Northwest Colorado
COUNCIL OF GOVERNMENTS
ECONOMIC DEVELOPMENT DISTRICT

# Comprehensive Economic Development Strategy

# 2026–2031

*Final Unformatted Version*

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# Contents

## About NWCCOG Economic Development District

Region 12 began in 1973, formed by an Executive Order signed by then-Governor of Colorado John A. Love (signed 11/17/1972). This Executive Order established planning and management districts within the State of Colorado for the purpose of encouraging state and local planning agencies to work together for the most effective operation of government. Fourteen such regions were established by this Executive Order. Northwest Colorado Council of Governments (NWCCOG) was established by a Memorandum of Understanding between the counties and municipalities within the region by 1976, thereupon adopting Articles of Incorporation and Bylaws which were periodically updated.

This Executive Order was in response to the Intergovernmental Cooperation Act of 1968, which placed certain responsibilities upon the states for coordination of Federal, State and local plans and projects. Through this Act, the President of the United States called for procedures which would encourage state and local planning agencies to work together in using common or consistent planning bases and in sharing planning facilities and resources, and utilization of common boundaries for planning programs/funding assisted by the Federal Government. The Act also was based on the philosophy that planning from the local level upward preserves the goals and objectives of local government, and that this preservation of local goals would be enhanced by a system of planning and management districts.

In 2007, the Colorado Attorney General's office confirmed that councils of government are associations of political subdivisions of the state, and for purposes of the statutes governing mineral leasing fund and local government severance tax fund, they are deemed political subdivisions and therefore may accept grants from the Department of Local Affairs (DOLA) from these funds. The term "political subdivision" can be interpreted to refer only to individual entities. However, these statutes must be read in conjunction with CRS 29-1-202 and -203, C.R.S. (2006) in which Part 2 of article 1 of title 29 was enacted to permit and encourage governments "to make the most efficient and effective use of their powers and responsibilities by cooperating and contracting with other governments."

The 2008 financial crisis produced the region's first major economic setback in a generation of sustained growth. The lengthy downturn sparked many new regional discussions and perspectives. As early as 2012, at the urging of the membership, NWCCOG began formal pursuit of Economic Development District status through the Economic Development Administration (EDA) to be recognized as a District. In July of 2016, EDA approved the proposed Articles of Incorporation and By-laws for the Economic

Development District under the umbrella of NWCCOG, which were then ratified by the membership. Northwest Colorado Council of Governments (NWCCOG) remains a voluntary association of county and municipal governments across a six-county region in northwest Colorado that believes that working together on a regional basis provides benefits that could not be obtained alone. NWCCOG remains flexible to respond to the ever-changing challenges and opportunities of the region. The Council, made up of representatives from each member jurisdiction, directs the activities of NWCCOG. The NWCCOG staff is responsible for carrying out the Council's direction. In its more than 50 years, NWCCOG has evolved into an organization that addresses a wide spectrum of issues and opportunities of interest to individual member jurisdictions and the region. Funding for the Economic Development District through the EDA Partnership Planning Grants has remained static at $70,000 per year which in the beginning was enough to fund the new program activities and a staff person. The grant requires a 100% match by the region, though in recent years, the total of $140,000 is barely enough to fund wages plus overhead for a Director-level position. This, in addition to what as of July is a 5 month delay on federal funding for the PPG grants across Colorado has limited the scope and vision of the program. Following the District director’s departure in August 2025, the EDD Board and NWCCOG Council have deferred hiring a replacement: the three-year PPG grant ended in early 2026, and the successor application submitted in February 2026 remains pending.

## Section 1: Summary Background

This Comprehensive Economic Development Strategy reaches one central conclusion: the economic question facing Northwest Colorado is no longer how to grow, but whether the people who make the regional economy function can afford to live in it — and whether the region's institutions can act at a regional scale quickly enough to matter. Nearly every theme surfaced during this CEDS cycle converges on those two constraints. Housing is the binding limit on workforce, diversification, civic participation, and community continuity. Coordination — not ideas, not job creation, and not, in most cases, capital — is the limit on the region's capacity to respond.

That conclusion is not a pessimistic one. Region 12 remains one of the most prosperous, internationally visible, and institutionally inventive rural regions in the United States. Its communities are building deed-restricted housing at a scale unmatched in the Mountain West, standing up regional transportation authorities, piloting geothermal district energy, and rebuilding civic engagement around residents under the age of thirty. The strategic problem is that these efforts remain community-by-community, while the pressures driving them — snow reliability, the continuing shift away from a resource-extraction tax base, a shrinking prime-working-age cohort, and housing costs decoupled from local wages — are regional and, increasingly, structural. This CEDS is organized around closing that gap.

### The Regional Economy at a Glance

The NWCCOG region is a high-amenity, tourism-anchored economy with resort-level wealth and rural-level fiscal capacity. A note on geography is warranted at the outset: NWCCOG's council membership comprises six counties, while the Economic Development District's formal footprint is the five-county region. Routt County participates in NWCCOG and appears throughout this document because its economy, workforce, and housing markets are inseparable from the region's, but it is not technically within the Economic Development District. Lake County is not currently a member and is not covered here, though it may be absorbed into the District in a future cycle. Where this document cites data described as covering the five-county region, that is the District footprint. The statistical picture presented to the region during this planning cycle is consistent across counties, and it explains most of the strategy that follows:

- Tourism dominates employment, accounting for roughly 45–51 percent of jobs in most counties, while average annual wages across the region fall well below what regional housing costs require.
- The region has more jobs than workers. Unemployment sits near 2 percent, meaning the gap between available positions and available workforce, not job creation, is the operative constraint on growth.
- The region is growing but aging. Growth is projected to continue in the resort counties while the most rural counties face population decline, and the 25–44 age cohort is contracting in most counties. Net migration, not natural increase, is the primary growth driver — which makes housing supply the effective ceiling on population.
- Housing costs have separated from local earnings. Median home sale prices in the region's resort markets now exceed a million dollars, a substantial share of the housing stock sits vacant as second homes or vacation rentals, and even at several times area median income homeownership is out of reach in parts of the region.
- Fiscal exposure is concentrated. Local governments depend heavily on sales and lodging tax, municipal debt capacity is limited, and TABOR constrains the reallocation of existing revenue tools toward current priorities.

| **45–51%** | **~2%** | **Net migration** |
|---|---|---|
| of jobs tied to tourism in most counties | unemployment — more jobs than workers | the region's primary source of growth |
| **Resort-level** | **Six** | **2026–2031** |
| wealth on rural-level fiscal capacity | member counties, five in the District | the window to act regionally |

*Figure 1. The NWCCOG region at a glance. Sources: Insights Collective regional analysis and Colorado State Demographer, presented to the 2026 Regional Economic Summit.*

### What Changed Since the 2021–2026 CEDS

Four developments reshaped the region's economic outlook during the last plan period, and each is treated as a design assumption rather than a risk in this document.

First, the region absorbed the worst snow year in living memory and learned where the financial risk now sits. Resort operators reported only modest declines in live ticket revenue, insulated by season pass strategies. Towns and small businesses absorbed the difference. Communities that had already invested in event-driven, non-snow winter programming grew municipal revenue despite losing an entire snow season, and visitor satisfaction held up once expectations reset. The lesson the region drew is that resort companies are largely immunized against bad snow years and mountain towns are not — which is why Pillar 6 treats recurring low-snow winters as a baseline planning scenario rather than an emergency.

Second, the region's long transition away from a resource-extraction economic base entered its most consequential phase. Northwest Colorado's communities have been moving off mining, energy generation, timber, and ranching for decades, trading a narrow but high-value assessed-value base for tourism, construction, and second-home investment. What is new is the pace: retiring generation and extraction facilities are removing assessed value from small taxing districts faster than replacement uses can be sited, and the communities most affected are the ones with the least fiscal cushion to absorb it. In the most exposed communities — some inside the District, some adjacent to it — the retirement of generating and extraction facilities requires replacing the substantial majority of a local assessed-value base within roughly a decade. The instructive part is not any single facility but the model: transition-stage communities that act quickly on light industrial siting, district energy, childcare, and workforce housing are attracting the 25–44 cohort that the rest of the region is losing. That pattern is transferable to any community in the District facing a narrowing extraction or single-employer base, and it is the reason Pillar 3 treats diversification and transition as one continuous effort rather than a response to a single industry's exit.

Third, housing production accelerated in ways the previous CEDS did not capture. Municipalities across the region are delivering deed-restricted units by the hundreds — one town is adding residents equivalent to a double-digit percentage increase in its population through new housing alone. Communities have leveraged modest lodging-tax revenue into hundreds of units, stood up municipal housing authorities that acquire land and entire existing neighborhoods, and completed projects on land banked a decade earlier. Deed-purchase programs pioneered in the region have since spread to jurisdictions in nearly every county. Scale, not innovation, is the remaining problem.

Fourth, regional governance moved from aspiration toward structure. Publicly owned middle-mile broadband now serves the entire region. Regional transportation authorities have been newly formed or have replaced predecessor county programs in several counties, while others deferred formation in favor of continuing existing county transit service. Geothermal district energy emerged as an unexpected shared asset, with municipally operated utility projects, converted public buildings, and state-funded exploration grants now underway in multiple jurisdictions. At the same time, candor from the summit was blunt: jurisdictions still compete for the same staff and the same programs rather than asking where a given investment makes the most geographic sense.

## How the Region Compares

International peer research covering more than fifteen resort regions was conducted for this cycle and reviewed with regional stakeholders. It identified four gaps that recur throughout this document. Leading peer regions publish firm benchmarks for the share of their workforce housed locally; NWCCOG has no equivalent regional metric. Peers abroad recycle tourism revenue directly into climate adaptation and economic diversification at a scale the region's resort taxes and marketing districts have not yet matched. International regions are explicitly designing for winters without snow, while most U.S. peers still treat low snow as a risk to mitigate. And several peer regions operate formal multi-government structures with real authority, whereas NWCCOG coordinates but does not govern. These gaps are not deficiencies so much as an agenda.

| Target share of workforce housed locally | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Whistler, BC | | | | | | | | | | | **75%** |
| Jackson, WY | | | | | | | | | | | **65%** |
| Breckenridge, CO (town goal) | | | | | | | | | | | **47%** |
| NWCCOG region | | | | | | | | | | | **no published target** |

*Figure 2. Published workforce-housing benchmarks, NWCCOG region compared with peer resort regions. Bars are shown in approximate 10-percent increments. NWCCOG has adopted no regional target; the bar is empty by fact, not by omission.*

## The Strategic Response: Six Pillars

The 2021–2026 CEDS was organized around four pillars: Workforce, Economy, Community, and Resiliency. This plan evolves to six — Housing & Community Stability, Workforce and Talent Development, Economic Diversification & Transition, Destination Stewardship, Regional Infrastructure & Governance, and Economic Resilience — deliberately mapped to the pillar structure of the Colorado state CEDS, Elevating Colorado 2025. The alignment strengthens federal and state funding eligibility while keeping the regional character where it belongs: in the strategies beneath each pillar rather than in a bespoke framework.

Two structural changes matter. Housing is elevated to a standalone pillar because it proved too large and too cross-cutting to nest inside workforce or community; every engagement session in this cycle returned to it. Resilience is retained as its own pillar but also applied as a cross-cutting lens, because every resilience conversation immediately landed in one of the other five domains. Each pillar carries numbered strategies, named actions, an evaluation framework, and identified owners, so that progress can be assessed annually rather than reconstructed at the end of the five-year term.

### Capacity: The Constraint on This Plan

This document states its own limiting condition plainly. EDA Partnership Planning Grant funding for the District has remained static since designation, matched dollar-for-dollar by NWCCOG member dues; the combined total now barely covers wages and overhead for a single director-level position. Federal disbursement for the state's planning grants has run months behind schedule, the District's staff position has been vacant for the better part of a year, and the successor three-year grant application remains pending. A prior criticism of the region's CEDS documents — that they focused on what council-of-governments staff could do rather than on community-wide strategy — is addressed here by assigning ownership across member governments, housing authorities, chambers, higher education, small-business support providers, and sub-regional economic development organizations. Delivery depends on that distribution holding, and on continued financial support from NWCCOG members and active stakeholders.

Taken together, the assessment and the strategies that follow describe a region with the wealth, the institutions, and the demonstrated willingness to act — and a five-year window in which to act regionally, before snow reliability, the extraction-to-amenity transition, and demographic contraction narrow the choices for it.

## Section 2. Assessment and Analysis

### a): Elements of CEDS Document

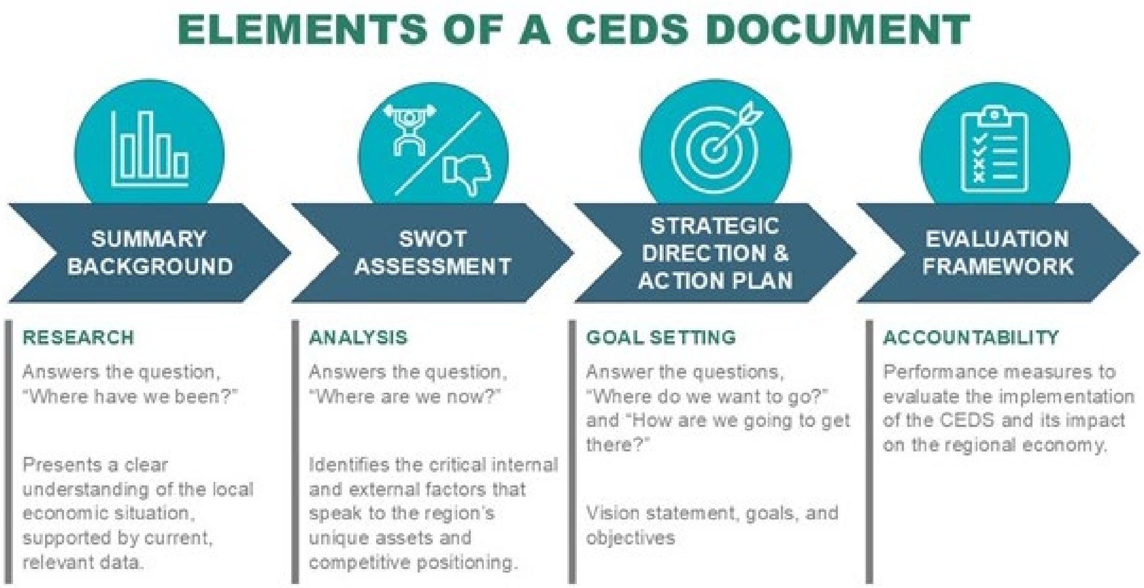
According to Economic Development Administration (EDA) guidance, every Economic Development District across the nation, to remain in good standing with the EDA to receive funding must carry out the drafting of a Comprehensive Economic Development Strategy (CEDS) every 5 years. A perfunctory document produced with minimal engagement satisfies that requirement, but rarely informs activity or coordination over its five-year lifespan. Most regions do not look at it that way, and leverage the opportunity to recognize sub-regional efforts, communicate common needs and establish a framework and strategy for what they do every day. At the very least, it provides the opportunity to benchmark with SWOT, publish some goals and be able to look back through the evaluation framework to visualize progress or non-progress. The process for developing the plan and month-to-month use of the document varies widely, as do the formatting and quality of the documents. For some regions it is a commonly agreed-upon blueprint, strategic and action plan rolled into one document that draws upon local needs and themes that, presumably, the content of which individual businesses, sectors, local agencies, local governments and related entities may be acutely aware of and actively addressing themselves. An ideal CEDS document draws upon sub-regional strategic, comprehensive plans and reports, efforts underway, known needs, and attempts to find "golden threads", throughlines, common themes which this document is calling Pillars. These may be repetitive of other local plans because they should be inclusive of those plans.

NWCCOG is the host for the Economic Development District in Region 12, manages the EDA Partnership Planning Grant assisting partners who apply for EDA grants under the strategic umbrella supplied by the CEDS and oversees grant compliance. Some larger Districts have large staff who manage programs, multiple funding streams, infrastructure and major economic hubs like ports. In Region 12, EDA partially funds one employee at NWCCOG who keeps the District in good standing, coordinates meetings of the Economic Development District Board of Directors, shares relevant data, and convenes stakeholders — the practical limit of what one position can cover across a varied and sophisticated rural resort region, on a grant that NWCCOG member dues more than match. There are aspirations of leveraging stakeholders active in this work more robustly, being a forum for advancement of challenging regional initiatives and responding to challenges in a more coordinated regional manner. This CEDS cycle aims toward that aspiration, but is reliant on financial support from NWCCOG Members, and active stakeholders, and on leadership that makes participation meaningful for those who commit to it.

EDA describes a CEDS as follows, per eda.gov:

> *Simply put, a CEDS is a strategy-driven plan for regional economic development. A CEDS is the result of a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.*[2] *It is a key component in establishing and maintaining a robust economic ecosystem by helping to build regional capacities (through hard and soft infrastructure) that contributes to individual, firm, and community success. The CEDS provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development in the region. The CEDS should take into account and, where appropriate, integrate or leverage other regional planning efforts, including the use of other available federal funds, private sector resources, and state support which can advance a region's CEDS goals and objectives. Regions must update their CEDS at least every five years to qualify for EDA assistance under its Public Works and Economic Adjustment Assistance programs. In addition, a CEDS is a prerequisite for designation by EDA as an Economic Development District (EDD).*

*The following graphic, adapted from the Mid-Ohio Regional Planning Commission (MORPC), illustrates these elements:*




| Demographic Pressure on the Regional Economy | Indicator |
|---|---|
| Fastest-growing county, projected to 2030 | +12.4% |
| Fastest-declining county, projected to 2030 | −8.4% |
| Prime working-age cohort (25–44) | Contracting in most counties |
| Primary growth mechanism | Net migration, not natural increase |
| Effective ceiling on population growth | Housing supply |

*Figure 3. Demographic pressure on the regional economy. Growth is projected to continue in the resort counties while the most rural counties decline; because net migration rather than natural increase drives that growth, housing supply sets the effective ceiling. Source: Colorado State Demographer, presented to the 2026 Regional Economic Summit.*

### b): SWOT Analysis

The four quadrants below summarize where the region's findings concentrate. Each quadrant names the pillars carrying the most findings in that category, with the count of individual findings in parentheses. The detailed pillar-by-pillar SWOT follows.

| STRENGTHS — internal, favorable | WEAKNESSES — internal, unfavorable |
|---|---|
| Regional Infrastructure & Governance (4)<br>Workforce and Talent Development (4)<br>Housing & Community Stability (3)<br>Economic Resilience (3) | Regional Infrastructure & Governance (7)<br>Housing & Community Stability (4)<br>Workforce and Talent Development (3)<br>Economic Resilience (1) |
| **OPPORTUNITIES — external, favorable** | **THREATS — external, unfavorable** |
| Housing & Community Stability (6)<br>Economic Diversification & Transition (4)<br>Workforce and Talent Development (3)<br>Regional Infrastructure & Governance (3) | Housing & Community Stability (4)<br>Destination Stewardship (4)<br>Workforce and Talent Development (3)<br>Economic Resilience (2) |

*Figure 4. SWOT findings by pillar. Counts are the number of individual findings recorded under each pillar in the detailed analysis that follows. Regional Infrastructure & Governance carries the most weaknesses of any pillar; Housing & Community Stability carries the most opportunities and, with Destination Stewardship, the most threats.*

A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is a mandatory element of a CEDS. This SWOT analysis integrates the 2021–2026 CEDS baseline with all new information gathered during the May 7, 2026 summit. Items marked * emerged from the 2026 CEDS engagement process and were not identified in the previous CEDS.

**Strengths** **Current 2026**

1. **Housing & Community Stability**
    a. *[1] Active housing programs producing units at scale again, changing resort community composition
    b. * Deed purchase programs proliferating. Began with Vail InDeed, continued WP, Avon and Eagle County Bold Housing Moves also in Roaring Fork Valley Good Deeds
    c. * Most NWCCOG municipalities have a variety of strategies for increasing the number of workforce housing units.
2. **Workforce and Talent Development**
    a. Educated, entrepreneurial workforce and strong small business culture
    b. Colorado Mountain College Campus locations across entire region except Grand County
    c. Some apprenticeship pipelines in place like CareerWise
    d. * Talent Pipeline: Eagle County Schools auto mechanics program, Hayden welding institute a private sector entity producing high-earning trade graduates from high school

[1] Items marked with a bold asterisk (*) are new for the 2026–2031 CEDS cycle; they emerged from the 2026 engagement process and were not identified in the 2021–2026 CEDS.

3. **Economic Diversification and Transition**
    a. Northwest Loan Fund provides access to capital
    b. * Geothermal energy emerging as regional asset (Eagle County Building, Hayden business park, Vail exploration grant)
    c. * There are three state-certified Colorado Creative Districts in the NWCCOG 6 county region. Steamboat Springs Creative District (Steamboat Creates), Silverthorne Creative District and Grand Lake Creative District (Colorful Creatives) as well as several folk schools emerging. New projects under those districts include Grand Lake Space to Create.
4. **Destination Stewardship**
    a. World-class outdoor recreation and public lands
    b. Natural beauty and quality of place that attracts talent and visitors
5. **Regional Infrastructure & Governance**
    a. Public middle mile Broadband infrastructure (Project THOR) covers all Region and beyond
    b. * Civic engagement innovation to involve younger generations in community governance: under-18 board requirements (Hayden's YEP, How the F series, L3 program)
    c. * Hayden's entrepreneurial governance model attracting 25–45 demographic
    d. * Regional Transportation Authorities (RTA) created. CORE Transit is an RTA that replaced ECO Transit in Eagle County, Routt County Regional Transportation Authority was established in 2025, next needs funding. Summit County paused plans to form an RTA in late 2025, keeping the current county program, Summit Stage
6. **Economic Resilience**
    a. * Winters Without Snow adaptation: Grand Lake's proven post-snow diversification (4.3% revenue growth despite zero snowmobile season)
    b. * Second home economy continues to fuel philanthropy through NPOs
    c. * Resort operator financial resilience through season pass strategies

**Weaknesses** **Current 2026**

1. **Housing & Community Stability**
    a. Severe housing shortage across full income continuum
    b. High cost of living: housing, healthcare, childcare
    c. Social and wealth inequity masked by resort community averages

   d. Deed-restricted housing may provide insufficient equity building for families

2. **Workforce and Talent Development**
   a. Lack of career pathways for young professionals beyond hospitality, construction and trades
   b. * Aging-out workforce, also philanthropic-minded, volunteer-minded engaged second homeowner cohort without clear replacement pipeline
   c. * 2% unemployment = more jobs than people,
3. **Economic Diversification and Transition**
   a. Economy dominated by single low-paying sector (tourism 45–51% of jobs)
   b. * Coal transition fiscal cliff: Routt County and Hayden how to replace $55M of $58M assessed value over 10 years
4. **Destination Stewardship**
   a. * Five years after COVID, NWCCOG destination jurisdictions with DMO or self-managed tourism locations each refocused on educating visitors about stewardship with a focus on behaviors
   b. In DS locations, changing user habits and mindsets is a major challenge in rapidly altering drought conditions, and hope is educating when recreating or on vacation is transferred back to where they live. Front Range Water use reduction target of 20% conservation by Denver Water only met with 2%, actual.
5. **Regional Infrastructure & Governance**
   a. Inadequate inter-regional transportation
   b. I-70 congestion increasing frustration by tourists, travel times for all, closures impact delivery of goods, and cost businesses and local governments millions of dollars by the hour.
   c. * Regional coordination still aspirational in some areas like talent cannibalizing, pay competition (example: police, planners, motivated NPO staff)
   d. * Civic engagement still eludes working families, workforce generally, and generational gap: traditional meetings inaccessible to people working 2+ jobs
   e. * Municipal debt capacity limited—small town budgets cannot support large bond issuances to address major infrastructure replacement/upgrade needs
   f. * Rising regulatory costs also attribute to interpretations of State regulations from Water Control Commission on wastewater plants unreasonable costs for little actual ROI pushing unnecessary costs on residents
   g. * CEDS historically focused on what COG staff can do rather than community-wide strategies
6. **Economic Resilience**
   a. * Financial risk from bad snow years has shifted from resorts to local businesses and governments

| **Opportunities** | **Current 2026** |
| --- | --- |

1. **Housing & Community Stability**
   a. Affordable land still exists for development in periphery of resort communities, at some distance including lake, Jackson and Grand counties.
   b. * Vacancy tax as revenue tool. As of publication in 2026, this is law, though it is actively being explored in Vail and across the region in counties such as Eagle with 48%,and Pitkin with an 80% vacancy rate.
   c. * Real estate transfer tax reauthorization—redirect locked RETT funds to current priorities
   d. * Inclusionary zoning as replicable policy across communities
   e. * Regional housing placement optimization—build where it makes geographic sense
   f. * Leveraging existing housing stock alongside new construction
2. **Workforce and Talent Development**
   a. * Trade schools and folk schools as year-round non-tourism economy
   b. * NWCCOG Energy Program has a BPI Certified Training Center, has hired a full-time, nationally recognized trainer, and is poised to expand to train private sector with only such facility on Western Slope.
   c. * CMC is very active in this area. NWCCOG and CMC could partner in some form.
3. **Economic Diversification and Transition**
   a. Remote work in-migration as potential economic diversification tool
   b. Growth in healthcare and professional/technical sectors
   c. * Geothermal as coal transition solution—repurpose mine waste heat, thermal energy bill advancing
   d. * Light industrial hubs in transition communities
4. **Destination Stewardship**
   a. * Post-slow-season “breathing room”—strategic window while visitor pressure is lower
   b. * Event-driven winter economy (concerts, festivals) to reduce chairlift-rider dependence
5. **Regional Infrastructure & Governance**
   a. * Micro-engagement formats for civic participation
   b. * AI adoption for government efficiency and youth engagement
   c. * Cross-jurisdictional RTAs as governance model for other regional challenges
6. **Economic Resilience**
   a. * Second homeowner engagement programs as philanthropy pipeline

**Threats** **Current 2026**

1. **Housing & Community Stability**
   a. Housing prices continue to outpace wage growth at all income levels
   b. * Local Youth raised in Mtn Towns don’t see possibility of staying because of costs

   c. * Young professional flight
   d. * Net migration needed but housing shortage prevents absorption of new residents
2. **Workforce and Talent Development**
   a. Workforce loss to more affordable communities outside the region
   b. Colorado in-migration of talent is slowing
   c. Demographic cliff of Baby-Boomers retiring is real
3. **Economic Diversification and Transition**
   a. * Coal plant closures creating fiscal cliff in Routt County without adequate transition timeline
4. **Destination Stewardship**
   a. Climate change: wildfires, drought, loss of snowpack
   b. Overcrowding and environmental degradation of public lands
   c. * Smoke seasons degrading summer economy and quality of life regardless of fire location
   d. * Water scarcity from low-snow years affecting municipal systems and recreation economy
5. **Regional Infrastructure & Governance**
   a. * TABOR constraints locking revenue tools into outdated purposes
6. **Economic Resilience**
   a. * Winters without reliable snow as recurring—not one-off—economic reality
   b. * Resort operators marketing ski passes not towns—corporate strategy decoupled from community welfare

### c): International Peer Research Summary and Local Comparisons

The NWCCOG Region is comprised of destinations that tend to benchmark themselves far beyond the region, with peers in the United States such as Jackson Hole WY, Tahoe CA, Sun Valley ID as well as non-snow locations. The comparisons extend beyond resort infrastructure & operations to community vision, destination stewardship and influence in such areas as climate change and sustainability. NWCCOG communities with ski and summer operations peer at this level, and expect to be recognized internationally. While promotion is not the work of a CEDS, anyone involved in Economic Development in the region must keep the international framework of these communities and the ski area operators in mind. That tourism remains the dominant economic driver, bringing investment with it, including second homes, and long-term visitors is vital to the success of the other communities. The Key Innovations below are specific for a CEDS. The NWCCOG Translations are intended to be general.

| Region | Key Innovation | NWCCOG Translation |
|---|---|---|
| Whistler, BC | 75% of workforce housed locally target; municipal housing authority owns 8,000+ bed units | Set a hard regional benchmark for workforce housing. Accountability through measurement. |
| Big Sky, MT | Cold Smoke Project: $60M resort tax bonds for 389-unit land trust on 99 acres | Use existing resort tax and marketing district authorities for housing bond issuances. |
| Mammoth Lakes, CA | Leased to Locals: $2K–$24K incentives to convert STRs to workforce housing | Expand Vail InDEED concept with cash incentives for STR conversion. |
| Jackson, WY | 65% workforce housing target; deed-restricted housing excludes remote workers | Decide explicit regional stance on remote worker access to deed-restricted housing. |
| Queenstown, NZ | Multi-level governance: council + national government + Maori tribes in single partnership | Formalize cross-jurisdictional governance through NWCCOG with shared deliverables. |
| Tahoe (CA/NV) | Bi-state regional planning agency rewriting development rights for affordable multifamily | Use NWCCOG as cross-county coordinating body for housing and land use policy. |
| Niseko, Japan | Glasgow Declaration signatory; using powder reputation to launch premium agriculture/wine | Develop post-snow economy while current tourism product is still strong. |
| Davos, Switzerland | My Climate Fund: guest carbon contributions matched by businesses, kept 100% local | Explore visitor contribution models for local resilience and infrastructure investment. |
| Colorado High Country | CC4CA is Colorado Communities for Climate Action, a powerful coalition of local governments including Aspen, Avon, Eagle County and Breckenridge that advocates stronger state and federal climate policy. | Exists, NWCCOG EDD could more explicitly align with advocacy efforts, consider a staff person at NWCCOG focused on Energy Policy. |

| Region | Key Innovation | NWCCOG Translation |
|---|---|---|
| Eagle County, CO | Climate Action Collaborative is a broad coalition of over 30 local organizations, businesses and governments working together to reduce carbon emissions across Eagle County. | Already exists, expand to other jurisdictions. |
| Summit County, CO | High Country Conservation Center is a nonprofit that leads local sustainability efforts through efficiency programs, waste reduction and zero waste initiatives in Summit County. | Already Exists. Expand to other jurisdictions. |
| Hayden, CO | Geothermal business park as municipal utility; inclusionary zoning; entrepreneurial governance | Already in the region. Scale and replicate models to other transition-ready communities. |
| Grand Lake, CO | Event-driven winter with snowmaker investment; creative district; 4.3% growth without snow | Already in the region. Share model across communities facing snow-reliability risk. |
| Mountain Towns | Eagle County, Summit County, Aspen, Avon, Breckenridge, Dillon, Eagle, Silverthorne, Vail and Winter Park are all Anchor Communities of this international organization. Organization holds annual summit and promotes/supports those active in this area | Already in the Region led primarily by the international ski towns and counties who have been active in climate change, emissions reductions and each have own action plans. Expand NWCCOG's support of MT2030 and encourage additional communities to take their climate action plans to another level. |
| Breckenridge, CO | In the 5-Year Blueprint, the Town has adopted a goal of increasing its deed-restricted housing units to 2,200 by 2030 increasing from 1,665 units in 2026. A long-term goal of 47% of town workforce housed within town limits, and a balance target of 35% resident | More jurisdictions adopting hard target housing goals |

| Region | Key Innovation | NWCCOG Translation |
|---|---|---|
| | housing to 65% vacation resort lodging. | |
| Breckenridge, CO | At the Alta Verde Workforce development, town has committed $6 million to this project that will achieve Net Zero designation. | |

### Biggest Gaps Between NWCCOG and Peer Regions

**Hard housing targets:** Whistler (75%) and Jackson (65%) publish firm benchmarks. NWCCOG has no equivalent regional metric.

**Tourism revenue recycling:** Davos and Niseko use tourism revenue directly to fund climate adaptation and economic diversification. NWCCOG communities have resort taxes and marketing districts but have not redirected them at comparable scale.

**Post-snow planning:** International regions are explicitly planning for winters without snow. Most US peer documents treat low-snow as a risk to mitigate, not a reality to design around. Grand Lake and Vail's experience this winter suggest NWCCOG is beginning this transition.

**Cross-jurisdictional governance:** Tahoe and Queenstown have formal multi-government structures with real authority. NWCCOG coordinates but does not govern. The Routt County RTA is the closest analog to peer governance models.

## Section 3: Strategic Framework — Six Pillars

The 2021–2026 CEDS used four pillars: Workforce, Economy, Community, and Resiliency. Based on today's discussion, we recommend evolving to five pillars that directly align with the Colorado State CEDS ("Elevating Colorado 2025"). This alignment strengthens federal funding eligibility while reflecting the region's actual priorities.

The key changes: Housing becomes its own pillar (it was too large and cross-cutting to nest elsewhere). Resilience becomes a cross-cutting lens applied to every pillar rather than standing alone (every conversation about resilience immediately landed in one of the other domains). The regional flavor comes from the strategies underneath each pillar, not from having a different structure than the state.

| Pillar | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 |
|---|---|---|---|---|---|---|
| **Pillar 1 · Housing & Community Stability** | | | | | | |
| **Pillar 2 · Workforce and Talent Development** | | | | | | |
| **Pillar 3 · Economic Diversification & Transition** | | | | | | |
| **Pillar 4 · Destination Stewardship** | | | | | | |
| **Pillar 5 · Regional Infrastructure & Governance** | | | | | | |
| **Pillar 6 · Economic Resilience** | | | | | | |
| **Plan milestone** | Adopt · assign owners | First annual report | Mid-cycle review | | | Prepare 2031–2036 CEDS |

*Figure 5. Implementation sequence, 2026–2031. Colored bands show the years in which each pillar is actively in delivery; Pillars 3, 4, and 5 begin after the first-year work of assigning owners and prioritizing actions described in Section 6. Milestones mark the points at which the Economic Development District Board reviews progress against Appendix C.*

### Summary of NWCCOG Pillar Alignment with Elevate Colorado, State CEDS Document

| NWCCOG Pillar | State CEDS Pillar | Key Focus Areas |
|---|---|---|
| Housing & Community Stability | Housing | Permanent deed-restricted housing, inclusionary zoning, vacancy tax, second home stewardship, regional housing placement |
| Workforce and Talent Development | Job Creation + Business Development | Young professional retention, trade education, civic engagement innovation, childcare infrastructure, net migration strategy |
| Economic Diversification & Transition | Growing Key Industries | Coal transition, light industrial, geothermal energy, creative economy, four-season business development, remote worker strategy |
| Destination Stewardship | Quality of Life + Tourism | Post-snow tourism product, shoulder season development, event-driven economy, residents-first orientation, resort-town relationship |
| Regional Infrastructure & Governance | Community Infrastructure + Resources | Transportation (RTAs, transit), water security, energy infrastructure, cross- |

| | | |
|---|---|---|
| | | jurisdictional coordination, AI/tech adoption |
| Economic Resilience | Economic Resilience | Low-snow baseline planning, local government fiscal resilience, small business and workforce continuity, economic concentration risk, disaster economics, regional early warning |

# ✦ Pillar 1: Housing & Community Stability ✦

**Supporting NWCCOG reports:**

- NWCCOG 2023 Workforce Housing Report
- Social & Economic Effects of Second Homes (2004)
- NWCCOG Community Metrics Project (2024)
- NWCCOG Regional Statistics Analysis (2026)

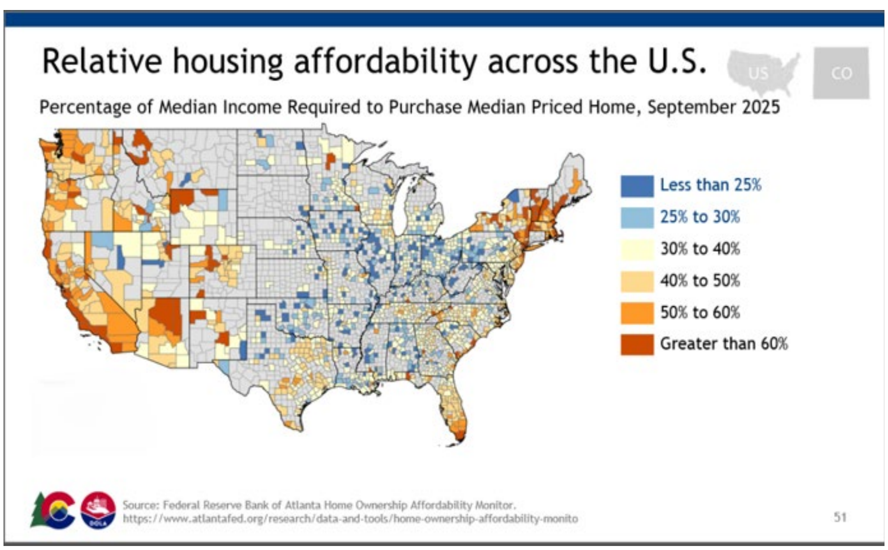
Elevate Colorado 2025, State CEDS Alignment: Pillar 1 — Housing

Each of NWCCOG's counties has recently done a Housing Needs Assessment, for instance:

- Eagle County Regional Housing Needs Analysis 2025 by EPS, RRC and HFH.
- Summit County Housing Needs Assessment 2023 by Root Policy Research
- Greater Roaring Fork Regional Housing Study 2019 by EPS
- Grand County Annual Data Report, staff from various sources
- Fraser River Valley Housing Needs Assessment Update 2022, by Williford LLC, WSW Consulting and Urbanrural Continuum
- Yampa Valley Housing Authority (YVEA) Housing Market and Demand Study 2025, by EPS and RRC
- NWCCOG 2023 Workforce Housing Report, by staff
- Elevating Colorado (state CEDS), by OEDIT

Placed as the top Strategic Theme, Goals and Strategies of the Colorado State Comprehensive Economic Development Strategy 2025, Housing emerged as the single most discussed topic across every session of engagement in preparation for the NWCCOG (Region 12) CEDS. The top strategy for the state is to "partner" across various listed stakeholders including local governments to "create attainable housing options for both homeowners and renters" (p. 39) It has been said that all local policy conversations eventually circle back to this issue – schools, childcare, healthcare, infrastructure and taxation, for instance. Housing is the binding constraint on workforce, economic diversification, civic engagement, and community continuity. Resort communities within the NWCCOG region have been groundbreaking on public housing strategies for decades and continue to innovate and build units. NWCCOG's 2023 Workforce Housing Report contained a Housing (Policy) Tools Matrix which revealed many more active housing strategies than the previous CEDS captured (p. 12), though a scan across the county needs assessments show that the scale of need still vastly exceeds supply. Even at 300% of area median income, homeownership is out of reach in parts of the region.

There is no shortage of data by county though some counties have municipalities and sub-areas that are not covered by a report, such as is the case with Grand County where Winter Park, Fraser to Granby are studied while Hot Sulphur Springs and Kremmling are not. The Fraser River Valley assessment notes that COVID and a wave of "out-of-area households" as well as the East Troublesome Fire and a surge in Short Term Rentals all conspired to increase costs and reduce the percentage of homes occupied year-round (p 9). In many cases, such as Eagle County's 2025 report drills down using geographic subareas common to each of our mountain resort counties such as "Upper-Valley, Mid-Valley and Down-Valley." That report cites in a summary of findings on page 4, "about 40 percent of all housing units are vacant as second homes or vacation rentals." Also, "the median home sale price "has increased dramatically in Eagle County, especially since 2019" to 2023 when it climbed to $1.3 million.

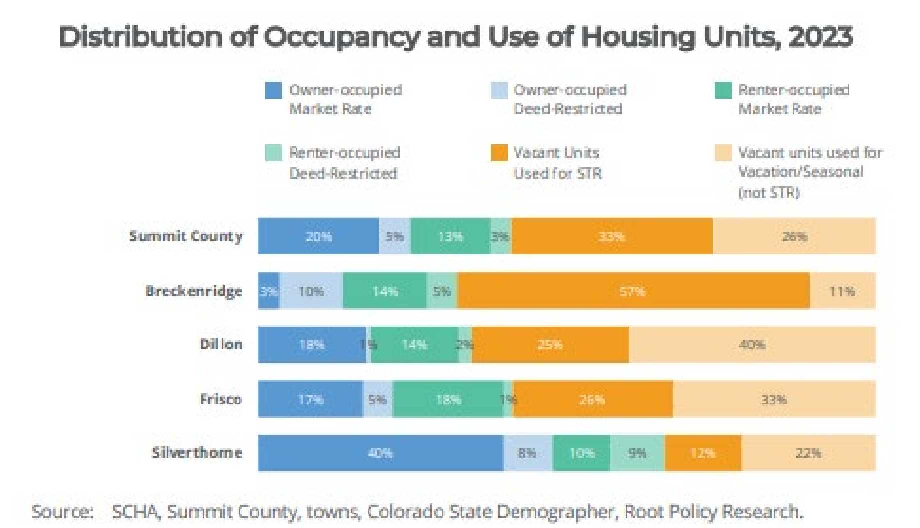



Colorado State Demographer Slide Deck, 2026 NWCCOG Regional Economic Summit, (Slide 51)

One of the traits that four of NWCCOG's six county's share with the most desirable places to live, mostly destination visitor, retirement, coastal, or the most urbanized zip codes in the United States is high housing costs. This map from the Colorado State Demography office visualizes this challenge.

Summit County's Housing Needs Assessment in 2023 highlighted another factor that is prevalent across NWCCOG counties, but most acute in Summit and Grand Counties. This is the Distribution of Housing by Use from that report noting the two gold colors on the right side of the spectrum which are Vacant Units Used for STR or for Vacation/Seasonal (not STR) which when compared with the far left blue, Owner-Occupied Market Rate shows the vast disparity. Also of note, is where local government policy is most apparent in the light blue which reflects owner-occupied Deed-Restricted units by percentage.

Pitkin County and the City of Aspen, partner with the Aspen/Pitkin County Housing Authority (APCHA), which is the largest and oldest workforce housing authority in the region. It manages 1,400 rent controlled and deed restricted units. Pitkin County reports a "housing shortage of roughly 1,500 units" while the Roaring Fork and Colorado River Valley's (Glenwood to Parachute) requires approximately 7,200 new affordable housing units according to a 2019 Regional Housing Study. This "work-shed" from Aspen down the Roaring Fork spans three counties, converging with the Colorado River Valley at Glenwood Springs, that corridor has a high level of coordination/collaboration with Transit through a regional transit authority (RAFTA), but lacks the same coordination among local governments and interested stakeholders that other up-valley to down-valley work-sheds that exist within a single county have when it comes to addressing housing at a sub-regional level. There are groups attempting to bridge that gap such as the [West Mountain Regional Housing Coalition](), a tax-exempt non-profit which has been highly active in several initiatives, including the Good Deeds Program and working with residents of the Cavern Springs Mobile Home Park to help preserve the 98-unit community through a resident-ownership initiative.




Source: Summit County Housing Needs Assessment 2023, p. 6

Pitkin County has been on the cutting edge of preserving mobile home parks, and the Good Deeds program is similar to initiatives across the region that sprung up after Vail introduced the InDeed program, illustrating the preservation of affordability for existing housing stock is as strategically important as (and much cheaper than) construction of new units. This is why strategy 1.1 and 1.2 below, though not necessarily the “low hanging fruit,” continue to be the best bang for the buck in workforce/affordable/attainable housing across the region.

| **Pillar 1: Housing & Community Stability** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 1.1 Scale Permanent Deed-Restricted Housing | Adopt Vail InDEED and lease-to-locals programs where they do not yet exist.<br>Coordinate deed restriction standards across jurisdictions | Add programs. Currently exist in Eagle, Summit and Pitkin Counties, as well as Vail, Avon, Eagle and Basalt, Breckenridge, Frisco, Silverthorne and Winter Park. | Towns, counties, housing authorities |
| 1.2 Leverage Existing Housing Stock | Incentivize short-term rental conversion to workforce housing | Update spreadsheet on Housing tools matrix p. 12, from 2023 Workforce Housing Report. With comparison. | Towns, housing authorities, property owners |
| 1.3 Adopt Existing Tools where Absent | Educate communities with fewer resources. | Additional measures shown on housing matrix. | Town councils, planning departments |
| 1.4 Expand Revenue Tools for Housing | Explore vacancy tax (Vail council priority; Eagle 48%, Pitkin 80% vacancy)<br>Advocate for real estate transfer tax reauthorization; redirect locked RETT funds to current housing priorities | New revenue is the metric. Update list from 2023 NWCCOG Workforce Housing Report. | Town councils, county commissioners, state legislators |

| **Pillar 1: Housing & Community Stability** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 1.5 Steward the Second Home Economy | Celebrate and include second homeowners as community members.<br>Study second home economic contribution: philanthropy, foundations, local spending | NWCCOG issue RFP for "update" to the 2004 **"Social and Economic Effects of Second Homes"** report and publish. | Chambers, foundations, town councils |
| 1.6 Optimize Regional Housing Placement | Map regional land availability and infrastructure capacity for housing development | This is being done behind the scenes in Eagle County. Find out if this is a topic at Mayor/Manager meetings, promote discussion about the idea. | NWCCOG, county planning, housing authorities |
| 1.7 Update NWCCOG 2023 Workforce Housing Report | Document contains measures for many of the above Actions. Update can include a 4-year comparison, benchmark for this CEDS period. | NWCCOG Publish update. | NWCCOG EDD Staff with Consultant |
| 1.8 Monitor Sentiment regarding balance between tourism and community | Track ballot measures for STR and altering funding from Tourism toward community benefits as a measure of shifts in the continuum identified in the 2024 Community Metrics Project and 2026 Regional Stats Analysis Project. | Look for other measures besides community surveys and voting of this. Opposition to projects, etc. | NWCCOG and CAST |
| 1.9 Preserve Manufactured & Mobile Home Communities | Support resident-ownership conversions | Number of manufactured/mobile-home units converted to resident or community ownership since 2026 | Counties, housing authorities, West Mountain Regional Housing Coalition, CHFA |

| **Pillar 1: Housing & Community Stability** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 1.10 Lower Construction Costs | Aggregate regional demand for factory-built/modular housing.<br>Standardize code and design specs to enable repeatable, lower-cost builds | Cost-per-door and delivery-time comparison for modular vs. site-built deed-restricted units delivered in-region | Towns, counties, housing authorities, regional builders |
| 1.11 Unlock Public & Underutilized Land for Workforce Housing | Inventory USFS, BLM, CDOT, school-district, and municipal parcels suitable for housing<br>Pursue federal land conveyances and public-private ground leases<br>Prioritize sites with existing infrastructure and transit access (ties to Pillar 5) | Acres/parcels of public or underutilized land entitled or conveyed for workforce housing since 2026 | Counties, towns, USFS/BLM, school districts, NWCCOG |
| 1.12 Expand Attainable Homeownership & Down-Payment Assistance | Grow for-sale deed-restricted ownership, not just rentals, targeting the "missing middle" up to 300% AMI<br>Regionalize down-payment assistance and shared-equity / community land trust models | New deed-restricted for-sale units created and households served by down-payment assistance. | Housing authorities, CHFA, counties, towns |
| 1.13 Close Sub-Regional Data & Coverage Gaps | Where Prop 123 is not being leveraged with HNA, commission housing assessments: Jackson County (Walden), Kremmling, and Hot Sulphur Springs<br>Standardization methodology across county Housing Needs Assessments for regional comparability | Share of NWCCOG population and municipalities covered by a current (≤5-year) housing needs assessment | NWCCOG EDD, counties, YVHA / APCHA / housing authorities |

| **Pillar 1: Housing & Community Stability** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| | Build a shared regional housing dashboard from existing assessments | | |

# ✦ Pillar 2: Workforce and Talent Development ✦

**Supporting NWCCOG reports:**

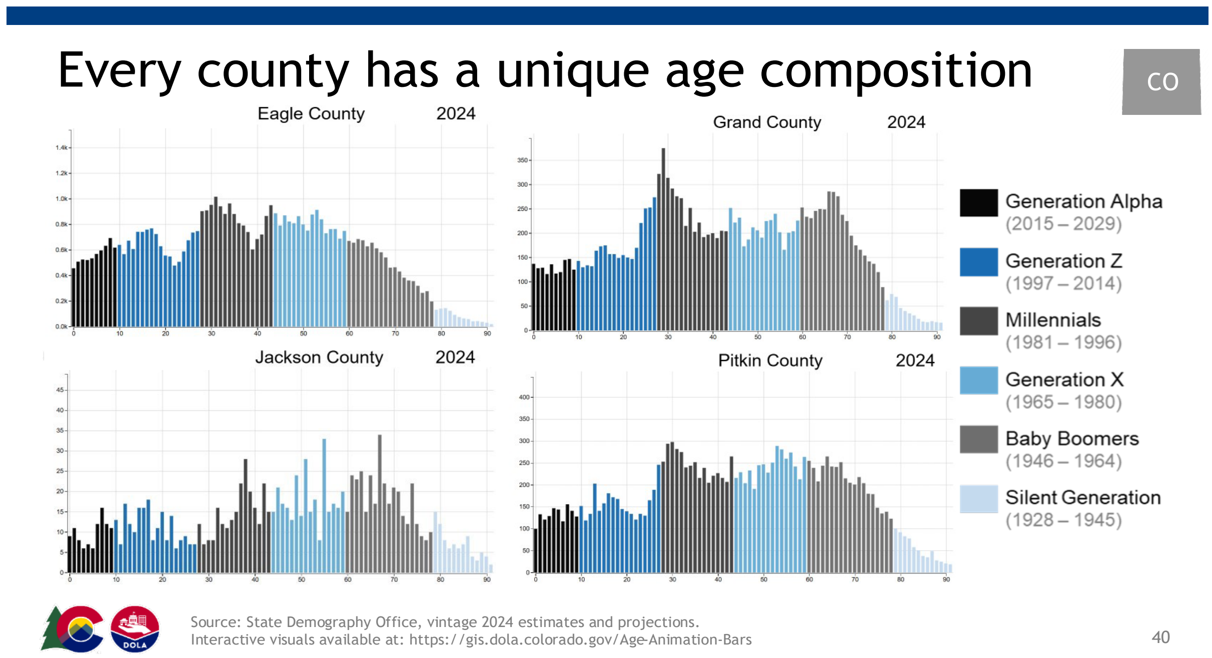
- NWCCOG 2021 Regional Assessment of Child Care
- NWCCOG Behavioral Health Landscape Assessment (2026)
- NWCCOG Community Metrics Project (2024)
- NWCCOG Regional Statistics Analysis (2026)
- 2021 Mountain Migration Report

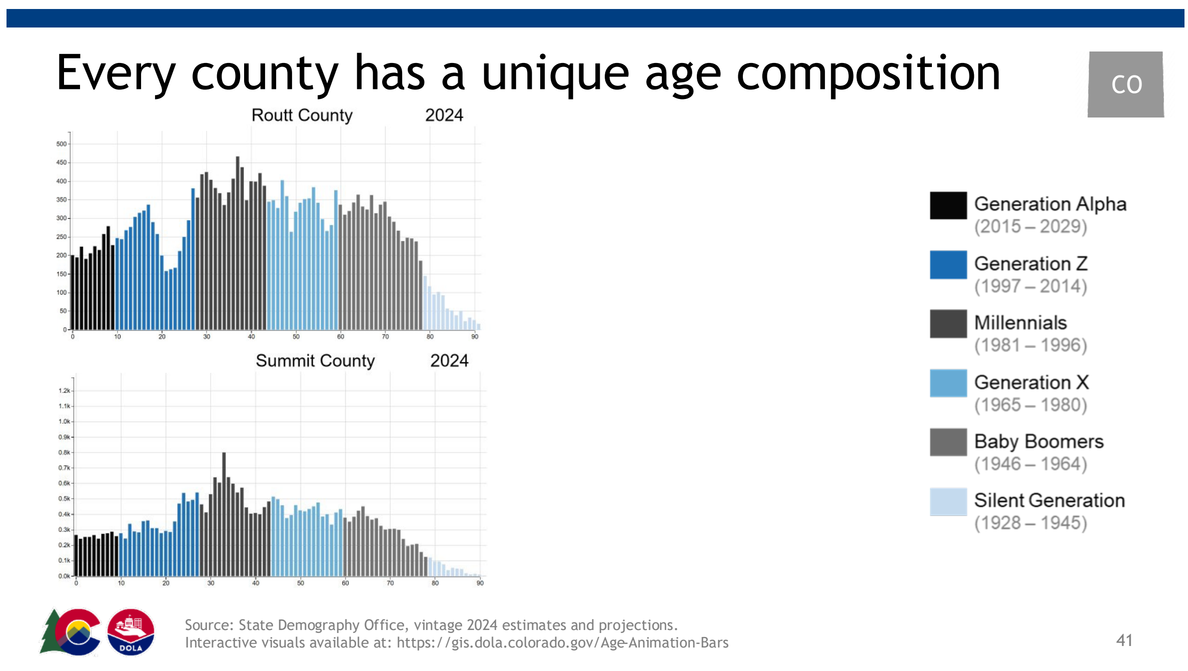
Elevate Colorado 2025 State Alignment: Pillar 2 — Job Creation + Business Development

The state strategy of job creation and business development are not as high priority for the NWCCOG region as is developing and retaining talent. Community leaders often lament the inability of children raised in the region to remain due to high housing cost combined with a service economy that has many more low wage jobs than not. Entities such as Colorado Mountain College which has campuses across the region, and the Vail Valley Partnership both recognize that this is partly due to a lack of vision or a disconnect between businesses including healthcare and construction that have lucrative career paths with youth. **With unemployment at 2%, the region's challenge is not creating jobs but filling key jobs.** The workforce pipeline has two gaps: attracting and retaining young professionals (25–45) and developing career pathways that make staying in the region viable long-term. Net migration must increase to fill existing positions, but housing is the prerequisite. Civic engagement innovation is part of this pillar because retaining young people requires giving them voice and agency in community decisions.

The state demographer points out that lower workforce participation and aging matter for a variety of reasons including, more competition for talent, shifts in demand for goods and services, the dynamic of income sources and amounts shifting, all reflected in downward pressure on tax revenue at all levels and upward pressure on government expenditures. The age composition of the Counties illustrates this conundrum.

Demographic trends run counter to this effort. Colorado has not produced enough children to replicate the slow aging-out of the Baby Boom generation. That was concealed by two other factors that demographers for the past 4-5 NWCCOG Regional EDD Summits have brought up, such as: in-migration from other states, and immigration. For many years as it grew from a rural to an urbanized state from the 1950s when the ski areas were launched, into the 1970s before there was Interstate 70 through the region, before airports in Eagle, Pitkin and Routt counties expanded for commercial travel, in-migrating talent continued to rise, peaking in the 1990s. With that statewide trend diminished across the country, the playing field for talent attraction has grown much more competitive. Talent, pre-collegiate and post collegiate flocked to Colorado for the State's (once) well-funded Universities, a growing tech industry, lifestyle industries such as craft beers and outdoor equipment all contributed to a growing cache and the ski lifestyle. There has been little focus on a "new" or more accurate vision for a gap year in the mountains. This is a natural progression from origin stories in the high country that begin with, "...I was taking some time off before starting law school," or "my friends and I decided to travel across the country to see Colorado... I got a job for the winter and never left." At least two generations of imports then stayed to raise families?

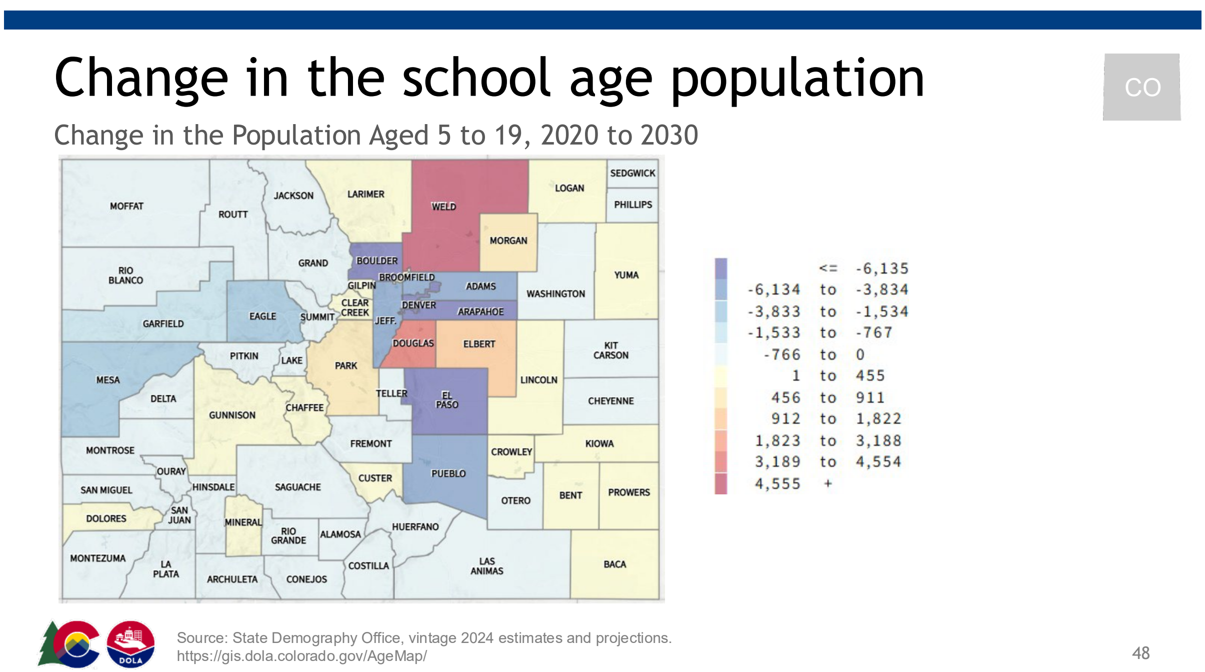



Colorado State Demographer Slide Deck, 2026 NWCCOG Regional Economic Summit, (Slide 40, 41)

The growing economies also drew both legal and undocumented immigrants. Up until the 2008 housing crash decimated that segment of the workforce, there was a job and other opportunities for just about anyone who arrived who was willing to work. Since TABOR, Colorado higher education, K-12 education and local governments suffered not being able to keep up those high funding levels and reputations that come from growth periods. As

NWCCOG communities continue to see residents who build lives, careers and raised families for most of their lives now sell off their homes at once-unimaginable prices, they take their equity, their social networks and energy with them. In their place, Colorado communities that were "down valley" are seeing a downward trend in school enrollment, and increasingly an imported older population who built their wealth elsewhere buying in, bringing different expectations for services than those who are exiting. While Pitkin, Grand and Eagle Counties have broader age distribution, Summit County has young adults in



Colorado State Demographer Slide Deck, 2026 NWCCOG Regional Economic Summit, (Slide 48)

their mid-20s, inflow, then within a few years leave. Five to ten years ago, those folks often stayed well into their 30's and 40's.

For the first time in half a century, NWCCOG counties are beginning to see a net out-migration. The forces at play with this trend are evidenced throughout this report and are likely irreversible since they are driven less by local factors than national affordability and demographic forces, global economic and environmental forces. The world is changing rapidly, and has changed irrevocably since the last CEDS produced immediately in the wake of COVID. This presents a challenge for multi-year plans such as this. NWCCOG has an opportunity to stand as a leader for the region in driving approaches to prepare our communities for these changes that will challenge fiscal sustainability of our local governments, threats to our natural resources, preparations for "winters without snow" as well as the demographic trends outlined herein. Times are challenging, but this does not need to be a depressing endeavor. Coloradoans are famously resourceful – even those we tend to import (when we did import) are resourceful. A college counselor at CSU liked to say, “don’t ever tell an 18-year-old there is something they cannot accomplish.” Amid the shock of so many changes at once, leaders still emerge, and local governments don’t have much choice but to persevere on behalf of their residents.

NWCCOG’s membership is comprised of municipalities and counties. Our strongest governmental links tend to be with these rather than metro districts, special districts (fire, water, sewer) or school districts. One of the strongest assets in the region is Colorado Mountain College, which has been responsive to demand for workforce development by adding degree programs, including fire, nursing, HVAC and other trades. Strengthening the relationship between school districts so that local governments better understand the trends occurring there, and with CMC so that further connections can be made. This would be a real improvement to NWCCOG’s contribution to Economic Development in the region.

NWCCOG plays a key role in collecting data and turning it into actionable reports. These cover topics like workforce housing, behavioral health services, early childhood viability, and economic and tourism trends. Reports such as the Regional Statistics Analysis 2026, the 2024 Community Metric project, and the seminal 2021 Mountain Migration report serve as springboards for community conversations and regional information sharing. Continuing to be a source of original research for the region while leveraging that work more actively is an internal goal for NWCCOG staff which can be assisted by active participation from the membership in bringing ideas, communicating benefits and disseminating the work.

| **Pillar 2: Workforce and Talent Development** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 2.0 Promote Aging-In-Place as a workforce strategy | See Vintage Program Goals and The Four-Year Area Plan, Region 12 | Contained in Plan | NWCCOG Vintage, (Area Agency on Aging Program) |

| **Pillar 2: Workforce and Talent Development** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 2.1 Retain Young Professionals Through Civic Integration | Require youth representation on boards and commissions (Hayden model: under-18 requirement)<br>Expand YEP (Young Emerging Professionals) model valley-wide<br>Scale. | Survey jurisdictions across region on youth involvement in government initiatives and create report. | Town councils, VBP, chambers, school districts |
| 2.2 Build Trade and Career Education Pipelines | Expand CareerWise apprenticeships across the five-county region<br>Support trade education.<br>Connect Colorado Mountain College programs to regional employer needs | Create comprehensive survey of initiatives currently underway. Promote expansion of those and additional. | School districts, CMC, Vail Valley Partnership's CareerWise program, employers |
| 2.3 Childcare as Workforce Infrastructure | Build childcare capacity assess need quickly, act without multi-year studies<br>Expand Silverthorne's Wildcard Preschool model (licensed for 75 children, infant through pre-K)<br>Explore employer-supported childcare cooperatives for smaller communities | Publish addendum to 2021 Regional Assessment of Child Care industry with updated accomplishments and initiatives since. | Towns, employers, nonprofits |
| 2.4 Attract Net Migration Strategically | Decide regional stance on remote workers: recruitment tool or housing pressure?<br>Develop targeted recruitment for critical shortage occupations. | Discuss gov and private sector's ability to impact these trends, take action if viable. | Chambers, employers, housing authorities, NWCCOG |
| 2.5 Support County-level Behavioral | Research by GPS consulting for publication of NWCCOG Behavioral Health Landscape Assessment identified | Discuss with Council level of NWCCOG involvement. | NWCCOG Staff with constellation of mental health |

| **Pillar 2: Workforce and Talent Development** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| (mental) Health efforts | possible roles for NWCCOG to play in this field. | | professionals across region. |
| 2.6 Leverage AI and Technology for Government Efficiency | Adopt AI tools for planning, synthesis, and public engagement (as modeled in this summit)<br>Train government staff on AI for faster analysis and response<br>Use technology to create asynchronous civic participation channels reaching younger demographics | Are there further roles for NWCCOG to play in leading as it did with presentation at 2026 EDD Summit? Report in from Regional BB Director, train the trainer. | Town managers, IT departments, NWCCOG |
| 2.7 Strengthen Partnership with Colorado Mountain College | Revitalize EDD Meetings to attract CMC staff back to relevant content and discussion topics. | Participation | NWCCOG Membership and Staff |
| 2.8 Build a Regional Labor-Market & Talent Data Function | NWCCOG host Digital CEDS dashboard tool on website. Partner with the State Demography Office and CDLE to track workforce participation, wages, and shortage occupations by county. | New tool developed. | NWCCOG EDD, State Demography Office, CDLE, CMC |
| 2.9 Integrate Immigrant & Seasonal Workers into the Workforce | Expand ESL, credential-recognition, and workforce-navigation services for immigrant and seasonal workers. Coordinate H-2B / J-1 seasonal-worker housing and onboarding with employers | Immigrant and seasonal workers served by integration programs; seasonal positions filled since 2026. NLF increase immigrant lending. | Employers, nonprofits, CMC, NWCCOG, chambers |

| **Pillar 2: Workforce and Talent Development** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 2.10 Improve Job Quality and Career Ladders in the Service Economy | Promote employer best practices on wages, benefits, and scheduling for service-sector workers. Map career ladders from entry-level service jobs into trades, healthcare, and management | Wage growth and retention in target service occupations; number of certified employers | Chambers, Vail Valley Partnership, employers, CMC |
| 2.11 Support an Aging Workforce & Business Succession | Provide business-succession planning for aging local business owners (ties to the Northwest Loan Fund). Create a phased-retirement and encore-career pathways to retain experienced workers<br>Coordinate with the Alpine Area Agency on Aging on workforce and services for older adults | Local businesses completing succession plans; older-worker participation retained since 2026 | NWCCOG (Alpine AAA), chambers, Northwest Loan Fund, employers |

# ✦ Pillar 3: Economic Diversification & Transition ✦

**Supporting NWCCOG reports:**

- 2026 Comprehensive Economic Development Strategy (when published)
- 2021 Mountain Migration Report
- Northwest Loan Fund Client Profiles 2013-2022

Very few of NWCCOG's 25 municipalities and 6 counties or their economic partners such as Routt County Economic Development Partnership or the Vail Valley Partnership have a specifically labelled "economic development plan" largely because many weave economic development and related topics into their strategic plan and drill down into one topic such as a Regional Housing Needs Assessment is required by Senate Bill 24-174, the Sustainable Affordable Housing Assistance Act. This makes gleaning local economic development efforts a challenge as does Eagle County's forgoing a traditional written document available as a PDF for a web based Strategic Plan that has "Learn More" tabs for each sub strategy. That document has one priority area, "Promote Thriving Communities" which touches on housing, early childhood, and workforce. Another priority area is "Protect our Mountain Ecosystem" which includes sub areas such as Advance a Clean Energy Economy" and "Reduce Wildfire Risk Countywide" which this document would sort into "Resilience." The Eagle County Regional Housing Needs Analysis 2025 is a good example of a drill down. Each of Eagle County's sub-area has a responsible staffer and link to their program web page. "Build Tomorrow's Workforce Today" webpage has a "Key Occupations and Sector Analysis Overview" as well as sector reports in PPT form for Construction; Healthcare & Social Assistance; Accommodation & Food Services; Arts, Entertainment & Recreation; Education, Childcare & Youth Services; and First Responders. There is also an attached PPT presentation that serves as the Community Comparison Report. These are Google Drive files rich in data without analysis.

Elevate Colorado 2025 State Alignment: Pillar 3 — Growing Key Industries

This goal is one that many skeptics have described as a fruitless pursuit in our region. Calls over the years to explore manufacturing, which has not historically been present, or brownfield revitalization because there are few abandoned or EPA properties that are not mines don't resonate. The remaining mines within the NWCCOG region, Climax mine which shares a border with Lake, Summit and Eagle Counties, and the Henderson Mine which shares a border with Grand and Clear Creek Counties remain operational with minimal staffing levels. Historically mining along with sheep and cattle grazing served by the now closed Tennessee Pass rail line, were the entire economy for the area. Today, preserving working ranches and “view corridors” with Conservation Easements and other protections from county open space funds is less about saving agricultural production, than preserving heritage. The ski areas changed all that. With the high price of land and built spaces, it is difficult to incubate ideas through early failures and strains. There are many other places around the country with better Geography of Jobs, regional innovation hubs which often gravitate near state universities, or cheap warehouse space, places not-yet-found, or dilapidated from past booms, needing reinvestment. None of that describes NWCCOG region. And yet, this pillar is perennial, perhaps because places like Steamboat Springs have become outdoor industry idea and branding places, even if production usually takes place overseas. There are other parts of the state better positioned for niche agriculture, peaches, wineries, and locally produced sauces, spices and honey.

The region’s economy was built on mining, then ranching, then skiing. Tourism still accounts for 45–51% of jobs in most counties, with low wages that cannot support the cost of living. Diversification has been a goal for decades but remains largely aspirational—DiAnn Butler, Grand County Economic Development Director: “Diversification is always a goal, but the reality of today is still tourism.” The coal transition in Routt County adds urgency: Hayden faces the loss of $55M in assessed value within a decade. One challenge of this is that Routt is in the NWCCOG region, but in a neighboring economic development region which is better suited for the coal mining and power generation Just Transitions discussion. The NWCCOG Energy program has discussed opening a fourth warehouse space in Craig to lead in workforce retraining, that program already has a foothold there by providing services. At the other end of the political spectrum, many NWCCOG member jurisdictions are leaders in groups such as Mountain Towns 2030 and other Climate Change groups. NWCCOG could lean into this new energy economy for economic development purposes, supporting the majority of its membership while needing to bring traditionally agricultural and resource extractive parts of the region along respectfully.

One thing that 2026 CEDS engagement underscored is this which should be a cautionary point: “the region needs concrete diversification actions, not more diversification strategies.”

The final strategy in this section leans into regulatory strategies for diversifying income to local governments through selective taxation and fees, strategies which may belong in the Housing section, or in a strategy section with a different title.

| **Pillar 3: Economic Diversification & Transition** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 3.0 Local Business Support (NWCCOG) | Northwest Loan Fund, expand capacity for more loans, and funding streams | Increased staffing number of jobs, loans, new clients. | NLF |
| 3.1 Support Local Communities with Broadband | Develop broadband-dependent industries leveraging Project THOR infrastructure | TBD | NWCCOG (Project THOR) |
| 3.2 Local Business Support (non-NWCCOG) | Increase access to capital<br>Entrepreneurial support | | NWSBDC, Named Economic Development Professionals in each Jurisdiction, |
| 3.3 Celebrate and Encourage Colorado Creative Districts | Existing in Grand Lake, Silverthorne, Breckenridge. Share benefits with others across the region. | More certified CDs, and more actions outside of that framework in the arts. | CD program is by municipality. Arts have various champions. |
| 3.4 Develop Light Industrial and Non-Tourism Economy | Designate regional light industrial hub.<br>Place light industrial, manufacturing, and logistics where geographic sense dictates—not in resort cores | Identify which NWCCOG jurisdictions support these uses, hold summit of those entities. Gypsum, Hayden, Kremmling, Steamboat. | Towns, Routt County ED Partnership, county economic development, NWCCOG |
| 3.5 Build the Creative and Trades Economy | Three NWCCOG members have creative districts. Scale Grand Lake's Space to Create folk school as year-round destination and workforce pipeline<br>Leverage Silverthorne's new arts district designation for creative economy development | Support existing, help with networking and other interested places. | Creative districts, chambers, towns. OEDIT, DOLA. |
| 3.6 Develop Geothermal and | Promote geothermal municipal utility model for other communities | Can NWCCOG find grant funding for interested parties? | Towns, utilities, state energy office |

| **Pillar 3: Economic Diversification & Transition** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| Renewable Energy as an Industry | Leverage thermal energy bill (passed CO House May 7, 2026) for project development<br>Explore repurposing coal mine waste heat for community heating systems | | |
| 3.7 Increase and Diversify the Tax Base | Explore vacancy tax implementation (Vail's top-10 council priority)<br>Advocate for statewide real estate transfer tax ($750M–$1.5B annual potential at 1%)<br>Redirect existing RETT revenues from outdated purposes (open space in landlocked valleys) to current needs<br>Develop fee-in-lieu and impact fee structures that capture development value for community investment | Advocacy for Policy changes are measured by adoption of new policy. | Town councils, county commissioners, state legislature |
| 3.8 Grow the Outdoor Recreation Industry & Brand Economy | Recruit and retain outdoor gear, apparel, and guiding businesses, building on Steamboat's outdoor-industry brand<br>Partner with the Colorado Outdoor Recreation Industry Office (OREC) on business attraction and grants<br>Link recreation assets (trails, rivers, resorts) to local product design, testing, and manufacturing where feasible<br>Market the region as a base for outdoor-industry headquarters and design talent | Outdoor-industry firms and jobs added or retained in the region since 2026 | OEDIT/OREC, towns, chambers, resorts, NWCCOG |

| Pillar 3: Economic Diversification & Transition | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 3.9 Expand Entrepreneurship & Access to Capital via the Northwest Loan Fund | Scale the Northwest Loan Fund to seed and grow non-tourism small businesses<br>Establish coworking, maker, and incubator space that lowers the cost of early-stage failure<br>Provide technical assistance and mentorship through CMC and Small Business Development Centers<br>Prioritize founders in transitioning communities (Hayden, Kremmling, Craig-adjacent) | Loans deployed, businesses started or retained, and jobs created through NLF and incubation since 2026 | NWCCOG (Northwest Loan Fund), CMC/SBDC, chambers, towns |
| 3.10 Leverage Project THOR Broadband for a Knowledge & Remote Economy | Close last-mile gaps that connect households and businesses to the Project THOR middle-mile network<br>Recruit remote workers and location-neutral businesses to diversify beyond tourism<br>Build digital-skills and telehealth capacity through CMC and health providers<br>Track broadband as core economic-development infrastructure (ties to Pillar 5) | Last-mile connections and remote-worker/business growth since 2026 | NWCCOG Broadband / Project THOR, providers, towns, counties, CMC |
| 3.11 Strengthen Health Care & Higher Education as Economic Anchors | Treat regional hospitals (Vail Health, St. Anthony Summit, others) and Colorado Mountain College as anchor employers and diversification engines<br>Support anchor-institution expansion, workforce training, and local procurement<br>Grow healthcare and education career pathways as higher-wage alternatives to seasonal tourism | Anchor-institution employment and program growth; higher-wage jobs added since 2026 | Hospital/health districts, CMC, counties, NWCCOG |

| Pillar 3: Economic Diversification & Transition | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 3.12 Manage the Coal Transition as a Regional Priority | This would have to be in conjunction with AGNC. Support Hayden's 10-year fiscal transition plan as a regional model<br>Develop workforce retraining from energy skills to adjacent industries (welding, geothermal, construction)<br>Pursue Northwest Colorado Energy Initiative funding and federal transition grants<br>Study Campbell County, WY carbon innovation center model for regional application | Routt County is in AGNC's EDD, but is in NWCCOG's Membership. Bridge this with support as supported by local officials. | Hayden, Routt County, NWCCOG, state/federal agencies, Just Transitions, DOLA, AGNC |

# ✦ Pillar 4: Destination Stewardship ✦

Outstanding Local Plans include:

- The Aspen Challenge: Aspen Destination Management Plan (ADMP) 2022-2027 by the Aspen Chamber Resort Association (ACRA)
- Glenwood Springs Destination Management & Strategic Marketing Plan 2025-2027 "authorized by" Glenwood Springs Tourism Management Board
- Vail's Stewardship Roadmap: A Community Positive Ten-Year Vision for a Thriving Visitor Economy by Better Destinations, MMGY NEXTFactor and The Travel Foundation.
- Grand County Tourism Revitalization Plan 2024, by Antero Group.
- Breckenridge Destination Management Plan by The Breckenridge Tourism Office with InterVISTAS Consulting and NEXTFactor Enterprises Inc.
- RRCR Conservation & Recreation Strategy (January 2025) by The Keystone Policy Center for the Routt Recreation & Conservation Roundtable (RRCR)

Elevate Colorado 2025 State Alignment: Pillar 4 — Quality of Life + Tourism

This pillar is in dynamic tension across the region.

Tourism remains the economic anchor for the NWCCOG EDD region. While that remains consistent, the manner in which tourism is promoted and delivered is dynamic as customer base changes, and approaches to managing tourism change. NWCCOG has been tracking this with various efforts over the past decade. Since inviting four members of the Insights Collective (IC) to share their perspectives on *Dynamics Impacting Resort Communities* at NWCCOG's 2022 Regional Economic Summit the year after COVID and our publication of the Mountain Migration Report (researched and written by WSW Consulting Inc. and Rees Consulting), a rich dialogue has continued on the the topic to this day between NWCCOG and members of the Insights Collective at subsequent Economic Summits, in Reports and in regular conversations. The 2024 Community Metrics Project provided deep research by IC that resulted in a dense White Paper and various other documents. That work aligned with surveying done by IC in a number of our communities including Vail and Aspen, and levers pulled by voters in 2022 across the region modifying lodging taxes to address other community needs than marketing, and Short-Term Rental (STR) tax measures, see pages 75-77 of our 2023 Workforce Housing Report.

From the Community Metrics Project emerged the concept of a continuum, like a see-saw with Tourism on one seat and Community on the other. Like much of what happened following COVID, the balance away from a focus on tourism in resort communities echoed in tourism-adjacent municipalities and counties. To be clear, the flywheel for the resort economy continues to be visitation and the money from outside flowing in. The big players such as Vail Resorts continue to pour money into marketing, while local leaders becoming acutely aware finite resources are steering discretionary marketing and revenues from regulating short term rentals back into infrastructure and programs to benefit the changing faces of their residents. Like the entire country, the resort region is increasingly a place of renting workers and working families needing local government interventions to remain in place while wealthier newcomers gentrify neighborhoods, nooks and crannies of the community where they were never expected.

Tourism is this region's economic engine and will remain so. The question is not whether to have tourism but how to steward it. The 2025–26 winter exposed a structural shift: resort companies, insulated by season pass revenue, are no longer financially vulnerable to bad snow years. Towns are. Jason Blevins: "Resort operators can't look to them for help anymore. It's up to mountain towns." This pillar is about towns taking ownership of their tourism destiny while maintaining quality of life for residents.

NWCCOG has continued to be at the forefront of exploring the continuum between community focus and tourism focus. The NWCCOG/CAST Community Assessment Project from 2024 is one example. Presentations from the

Something is different in recent years from traditional destination marketing. The Breckenridge Tourism Office was one of the earliest to set the trend in their May 2019 document which cites four destination master plan goals:

> *Deliver a balanced year-round economy driven by destination tourism by 2024
>
> *Elevate and fiercely protect Breckenridge's authentic character and band – our hometown feel and friendly atmosphere
>
> *More boots and bikes, less cars
>
> *Establish Breckenridge at the leading edge in mountain environmental stewardship and sustainable practices.

Communities within the NWCCOG region and their Destination Marketing Organizations have leaned heavily into educating visitors. Vail's "community positive ten-year vision" document adopted in June of 2023 shows the change up-front. The quote on the document's title page encapsulates the vision perfectly:

*I hope to see our mountain community protected, less people moving away because they can't find housing, less crowding on the hiking and ski trails, more sustainable measures, more mental health resources, funding, help for those who need it and can't afford it. - Vail Resident Survey Respondent.*

The City of Glenwood Springs, through its administrative partner The Glenwood Springs Chamber Resort Association notes a "shift in focus from simple promotional marketing to holistic destination management." Not all of the major resort communities in NWCCOG region are served by Destination Marketing Organizations (DMO). Routt County's Destination Management Plan operates through a coalition called the Routt Recreation and Conservation Roundtable. Communities are also taking a very long view with Grand PLACES 2050 and shorter strategy documents like the (RRCR) document.

| **Pillar 4: Destination Stewardship** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 4.1 Develop Post-Snow Tourism Products | Plan explicitly for recurring low-snow winters—not as crisis response but as standard operating procedure | TBD | DMOs, towns, event organizers, resorts |
| 4.2 Strengthen Shoulder Season Economy | This has been a decade-long effort experiencing recent push-back from locals and local businesses. Explore how to mitigate this. | TBD – Recognize the post-pandemic "breathing room" as a strategic window for rebalancing | DMOs, chambers, recreation districts, businesses |
| 4.3 Manage Tourism Rather Than Maximize It | Adopt destination management plans with residents-first orientation (Glenwood Springs model)<br>Develop tourism carrying capacity metrics and manage to them | | DMOs, town councils, resort operators |

| **Pillar 4: Destination Stewardship** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 4.4 Redefine the Resort-Town Relationship | Acknowledge that resort companies' pass-driven business model has decoupled their financial risk from towns'<br>Develop town-owned or town-branded tourism products independent of resort operations<br>Ensure resort marketing includes community identity, not just pass sales | TBD | Town councils, resort operators, DMOs |
| 4.5 Protect the Natural Assets That Drive Tourism | Manage wildfire and smoke risk as tourism and quality-of-life threats across all seasons<br>Invest in water quality and stream health—stressed fish and low rafting flows are summer economy killers<br>Prevent environmental degradation on public lands through managed access<br>Integrate environmental resilience into all destination marketing and product development | TBD | Counties, USFS, recreation districts, water districts |

# ✦ Pillar 5: Regional Infrastructure & Governance ✦

**Supporting NWCCOG reports:**

- 2026 Comprehensive Economic Development Strategy (when published)
- 2022 NWCCOG Regional Survey of Budgeting Practices
- 2021 NWCCOG Transportation Gap Analysis Assessment

Elevate Colorado 2025 State Alignment: Pillar 5 — Community Infrastructure + Resources

This is a new Pillar for the CEDS in 2026, though it has been a core purpose of NWCCOG since it began 50 years ago. By law, each municipality in Colorado must adopt a comprehensive land use plan, although content varies widely. For some, this is the primary strategic plan, the economic development plan and land use wrapped into one document. For others, it is just land use. One effort over the next CEDS period that would be of use would be to identify what elements are in each, and which jurisdictions address those elements separately.

Coming into 2026, state and federal funding has diminished considerably. This trend is likely to continue throughout this 5-year CEDS period into the foreseeable future due to national tax policy, federal debt and state funding limitations. As a result, municipalities counties and special districts will be pressured to self-fund infrastructure projects large and small entirely where grant funding with a local match once was a standard option. This also comes at a time when many NWCCOG communities are approaching a natural "build-out" with regard to developable land. Some, like Silverthorne are aggressively redeveloping commercial areas. Few mountain towns have opportunities for this at scale. What is may mean is that local tax bases will have to mature to address places that can no longer "grow" to develop new revenue or pursue initiatives as easily. There will be many more competing interests internally for funding.

Infrastructure and governance are the connective tissue that makes every other pillar work. Transportation, water, energy, and cross-jurisdictional coordination came up repeatedly—not as standalone resilience topics but as prerequisites for housing, workforce, diversification, and destination stewardship. This pillar absorbed what was previously "Regional Resilience" because resilience is a lens applied to everything, not a sector that stands alone.

| **Pillar 5: Regional Infrastructure & Governance** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 5.0 Understand the Funding Gaps for Capital Projects | Survey the infrastructure needs of member jurisdictions | TBD | NWCCOG, with DOLA and the Metro District Association |
| 5.1 Expand Regional Mobility | NWCCOG's Regional Transportation Coordinating Council (RTCC), led by the Mobility Director are actively working across transit organizations and mobility stakeholders | Update 2021 Transportation Gap Analysis Assessment | NWCCOG Mobility Manager, RTCC |
| 5.2 Expand Regional Transportation | Build on Regional Transportation Authority as a governance model<br>Expand public transit options along I-70 and Highway 40 corridors.<br>Develop transit connections that serve workforce commuter patterns, not just tourist flows<br>Develop transit connections across jurisdiction lines using integrated technology, expanded routes, IGAs, etc. | Project-by-project. For example: the 5304 planning grant study from Parachute-Silt would expand local transportation options in these communities. | RTAs, CDOT, towns, counties, ECO Transit, RTCC/NWCCOG Mobility Program, Colorado River Valley Economic Development Partnership |
| 5.3 Secure Water Resources | Plan for low-snow years as water system management crises, not just ski industry problems<br>Invest in water storage, conservation, and distribution infrastructure<br>Integrate water security into housing and development planning (can infrastructure support growth?)<br>Protect stream health for both ecological and economic reasons (rafting, fishing = summer economy) | QQ should establish a strategic plan like this document involving multiple partners | QQ, Water districts, counties, state water agencies |

| Pillar 5: Regional Infrastructure & Governance | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 5.4 Build Energy Infrastructure for Transition | Scale geothermal networks (Hayden's municipal utility model with 15-year cost recovery and 80-year warranty)<br>Explore repurposing existing energy infrastructure (coal mine waste heat, power plant sites)<br>Pursue federal and state energy transition funding for renewable infrastructure | There is no geothermal go-to entity or person in the NWCCOG region. Identifying whether that is necessary and what that looks like will be a measure of success. | Towns, utilities, state energy office, federal agencies |
| 5.5 Strengthen Cross-Jurisdictional Governance | Coordinate regional placement of housing, industry, transportation and infrastructure<br>Use NWCCOG as coordinating body for cross-county strategy implementation | Adopt a regional strategic plan to accompany CEDS.<br>Align CEDS strategies with existing subarea plans (Pitkin Vision 2050, Eagle Strategic Plan, Grand County 7 Core Objectives, etc.) | NWCCOG, all member governments |
| 5.6 Build Wildfire and Disaster Resilience | Develop regional wildfire preparedness and evacuation coordination<br>Plan for smoke season economic impacts across all tourism seasons<br>Invest in forest health and fuel management as economic protection<br>Create mutual aid frameworks for disaster response across the five-county region | There are multiple entities and districts, including interagency groups in this area, though there is currently no regional policy tracking which is something requested by Council. | Counties, fire districts, USFS, emergency management |

# ✦ Pillar 6: Economic Resilience ✦

**Supporting NWCCOG reports:**

- 2026 Comprehensive Economic Development Strategy (when published)
- 2022 NWCCOG Regional Survey of Budgeting Practices

Economic resilience is the region's capacity to anticipate, withstand, and recover from shocks—climate, market, and disaster—without losing its economic identity. Where Pillar 5 addresses the physical and governance infrastructure of resilience, this pillar focuses on the economic dimension: the fiscal health of local governments, the durability of small businesses and the workforce, and the region's exposure to a single defining risk—winters without snow. The goal is to plan for volatility as the norm rather than the exception, so that a bad snow year, a downturn, or a disaster becomes a managed event rather than a crisis.

| Pillar 6: Economic Resilience | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| 6.0 Plan for Winters Without Snow | Treat recurring low-snow and no-snow winters as a baseline planning scenario, not an emergency response<br>Model the fiscal impact of declining ski-season revenue on local government budgets and sales-tax collections<br>Accelerate winter revenue that does not depend on snow. | TBD | NWCCOG, counties, towns, DMOs |
| 6.1 Strengthen Local Government Fiscal Resilience | Encourage member jurisdictions to set reserve targets appropriate to their revenue volatility | TBD. Build on the 2022 NWCCOG Regional Survey of Budgeting Practices. | NWCCOG, county and municipal finance offices, DOLA |

| **Pillar 6: Economic Resilience** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| | Reduce over-reliance on sales and lodging tax by broadening the local revenue base where feasible<br>Coordinate a shared regional playbook for responding to economic downturns | | |
| 6.2 Build Small Business and Workforce Resilience | Expand access to capital, technical assistance, and continuity planning for small businesses<br>Support businesses in shifting from seasonal to year-round revenue models (links to Pillar 4)<br>Develop rapid-response tools to retain jobs and talent during shocks (links to Pillar 2) | TBD | SBDC, chambers, workforce center, NWCCOG |
| 6.3 Diversify Against Economic Concentration Risk | Reduce structural dependence on tourism and construction as the region’s sole economic drivers (links to Pillar 3)<br>Grow shock-resistant sectors: health care, remote and knowledge work, outdoor-industry manufacturing, energy transition<br>Track economic concentration and diversification metrics | TBD | NWCCOG, local EDCs, counties |

| **Pillar 6: Economic Resilience** | | | |
|---|---|---|---|
| **Strategy** | **Actions** | **Evaluation Framework** | **Owners** |
| | across the five-county region | | |
| 6.4 Prepare for Climate and Disaster Economic Shocks | Quantify the economic exposure of wildfire, smoke, drought, and flooding to tourism, property, and employment<br>Coordinate business-continuity and disaster-recovery economics with the resilience infrastructure in Pillar 5 | TBD. Option: Pursue federal and state resilience and recovery funding at a regional level ahead of, not after, events | Counties, emergency management, NWCCOG, state agencies |
| 6.5 Establish Regional Economic Monitoring and Early Warning | Build a shared regional dashboard of leading indicators (snowfall, sales tax, lodging occupancy, employment)<br>Use the data to trigger coordinated regional response before a downturn deepens<br>Report annually through the CEDS Evaluation Framework. | TBD | NWCCOG, member governments |

## Section 4: Evaluation Framework

The Evaluation Framework will be developed at the next stage of the strategy, once the general goals in Section 3 have been translated into prioritized actions with named owners and measurable targets. That work is scheduled for the first year of the plan period.

## Section 5: Annual Progress Reports

The EDD will publish an annual progress report annotating the status of each strategy and action against the Evaluation Framework, for review by the Economic Development District Board and the NWCCOG Council.

Progress is tracked in the Annual Progress Matrix at Appendix C, which lists every strategy from all six pillars against the years 2026 through 2031. Each year, the Economic Development District Board reviews the matrix and records two judgments for each strategy. The first is status: C for complete, U for underway, P for postponed, or D for deleted. The second, for strategies still underway, is direction of travel — improving, holding, or declining — shown as an arrow on a green, amber, or red field. Separating the two prevents a strategy from being reported as simply "in progress" year after year without any statement of whether it is actually gaining ground. A comment accompanies each entry. The matrix is the standing record of the plan's implementation and carries forward from one annual report to the next.

## Section 6: CEDS Steps

**1. Public Engagement:** The base for this CEDS was built from the previous document, including a scan of all documents listed for the Pillars above for content. This was reviewed at the 2026 NWCCOG Regional Economic Summit May 7th with a facilitator and over 60 participants who were encouraged to continue commenting on this document through a shared Google Drive folder afterwards. The Draft CEDS was presented at the June and August NWCCOG Council and EDD meetings where over 50 participants were present and actively engaged in feedback which was included in the rolling draft document.

**2. Comment Period:** a current draft was published on the NWCCOG Website EDD page on July 30th, 2026 with a Download button and a Submit Comments via Online Form button which generated a dozen comments which were integrated into the rolling draft document. Notice was sent out to entire NWCCOG Constant Contact Mailing List with over 150 people, and sent specifically to each jurisdiction requesting comment. Overall comments included reducing references to specific projects, keeping the Action matrix Actions more generalized. This remained open through August 2026.

**3. Community Validation:** Each county and municipality review the pillar framework and strategies for alignment with their existing plans and priorities. This step is a forward step for the first year of the CEDS, not an action completable within the draft CEDS publication timeline.

**4. Owner Assignment:** Placeholder owners need to be replaced with specific organizations and individuals who will champion each strategy. The matrix identifies owners where appropriate.

**5. Action Prioritization:** Identify which actions can be implemented immediately (quick wins), which need 1–2 years of development (medium-term), and which require 3–5 years (long-term). This will be an activity for the NWCCOG Economic Development District Board to consider and implement at its discretion.

**6. Draft CEDS Completion:** NWCCOG EDD staff completed a working draft as the foundation for the formal CEDS document, which was sent to a design consultant prior to the due date of September 30, 2026 expiration of the current plan. Funding for the Partnership Planning Grant period which began March 16th, 2026 was announced August 24th, 2026, thereby presuming a grace period for publication of the final document.

**7. Resilience Integration:** Each pillar's strategies should be stress-tested against climate, economic, and demographic scenarios to ensure the plan is robust to the region's most likely disruptions.

## Appendix A: How This Document Was Built

**Preparation:** This CEDS was assembled using AI-assisted review and synthesis of extensive research compiled by NWCCOG, including the CEDS from the prior five-year period, numerous planning documents by municipalities, counties, economic development entities within the region as well as media coverage of current issues. NWCCOG hired Stephen Kuban, CEO & Principal, Kuban Transit Solutions in March of 2026 to collaboratively develop "An Interactive AI Workshop: Building Regional Strategy Live" facilitation which occurred on the afternoon of May 7th, 2026 at the Silverthorne Pavilion. Using that baseline data, Kuban led a panel of economic development experts from across the region through a discussion, and included extensive audience participation. This structure allowed the AI-assisted synthesis to be grounded in, and continuously corrected by, direct regional expertise.

**The Workshop** began with the current Comprehensive Economic Development Strategy (CEDS), and current County-level economic strategic planning documents which were uploaded prior to the presentation. Kuban led a panel of representatives from NWCCOG Member Counties in a discussion, with live audience interaction. The objectives for the work product were

1) to engage audience in discussion of the region's economic issues that will provide first engagement for upcoming CEDS due in September, providing framework for a series of calls resulting in final document,

2) to produce a report within a week summarizing input, and

3) to teach participants how to use AI through learning-by-doing.

**The first draft** of this document was synthesized live during the NWCCOG Economic Development Summit on May 7, 2026 in Silverthorne, Colorado. Over 60 regional stakeholders participated in a full-day workshop combining morning presentations, an afternoon expert panel, and real-time audience contributions via a shared Google document. Kuban recorded each of the morning sessions and used AI to blend their content into the draft. Those presentations featured Kate Watkins (State Demographer), Brian London and Carl Ribaudo of Insights Collective, a Tourism Think Tank (statistical analysis of the five-county region), Kami Collins, Rural Opportunity Representative West for the State of Colorado's Office of Economic Development and International Trade (OEDIT), and Erik Williams, Director of Community Development for the Vail Valley Partnership who presented on their Workforce strategy which they call CareerWise (a Colorado apprenticeship model). The afternoon panel, facilitated by Stephen Kuban included Jason Blevins (Colorado Sun, Co-founder), Jacob Zook (City of Glenwood Springs, Economic Development Specialist), DiAnn Butler (Grand County, Economic Development Director), Matthew Mendisco (Town Manager of Hayden), and Mia Vlaar (Town of Vail, Economic Development Director).

AI tools were used throughout the day to transcribe, synthesize, and organize the discussion in real time. International peer research covering 15+ resort regions globally was conducted in advance and shared with the room. This draft reflects the full day of input, including audience comments on the shared document.

## What We Heard at the Regional Economic Summit

### Presentations

**State Demographer (Kate Watkins):** The region is growing but aging. Summit County projects 12.4% growth by 2030, but Jackson County faces an 8.4% population decline. The 25–44 age cohort is shrinking in most counties, creating a leadership and workforce pipeline gap. Net migration is the primary growth driver, not natural factors such as birth and death.

**Regional Statistical Analysis (Brian London & Carl Ribaudo):** Insights Collective performed interviews with Mayors and Managers in the Winter of 2026 to build a survey for leaders across the region, resulting in a report published in July of 2026. Their presentation was a sneak preview summary of that work. Tourism dominates employment (45–51% in most counties) but wages lag. Average annual wages range from $47,060 (Grand) to $59,852 (Eagle). The region has more jobs than workers—unemployment at roughly 2%—and the gap between jobs and available workforce is the binding constraint, not job creation.

**OEDIT (Kami Collins):** Colorado's state economic development office provides grants, tax credits, and technical assistance. The rural and resort communities in this region often don't look "needy" on paper because resort wealth masks real local struggles.

**CareerWise Colorado (Erik Williams):** The Vail Valley Partnership is one of the three sub-regional Economic Development organizations within the NWCCOG Economic Development District. They and their CEO have won national awards for their model, business practices and services. Attendees of the 2026 Regional Economic Summit were treated with a snapshot of one of those programs, a Swiss-model youth apprenticeships placing high school students in professional career tracks. Expanding into the region with Eagle County as a hub. Addresses both workforce pipeline and young professional retention.

## Key Themes

**Housing is the region's most active arena—and the region deserves more credit.** Vail is adding 1,100 residents through new housing (a 23% population increase). Glenwood Springs leveraged $500K in lodging tax into 250 units. Hayden's municipal housing authority purchased an entire neighborhood and has 145 deed-restricted units coming online up to 160% AMI. Snowmass requires 100% developer mitigation. Silverthorne built 400 units on land purchased a decade ago. Eagle County's Bold Housing Moves and the Roaring Fork Valley's Good Deeds program are producing results. The challenge is scale: even at 300% AMI, you cannot buy a home in the Roaring Fork Valley.

**The worst snow year in memory was a stress test—and the region adapted.** Resort operators reported only 4–5% live ticket revenue declines thanks to season pass strategies. The financial risk has shifted to towns. Grand Lake had zero snowmobile revenue but town revenue grew 4.3% because of event-driven diversification. Vail's net promoter scores rose 10 points once expectations adjusted. As Jason Blevins observed, resort companies are now largely immunized from bad snow years, leaving mountain towns to own their economic resilience.

**The coal transition is the most urgent fiscal story in the region.** Hayden must replace $55M of $58M in assessed value within 10 years as coal plants close. Yet Hayden is also the only community on the Western Slope with 25–45 as its fastest-growing demographic, driven by relative affordability and entrepreneurial governance. Their model: act fast, skip studies when the need is obvious, build childcare and housing without waiting for perfection.

**Civic engagement innovation is already happening.** Hayden requires under-18 members on every board. Vail Valley Partnership launched Young Emerging Professionals (YEP). The "How the F" series teaches young adults practical life skills for $20 per session. Participants acknowledged, however, that traditional evening meetings exclude people working two or more jobs, and that micro-engagement formats are needed.

**Regional coordination is talked about more than practiced.** As Matthew Mendisco put it, jurisdictions "cannibalize each other's programs instead of asking where does it make the most sense to build." Light industrial makes sense in Hayden, not Steamboat. Housing should go where land is available. The Routt County Regional Transportation Authority just passed—a concrete step toward cross-jurisdictional governance. Highway 40 accidents increased 400% from 2020 to 2025.

**Second-home economies anchored by Part-Time Owners are an undervalued asset.** Jason Blevins suggested that second-home economies may eclipse tourism economies in their contribution through philanthropy, foundation giving, and board service. The risk is the aging-out of engaged 1990s-era buyers without an equally engaged replacement cohort. Participants urged the region to recognize second homeowners as community members rather than assigning them blame for housing pressures. But also consider vacancy taxes (Vail exploring, Eagle County 48% vacant, Pitkin County 80% vacant).

**Geothermal energy emerged as a surprise regional asset.** Hayden's 58-acre business park will be fully heated/cooled by geothermal network run as a municipal utility. Vail received a $1.73M grant for geothermal exploration. Eagle County just completed a model Geothermal project converting the county building entirely to meet 2030 emissions goals. Colorado's thermal energy bill passed the full House today. Coal mine waste heat could be repurposed rather than building new.

## Appendix B: List of Tables and Figures

### Tables



### Figures



### Embedded Source Images



*Page references are omitted pending final layout by the design consultant.*

## Appendix C: Annual Progress Matrix

This matrix carries the full list of strategies from all six pillars, grouped and color-coded to match Section 3. As part of the annual progress report described in Section 5, the Economic Development District Board records two things in each year's narrow box: a status letter — C for complete, U for underway, P for postponed, or D for deleted — and, for items still underway, a trend arrow indicating whether conditions are improving, holding, or declining. Shade the box green, amber, or red to match the arrow. Comments go in the wide cell alongside. The status key, trend key, and year headings repeat at the top of every page.

| STATUS | | C = Complete | | U = Underway | | P = Postponed | | D = Deleted | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TREND (Underway items only) | ↑ | Improving | → | Holding | ↓ | Declining | | | | | | |
| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| **Pillar 1: Housing & Community Stability** | | | | | | | | | | | | |
| 1.1 Scale Permanent Deed-Restricted Housing | | | | | | | | | | | | |
| 1.2 Leverage Existing Housing Stock | | | | | | | | | | | | |
| 1.3 Adopt Existing Tools where Absent | | | | | | | | | | | | |
| 1.4 Expand Revenue Tools for Housing | | | | | | | | | | | | |

| STATUS | | C = Complete | | U = Underway | | P = Postponed | | D = Deleted | | | | |
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| TREND (Underway items only) | ↑ | Improving | → | Holding | ↓ | Declining | | | | | | |
| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| 1.5 Steward the Second Home Economy | | | | | | | | | | | | |
| 1.6 Optimize Regional Housing Placement | | | | | | | | | | | | |
| 1.7 Update NWCCOG 2023 Workforce Housing Report | | | | | | | | | | | | |
| 1.8 Monitor Sentiment regarding balance between tourism and community | | | | | | | | | | | | |
| 1.9 Preserve Manufactured & Mobile Home Communities | | | | | | | | | | | | |
| 1.10 Lower Construction Costs | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| 1.11 Unlock Public & Underutilized Land for Workforce Housing | | | | | | | | | | | | |
| 1.12 Expand Attainable Homeownership & Down-Payment Assistance | | | | | | | | | | | | |
| 1.13 Close Sub-Regional Data & Coverage Gaps | | | | | | | | | | | | |
| **Pillar 2: Workforce and Talent Development** | | | | | | | | | | | | |
| 2.0 Promote Aging-In-Place as a workforce strategy | | | | | | | | | | | | |
| 2.1 Retain Young Professionals | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| Through Civic Integration | | | | | | | | | | | | |
| 2.2 Build Trade and Career Education Pipelines | | | | | | | | | | | | |
| 2.3 Childcare as Workforce Infrastructure | | | | | | | | | | | | |
| 2.4 Attract Net Migration Strategically | | | | | | | | | | | | |
| 2.5 Support County-level Behavioral (mental) Health efforts | | | | | | | | | | | | |
| 2.6 Leverage AI and Technology for Government Efficiency | | | | | | | | | | | | |
| 2.7 Strengthen Partnership with Colorado Mountain College | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| 2.8 Build a Regional Labor-Market & Talent Data Function | | | | | | | | | | | | |
| 2.9 Integrate Immigrant & Seasonal Workers into the Workforce | | | | | | | | | | | | |
| 2.10 Improve Job Quality and Career Ladders in the Service Economy | | | | | | | | | | | | |
| 2.11 Support an Aging Workforce & Business Succession | | | | | | | | | | | | |
| **Pillar 3: Economic Diversification & Transition** | | | | | | | | | | | | |
| 3.0 Local Business Support (NWCCOG) | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| 3.1 Support Local Communities with Broadband | | | | | | | | | | | | |
| 3.2 Local Business Support (non-NWCCOG) | | | | | | | | | | | | |
| 3.3 Celebrate and Encourage Colorado Creative Districts | | | | | | | | | | | | |
| 3.4 Develop Light Industrial and Non-Tourism Economy | | | | | | | | | | | | |
| 3.5 Build the Creative and Trades Economy | | | | | | | | | | | | |
| 3.6 Develop Geothermal and Renewable | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| Energy as an Industry | | | | | | | | | | | | |
| 3.7 Increase and Diversify the Tax Base | | | | | | | | | | | | |
| 3.8 Grow the Outdoor Recreation Industry & Brand Economy | | | | | | | | | | | | |
| 3.9 Expand Entrepreneurship & Access to Capital via the Northwest Loan Fund | | | | | | | | | | | | |
| 3.10 Leverage Project THOR Broadband for a Knowledge & Remote Economy | | | | | | | | | | | | |
| 3.11 Strengthen Health Care & Higher Education as | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| Economic Anchors | | | | | | | | | | | | |
| 3.12 Manage the Coal Transition as a Regional Priority | | | | | | | | | | | | |
| **Pillar 4: Destination Stewardship** | | | | | | | | | | | | |
| 4.1 Develop Post-Snow Tourism Products | | | | | | | | | | | | |
| 4.2 Strengthen Shoulder Season Economy | | | | | | | | | | | | |
| 4.3 Manage Tourism Rather Than Maximize It | | | | | | | | | | | | |
| 4.4 Redefine the Resort-Town Relationship | | | | | | | | | | | | |
| 4.5 Protect the Natural Assets | | | | | | | | | | | | |

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| **Strategy** | **2026** | **Comments** | **2027** | **Comments** | **2028** | **Comments** | **2029** | **Comments** | **2030** | **Comments** | **2031** | **Comments** |
| That Drive Tourism | | | | | | | | | | | | |
| **Pillar 5: Regional Infrastructure & Governance** | | | | | | | | | | | | |
| 5.0 Understand the Funding Gaps for Capital Projects | | | | | | | | | | | | |
| 5.1 Expand Regional Mobility | | | | | | | | | | | | |
| 5.2 Expand Regional Transportation | | | | | | | | | | | | |
| 5.3 Secure Water Resources | | | | | | | | | | | | |
| 5.4 Build Energy Infrastructure for Transition | | | | | | | | | | | | |
| 5.5 Strengthen Cross-Jurisdictional Governance | | | | | | | | | | | | |

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| 5.6 Build Wildfire and Disaster Resilience | | | | | | | | | | | | |
| **Pillar 6: Economic Resilience** | | | | | | | | | | | | |
| 6.0 Plan for Winters Without Snow | | | | | | | | | | | | |
| 6.1 Strengthen Local Government Fiscal Resilience | | | | | | | | | | | | |
| 6.2 Build Small Business and Workforce Resilience | | | | | | | | | | | | |
| 6.3 Diversify Against Economic Concentration Risk | | | | | | | | | | | | |
| 6.4 Prepare for Climate and | | | | | | | | | | | | |

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| Disaster Economic Shocks | | | | | | | | | | | | |
| 6.5 Establish Regional Economic Monitoring and Early Warning | | | | | | | | | | | | |

## Thank You

This Comprehensive Economic Development Strategy is the product of the Northwest Colorado Council of Governments Economic Development District Board of Directors, whose members gave their time, judgment, and candor across a full year of meetings, workshops, and draft review. The Board set the direction of this plan, tested its assumptions against conditions on the ground in their own communities, and insisted that it describe the region as it actually is. NWCCOG is grateful for that service.

Thanks are due as well to the more than sixty regional stakeholders who participated in the 2026 Regional Economic Summit, to the presenters and panelists who shared their data and their perspective, and to the member jurisdictions and partner organizations that contributed plans, reports, and comment throughout the drafting process. This plan belongs to the region, not to the District office.

## NWCCOG Member Jurisdictions

| County | Member Municipalities |
|---|---|
| **Eagle County** | Town of Avon · Town of Basalt · Town of Eagle · Town of Gypsum · Town of Minturn · Town of Red Cliff · Town of Vail |
| **Grand County** | Town of Fraser · Town of Granby · Town of Grand Lake · Town of Hot Sulphur Springs · Town of Kremmling · Town of Winter Park |
| **Jackson County** | Town of Walden |
| **Pitkin County** | City of Aspen · Town of Snowmass Village |
| **Summit County** | Town of Blue River · Town of Breckenridge · Town of Dillon · Town of Frisco · Town of Montezuma · Town of Silverthorne |
| **Routt County** | Town of Hayden · City of Steamboat Springs |

Routt County and the City of Glenwood Springs (Garfield County) participate as ex-officio members of the Economic Development District: they support the District through member dues, receive all District services, and hold seats on the EDD Board, though neither lies within the formally designated District footprint of Colorado Planning and Management Region 12.