would need to add more than 430,000 new construction workers in 2025 to keep up with the demand, but currently registered apprenticeship programs produce only around 35,000 new workers a year. Unregistered programs, community colleges and technical schools add tens of thousands more, but the nation still falls around 250,000 workers short of the estimated need:

> U.S. plans for new factories, new tech hubs -- even new homes -- are about to crash into one very inconvenient fact. Not enough people work in construction to turn those plans into actual hammer-and-nail reality. Not even close. That one bottleneck threatens everything from America's competitive edge in high-tech manufacturing to its exit from a grinding housing crisis. The answer may seem simple: Just hire more construction workers. But construction jobs often require four or five years of training in an apprenticeship program. And as researchers found, those programs have not scaled up fast enough to meet the need (Irving, 2025).

CREATIVE ECONOMY

Prosperity Survey Best Bet

The Arts and Entertainment sector accounts for less than 1% of GDP and fewer than 600 formal jobs, but also may include close to 10,000 entrepreneurs, sole proprietors, and self-employed artists and musicians. Creative industries include advertising, architecture, arts and crafts, design, fashion, film, video, photography, music, performing arts, publishing, computer games, TV and radio production.

The Creative Economy is multi-dimensional and intersects with Retail and Wholesale Trade, Tourism, and other sectors in the overall economy. Retail and wholesale trade combined account for $780 million in GDP and over 12,000 jobs, bring in outside dollars, and Retail Trade has the fourth biggest competitive advantage of all regional industries.

Assessment of Downside Risk

The New Mexico Economic Development Department Creative Industries Division uses a broad definition of Creative Industries that encompasses 32 different ways of creating products, content, and intellectual property. Although we have people working in many of these categories, a dominant creative industry in our region is the production of indigenous fine art, jewelry, pottery and textiles. Rose Eason, Executive Director of gallupARTS, the nonprofit McKinley County Arts Council, reports that one in four people in McKinley County make at least part of their living from art. Issues around taxes, business licensing, and insurance may seem risky for creative entrepreneurs reluctant to formalize their business. "For self-employed artists and people who work in household enterprises, geographic isolation and lack of business experience are the biggest obstacles (The Policy Circle)."

"The imposition of U.S. tariffs on imported raw materials and finished goods has exerted a discernible impact on the domestic arts and crafts market (Pangarkar, 2025)." When the landed costs of imported textiles, yarn, wood products, paper goods, and synthetic materials increase by up to 25% due to tariffs, these elevated expenses compress profit margins resulting in upward adjustments in consumer pricing and fewer sales.

The digital divide limiting access to the internet is a major Downside Risk across the creative industries. "For musicians, access to digital tools for artistic creation and distribution including digital music platforms, online tutorials, and sound-mixing software remains a pressing concern (Henderson, et al, 2022)."

For artists and craftspeople working in home-based enterprises outside the urban centers, either they can't get online to reach the digital marketplace or they face increasingly steep competition, including from makers taking advantage of Artificial Intelligence (AI) to produce cheap art and online content. "AI is rapidly transforming the art world, from its role in creation to its impact on the market (Deloitte)."

Counterfeit indigenous arts and crafts are a threat to the authenticity of creative products, and the Government Accountability Office is unable to provide a reliable estimate of the extent of this problem (Mittal, GAO), but present a threat to the authenticity of Native products.

Global inflation and economic recession are persistent challenges. "The global art market has slipped back into stagnation (Deloitte, 2025)." According to Merrill, a Bank of America

Company, the international art market has entered "a new era of unpredictability characterized by external shocks. In 2024 sales slipped across all major art categories."

ENERGY

Prosperity Survey Best Bet

Mining, Quarrying, and Oil and Gas Extraction Industries contribute over a billion dollars to the GDP, provide almost 4,500 jobs, and have the single biggest competitive advantage of all economic sectors in the region. These industries extract natural resources by mining mineral solids such as coal and uranium or extracting liquid minerals such as crude petroleum and natural gas for export to global markets. The sector includes the generation, transmission and distribution of electric power, distribution of natural gas, and construction of oil/gas pipelines.

Historically, the Energy sector has been the backbone of the regional economy, but a shift away from fossil fuels, coal mine and coal plant closures, and new more efficient technologies have had a negative impact on jobs, and further contraction is possible. Large legacy site restoration projects are an opportunity to train and deploy local workforce and build a restoration economy.

The region has had an influx of large-scale solar field development, but focus is needed to translate these opportunities into local wealth. Wind development, microgrid, geothermal, small modular units, and battery storage projects are other opportunities, especially in remote communities.

Assessment of Downside Risk

Our energy industry is in transition, threatened by fluctuating market prices. Available natural resources in the region could support new quarrying operations to produce dimension stone, but these resources are located on federal lands and are subject to legislative restrictions that limit this opportunity.

Uranium mining has resulted in environmental contamination in Cibola and McKinley Counties. The worst spill of radioactive material in U.S. history occurred in 1979 in Churchrock near Gallup. A possible recent resurgence in uranium mining in Cibola County is expected to use In-Situ Leach Mining (ISL) and In-Situ Recovery (ISR) technologies to mitigate potential damage, but the risk of further environmental harm cannot be discounted.

HEALTHCARE AND SOCIAL ASSISTANCE

Prosperity Survey Best Bet

This sector generates $642 million in GDP and accounts for almost 12,000 jobs, brings in outside dollars, and has a significant competitive advantage for the region. The sector includes medical and health care and social assistance such as counseling centers providing health practitioners or social workers with expertise and advanced educational degrees. However, all three counties currently have received the Health Professional Shortage Area designation with identified gaps in critical services for primary care, dental care, and mental health care. Federal cuts to Medicaid may threaten the funding and even the survival of the rural hospitals in all three counties, while State-driven investments to restore behavioral health systems and outcomes present an opportunity for the region.

Assessment of Downside Risk

Medicaid covers 16.1 million people in rural communities and "plays a vital role in sustaining rural hospitals so they can continue to support patients and their communities" (Osorio, et al, 2025).

Federal cuts to Medicaid may threaten the funding and even the survival of the rural hospitals in all three counties of our region, where Medicaid dependence rates are higher than the already high rates for New Mexico:

Table 10: **County Medicaid/CHIP Coverage Rates Compared to New Mexico**

	County Rate	**New Mexico Metro Rate**	**New Mexico Small Town/Rural Rate**
San Juan County (Metro)	69%	59%	-
McKinley County (Small Town/Rural)	83%	-	63%
Cibola County (Small Town/Rural)	79%	-	63%

Source: Osorio, et al, American Hospital Association

QUANTUM TECHNOLOGIES

Prosperity Survey Best Bet

Emerging Quantum technologies are on the cutting edge of advanced computing capabilities, and New Mexico wants to position the state as a hub for companies such as Elevate Quantum and Quantinuum to locate facilities in the state. The northwest region could leverage the relative freedom from catastrophic weather events as an asset to market the Safeshoring strategic advantage for Quantum initiatives. However, despite recent investments and progress, internet access is comparatively low and the region remains non-competitive in the digital economy.

Jobs in the Quantum field require a high degree of expertise and specialized training, and throughout the region, low scores in Educational Proficiency in Math, Reading, and Science at high school level and relatively low percentages of people with a BA or higher are a downside risk. Private sector education accounts for less than 1% of GDP and jobs, but regional public education includes eight K-12 school districts and two public universities, contributing a substantial percentage of the $2 million dollar Public Administration sector.

Higher education assets include STEM-based Navajo Tech University with the Center for Advanced Manufacturing, University of New Mexico branch campus in Gallup, New Mexico State University branch campus in Grants, and the San Juan College School of Energy. These assets could be leveraged to prepare the workforce for employment in the Quantum field.

Assessment of Downside Risks

High Tech industries like Quantum will require a high level of ready access to the internet. Despite recent investments and progress, internet access in northwest New Mexico is still comparatively low, and the region remains non-competitive in the digital economy. Outside the urban areas of Farmington, Gallup, Crownpoint, and Grants, Broadband coverage is low and is largely zero on tribal lands.

Table 11: **Broadband Coverage by Location in Northwest New Mexico**

Location	% Broadband Coverage
San Juan County	65.01%
Farmington	98.05%
Sanostee	0%
McKinley County	33.3%
Gallup	99.94%
Crownpoint	99.25%
Pinedale	0%
Cibola County	84.8%
Grants	100%
Acoma Pueblo	0%

Source: Federal Communications Commission's (FCC) National Broadband Map

REGIONAL COMMUNITY DEVELOPMENT FOUNDATION

Prosperity Survey Best Bet

A non-profit Regional Community Development Foundation could focus on developing an ecosystem to support entrepreneurship, improve financial literacy, and facilitate access to capital for business and enterprise development projects that present too much risk for traditional developers.

The Foundation could implement asset-building programs such as individual and family development accounts. By attracting foundational and philanthropic investments to be an innovator in emerging and promising economic and community development models, the Foundation could grow into a Community Development Financial Institution (CDFI).

Assessment of Downside Risk

Revolving loan funds administered by community development organizations have been a primary mechanism for increasing access to capital for non-traditional borrowers who cannot obtain a bank loan for a variety of reasons. The NWNMCOG Revolving Loan Fund project was not sustainable despite a high level of collaboration throughout the region. NWNMCOG Economic Development Director Michael Sage reported that project development had included meetings with over 200 companies and linkages with over two dozen partners in all three counties including Small Business Development Centers (SBDCs), Chambers of Commerce, MainStreet organizations, and colleges and universities. Private sector engagement included outreach to almost a dozen banks and credit units as well as two dozen business prospects. Even with these connections, the NWNMCOG RLF project did not survive.

An additional Downside Risk to a Community Development Foundation is the potential for unnecessary duplication of effort and diffusion of resources on a new initiative when a variety of similar programs already operate in this arena:

- Start Now NM
- prosperityworks.net (individual development accounts)
- Navajo Townsite Community Development Corporation (CDC)
- First Nations Development Institute
- Navajo CDFI (Community Development Financial Institution)
- PATH (People Assisting the Homeless) at Southwest Indian Foundation (homebuyer education and down payment assistance)
- WESST (Women's Economic Self Sufficiency Team)
- helloalice.com (small business loans and grants)
- elevatetheamericandream.com

TOURISM AND MARKETING

Prosperity Survey Best Bet

The Tourism sector contributes almost $33 million to GDP and about 8,300 jobs. The combined Tourism industries bring in outside dollars and have the third biggest competitive advantage among the region's industries. The Tourism sector comprises lodging, food service, arts, entertainment, and recreation. Farmington, Gallup, and Grants all have recreation master plans.

Tourism assets in the region's downtown districts include MainStreet programs in Farmington, Gallup, Grants, and the first Native American MainStreet program in Pueblo of Zuni as well as two catalytic placemaking projects: Complete Streets in Farmington and Coal Avenue Commons in Gallup. The Value Chain for Downtown Revitalization includes replacing inadequate utility infrastructure, addressing deteriorating buildings, and installing new broadband capacity, and may include developing a continuum of housing developments near job centers and transportation corridors.

The Trail of the Ancients (TOTA), a federal and state designated Scenic Byway and All American Road, runs through all three counties and could spark a range of projects leveraging the region's rich scenic, archeological, historic, cultural, natural, and recreational assets to advance Tourism as a major economic driver.

Assessment of Downside Risk

The lack of regional coordination around the marketing of our many tourist attractions is a major Downside Risk to the growth of this economic sector. On the other hand, increased tourism brings its own Downside Risks. Employment in these industries tends toward low-wage jobs that may be inconsistent or seasonal. More visitors can place a strain on public services, first responders, and the transportation network. More auto traffic means increased congestion and pollution from emissions.

Development plans for the Trail of the Ancients bring concerns about overcrowding and potential degrading of sacred archeological and historical sites and monuments. The impact of increased visitor traffic to both infrastructure and sensitive cultural sites could include depletion of limited local resources like water. More tourist activities could bring direct harm to the region's wildlife and fragile ecosystems (NWNMCOG and Bohannan Huston, 2024).

The Trail of the Ancients passes through lands occupied by populations of eagles, hawks, falcons, bear, deer, elk, coyote, mountain lions, and Mexican Gray Wolves who face risks of habitat destruction from development. More human visitors mean more risks to vulnerable plants such as desert scrub, grasslands, saltbush and piñon-juniper woodlands as well as vegetation stabilizing ancient sand dunes. The Zuni Mountain subalpine forests of ponderosa pine, oak, juniper, aspen, spruce and fir trees could be at risk of fire as a result of increased camping and recreational activities.

ALL PROJECTS FACE RISKS

Any strategy, any plan, any project can face a Downside Risk. And sometimes projects fail. Not all of them, and not every time, but a lot of them. Even when they succeed they may not last for the long haul.

In 2024 we evaluated the track record for a group of 21 economic development projects that had been on the drawing board in 2009. Many of them seemed visionary and still viable fifteen years later. We found that four of the projects had been successfully completed and six had been partially implemented. Two had been implemented but failed, and eleven -- more than half -- never got off the ground.

More recently we see that NWNMCOG's regional Revolving Loan Fund operated for a while but was not sustainable. The SoloWork project in Cibola County proved to be a successful model, but participation declined, the funding dried up, the $200,000 needed for the annual budget was not available, and the project ended.

There will always be a downside risk to any bet on an economic development strategy. The greater risk for a region like northwest New Mexico would be to try nothing.

> "There is a crack in everything. That's where the light gets in."
>
> - Leonard Cohen

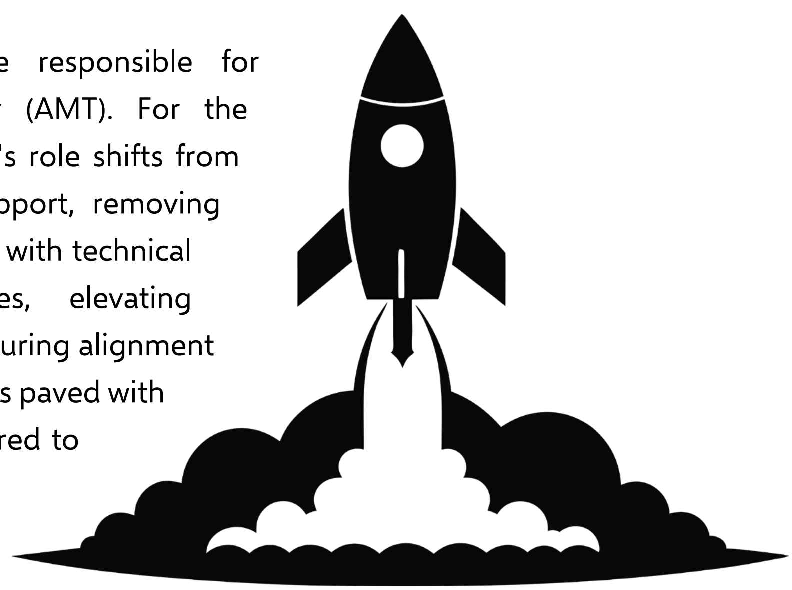
CHAPTER 3
STRATEGY & IMPLEMENTATION PLAN

To set ourselves up for our best chance of achieving our Moonshot, the NWNMCOG will advance the following two-part Strategy:

1. **NWNMCOG Leadership on Advanced Manufacturing and Transportation**: During our public engagement project, participants ranked a set of nine Best Bet economic focus areas and identified Advanced Manufacturing and Transportation (AMT) as the people's choice for the Best Bet to improve economic activity in the region. This will be our Moonshot Strategy. The NWNMCOG will leverage volunteer leadership to lead the charge and will provide the Moonshot Team with technical assistance, coordination, and administrative and staff support.
2. **Distributed Leadership in Remaining Focus Areas:** The NWNMCOG will utilize a Distributed Leadership model to empower any volunteer Working Group willing to take the lead in advancing one of the remaining eight Best Bet economic focus areas to improve the economy. This approach recognizes that sustainable economic development emerges from community ownership rather than top-down mandates.

THE MOONSHOT

In this model, NWNMCOG will be responsible for implementing one Best Bet strategy (AMT). For the remaining eight Best Bets, NWNMCOG's role shifts from direct implementation to strategic support, removing institutional barriers, connecting groups with technical assistance or funding opportunities, elevating successes to broader audiences, and ensuring alignment with regional priorities. Once a pathway is paved with AMT, this model and tactics can be shared to the other groups.



INTRODUCTION

In October, 2025, 170 people from all over northwest New Mexico voted in the NWNMCOG Prosperity Survey, ranking nine Best Bets for economic development in the region. They picked Advanced Manufacturing and Transportation (AMT) as the #1 Best Bet for the Moonshot to add a billion dollars to the GDP and create 10,000 new jobs by 2030. The NWNMCOG Board of Directors/Strategy Committee agreed with their choice.

Moneyball Principle #1:

"When you get the answer you're looking for, hang up."

This is an outline for a White Paper that will be written by NWNMCOG and the Moonshot Team in the first quarter of 2026 to kick off the beginning of the Moonshot Strategy.

VISION STATEMENT

By 2030 we will move our economy in a new positive direction by adding a billion dollars to our Gross Domestic Product (GDP) and creating 10,000 new jobs.

VALUE PROPOSITION

We will leverage our competitive advantage in manufacturing, our major transportation and logistics assets, and our entrepreneurial spirit to generate revenue from the export of regional products and create new economic opportunities for the people of the region.

RECRUIT THE MOONSHOT TEAM

Moneyball Principle #2:

"The game is not about statistics, it's about people."

Implementation of the Moonshot will require a Champion to lead a multidisciplinary volunteer team, which should include Thought Leaders who are experts in the industry and stakeholders in related industries. This group will act together with committed community Shareholders to plan, implement, and evaluate the Moonshot Strategy. NWNMCOG will provide staff support to the Champion and the Team, and the NWNMCOG Board of Directors/Strategy Committee will provide leadership and oversight.

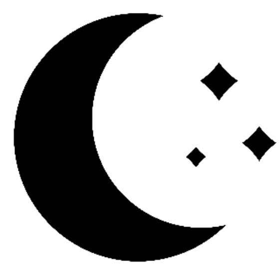
NWNMCOG will work with the Champion to build the Team by drawing on an initial cadre of volunteer respondents to the Prosperity Survey who indicated they were interested in working on AMT, augmented with targeted Thought Leaders, experts, and additional Shareholders as needed to contribute subject matter expertise and/or represent a wide variety of backgrounds with a range of opinions and lived experiences. Recruitment and orientation to the Team will require developing a Job Description outlining the purpose of the Team, scope of work, roles and responsibilities, and work plan for Team members.

DEFINE THE CLUSTER

Moneyball Principle #3:

"Use data and statistical analysis to find value no one else can see."

The Advanced Manufacturing and Transportation cluster encompasses many sectors of the economy. The Team should begin the work of defining the AMT Cluster by analyzing NAICS code data down to the six-digit level as needed to find percentages of GDP, Businesses, and Jobs together with Location Quotients for NAICS 31-33 Manufacturing and 48-49 Transportation and Warehousing as well as additional potentially relevant sectors including but not limited to:



- 11 Agriculture, Forestry, Fishing and Hunting (Food products, Wood products)
- 23 Construction (Build out of Industrial Parks)
- 42 Wholesale Trade (Product Marketing)
- 44-45 Retail Trade (Product Sales)
- 71 Arts, Entertainment and Recreation
  - The New Mexico EDD recognizes 32 different categories of activities in the Creative Industries alone, each of which has the potential to create marketable products that could be exported to generate revenue.

The Team should carry out a detailed analysis of these sectors to identify the ones with the best chance for growth where we have experience, capacity to expand, regional competitiveness, and a large and growing market for the products.

This exercise should provide the data needed to set some baselines for the AMT Cluster so the Team can monitor GDP and Job Growth and increased Sector Diversity over time as the Strategy is implemented.

ABCD ANALYSIS

The Team should think through an ABCD analysis specific to the AMT Sector by pulling key points from the 2025-2030 CEDS ABCD Analysis and expanding this review with expertise and input from Team members.

CONNECT WITH KEY PARTNERS

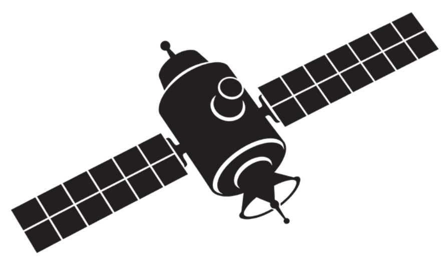
Moneyball Principle #4:

"Understand what is really happening."

The Moonshot Team approach to potential partners should emphasize a fundamental policy of "No Zero-Sum Games" and a commitment to coopetition as a working method for collaboration.

NEW MEXICO ECONOMIC DEVELOPMENT DEPARTMENT (EDD)

Our AMT Moonshot is well-aligned with New Mexico's 2025 economic development plan. New Mexico has set a goal to "build Statewide Site Readiness, supporting our development of our industrial parks as a key asset," and has named "Intelligent Manufacturing" as one of nine target industries to position New Mexico as a "top tier option for advanced manufacturing."



NAVAJO NATION ECONOMIC DEVELOPMENT DEPARTMENT

The 2024 Navajo Nation CEDS has established "Industrial Development and Manufacturing" as one of nine Goals, with a set of related Action Steps to "Evaluate current industrial manufacturing prospects" and "Obtain and utilize economic data to target business sectors and industries (i.e., solar, manufacture, industrial businesses, etc.)."

Navajo Nation has industrial parks in our region at Church Rock, Shush Be Toh (Iyanbito), Shiprock, NAPI, and NFPI Navajo that could be part of the AMT industrial development plan leading to mutual benefit.

NAVAJO TECHNICAL UNIVERSITY

The Center for Advanced Manufacturing ("the Lab") in the Navajo Tech School of Engineering, Math and Technology has expertise and training programs in the field of intelligent manufacturing.

NEW MEXICO MANUFACTURING EXTENSION PARTNERSHIP

This organization should be explored to identify any available resources to support small-scale makers in a variety of categories.

NWNMCOG LONG RANGE TRANSPORTATION PLAN

Some of the major goals of the Regional Long Range Transportation Plan dovetail with AMT economic development:

- Link regional assets to global markets;
- Capitalize on regional trade routes for market access;
- Establish stronger regional and local air service in consultation with economic development districts and other regional partners.

GREATER GALLUP ECONOMIC DEVELOPMENT CORPORATION

Connect with GGEDC regarding the status and long range plans for Tradeport America and to find out more about the "Prewitt/Escalante Redevelopment" GGEDC special project potential to be folded into an AMT site readiness strategy.

FOUR CORNERS ECONOMIC DEVELOPMENT

The 4CED 2022 Plan includes "Manufacturing" as one of five key goal areas and should be able to provide updated status reports on the Four Corners Freight Rail Project.

FARMINGTON ECONOMIC DEVELOPMENT DEPARTMENT

Farmington has an Outdoor Recreation Industry Initiative that may contribute products for export.

CIBOLA ECONOMIC DEVELOPMENT FOUNDATION

Cibola has established development of the Milan Industrial Park as the key goal area for the current period.

TRIBAL ECONOMIC DEVELOPMENT GROUPS

NWNMCOG and the Moonshot Team should reach out to explore possibilities for collaboration with tribal economic development groups:

- Acoma Economic Development Office
- Laguna Planning Programs
- Laguna Community Foundation
- Laguna Development Corporation
- Zuni Planning and Community Development Office

CONSTRUCT VALUE CHAINS

Moneyball Principle #5:

"Ask the right questions."

Conceived by Harvard Business School Professor Michael Porter, a Value Chain is a network of people, businesses, organizations, and agencies addressing a market opportunity to meet demand for specific products. The Value Chain is a tool for connecting assets to market demand by creating sector-specific strategies of collaboration and coopetition.

A Value Chain refers to all the various business activities and processes involved in creating and marketing a product. The Moonshot Team should bring partners together to build Value Chains in sectors with the most promise for growth:

> Building a Value Chain takes coopetition to a higher level, in terms of bringing partners together, mapping out the Value Chain System, determining where the gaps lie, and strategizing collaboratively about how to fill them (NADO Research Foundation, EDD Community of Practice).

CONSTRUCT THE ACTION PLAN

Moneyball Principle #6:

"Focus on results."

This is a plan to make a plan. Based on the ABCD assessment for the AMT Cluster, the Moonshot Team should craft a Strategy and Action Plan that take maximum advantage of Assets and mitigate Downside Risks. The Team should be able to use the findings of their NAICS Code analysis and environmental scan with partners to identify opportunities and specific projects to target the strongest outcomes.

SHORT TERM STRATEGY 2026-2027

Focus on development of base industries with the highest Location Quotients and target quick payoffs.

MEDIUM TERM STRATEGY 2028

Based on short term track record, aggressively pursue private sector investment in the most promising projects.

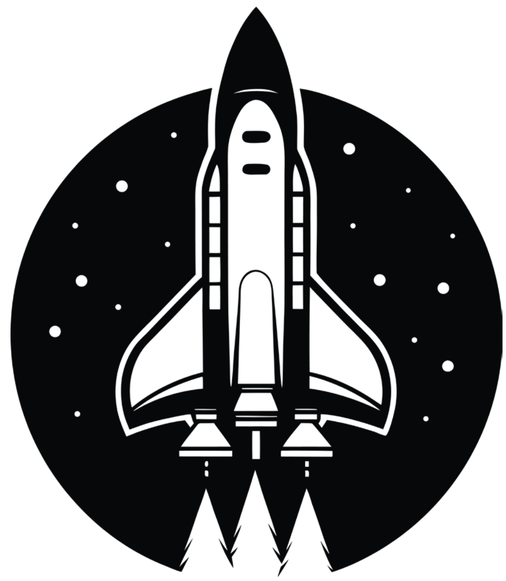
LONG TERM STRATEGY 2029-2030

Tradeport America and the Four Corners Freight Rail Project should form the core of the long-term AMT development Strategy.

TIMELINE AND MILESTONES

2026

- Find the AMT Champion (Moonshot Team leader)
- Recruit and activate the Moonshot Team
- Make connections with partners
- Write the White Paper
- Begin building out the network
- Construct the Action Plan



2027 - 2029

- Do the Plan
- Come together annually to evaluate progress and interim results

2030

- Use CEDS Performance Measures to Evaluate Outcomes
- Take Stock
- Where do we go from here?

DISTRIBUTED LEADERSHIP STRATEGY

Distributed Leadership multiplies capacity by mobilizing diverse community expertise and networks. This model can build shared, authentic ownership for implementation across all three counties, ensuring strategies that reflect ground truth and increasing the likelihood of sustained momentum beyond formal planning cycles.

Successful implementation of any one of the Best Bet focus areas requires that a Champion from the community take the lead to develop and convene a Working Group, organize the work program, and provide ongoing administrative and staff support to the Working Group.

The Champion could emerge from the cadre of volunteers who stepped up in response to the Prosperity Survey and indicated their interest in working on one or more of the Best Bets. The Champion could be a private citizen, public official, business leader, public agency, private non-profit group, one of the region's economic development organizations or groups, or some combination working as a team. The Champion may be themselves a Thought Leader, or if not, should be supported by a Thought Leader who is a technical expert or existing leader in the relevant industry.

Each Best Bet Champion will be free to develop their own approach to the work of implementing their Best Bet strategy. NWNMCOG will provide the Outline for the Moonshot White Paper as an optional model to guide the development process, but the Working Groups will be empowered to adapt some or all of the Moonshot approach or create their own way forward. This model will generate broader leadership capacity throughout the region, creating a more resilient economic development ecosystem.

NWNMCOG will maintain communication touchpoints and track progress. This light-touch coordination preserves volunteer energy and initiative. NWNMCOG will post Working Group reports, major success stories, and other relevant updates to a central project website allowing the public and the Working Groups to stay up to date on implementation of the CEDS to promote accountability and provide transparency in the regional economic development process.

TIMELINE AND MILESTONES

2026

- Identify Champions to establish the scope of the CEDS implementation plan
- Champions convene Working Groups, make and report plans

2027-2029

- Working Groups implement their plans
- Working Groups monitor progress and report results

2030

- NWNMCOG uses CEDS Performance Measures to evaluate the outcomes and impact of the overall implementation of the Moonshot and Working Group Best Bets
- Take Stock
- Where do we go from here?


FLAGSTAFF
174 MILES
L.A
558 MILES

CHAPTER 4
PERFORMANCE MEASURES

The NWNMCOG will use specific performance measures periodically to measure progress and evaluate outcomes of the implementation of the 2025-2030 Comprehensive Economic Development Strategy (CEDS). The overall purpose of the CEDS is to create economic growth in San Juan, McKinley and Cibola Counties. For outcome evaluation purposes, economic growth will be defined by measuring changes against established baselines.

2025 CEDS REGIONAL BASELINES

GROSS DOMESTIC PRODUCT (GDP)

- $8,293,731,000 (2023)

EARNERS

- 73,135 Jobs (2024)
- 9,880 Non-Employer Establishments

SECTOR DIVERSITY

- Private sector share of GDP, 71.1% (2023)
- NAICS 21 and 92 combined share of GDP, 45.58% (2023)
- 10 of 20 NAICS Code sectors contribute more than 3% to the regional GDP (2023)

POVERTY

- Regional Average Median Household Income, $49,760 (2019-2023)
- Regional Average Gini Index Score, .466 (2018-2022)

DATA SOURCES

All databases have inherent limitations. For instance, GDP data from the U.S. Bureau of Economic Analysis (USBEA) include some missing values due to the confidentiality of certain industry information. The type and quality of data used are critical to successful, effective, and reliable monitoring and evaluation efforts:

Care should be taken not to over-interpret change calculations based on small sample sizes. In general, 5-year estimates are most reliable due to the largest sample size, unless the most current data are needed. Sequential five-year estimates contain four years of overlapping coverage so extreme caution should be used in making comparisons with consecutive years of multi-year estimates ("Understanding and Using American Community Survey Data," US Census Bureau at census.gov). A codebook of data sources for the CEDS evaluation is provided in Appendix C.

Extreme care should be taken when choosing data. Even if care is taken in choosing and using data, limitations and assumptions should be clearly documented when reporting.

"Economic Development Strategic Planning,"
International Economic Development Council, Winter 2023

GROSS DOMESTIC PRODUCT (GDP)

GDP is the single most widely used metric to evaluate the productivity of an economy. GDP includes net exports of goods and services, government spending, and consumption (spending by households on goods and services). As measured by the U.S. Bureau of Economic Analysis, GDP does not include transfer payments such as Social Security (McLaren, 2022).

In northwest New Mexico, informal work, an extensive cash economy, and a "grey economy" may represent a significant productivity factor beyond the ability of the BEA to measure it.

EARNERS

Terms "employment" and "jobs" may be considered synonymous, with the caveat that a simple measure of the total number of people who are employed may not include an unknown number of job vacancies that remain unfilled for a variety of reasons. Additional factors complicating a simple job count include people holding down more than one job but counted only as one "employed person," and how full-time and part-time jobs may or may not be counted as one "job."

Table 12: **Employment by County per U.S. Bureau of Labor Statistics, 2024**

County	Jobs
Cibola County	7,220
San Juan County	46,471
McKinley County	19,444
Regional Total	**73,135**

Source: Quarterly Census of Employment & Wages (QCEW), 2024

The U.S. Census defines a business "establishment" as a single location where business occurs and a "firm" as a business operating at more than one location. Employer establishments include at least one employee, while non-employer establishments have no employees and can be self-employed individuals or sole proprietors.

Table 13: **Regional Businesses in 2022**

	San Juan County	Cibola County	McKinley County
Employer Establishments	2,483	282	950
Non-Employer Establishments	5,780	1,117	2,983
All Employer Firms	1,952	262	626

Source: US Census QuickFacts

POVERTY

Poverty may be measured with a variety of indicators, including median household income, per capita income, and percent of persons in poverty. In northwest New Mexico, defining "poverty" may also require cultural considerations that may distinguish between statistical "poverty" and an individual's or family's perception of being "poor."

The US census uses median household income and a set of money income thresholds that vary by family size and composition to determine who is in poverty ("How the Census Bureau Measures Poverty," US Census Bureau). This calculation distinguishes between household and housing unit, defining "housing unit" as a structure and "household" as one or more people living together. The Census uses 23 sources of income to value household income, using only income before taxes and not including capital gains or non-cash benefits such as public housing, Medicaid, and food stamps.

Table 14: **Median Household Income**

Cibola County	$51,765
San Juan County	$53,020
McKinley County	$44,496
Regional Average	**$49,760**

Source: U.S. Census QuickFacts (2019 – 2023)

The Gini Index, a measure of income inequality, can serve as a second indicator of poverty. The Gini Index measures the distribution of wealth in an area on a scale from 0 to 1. A score of 0 would indicate complete equality where all have equal share of the wealth, while a score of 1 would indicate the highest level of inequality where one person or group has all the wealth. A Gini score >.4 indicates a big income gap within an economy, and a score between .5 and 1 indicates severe income inequality. The average regional Gini Index score in northwest New Mexico would be .466.

Table 15: **Gini Index, 2018-2022**

U.S.	0.4811
New York	0.5149
California	0.4866
New Jersey	0.4782
New Mexico	0.4768
CEDS Region	0.4660

Source: U.S. Census Bureau

MEASURING RESILIENCE

Our performance measures include two of the key metrics recommended by EDA to monitor changes in the levels of resilience in the economy: Sector Diversity and the Gini Index of income inequality.

Although two of the 20 NAICS codes combined hold a dominant position in our economy, contributing nearly 46% of our GDP, another 8 sectors provide significant contributions ranging from 3% to over 5%, representing a fairly diversified base. Our CEDS is intended to grow some of the smaller sectors to increase diversity in the economy.

Improving (lowering) our Gini Index score is our second aim to measure the results of our plan to foster resilience for the people of the region. We have a fairly big income gap, but it could be worse.

Table 16: **Gini Index, 2018-2022**

U.S.	0.4811
New York	0.5149
California	0.4866
New Jersey	0.4782
New Mexico	0.4768
CEDS Region	0.4660

Source: U.S. Census Bureau

HOW THE CEDS PLAN WILL PROMOTE RESILIENCE

In the context of economic development, the purpose of economic resilience is to prepare regions to recover from adversity. Due to the innate strength and resilience of our people, the northwest New Mexico Region has come through the shock of the COVID-19 Pandemic and has weathered the disruptions to health, emergency response, and economic systems with no net losses to the annual GDP, major businesses largely recovered, and the key organizational structures reasonably intact.

STEADY-STATE INITIATIVES

Steady-state initiatives are the long-term efforts in place to bolster the region's system-level capabilities to withstand downturns in larger economies, transformative changes in critical industries, or a range of natural or man-made disasters.

Our CEDS plan has built-in features aimed at bolstering the regional community's involvement in the planning process, building on our assets, leveraging our competitive advantages, broadening the industrial base, and diversifying the economy.

Our strategy focuses on a Moonshot to implement development plans around two key economic sectors along with the potential implementation of eight other initiatives to support expansion of major businesses as well as helping entrepreneurs, artists and artisans expand their production, create jobs, increase income, decrease economic leakage, and strengthen the diversity and resilience of the regional economy.

Our information network includes a contact list of nearly 500 people interested in following the implementation of our CEDS. Our Prosperity Survey received 170 responses, and 58 responders indicated an interest in taking an active role in working on the Plan. We intend to maintain public engagement by posting reports and updates on a central project website. Our Moonshot implementation approach and Distributed Leadership model are designed to build out the information network of partners and stakeholders.

RESPONSIVE INITIATIVES

All three counties have developed their own pre-disaster recovery plans. County-level and locally-based emergency preparedness, response, management, and recovery plans include comprehensive multi-hazard multi-jurisdictional components:

- Information and communications
- Law enforcement coordination
- Fire and rescue coordination
- Health and medical services
- Mitigating vulnerability of key infrastructure
- Evacuation, shelter in place, and mass care procedures
- Continuity of government plans
- Continuity of operations plans
- Recovery coordination mechanisms

The NWNMCOG's *Regional Recovery Strategy (RRS)* provides a framework for NWNMCOG and partners to respond to the immediate demands of recovery efforts and mitigate the impacts of future disaster events. The *RRS* incorporates local disaster, emergency response, and recovery strategies as well as local and regional comprehensive plans. NWNMCOG provides a neutral forum to convene diverse stakeholders, facilitate discussion, and plan initiatives around issues of economic resilience, preparedness, and recovery.

> “Life doesn't get easier or more forgiving; we get stronger and more resilient.”
>
> - Steve Maraboli, Life, The Truth, and Being Free

APPENDIX A
PLANNING PROCESS & ENGAGEMENT SUMMARY

PLANNING PROCESS

NWNMCOG kicked off the planning process for the 2025 CEDS with a Taking Stock workshop in November, 2023, to assess the state of the regional economy. Analysis of regional and state data between 2007 and 2022 revealed that the region had lost almost 18% of the annual gross receipts during that fifteen-year period while New Mexico gained more than 18% in the same period.

We had carried out dozens of projects with funding in the millions. And yet, according to the Innovation Index at statsamerica we had a low level of positive outcomes from existing economic activity and a low standard of living, and the percentages of people living in poverty were higher than they were in 2007. Were we misallocating capital on the wrong things?

We recognized we were at an inflection point.

PROCESS COMMITTEE

Beginning in January, 2024, the CEDS Process Committee undertook a new approach to strategic planning based on research and analysis with broad public and private input. The Committee set direction, provided guidance, shaped and oversaw the economic analysis, and monitored implementation of the CEDS development process throughout 2024-2025.

The Committee was led by NWNMCOG staff augmented with input and advice from outside consultants, business and industry leaders, private citizens, and a variety of stakeholders who served as a sounding board and provided subject matter expertise. Mr. Yiwei Wang, a masters-level public policy student at the Harvard Growth Lab, provided staff support to the Committee from June to August, 2025.

EVALUATION OF 2021 CEDS

For the process evaluation, we conducted a detailed Update Survey with the regional Economic Development Organizations to determine what projects and activities had been carried out within the framework of the seven goal areas and 21 strategies of the 2021 CEDS as well as any additional activities and accomplishments above and beyond the plan. From these raw data we produced a list of more than a dozen highlighted accomplishments, mostly related to infrastructure improvements.

For the outcome evaluation, we analyzed data related to the baselines and found a set of mixed results with a few small gains offset by persistent poverty and a loss of 2,109 jobs.

RESEARCH

We conducted a wide-ranging and ongoing review of the literature on economic development best practices as well as reports in areas such as housing, construction, the creative economy, and a variety of other industry-specific articles and publications. We consulted experts at RAND to research new applications of the Delphi process for consensus building and the use of Vignettes for broad community surveys.

For our data analysis, we consulted the U.S. Bureau of Economic Analysis (BEA) and the Census Bureau within the Commerce Department and the U.S. Bureau of Labor Statistics, an agency of the Department of Labor. We also consulted the New Mexico Department of Workforce Solutions, Labor Analysis Statistics & Economic Research (LASER), Local Area Unemployment Statistics (LAUS).

We looked at county-level and regional data for the Gross Domestic Product (GDP) broken down by two-digit NAICS Codes. We looked at labor force, employment by industry, and business formation statistics. We reviewed American Community Survey (ACS) QuickFacts five-year averages for Population, Age and Sex, Housing, Families and Living Arrangements, Computer and Internet Use, Education, Health, Economy, Transportation, Income & Poverty, and Businesses.

We augmented our data analyses with additional quantitative data from sources such as the New Mexico State University Arrowhead Center Base Industry Studies, NMVistas.org for the region's school districts, the Economic Development Capacity Index (EDCI) at the National Economic Resilience Data Explorer (NERDE, Argonne National Laboratory), and the Center On Regional Innovation (CORI).

WORKSHOPS

During the summer of 2025, the Process Committee conducted a series of workshops to review and process the findings that had come out of our research and the extensive raw data from the Update Survey. Much of this information supported new assessments of Assets and Challenges as well as a set of ideas for Vignettes that might lead to economic growth.

ASSETS AND CHALLENGES WORKSHOP

We combed through the various sections of the 2021 CEDS document and pulled out any language and/or items mentioned or listed as assets, strengths, opportunities, weaknesses, threats, or challenges. From these raw data together with input from the Update Survey we produced inventories of Assets and Challenges.

Through a workshop process, we reviewed the inventories, summarized and prioritized the lists, and developed an understanding of our greatest strengths upon which to build the 2025-2030 economic development strategy together with the challenges we would need to mitigate. These findings were organized in thought clusters around recurrent themes and edited by NWNMCOG to create the final assessment of Assets and Challenges for the new CEDS.

ECONOMY WORKSHOP

We reviewed all the available data we had found on various aspects of the economy. The purpose of this Workshop was to decide how we would interpret the available data and which data we would present in the 2025 CEDS. We framed our discussions around the questions of how the regional economy works and how we wanted to define economic growth. From these discussions, we decided on the definition of economic growth and which data we would use as baselines for the evaluation framework.

VIGNETTE WORKSHOP

For the Vignette Workshop, we reviewed an inventory of potential topics to consider for development as Vignettes describing economic growth opportunities. These topics were derived from our research on the Arrowhead Center Base Industries, the NERDE main economic sectors based on GDP and/or Number of Jobs, the NMEDD top industries based on analysis of industry size by matched taxable gross receipts, the strategies from the 2021 CEDS that the EDOs had greenlit in the Update Survey for inclusion in the new CEDS, promising sectors and clusters from economic development best practices research, and a review of COG member project priorities.

Initially these workshop discussions resulted in a list of 17 snapshot pathways that in theory could produce economic growth. We looked at them more closely through the lens of our analysis of Assets and Challenges, and boiled them down to a set of nine Best Bets that we would take to the community to engage the public in making the final decision about where NWNMCOG would focus its economic development strategy for 2025-2030.

ENGAGEMENT SUMMARY

PROSPERITY SURVEY

The nine Vignettes defined as Best Bets for the Prosperity Survey were presented to the public on October 7th, 2025, using an email contact list of over 500 individuals as well as Facebook postings and an interactive website, theprosperitycollaborative.org. We asked respondents to rank the nine Best Bets in order of priority for which ones were most likely to least likely to produce economic growth and prosperity.

We used a ranked-choice voting method to elicit the broadest possible representation of what respondents thought. We received responses from 170 people from all over the region. An outside expert consultant analyzed the data for us and produce the result: Advanced Manufacturing and Transportation became our Moonshot.

SOCIAL MEDIA

We pushed the survey announcement out via social media platforms. The NWNMCOG made announcements on Facebook and X (formerly known as Twitter) and requested their partner agencies also distribute the announcement on their social media platforms. Additionally, NWNMCOG ran ads on Meta's platform to Facebook and Instagram during the week of October 12th, 2025.

EMAIL OUTREACH

The project team utilized a variety of contact lists that were generated for other regional-focused projects. These lists included members of the public, property owners, business leaders, and elected leaders and staff of member agencies. Additionally, the NWNMCOG reached out to the following known stakeholders:

- NWNMCOG Board of Directors
- Navajo Chapter Houses
- Pueblo of Acoma elected leaders and staff
- Other regional economic development organizations (EDOs)
- Revolving Loan Fund Members
- Higher education contacts

- Regional and state legislators and staff
- Funders in the region

The combination of these lists resulted in over 500 unique contacts. On Tuesday, October 6th, 2025, batch emails were sent out to these contacts with a link to the Prosperity Survey with a request for their input. The content of the email is below.

Figure A1: **Prosperity Survey Email Blast**

Good afternoon! You are receiving this email because you have recently been involved with projects led by the Northwest New Mexico Council of Governments (NWNMCOG) or other regional entities. We are reaching out with another opportunity to help improve the region—this time, with a focus on the economy.

The NWNMCOG is currently preparing a Comprehensive Economic Development Strategy covering McKinley, Cibola, and San Juan counties. We would appreciate your input on a brief survey.

The Prosperity Survey

Imagine you have been put in charge of setting the focus for economic prosperity in northwest New Mexico for the next five years. As the Captain, your responsibility is to create $1B in additional economic activity and 10,000 new careers.

Our economy has been hit hard by downturns and displaced workers, and that has led to the erosion of the tax base which affects our families and quality of life in your community.

Your team has completed a deep dive to find the most promising best bets for economic growth based on our assets and challenges. The team created the Prosperity Survey to provide snapshots or "Vignettes" that you can read and analyze and then decide where to place our bets.

So, Captain -- what do you think we should bet on?

TAKE THE SURVEY: https://www.surveymonkey.com/r/prosperity2025

LEARN MORE ABOUT THE PROJECT: https://www.theprosperitycollaborative.com/

Reach out to NWNMCOG-CEDS@bhinc.com with any questions or comments. If you would like to opt out of future communications on this project, please reply to this email with "Stop."

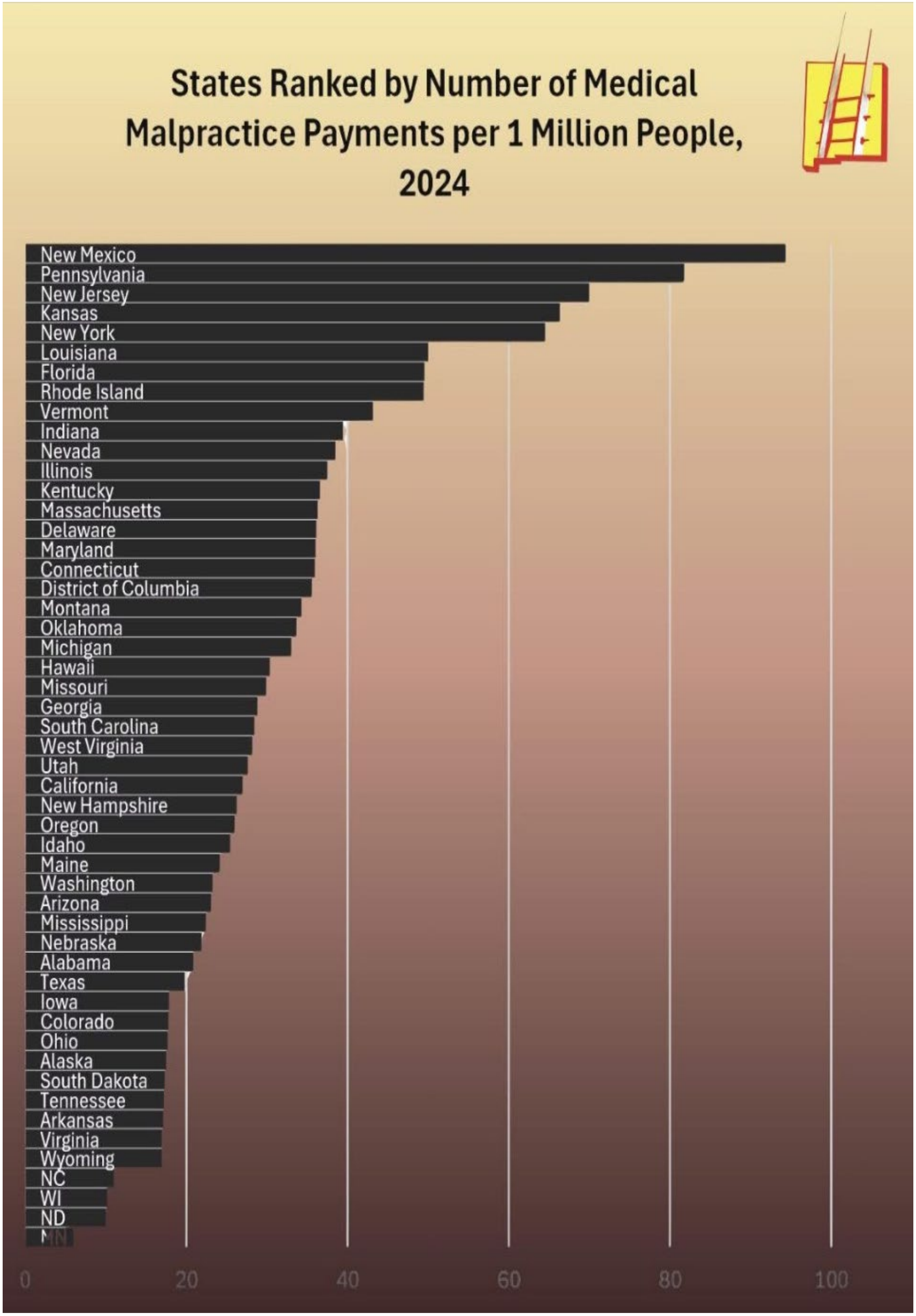
DRAFT CEDS FOR PUBLIC REVIEW

On November 20th, 2025, a draft of the CEDS was posted on the project website, theprospeirtycollaborative.com, for public review. An email notice was sent to the same contact list as the Prosperity Survey. Opportunities for public comment included direct emails to the project email, NWNMCOG-CEDS@bhinc.com, and an online form on the website, theprosperitycollaboratige.com. The NWNMCOG posted the notification on its Facebook and X (Twitter) accounts via regular posts and paid advertisements. The draft was available for public review and comment for 30 days: from November 20th, 2025 to December 20th, 2025.

There were four public comments. Public comments were considered and incorporated into the final CEDS, as appropriate. The following table identifies comments and indicates how they were addressed in the final version.

Commentor	***Comment***	***Email***	***Addressed?***
Mark Stark	Please update the references to the San Juan Freight Rail project to the Four Corners Freight Rail project.	mstark@sjcounty.net	Updated in-text references.
Amy E. Clark	I read your report. Thank you for emailing it to us. As a relatively new resident of McKinley County (moved here in 2009), I've noticed a number of areas especially promising, just awaiting funding for development. 1. A great need for stipend-paying technical training for new high school graduates and the unemployed. 2. Government investment in clean energy equipment and installations. Just some ideas. Mrs. Amy E. Clark	quaker.lady@yahoo.com	Workforce training programs and clean energy opportunities are discussed in the draft CEDS.
Les Gaines	Under health care we need to mention something that address this chart and the massive loss of health care providers. We will Never have growth with the current health care crisis. Soon to follow is the highest insurance rates in the nation. Which will force people like me to leave our homes. *[Commenter included image showing high cost of malpractice lawsuits in NM compared to other states, included below.]*	plesant74@gmail.com	Discussion of malpractice issues is discussed on Page 31 of the draft CEDS.

Tim Gibbs	I wanted to share a piece we put together highlighting a unique opportunity here in San Juan County. As you know, we continue to work closely with the County on the Four Corners Rail initiative, and one of the most promising extensions of that effort is the potential use of the rail right-of-way as a dedicated infrastructure corridor—specifically for a large-scale trunk fiber-optic line. We are seeing behind-the-meter project inquiries nearly every week, certainly one to two times per month, and one of the most critical assets we need to position this region as a premier site for those developments is a high-capacity fiber trunk. The rail corridor offers an ideal, purpose-built right-of-way that could deliver enormous communications capability to the Navajo Nation and the broader region, while also establishing a north–south connection into Colorado and enabling a radial loop between Denver and Salt Lake City. It is a rare opportunity with significant regional and national value. I've included a one-pager that could serve as a drop-in for the CEDS. If possible, I would love to see this included—having it formally reflected in the SEDS increases the likelihood of consideration for federal funding. Please let me know your thoughts, and whether we are still within the window to incorporate it. I appreciate your help, as always. *[Commenter attached word document providing overview of project, included below.]*	tgibbs@4cornersed.com	1. Rail - highlighted already and in the top strategy for implementation. 2. Added text: "Behind-the-meter - Industrial Park section - is a way to get mega power for projects not just in San Juan County but we need in Milan and Gallup too." Relevant video: https://www.cnbc.com/video/2025/02/24/why-ai-has-google-microsoft-and-amazon-spending-big-on-energy-sources.html 3. Fiber - added a sentence in an infrastructure not just fiber but a US491 utility corridor that started with NGWSP and then four-laning - now rail plus utilities.


States Ranked by Number of Medical Malpractice Payments per 1 Million People, 2024
New Mexico
Pennsylvania
New Jersey
Kansas
New York
Louisiana
Florida
Rhode Island
Vermont
Indiana
Nevada
Illinois
Kentucky
Massachusetts
Delaware
Maryland
Connecticut
District of Columbia
Montana
Oklahoma
Michigan
Hawaii
Missouri
Georgia
South Carolina
West Virginia
Utah
California
New Hampshire
Oregon
Idaho
Maine
Washington
Arizona
Mississippi
Nebraska
Alabama
Texas
Iowa
Colorado
Ohio
Alaska
South Dakota
Tennessee
Arkansas
Virginia
Wyoming
NC
WI
ND
MN
0
20
40
60
80
100

Extended Word Comment re Regional Fiber Backbone Infrastructure

Our region's infrastructure, as noted in the "Infrastructure Deficits" discussion, is sorely lacking. While our continuing needs around Broadband Infrastructure are briefly discussed (though usually thought of as fiber to the premise, enabling a high-speed internet connection to a single residential or small business location) there is another, perhaps more fundamental, piece of communications infrastructure that we must consider in this CEDS. An infrastructure "Game Changer", if you like.

The deployment of, and access to, **long-haul interstate fiber backbone** will be critical to addressing the noted Challenges and achieving measurable and sustainable success across several of the Prosperity Survey Best Bet objectives.

Let's define **long-haul interstate fiber backbone** as:

"A high-capacity fiber-optic network that connects major routers, data centers, and internet exchanges across cities, counties, or states. It forms the foundational network infrastructure for delivering internet traffic at scale."

A fiber backbone of this class usually consists of fiber bundles of up to several thousand individual fiber optic strands and carries enormous (~1 TBps) volumes of data between regions and ISPs. In this context we must consider **long-haul** backbones that span hundreds of miles between major cities and **regional** backbones that connect key internet/ telecoms facilities and ISPs within a city or region.

Without this infrastructure, our region will continue to fall further behind those regions that do have direct access to major fiber backbone routes and interconnections. To deliver economic growth and prosperity in the future AI-enabled and data-driven economy, we must have adequate (and scalable) data transport capabilities. Without it, our access to, and ability to develop within, the global internet economy will be fragmented and far slower.

We have a distinct, and perhaps unique, opportunity to address this particular infrastructure gap as we seek to deliver the proposed 4 Corners Freight Rail project: incorporate a "multi-use" infrastructure component into the railway right of way and final alignment. Laying a major fiber run alongside the rail will be highly capital efficient and can do nothing but enhance the attractiveness and significance of the project.

Given proximate access to a regional backbone like this, smaller, more local ISPs will have new opportunities to build out their fiber networks and increase access across their service areas. Our ability to market to and recruit large, data-intensive industries and facilities will be significantly enhanced as well.

APPENDIX B
ADDITIONAL TABLES

TABLE B1: **Internet Access, 2019-2023**

	USA	New Mexico	San Juan County	Cibola County	McKinley County
Households With Broadband Internet Subscription	89.7%	84.2%	69.2%	73.2%	57.8%

Source: U.S. Census

TABLE B2: **Regional Housing Data Compared to New Mexico**

	New Mexico	San Juan County	Cibola County	McKinley County
Median value of owner-occupied housing unit 2019-2023	$232,200	$185,000	$120,000	$72,100
Persons per household 2019-2023	2.51	2.91	3.05	3.33
Building Permits 2023	8511	117	Data not available	1

Source: U.S. Census QuickFacts

TABLE B3: **Percent of Persons in Poverty in 2023**

San Juan County	McKinley County	Cibola County	New Mexico	United States
19.9%	34.3%	23.7%	17.8%	11.1%

Source: U.S. Census, July 1, 2024

TABLE B4: **Educational Proficiency by School District, 2023-2024 School Year**

School District	Schools/Enrollment	Math	Reading	Science
GMCS	32/12,564	16%	28%	26%
Grants	12/3,225	18%	36%	29%
Aztec	7/2,499	19%	38%	29%
Bloomfield	7/2,494	20%	33%	32%
Shiprock Central Consolidated	16/4,706	13%	25%	24%
Farmington	18/11,039	23%	35%	37%
Zuni	4/1,215	11%	20%	19%
New Mexico	837/311,284	23%	39%	38%

Source: NMVistas.org

TABLE B5: **Educational Attainment, 2019-2023**

	USA	New Mexico	San Juan County	Cibola County	McKinley County
High School Graduation or Higher	89.4%	87.7%	86.4%	85.4%	80.9%
B.A. or Higher	35%	30.2%	16.6%	18.8%	12.5%

Source: U.S. Census

APPENDIX C
2025 – 2030 CEDS CODEBOOK

A Note to Our Readers

Welcome, and thank you for your interest in the work behind the 2025–2030 NWNM CEDS. We truly appreciate your curiosity and commitment to understanding the data that guides our region's economic development for the years ahead.

Let's make Northwest New Mexico a stronger and better place for everyone!

Limitations of the Data

While this dataset provides the most comprehensive regional economic data available to us at the time, it is important to recognize its limitations:

1. **Source inconsistencies**: For example, 2023 employment data for NAICS codes 11–81 were obtained from one source, while NAICS code 92 had to be drawn from a different source due to missing values. As a result, the aggregated GDP shares do not sum precisely to 100 percent.
2. **Limitations of data collection**: All large-scale datasets, particularly those collected through surveys like the Census, face inherent challenges. In some regions, data collection can be incomplete or encounter community pushback due to distrust of government, which reduces accuracy. We should be aware that there is no such thing as "perfect data." Additionally, data collection methods and reporting may change between now and future reporting dates per decisions by the US Census Bureau, the US Bureau of Economic Analysis, and the US Bureau of Labor Statistics; some data used to develop this CEDS may not be available during the next update in five years.
3. **Interpreting Data with Caution**: Our employment table uses NAICS categories designed for national comparability, not local cultural framing. For example, Native jewelry is classified as Manufacturing (339910: Jewelry and Silverware Manufacturing) rather than a part of "71 Arts, Entertainment, and Recreation." This can make the regional arts sector appear smaller in the data than it feels on the ground. Because categories are designed by certain institutions for specific purposes, they may not capture the full local reality. It's important to seek out multiple sources of data and

perspectives when something doesn't seem to match your lived experience. Oftentimes, the difference lies in categorization methods rather than inaccuracy.

Despite these flaws, this dataset represents the most accurate information available at the time of compilation. User should treat the statistics as a starting point rather than an absolute truth. When disparities emerge between the numbers and local experiences, please don't feel frustrated or treat it as a failure. Rather, it is an opportunity! Identifying mismatches between data and lived reality is the very first step toward meaningful change (Hooray!). Thus, while we should use data to guide decisions, we should avoid becoming overly fixated on the numbers alone. The most effective analysis combines statistical evidence with personal experience and local knowledge.

We hope this codebook can serve as a golden cudgel on your journey to better understand Northwest New Mexico. But at the end of the day, **it is your personal interpretation grounded in both data and lived experience that matters the most.**

GDP

General Information

- BEA Dataset Title: Gross Domestic Product (GDP) by County, Metro, and Other Areas
- CEDS Dataset Title: Real GDP (in Thousands of Chained 2017 Dollars)
- Geography: Cibola County, McKinley County, San Juan County, and the Northwest New Mexico Region (combined total of the three counties)
- Years Covered: 2020–2023
- Data Source:
    1. Go to this link: https://www.bea.gov/data/gdp/gdp-county-metro-and-other-areas
    2. Select "Table Only" on this website to access the most recently updated Excel Spreadsheet; or simply use this link to access the Excel spreadsheet, current as of the date this codebook was created: https://www.bea.gov/sites/default/files/2024-12/lagdp1224.xlsx

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan, plus regional sum
Year	Calendar year of the data
Real GDP	Inflation-adjusted GDP at the county/regional level

EARNERS

General Information

- BEA Dataset Title: Employment by County, Metro, and Other Areas
- Dataset Title: Annual Average Number of Employment
- Geography: Cibola County, McKinley County, San Juan County, and the Northwest New Mexico Region (combined total of the three counties)
- Years Covered: 2019–2023
- Data Source: https://www.bea.gov/data/employment/employment-county-metro-and-other-areas

Note: This data is no longer being tracked or updated as of 2024. Consider using US Census Bureau Data described later in this document instead.

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan, plus regional sum
Year	Calendar year of the data
Total Employment	Total number of jobs (including government and private)
Private Sector Employment	Number of private-sector jobs
Percentage of Private Employment	Share of private-sector jobs relative to total regional employment

SECTOR DIVERSITY

PRIVATE SECTOR CONTRIBUTION TO GDP

General Information

- BEA Dataset: CAGDP9 Real GDP by county and metropolitan area (private industries)
- CEDS Dataset Title: Private Sector Contribution to GDP (in Thousands of Chained 2017 Dollars)
- Geography: Cibola County, McKinley County, San Juan County, and the Northwest New Mexico Region (combined total of the three counties),
- Years Covered: 2019–2024
- Data Source: https://apps.bea.gov/itable/?ReqID=70&step=1&_gl=1*k7f9jy*_ga*MTIxODA1OTkxOS4xNzUwNjI2Mjcx*_ga_J4698JNNFT*czE3NTUwMzUxMTUkbzM0JGcwJHQxNzU1MDM1MTE1JGo2MCRsMCRoMA..#eyJhcHBpZCI6NzAsInN0ZXBzIjpbMSwyOSwyNSwzMSwyNiwyNywzMF0sImRhdGEiOltbIlRhYmxlSWQiLCI1MDMiXSxbIk1ham9yX0FyZWEiLCI0Il0sWyJTdGF0ZSIsWyIzNTAwMCJdXSxbIkFyZWEiLFsiMzUwMDYiLCIzNTAzMSIsIjM1MDQ1Il1dLFsiU3RhdGlzdGljIixbIjEiLCIyIl1dLFsiVW5pdF9vZl9tZWFzdXJlIiwiTGV2ZWxzIl0sWyJZZWFyIixbIjIwMjMiLCIyMDIyIiwiMjAyMSIsIjIwMjAiLCIyMDE5Il1dLFsiWWVhckJlZ2luIiwiLTEiXSxbIlllYXJfRW5kIiwiLTEiXV19

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan, plus regional sum
Year	Calendar year of the data
Private Industry	Value added by private industries
All Industry Total	Value added by all industries
Percentage of Private Sector Share of GDP	The percentage of private industry GDP divided by total GDP

2023 NWNM ECONOMIC DATA BY 2-DIGIT NAICS CODE

General Information

- Dataset Title: Employment Data by 2-Digit NAICS Code, Northwest New Mexico (NWNM)
    - 2-digit NAICS Code Explanation: https://www.census.gov/programs-surveys/economic-census/year/2022/guidance/understanding-naics.html
- Geography: The Northwest New Mexico Region (combined total of the three counties),
- Year Covered: 2023
- Data Source:
    - NAICS 11–81 (all industries except Public Administration)
        - Source: U.S. Bureau of Labor Statistics (BLS), Employment and Wages Data Viewer (Metrics = One area, One industry, annually)
        - https://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables
    - NAICS 92 (Public Administration)
        - Source: U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW) -- QCEW NAICS-Based Data Files (1975 - most recent)
        - https://www.bls.gov/cew/downloadable-data-files.htm
        - Note: NAICS 92 does not appear on the Employment and Wages Data Viewer. Instead, it is compiled separately from the federal, state, and local government files on QCEW and added to ensure the denominator for total employment is complete when calculating Location Quotients (LQs).
- Employment counts are annual averages, not point-in-time values.
- Location Quotients (LQs) compare the NWNM share of employment in an industry to the U.S. share in the same industry.
- To calculate the private sector share of GDP, simply divide the total GDP of NAICS 11-81 by the total regional GDP. You may notice a slight difference between your calculation and the figure reported in the CEDS. This discrepancy is due to data limitations, not an error on your part. So don’t worry.

Variable Definitions	
Variable Name	**Definition**
Year	Calendar year of the data
2-Digit NAICS Code	Industry classification at 2-digit NAICS level
Annual Establishments	Average number of business establishments in that industry in NWNM
Annual Average Employment	Average number of employees in that industry in NWNM
Annual Average Employment Location Quotient	Ratio of industry concentration in Northwest NM compared to U.S.

2-Digit NAICS Code List

- 11 Agriculture, forestry, fishing and hunting
- 21 Mining, quarrying, and oil and gas extraction
- 22 Utilities
- 23 Construction
- 31-33 Manufacturing
- 42 Wholesale trade
- 44-45 Retail trade
- 48-49 Transportation and warehousing
- 51 Information
- 52 Finance and insurance
- 53 Real estate and rental and leasing
- 54 Professional, scientific, and technical services
- 55 Management of companies and enterprises
- 56 Administrative and support and waste management and remediation services
- 61 Educational services
- 62 Health care and social assistance
- 71 Arts, entertainment, and recreation
- 72 Accommodation and food services
- 81 Other services (except public administration)
- 92 Public administration

Employment Location Quotient (LQ) Formula

$$LQ = \frac{\frac{e_i}{e}}{\frac{E_i}{E}}$$

- e_i = Local Employment in Industry i
- e = Total Local Employment
- E_i = National Employment in Industry i
- E = Total National Employment
- LQ > 1 – NWNM has proportionally more workers employed in a specific industry sector than the whole nation
  - A significantly high LQ indicates a competitive advantage and greater growth potential for a specific industry in the region. A larger workforce in that industry suggests both the availability of skilled labor and the likelihood of exporting goods or services to other regions.
- LQ < 1 – NWNM has proportionally fewer workers employed in a specific industry sector than the whole nation
  - A significantly low LQ indicates that an industry is underrepresented in the regional economy compared to the national average. This suggests the region is more dependent on imports of goods or services in that sector and has limited specialization or competitive advantage locally.

Labor Force Participation

General Information

- US Census Bureau Title: American Community Survey S2301 Employment Status
- US Bureau of Labor Statistics: Labor Force Participation Rate (CIVPART), Seasonally Adjusted
- CEDS Dataset Title: Annual Average Number of Employment
- Geography: Cibola County, McKinley County, San Juan County, the Northwest New Mexico Region (combined total of the three counties), and the U.S.
- Years Covered: 2019–2023
- Data Source:
  - County Data Source: https://data.census.gov/table?q=labor+force+participation+rate&g=050XX00US35006,35031,35045
  - U.S. Data Source (converted monthly to annual data): https://fred.stlouisfed.org/series/CIVPART; Since the U.S. labor force participation rate is recorded monthly, I simply aggregated the 12 months data and took the average to obtain the annual labor force participation rate.
- Child-friendly Interpretation of Labor Force Participation Rate: Imagine you have 10 friends who are all old enough to work. If 6 of them have a job or are trying to find one, then the labor force participation rate is 6 out of 10, or 60%.

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan, plus the U.S.
Year	Calendar year of the data
Labor Force Participation Rate	The rate of working-age population that are either working or actively looking for work

Poverty

Percentage of Population Below Poverty Level

General Information

- US Census Bureau Title: American Community Survey S1701 Poverty Status in the Past 12 Months
- CEDS Dataset Title: Percentage of Population Below Poverty Level
- Geography: Cibola County, McKinley County, San Juan County, the Northwest New Mexico Region (combined total of the three counties), and New Mexico State
- Years Covered: 2019–2023
- Data Source: https://data.census.gov/table/ACSST5Y2023.S1701?q=poverty+by+county

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan, plus New Mexico State
Year	Calendar year of the data
Percentage of Population Below Poverty Level	Share of individuals living below the federally defined poverty threshold

Average Median Household Income

General Information

- US Census Bureau Title: American Community Survey S1901 Income in the Past 12 Months (in 2023 Inflation-Adjusted Dollars)
- CEDS Dataset Title: Average Median Household Income (in 2023 Inflation-Adjusted Dollars)
- Geography: Cibola County, McKinley County, San Juan County, and the Northwest New Mexico Region (combined total of the three counties)
- Years Covered: 2018–2022
- Data Source: https://data.census.gov/table/ACSST5Y2023.S1901?q=median+household+income+by+county
- Limitation: The mean household income is sensitive to very high or very low incomes (outliers). A few rich households can pull the mean up a lot, even if most families earn less.

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan
Year	Calendar year of the data
Mean Household Income	The average income of all households in a region, found by dividing the total income by the number of households

Gini Index

General Information

- US Census Bureau Dataset Title: B19083 Gini Index of Income Inequality
- CEDS Dataset Title: Gini Index
- Geography: Cibola County, McKinley County, San Juan County, and the Northwest New Mexico Region (combined total of the three counties)
- Years Covered: 2018–2022
- Data Source: https://data.census.gov/table/ACSDT1Y2023.B19083?q=gini+index+by+county

Variable Definitions	
Variable Name	**Definition**
Geographic Region	Cibola, McKinley, San Juan
Year	Calendar year of the data
Gini Index	A number between 0 and 1 that shows how evenly or unevenly income is distributed across households

Gini Index Interpretation

- What does the number mean?
  - 0 means perfect fairness -- everyone has the same amount of money.
  - Close to 0 -- money is shared pretty evenly; most families have similar amounts.
  - Close to 1 -- money is shared very unfairly; a few families have almost everything while many have very little.
  - In the middle -- some families have more, some have less, but it's not completely fair or completely unfair.
- Story Analogy -- Imagine 10 kids are sharing 100 pieces of candy.
  - If every kid gets 10 pieces each -- the Gini Index is 0 (everyone is equal).
  - If one kid keeps all 100 pieces and the other 9 kids get nothing -- the Gini Index is 1 (total unfairness).
  - If a few kids get lots of candy and the rest get only a little -- the Gini Index is somewhere in the middle (some unfairness).

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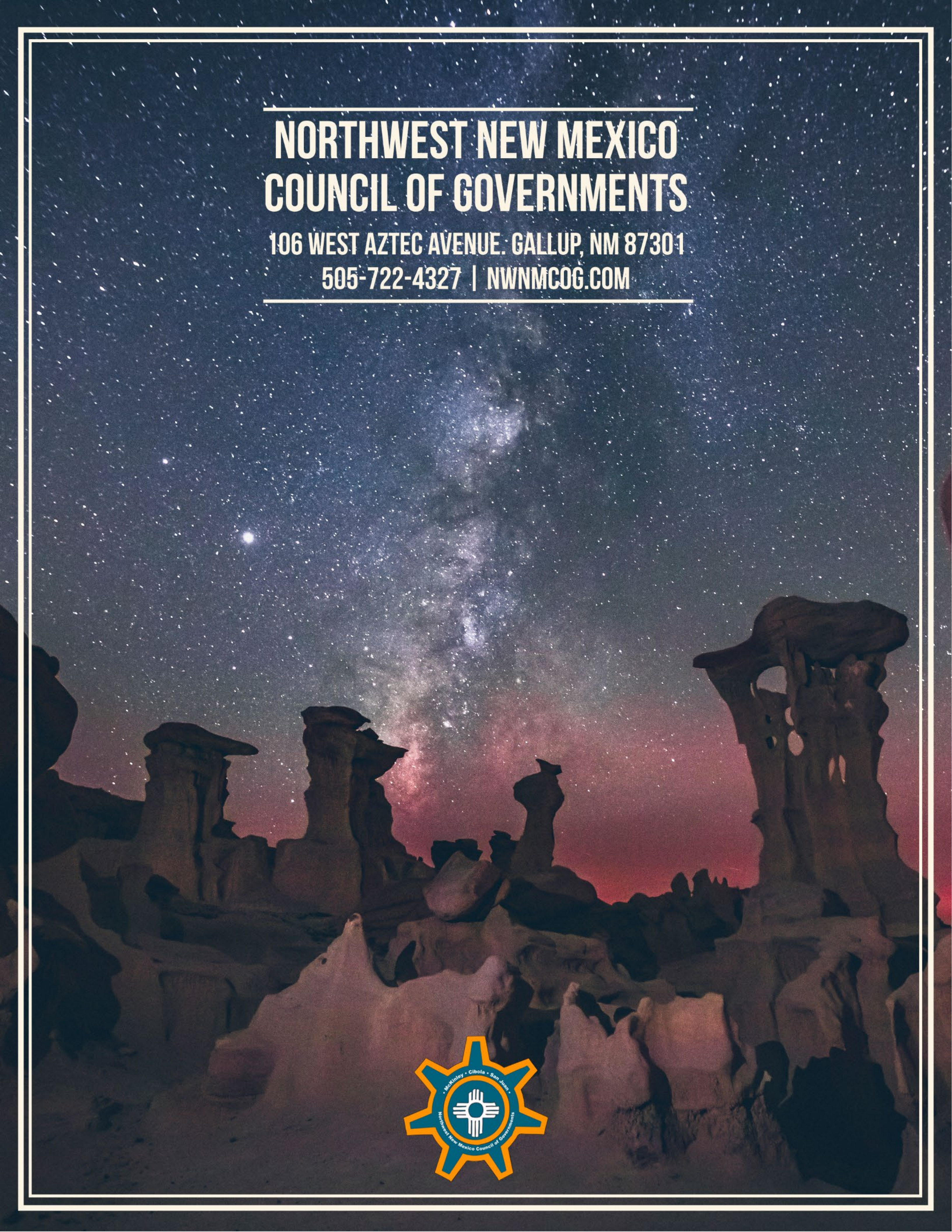

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