



2022 Performance Report

Montezuma County, Colorado

The Region 9 Economic Development District of Southwest Colorado Inc. (Region 9) is a nonprofit, 501 (c) 6 public-private partnership that promotes and coordinates economic and community development efforts throughout Southwest Colorado. Region 9 covers 5 counties, 10 municipalities and the 2 Native American Tribes in Colorado (Ute Mountain Ute and Southern Ute). Incorporated in 1989, Region 9 is led by a 26-member Board of Directors; 17 from local governmental jurisdictions and 9 from the private sector.

2022 Montezuma Representatives

Jim Candelaria – Montezuma County
Kelly Koskie – Cortez
Ken Charles – Dolores
Janice Bryan/Jason Armstrong – Mancos
Dewayne Findley/Cassie Alexander – At large
Shawn Gregory – At large & Loan Committee
Jon Callender – Loan Committee
Vacant – Ute Mountain Ute Tribe



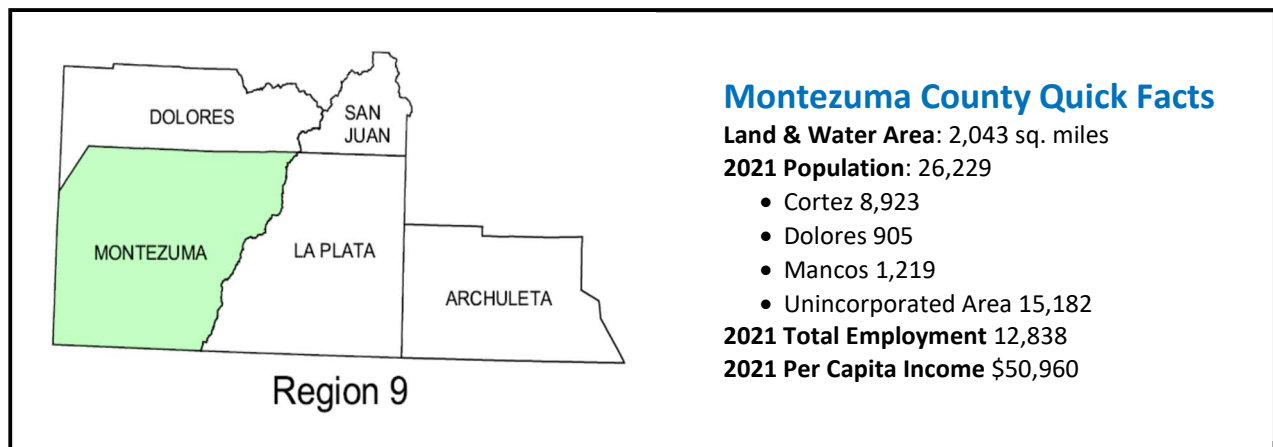
Region 9 Staff

Laura Lewis Marchino – Executive Director
Brian Rose – Deputy Director
Jenny Stollar – Business Loan Officer
Terry Blair-Burton – Program Administrator
Shirley Jones – Comptroller
Stephani Burditt – Grant Compliance Specialist

Heather Peterson – Office Manager
Heather Otter – Economic Development Project Manager
Shak Powers – Regional Projects Manager
Tiffany Brodersen – Community Grant Navigator
Elizabeth Marsh – SCAPE Executive Director
Brittany Cupp – SCAPE Program & Community Manager

Region 9 Programs and Services

- Business loans
- Regional broadband, housing, transportation
- Colorado State Data Center local affiliate
- Technical assistance and special projects
- Southwest Enterprise Zone administration
- Research for community and regional projects
- Southwest Colorado Accelerator Program for Entrepreneurs (SCAPE)
- Grant Navigator
- Comprehensive Economic Development Strategy (CEDS)
- Administrative support for San Juan Development Association with financials and microloan program
- Administrative support for San Juan Resource Conservation District, All Hazards, SWIMT
- Facilitation for Southwest Opioid Response District (SWORD)



Technical Assistance – Region 9 provides technical assistance in Montezuma County and area municipalities by participating in community meetings, researching, administering grants, and advocating for communities at the Regional, State, and Federal levels. Activities are listed below.

County-Wide

- Responded to 435 inquiries, nearly the same as 2021, regarding business resources, EZ Contribution Project inquiries, loans, grant, and data requests. Inquiry types and numbers are listed below.

	Business Loan	Data	EZ	Grants	General	OZ	Totals
Montezuma	5	9	81	9	39	0	143
Cortez	33	11	32	5	17	0	98
Dolores	5	5	1	1	7	0	19
Mancos	6	6	58	2	13	1	86
Ute Mountain Ute	0	4	56	13	16	0	89

- Resented to local governments and organizations on regional data and economic development trends.
- Region 9 and Southwest Small Business Development Center provided Starting Your Business Workshops to businesses across Montezuma County.
- Supported workforce development efforts through partnerships with area high schools and higher education.
- Region 9 and SCAPE participated on the Mancos High School Entrepreneur Career Pathway Advisory Committee.
- Region 9 funded Commercial Driver’s License training and funding.
- Regularly attended the Montezuma Stakeholders Meetings.
- Served as part of the core team for the Montezuma-Dolores Roadmap Program and Montezuma Community Collective.
- Hosted economic development workshop in Cortez for staff working in those roles throughout the Region.
- Worked with stakeholders throughout the County on infrastructure projects including broadband, housing, and transportation.
- Served on the Southwest Memorial Hospital Board of Directors
- Relocated the Region 9 satellite office to the Cortez Area Chamber of Commerce Business Resource Center.
- Facilitated grant meetings for Montezuma County and communities.

Regional Initiatives – 2022 was a year of tremendous growth and change. We are most proud of the successful integration of the Southwest Colorado Council of Governments with the Region 9 organization, creating long-term economies of scale and efficiencies.

Other Highlights include:

- Hosted the State Enterprise Zone Administrator’s meeting in Silverton.
- Added a Regional Projects Manager in Montezuma County, a Grant Compliance Specialist, and a Community Grant Writer.
- Our Community Grant Writer coordinated a monthly Grant Digest and wrote 10 grants of which 6 have been awarded, totaling \$1,871,205. Two others are still pending including an NTIA \$66M Middle Mile Broadband application.
- Expanded our services to include broadband, transportation, and housing.
- Facilitated the monthly SWORD (SouthWEST Opioid Response District) Regional Council to manage the opioid settlement funds. Region 9 received \$150K of congressionally designated funding to conduct a feasibility study to identify the best options to fill existing treatment gaps.
- Provided additional economic data resources including our data dashboard and commercial property search.
- Responded to 1,786 inquiries covering business resources, grants, and data requests. This number increased from 1,228 in 2020 and 1,760 in 2021.
- Staff represented the region on the Small Business Development Center Advisory Committee, the Southwest Colorado Workforce Investment Board, Southwest Colorado Accelerator for

Entrepreneurs (SCAPE), B:Side Capital Loan Committee, Pueblo Community College Southwest Advisory Board, Economic Development Council of Colorado (EDCC), Fort Lewis College Business Advisory Council, School of Business Administration, Colorado Association of Regional Organizations (CARO), and the National Association of Development Organizations. Please see our County Performance Reports for county specific involvement.

- Completed Southwest Colorado Broadband Plan.
- Received \$6.6M in funding including \$500K in USDA Intermediary Relending loan funds, \$5M (shared among 8 regions) to provide Start Up Loan Funds on behalf of the Colorado Office of Economic Development and International Trade (OEDIT), SBA Microloan and Technical Assistance funds, \$150K of congressional dedicated funding for a regional feasibility study to identify viable treatment solutions for opioid and other substances, \$413K for a Carrier Neutral Location for fiber connectivity in partnership with La Plata County, and \$250K in USDA Rural Community Development Initiative (RCDI) funding matched \$250K by the Colorado Housing and Finance Authority (CHFA) for the Ute Mountain Ute Tribe to update their Comprehensive Master Plan and a Housing Study covering the communities of Towaoc and White Mesa.

Southwest Colorado Accelerator Program for Entrepreneurs (SCAPE) offers in-depth mentoring, education, and access to equity funding for early stage and growing companies. The program has launched 52 companies based in rural Southwest Colorado. These businesses raised \$40M in capital contributing to the creation of 230 local jobs. SCAPE companies have been recognized as Colorado Companies to Watch and have been recipients of the Colorado Early Seed Stage Grant. SCAPE is the hub of the entrepreneurial ecosystem and hosts regional investment and startup initiatives. Visit www.goscape.org/. Region 9 is a proud investor in this program.

Enterprise Zone Program – Montezuma County is an Enhanced Rural Enterprise Zones (EREZ) through 2024. This program provides financial business incentives to promote and encourage new job creation. A business which includes farming and mining located within the Enterprise Zone may be eligible for EZ tax credits, including capital investment tax credits, job tax credits, research and development tax credits, and other incentives. Since 1992, Montezuma County businesses have claimed approximately \$745M in eligible investments, resulting in \$15M in certified tax credits and reported 2,200 new jobs. In 2022, Region 9 received 652 inquiries regarding the Enterprise Zone Program, comprising of 228 inquiries within Montezuma County. Montezuma continues to lead the region in business participation with 165 businesses claiming \$351,249 in tax credits and creating 34 new jobs.

An **EZ Contribution Project** allows donor contributions of at least \$100 (depending on the organization) to Enterprise Zone projects which are eligible for a 25% State tax credit on cash donations, and a 12.5% State tax credit on in-kind donations. Regional wide in 2022, there were 25 designated Enterprise Zone Contribution Projects. There were 5 new projects added, 7 projects ended or were not renewed, including one COVID project. Projects generated \$1.34M in economic activity through direct and in-kind contributions. This is a declining trend for participation with 28 Projects at \$1.46M in 2022 from 30 projects at \$2.35M in 2020, and 30 projects in 2019 at \$4.14M.

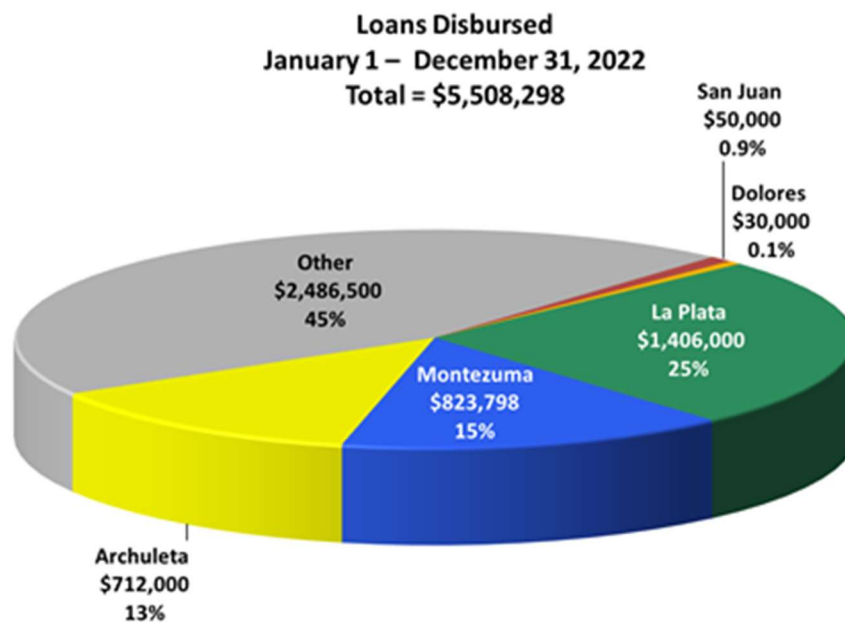
Enterprise Zone contribution projects that impacted Montezuma County in 2022

- Bridge Emergency Shelter
- Cortez Cultural Center
- Habitat for Humanity of Montezuma County
- Montezuma Food Systems
- Sunflower Theatre
- Mancos Common Press
- Region 9 Economic Development District of Southwest Colorado (Region 9 EDD)
- Southwest Colorado Accelerator Program for Entrepreneurs (SCAPE)
- Southwest Small Business Development Center (SBDC)

Data – Region 9 offered data tools and prepared strategy and research reports that included data specific to Montezuma County in 2022. Region 9 is a Colorado State Data Center local affiliate and provides reliable, unbiased, and timely regional socio-economic data to citizens and policymakers. All the District’s reports and data tools can be found at www.region9edd.org under the Data tab.

- Region 9 Economic Snapshot 2022
- Region 9 Livable Wage Report 2022
- Regional Data Dashboard
- Regional Commercial Property Search Tool

Loans – In 2022, Montezuma County had 13 new loans (2 are new loans to existing clients) and 7 loans paid off (one from a continuing client). The County’s loans represented 15% of all the loans dispersed by Region 9.



As a primary lender for start-up businesses, Region 9 provides commercial loans to businesses. Loan funding supports businesses in creating and retaining jobs, leveraging other funds, or exporting a good or service from the local economy. The Business Loan Fund (BLF) includes several Federal and State

sources: Community Development Block Grants (CDBG) from the Colorado Office of Economic Development and International Trade (OEDIT) (contracted through La Plata County and the 5-county region through an inter-governmental agreement); the USDA Intermediary Re-lending (IRP) & Rural Micro Entrepreneur Assistance Program (RMAP); the Economic Development Administration (EDA); Start Up Loan Fund through OEDIT; Small Business Administration Microloan Program (SBA) and revolved funds from previously restricted funds that are re-distributed in the community. Loan clients from Montezuma County communities are listed below.

Loan Clients

Cortez

303 Labs Co.
Aubuchon Custom Productions
Baier Essentials
Clayton Archer
Curt Mangan
Denkai Animal Sanctuary
Elevate'M **NEW**
Gustafson Trucking
High Desert Life Outdoors
KB Insurance Group
K & J Customs
Lotsa Pasta
Moving Mountains
Nash Trucking *
Rentz **NEW**
Repair Doctor **NEW**
Rowe & Sons Trash Services
San Juan Coffee **NEW**
Shiloh's **NEW**
Talos Outdoors **NEW**
Top Line Floors
Western Equipment **NEW**
Wigglin' Pig **NEW**
Yellow Car Country Wine

Dolores

RJN Construction Management
Rudosky Golf
Straight Edge Home Inspections
S & S Wallwood
Vessel

Lewis

Lambert Livestock & Cattle Co.

Mancos

Botanical Companions
Lost Lake Canyon Lodge
Luna Mesa
Mestas Welding **NEW**
Mud Creek Hogan Trading Co. **NEW**
Ott's Sawmill
Red Mesa Rentals
The Nest Preschool
Underwood Forestry
Zuma Natural Foods **NEW**

County (Unincorporated Area)

Alexander Excavation
Colorado Norton Works
Countryside Disposal
Eighty Eight Auto Repair
Montezuma Valley Plumbing
Organic Family Farms
Reflections in Metal
Steele Investment

Paid Off

Bo Dean's Towing
Fabulous Fabrications
Lotsa Pasta
Mancos Brewing Company
Southwest Printing
STR Custom Coatings
West Adventures & Tours