



2023 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.

2023 Montezuma Representatives

Bernadette Cuthair – Ute Mountain Ute Tribe
Cassie Alexander – At large
Chris Aiken – Loan Committee
Janice Bryan/Jason Armstrong – Mancos
Jim Candelaria/Kent Lindsay – Montezuma County
Kelly Koskie/Drew Sanders – Cortez
Leigh Reeves – Dolores
Shawn Gregory – At large & Loan Committee



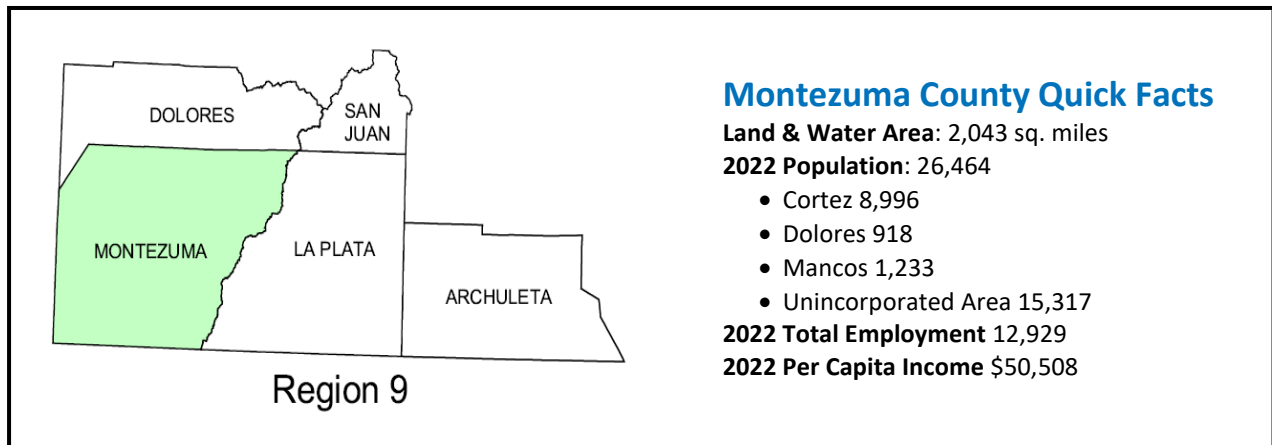
Region 9 Staff

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
Elizabeth Heine – Office Manager

Heather Otter – Economic Development Project Manager
Shak Powers – Regional Projects Manager
Tiffany Brodersen – Community Grant Navigator
Claire West – SWORD Project Coordinator
Donna Graves – Information Services
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 396 inquiries, down from 435 in 2022, regarding business resources, EZ Contribution Project inquiries, loans, grant, and data requests. Inquiry types and numbers are listed below. This may be partially attributed to the increased economic development staff capacity across the county and towns handling inquiries.

	Business Loan	Data	EZ	Grants	General	OZ	Totals
Montezuma	3	5	158	24	27	1	218
Cortez	19	3	39	0	17	0	78
Dolores	7	3	10	4	10	0	34
Mancos	5	2	8	0	9	0	24
Ute Mountain Ute	0	1	9	16	16	0	42

- Region 9 and Southwest Small Business Development Center provided Starting Your Business Workshops to businesses across Montezuma County.
- Region 9 and SCAPE participated in the Mancos High School Entrepreneur Career Pathway Advisory Committee.
- Region 9 and Cortez Economic Development staff co-hosted the Quarterly Eco Devo Meet Up in the Town of Dolores for economic development professionals and grant writers from across our region.
- Participated in the launch of the Montezuma Community Collective in Cortez to begin the implementation phase of the Roadmap Plan.
 - Served as part of the core team for the Montezuma-Dolores Roadmap Program and Montezuma Community Collective (MCC).
 - Participated in weekly EDA Roadmaps/Montezuma Steering Team Meetings.
 - Presented on Roadmaps and MCC at Ute Mountain Ute Tribal Council.
 - Facilitated the MCC Housing and Transit group meetings.
- Facilitated meetings to update the Community Development Action Plan (CDAP) for 2024-2026.
- Presented Eco Devo Fundamentals and CDAP update process to Mancos and Dolores Town Boards.
- Facilitated the Mancos Valley Chamber Board Retreat.
- Teamed up with the Town of Mancos and Montezuma County to participate in Montezuma-Cortez High School's Futures Fair – career and internship exploration experience for students.
- Presented to Mancos High School Business Class on business lending.
- Participated on Mancos High School's Entrepreneur Pathway Advisory Board and judged the students' pitch events.
- Helped fund a Commercial Driver's License career pathway at Mancos High School.
- Provided a Hootsuite social media marketing tutorial to the Town of Mancos and the Mancos Chamber.
- Facilitated quarterly grant meetings for Montezuma County and communities.
- Edited Montezuma County's Energy Impact Assistance Fund Grant application regarding the project for solar at the fairgrounds.
- Submitted letters of support for Montezuma County's EDO and Colorado Opportunity Now Grant applications.
- Submitted letter of support for the Town of Mancos, Cortez, and Montezuma's EDO grant applications.
- Successfully assisted the Montezuma Heritage Museum become an Enterprise Zone Contribution Project.
- Participated on the Ute Mountain Ute Grocery Store Steering Committee.
- Hosted the event Understanding Trauma & its Connections to Substance Misuse & Recovery in conjunction with SWORD in the Town of Mancos.
- Region 9 and SBDC presented and provided business resources at a Mancos Chamber of Commerce event.

- Provided data for the Make It Montezuma Community Prospectus and county website updates and presented at two Make it Montezuma events, a free business resource series in Cortez.
- Served on the Southwest Memorial Hospital Board of Directors.
- Facilitated project groups at Ute Mt Ute Tribe’s Funder Retreat in Denver.
- Administering RCDI grant for Ute Mt Ute Tribe to fund Comprehensive Housing and Master Plan.

Broadband

- Assisted the City of Cortez and Town of Dolores attain Broadband Ready Certifications by the Colorado Broadband Office.
- Assisted Montezuma County with successful Capital Project Fund project applications.
- Updated Dark Fiber contracts with governments and ISPs.
- Full-time staff based in Cortez.

Transportation

- Assisted Montezuma County, Dolores County, and the Town of Rico develop a pilot program to transport Rico seniors to Cortez weekly for groceries, shopping, and medical appointments.
- Presented to the Montezuma County League of Women’s voters regarding Housing, Broadband, and Transportation efforts in the Region.

Housing

- Consulted with the City of Cortez Housing Needs Assessment Steering Committee.
- Participated in the Affordable Housing Impact Fee Workshop in Mancos.
- Assisted Montezuma County and municipalities with Ayer’s consultants regarding IHOP planning. This included Think Like a Developer Training. Site visits were made to all municipalities.
- Coordinated and led Colorado Division of Housing staff and CHFA on a tour of regional housing projects with a visit to Cortez.
- Accompanied Representative McLachlan, Senator Simpson, and Senator Jeff Bridges on a tour to discuss housing in Cortez and Mancos.
- Successfully sponsored Higher Purpose Homes as Rural Jumpstart Business in Montezuma County.

Regional Highlights – Region 9 EDD serves Montezuma County through regional initiatives and programming including broadband, transportation, and transit initiatives, as well as coordination around regional housing including:

- Facilitated monthly SouthWEST Opioid Response District (SWORD) meetings. Region 9 EDD received a completed feasibility study to identify the best options to fill existing treatment gaps.
- Responded to 1,661 inquiries covering business resources, grants, and data requests across the region. This number decreased from 1,786 in 2022. Inquiries were 1,760 in 2021 and 1,228 in 2020. An increase in economic development staff across the region elevated the capacity within communities to manage inquiries.
- Conducted long needed audit of SCAN (Southwest Colorado Access Network) fiber.
- Received 1.55M in new program funding including \$870K in CDBG funding; \$500K Colorado Forest Service Loan Fund, \$36,458 SBA Microloan and Technical Assistance funds; \$41K for Rural Technical Assistance Program (RTAP) for High Alpine recreation geospatial study as pass through for the High

Alpine Roadmap groups; \$100K in Grant Navigator funds; \$40K for CEDS implementation funds to assist with SWORD Coordinator position.

- Received NADO Impact Award for the integration of Southwest Colorado Council of Governments (SWCCOG).
- Made 49 presentations to community organizations covering everything from Enterprise Zone, Grant readiness, Rural Economic development, businesses financing and data.
- Reestablished quarterly County/Town Administrator luncheons.
- Conducted quarterly Economic Development meetups for economic development professionals in the region.
- Provided significant technical assistance around Prop 123 baseline data and educating communities and counties on impacts.
- Provided quarterly e-newsletter and monthly Grant Digest.
- Established Transit website (southwestrtc.com).
- Hosting weekly collaboration meetings for broadband stakeholders and housing stakeholders across the region.

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 \$54M in capital contributing to the creation of 230 local jobs. 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 – Region 9 EDD is the Southwest Colorado Rural Enterprise Zone (EZ) Administrator and determines if a business is located within EZ boundaries, processes EZ tax certification forms, administers the designation of EZ Contribution Projects, and certifies donations. Businesses in the EZ boundaries are eligible for a variety of tax credits. Currently, all of Montezuma, San Juan and Dolores Counties, and sections of La Plata and Archuleta Counties, are designated EZ areas. Archuleta, Montezuma, Dolores, and San Juan Counties have also been designated as Enhanced Rural Enterprise Zones (EREZ) through 2024.

Between 2003-2023, Montezuma County businesses made \$608M in eligible investments, claimed \$13M in certified tax credits and reported 1,089 new jobs. In 2023, Region 9 received 792 inquiries regarding the Enterprise Zone Program. The County and communities generated 224 of those inquiries. 163 Montezuma businesses invested \$10.3M, claimed \$310K in tax credits and lost 14 jobs from participating businesses.

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 2023, there were 26 designated Enterprise Zone Contribution Projects. There were 7 new projects added, six renewals, and five projects ended. Projects generated \$1.6M in economic activity through direct and in-kind contributions.

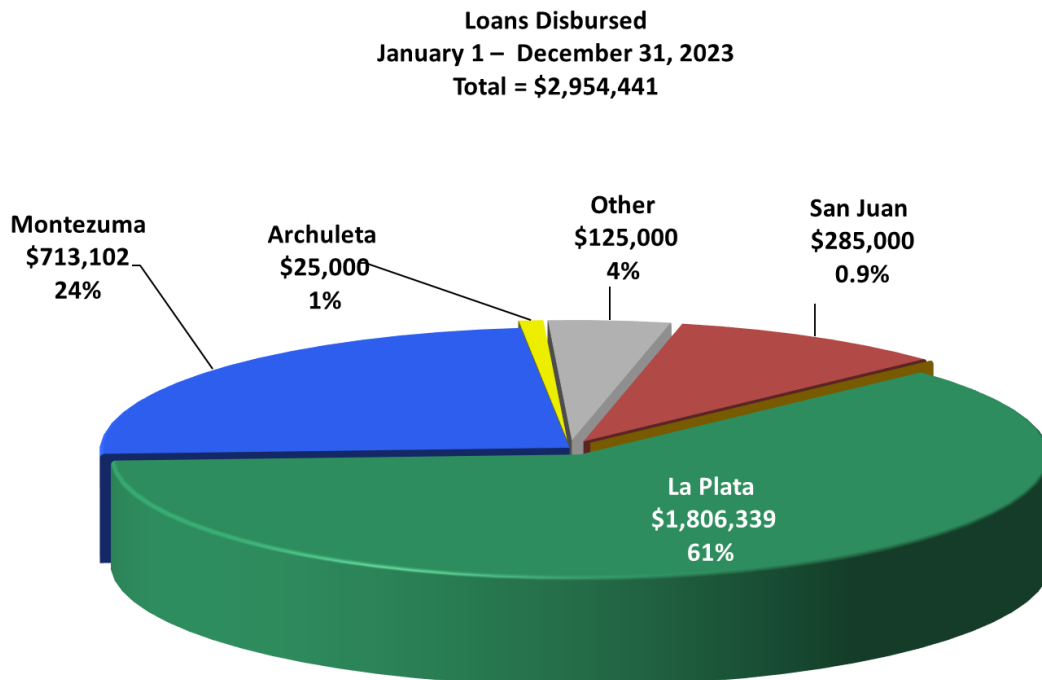
Enterprise Zone contribution projects that impacted Montezuma County in 2023 are below.

- Cortez Cultural Center
- Crow Canyon Archaeological Center
- Habitat for Humanity of Montezuma County
- Mancos Common Press
- Montezuma Food Systems
- Montezuma Heritage Museum
- Southwest Memorial Hospital Foundation
- Region 9 Economic Development District of Southwest Colorado – Broadband Project
- Ute Mountain Ute Tribe Grocery Store, Business Incubator, Community Hub

Data – Region 9 offered data tools and prepared strategy and research reports that included data specific to Montezuma County in 2023. 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 2024
- Regional Data Dashboard
- Regional Commercial Property Search Tool

Loans – In 2023, Montezuma County had 9 new loans and 4 loans paid off. The County’s loans represented 24% of all the loans dispersed by Region 9, up from 15% in 2022.



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

County (Unincorporated Area)

Alexander Excavation
Countryside Disposal
Eighty Eight Auto Repair
Montezuma Valley Plumbing
Organic Family Farms

Cortez

303 Labs Co.
Aubuchon Custom Productions
Baier Essentials
Clayton Archer
Denkai Animal Sanctuary
Elevate'M **NEW**
Gustafson Trucking
High Desert Life Outdoors
KB Insurance Group
K & J Customs
Kustom Diesel Towing **NEW**
LJS Dental **NEW**
Lotsa Pasta
Montezuma Mexican Restaurant **NEW**
Nash Trucking
Rentz
Rowe & Sons Trash Services
San Juan Coffee
Shiloh's
Southwest Doughnuts **NEW**
Talos Outdoors
Western Equipment
Wigglin' Pig

Dolores

ADB Enterprises **NEW**
Straight Edge Home Inspections
S & S Wallwood
Colorado Norton Works

Mancos

Mestas Welding **NEW**
Mud Creek Hogan Trading Co.
Red Mesa Rentals
The Boathouse on Grande **NEW**
The Nest Preschool
Underwood Forestry
Zuma Natural Foods
Reflections in Metal **NEW**

Paid Off

5R Farm & Trucking
Botanical Companions
Ott's Sawmill
Steele Investments