2025-2029

Orem City Consolidated Plan



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Executive Summary

ES-05 Executive Summary – 24 CFR 91.200(c), 91.220(b)

1. Introduction

Orem, in partnership with the U.S. Department of Housing and Urban Development (HUD), is required to prepare a Five-Year Consolidated Plan in order to receive funding for the Community Development Block Grant Program (CDBG). The Consolidated Plan comprises the planning and application requirements for the CDBG program. Orem's CDBG program year runs from July 1 through June 30. CDBG staff used the online IDIS Consolidated Plan Tool, CPD Maps and CPS maps data, other HUD planning resources, and consultation with a variety of community partners and agencies to prepare this plan in accordance with HUD regulations.

The 2025-2029 Consolidated Plan (Plan, The Plan, 2025 ConPlan) is organized into four primary sections:

I. The Process (PR) The Process section of the plan outlines the development of the plan, including citizen participation efforts and stakeholder involvement.

II. Needs Assessment (NA) The Needs Assessment section provides an analysis of housing, homeless and community development needs, with focus on the needs of low-income households, racial and ethnic minorities, homeless persons, and non-homeless special needs populations.

III. Housing Market Analysis (MA) The Housing Market Analysis section provides information and data on Provo City and HOME Consortium's housing market, including an evaluation of local resources. The housing market analysis supplements information supplied by the needs assessment and establishes a framework for five-year goals and priorities to be developed.

IV. Five-Year Strategic Plan (SP) Once community needs, market conditions and resources are identified, program goals, specific objectives, and benchmarks for measuring progress are set forth in the Strategic Plan section of the 2020 ConPlan. Efforts are prioritized to direct the allocation of federal funding to maximize impact within the community.

The plan includes the 5-Year Strategic Plan for Program Years 2025 - 2029 and will conclude with Orem's Annual Action Plan for 2025. The Action Plan will outline the activities and funding priorities for the first year of the Consolidated Plan, and will cover July 1, 2025- June 30, 2026.

2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

Through the consultation and citizen participation process and the needs assessment and market analysis, Mountainland Association of Governments (MAG), responsible for the administration of the Orem CDBG program, has identified the following priority needs:

• Non-housing community development: This priority need will be met through non-housing community development projects that may include but are not limited to neighborhood improvement, transportation, infrastructure, community amenities, water and sewer systems, and economic development activities.
• Public Services to low- and moderate-income residents: This priority need will be met through projects that may include but are not limited to services to the elderly or disabled, youth services, mental illness or substance abuse treatment, services to victims of domestic violence, and any service that brings families out of poverty.
• Affordable Housing: This priority need will be met through projects that may include but are not limited to rental assistance, unit rehabilitation, unit or land acquisition, public housing, and lead paint mitigation.

Specific goals to meet these needs can be found in Section SP-45 of this plan.

3. Evaluation of past performance

MAG and Orem have developed a strong CDBG program by fostering solid partnerships. MAG staff have cultivated a collaborative relationship with HUD, City staff, local government representatives, and nonprofit organizations to deliver quality services and programs to low- and moderate-income residents.

The use of CDBG funds are documented in the City's Consolidated Annual Performance and Evaluation Reports (CAPERs), which detail activities undertaken and accomplishments achieved.
At the end of each program year, the City assesses progress toward program objectives. The results are shared with the public through the Consolidated Annual Performance and Evaluation Report (CAPER). Past CAPERs are available at https://magutah.gov/orem-cdbg-program/.

Orem acknowledges that evaluating past performance is essential to ensuring that both the City and its subrecipients implement activities effectively and align them with the identified needs and strategic goals.

4. Summary of citizen participation process and consultation process

Section PR-10 provides a detailed summary of the citizen participation and consultation process used to develop the Consolidated Plan. MAG, the administrator for Orem, sought input from local citizens, impacted populations, service providers, local government officials and staff, and nonprofit and for-profit organizations involved in housing and community development activities. A public hearing and key stakeholder meetings were held to gather input, and a needs survey was distributed throughout the City and region to residents, elected officials, service providers, and business and civic leaders. A draft plan was made available for public comments.

It is the policy of the Orem Community Development Block Grant Program to:

• Give citizens timely notice of local meetings and reasonable and timely access to information, performance reports, and records relating to the program's proposed and actual use of CDBG funds.
• Take reasonable steps to provide technical assistance to groups or organizations representing persons of low- and moderate-income that request assistance in developing proposals.
• Hold public hearings for the purpose of obtaining the views of citizens and responding to proposals and questions.
• Take reasonable steps to assist non-English speaking residents to be able to understand and participate in discussions that take place at public hearings, when a significant number of non-English speaking residents can reasonably be expected to attend.
• Provide citizens with reasonable advance notice of and opportunity to comment on proposed activities not previously included in the Consolidated Plan and any proposed deletion or other substantial change to the activities.
• Take reasonable steps to address concerns expressed by citizens and to respond to any formal complaints or grievances in a timely manner.

5. Summary of public comments

No public comments received.

6. Summary of comments or views not accepted and the reasons for not accepting them

NA

7. Summary

Consortium partners, the local continuum of care, community members, stakeholders, service providers, and housing providers gave valuable input in the development of the Consolidated Plan, and we are committed to improving the living environment and expanding economic opportunities for low- and moderate-income people.

The Process

PR-05 Lead & Responsible Agencies - 91.200(b)

1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency

CDBG Administrator	OREM	Mountainland Association of Governments (MAG)
HOME Administrator		City of Provo

Table 1 – Responsible Agencies

Narrative

MAG has been the administering agency for the Orem CDBG program since FY24. MAG CDBG staff are responsible for preparation of the Consolidated Plan and for administration of the grant program.

Consolidated Plan Public Contact Information

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PR-10 Consultation - 91.100, 91.110, 91.200(b), 91.300(b), 91.215(l) and 91.315(l)

1. Introduction

CDBG administrators for the Orem CDBG Program are well connected with other CDBG and CoC administrators throughout the region; particularly staff administering the Eagle Mountain, Utah County, and Provo CDBG programs, in addition to the region's CoC administrators. Orem, Utah County, Lehi, and Provo work together annually to administer a regional CDBG application process in order to best reach public service and community development providers across the region that serve our respective entitlements. Orem CDBG staff worked together with these regional partners to administer a survey to local providers, and combined our efforts to prepare the portions of this plan regarding regional efforts, including housing and homelessness services.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).

CDBG staff representing Orem City, Provo City, Orem City, and Lehi City engaged in a collaborative effort to consult with representatives of low-income neighborhoods, non-profit and for-profit housing developers, service providers, public service agencies, homeless service providers, faith-based organizations, supportive housing and service providers, community stakeholders, community partners, business leaders, and beneficiaries of entitlement programs to inform and develop the priorities and strategies contained within the Consolidated Plan.

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness

A needs survey was provided, and input was received from over 214 respondents, 59 of which were Orem residents. The survey was made available electronically and published to entitlement recipients' websites and social media. Additionally, the survey was emailed to current service and housing partner agencies who were asked to answer the survey, as well as make it available to clients. Collaboration with service providers and other government agencies provided data used in technical analysis for the Consolidated Plan.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS

The vision of the Mountainland Region Continuum of Care (CoC) is to provide decent, safe, and affordable housing and effective support services to homeless families and individuals including initial stabilization, transitional housing, permanent housing, access to mainstream resources, and independence from governmental assistance. United Way of Utah County (United Way) leads the CoC, of which Orem is a member, represented by MAG. The CoC is an organized body of local jurisdictions, government agencies, local nonprofit organizations, faith-based service and housing organizations, and other agencies and partners seeking to maximize resources and avoid duplication of services while providing consistent and unified planning in Utah County. The CoC lead the annual efforts for the point in time count, in which volunteers participated in an outreach to find homeless individuals. The CoC developed a coordinated intake and assessment system to coordinate services and support individual agencies in reaching project goals and HUD and CoC established performance goals. The CoC centralizes resources, leveraging partnerships amongst CoC members.

2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities

Table 2 – Agencies, groups, organizations who participated

1	**Agency/Group/Organization**	Rocky Mountain University of Health Professionals Foundation
	Agency/Group/Organization Type	Services-Health Foundation
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
2	**Agency/Group/Organization**	Family Haven
	Agency/Group/Organization Type	Services-Children Services-Education Services - Victims
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis

	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
3	**Agency/Group/Organization**	Tabitha's Way
	Agency/Group/Organization Type	Services - Food Bank
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
4	**Agency/Group/Organization**	Friends of Utah County Children's Justice Center
	Agency/Group/Organization Type	Services-Children Services - Victims

	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
5	**Agency/Group/Organization**	BOYS AND GIRLS CLUBS OF UTAH COUNTY
	Agency/Group/Organization Type	Services - Housing Services-Children Services-Education
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.

6	**Agency/Group/Organization**	Timpanogos Legal Center
	Agency/Group/Organization Type	Services-Education Services - Tax Clinic
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
7	**Agency/Group/Organization**	Mental Health/Community Outreach Unite (Orem Police Department)
	Agency/Group/Organization Type	Services-Persons with Disabilities Services-homeless Other government - Local
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis

	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
8	**Agency/Group/Organization**	Orem City Victim Services
	Agency/Group/Organization Type	Services-Victims of Domestic Violence
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
9	**Agency/Group/Organization**	Orem Police Department
	Agency/Group/Organization Type	Code Enforcement

	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
10	**Agency/Group/Organization**	The Refuge
	Agency/Group/Organization Type	Services-Victims of Domestic Violence Services-homeless
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
11	**Agency/Group/Organization**	Centro de Educacion Financiera

	Agency/Group/Organization Type	Services-Education
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
12	**Agency/Group/Organization**	Utah Tax Help Services
	Agency/Group/Organization Type	Services-Education Services - Tax Clinic
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis

	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
13	**Agency/Group/Organization**	House of Hope
	Agency/Group/Organization Type	Services-Victims of Domestic Violence
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
14	**Agency/Group/Organization**	PROJECT READ
	Agency/Group/Organization Type	Services-Education Services - Narrowing the Digital Divide

	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
15	**Agency/Group/Organization**	Mountainlands Community Health Center, Inc
	Agency/Group/Organization Type	Services-Health
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
16	**Agency/Group/Organization**	MAG Aging Department

	Agency/Group/Organization Type	Services-Elderly Persons Regional organization
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
17	**Agency/Group/Organization**	Wasatch Behavioral Health / Vantage Point Provo
	Agency/Group/Organization Type	Services-Health
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Market Analysis

	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Public Service Organization that assisted in identifying service gaps within the community. The joint effort facilitated discussions and feedback from agencies working directly with those in need. As a result, the City identified key priorities and goals for the Plan, including specific public service focus areas where funding will be strategically directed and maximized across the community.
18	**Agency/Group/Organization**	Orem City
	Agency/Group/Organization Type	Services - Broadband Internet Service Providers Services - Narrowing the Digital Divide
	What section of the Plan was addressed by Consultation?	Economic Development Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	I consulted with Economic Development Division Manager Kathi Lewis and Grants Analyst Heather Cox regarding Orem's broadband access. I was directed to several comprehensive sources, which are all cited in the Broadband section of this plan.
19	**Agency/Group/Organization**	MOUNTAINLAND ASSOCIATION OF GOVERNMENTS
	Agency/Group/Organization Type	Regional organization Planning organization
	What section of the Plan was addressed by Consultation?	Hazard Mitigation
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	I consulted with Shauna Meacham, planner with MAG, regarding the regional pre-hazard mitigation plan she created which addresses Orem individually. All aspects of the plan I consulted and cited within the Hazard Mitigation section of this plan.

Identify any Agency Types not consulted and provide rationale for not consulting

All relevant organizations and agencies were either consulted or invited to participate in the Consolidated Plan process. No groups were excluded from participating.

Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Mountainland CoC	Housing and Homeless Needs
Housing Market Analysis 2024	Provo City	Non-Housing Needs
Housing and Homeless Needs Assessment 2024	Provo City	Housing and Homeless Needs
Mountainlands Comprehensive Economic Development	MAG	Economic Development Strategy
Pre-Disaster Mitigation Plan	MAG	Non-Housing Needs

Table 3 – Other local / regional / federal planning efforts

Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(l))

Orem is part of the Utah Valley HOME Consortium and coordinates efforts with other members of the Consortium. Orem is also part of the Utah County Council of Governments. MAG is a metropolitan planning organization and participants in many regional planning efforts that include cooperation and coordination with neighboring units of local government and State entities. MAG is also involved in the CoC board, Utah Valley Home Consortium, and other local boards.

Narrative

Please find the full plans listed above, as well as full documentation for the consultations listed above in the appendices.

PR-15 Citizen Participation - 91.105, 91.115, 91.200(c) and 91.300(c)

1. Summary of citizen participation process/Efforts made to broaden citizen participation

Summarize citizen participation process and how it impacted goal-setting

It is the policy of the Orem Community Development Block Grant (CDBG) Program to:

- Give citizens timely notice of local meetings and reasonable and timely access to information, performance reports, and records relating to the program's proposed and actual use of CDBG funds.
- Take reasonable steps to provide technical assistance to groups or organizations representing persons of low and moderate-income that request assistance in developing proposals.
- Hold public hearings for the purpose of obtaining the views of citizens and responding to proposals and questions.
- Take reasonable steps to assist non-English speaking residents to be able to understand and participate in discussions that take place at public hearings, when a significant number of non-English speaking residents can reasonably be expected to attend.
- Provide citizens with reasonable advance notice of and opportunity to comment on proposed activities not previously included in the Consolidated Plan and any proposed deletion or other substantial change to the activities.
- Take reasonable steps to address concerns expressed by citizens and to respond to any formal complaints or grievances in a timely manner.
- Encourage citizen participation, particularly of low and moderate-income persons who reside in the areas for which grant funding is proposed to be used.

Residents of Orem were given the opportunity to participate in developing the plan in various ways. Meetings were held with key stakeholders to gather input into community needs and existing services. CDBG staff also advertised the availability of a survey to gauge resident interest in various CDBG eligible activity categories. The survey was both in English and Spanish. Citizens could provide input into needs within Orem in this survey. The City also held two public hearings with associated comment periods to gather input into needs and the plan. The first took place on December 10, 2024 for the purpose of gathering initial feedback regarding citizen priorities before the plan was drafted or grant awards were made to subrecipients. The second took place on May 29, 2025 for the purpose of gathering feedback on the draft consolidated plan. All the resident and community feedback was used to create the consolidated and action plans.

Please refer to plan appendices for documentation of all citizen participation listed below for the Orem CDBG 2025-2029 Consolidated Plan and FY25 Annual Action Plan.

Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)

1	Survey	Non-English Speaking - Specify other language: Spanish Non-targeted/broad community	A survey gauging resident and service provider priorities for CDBG funding was disseminated to gather input, data, and feedback while developing the plan. 57 Orem residents completed the survey.	The following priorities are ranked in order of importance to survey respondents that were Orem residents. The full record of Orem survey responses is included in the appendices.Housing:1)Affordable housing2)Communities facing housing barriers3)Making homebuying affordable4)Making renting more affordableCommunity Services:1)Libraries 2)Parks/Open Spaces3)Walking/Biking Paths4)Senior CentersStreets and Utilities:1)Street Improvements2)Sidewalk Improvements3)Se	All comments were accepted.	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
				wer/Water Improvements4)Accessibility Improvements on Public StreetsBusiness/Community Support:1)Crime Victim Services2)Senior Services3)Neighborhood Cleanups4)Support for Existing Local BusinessesMost Popular Write-In Priorities:1)Bike lanes / paths2)Utility / rental / homeownership assistance3)Affordable housing4)Disability services5)Mental health services		

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
2	Public Hearing	Non-targeted/broad community	On December 10, MAG staff explained the purpose of CDBG funding and requested citizen feedback on their priorities during a hearing in the early stages of the planning process.	No comments were received	N/A	
3	Internet Outreach	Non-targeted/broad community	The full draft plan was posted on MAG's website along with a public comment form during the public comment period. See proof of publication in the appendices.	No comments were received.	N/A	
4	Public Hearing	Non-targeted/broad community	A second public hearing was held on May 29, 2025 to gather citizen input on the Consolidated Plan draft.	No comments were received.	N/A	

Table 4 – Citizen Participation Outreach

Needs Assessment

NA-05 Overview

Needs Assessment Overview

The Needs Assessment provides an overview of the demographic and economic characteristics of individuals and households in Orem, as well as the local housing stock and its ability to meet residents' needs. By consolidating data from local, state, and national sources, it creates a comprehensive picture of current and future housing demand. As part of the Consolidated Plan, the Needs Assessment—along with input from consultations and citizen participation—identifies community development priorities, forming the foundation for the Strategic Plan and guiding programs and projects. Additionally, Civicus Consulting prepared a Housing and Homeless Needs Assessment and Housing Market Analysis.

Orem is home to approximately 98,070 residents. It stretches across 18.61 square miles and has a population density of 5,270 people per square mile.[1]

Orem remains predominantly white, with 75% of residents falling into this category. The largest minority group consists of individuals identifying as two or more races, with 12% of residents making up this group.[2] The Hispanic and Latino population in Orem continues to grow. In 2013, Hispanic and Latino residents made up 15.7% of the population, making it the largest minority in the City. By 2023, Hispanic and Latino residents made up 21.8% of the population, representing growth of 38.9% over those ten years.[3]

Orem remains the second most populated city in Utah County, after Provo City. Orem and Provo constitute the longtime population center of the County; though Saratoga Springs, Eagle Mountain, and Lehi are growing rapidly and are expected to overtake the Provo-Orem area as the County’s population center over the next decade.[4] Though it will no longer be one of the largest cities in the county in the coming decades, Orem is still expected to experience significant growth of 13.1% between 2020 and 2050, gaining 12,815 new residents over that period. [5]

NA-10 Housing Needs Assessment - 24 CFR 91.405, 24 CFR 91.205 (a,b,c)

Summary of Housing Needs

Demographics	Base Year: 2009	Most Recent Year: 2020	% Change
Population	91,695	97,885	7%
Households	26,150	29,910	14%
Median Income	$55,166.00	$65,622.00	19%

Table 5 - Housing Needs Assessment Demographics

Data Source: 2000 Census (Base Year), 2016-2020 ACS (Most Recent Year)

Number of Households Table

	0-30% HAMFI	>30-50% HAMFI	>50-80% HAMFI	>80-100% HAMFI	>100% HAMFI
Total Households	3,455	4,000	6,450	4,225	11,780
Small Family Households	1,410	1,800	2,775	2,150	5,675
Large Family Households	410	645	1,185	855	2,825
Household contains at least one person 62-74 years of age	350	390	1,170	605	2,685
Household contains at least one person age 75 or older	410	600	770	355	910
Households with one or more children 6 years old or younger	895	1,095	1,614	1,159	1,484

Table 6 - Total Households Table

Data Source: 2016-2020 CHAS

Housing Needs Summary Tables

1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Substandard Housing - Lacking complete plumbing or kitchen facilities	20	45	65	10	140	0	40	35	0	75
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	85	4	65	65	219	4	0	0	0	4
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	105	175	130	40	450	15	110	75	65	265
Housing cost burden greater than 50% of income (and none of the above problems)	1,370	515	25	50	1,960	660	360	125	35	1,180

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Housing cost burden greater than 30% of income (and none of the above problems)	360	1,160	875	100	2,495	135	400	860	235	1,630
Zero/negative Income (and none of the above problems)	220	0	0	0	220	125	0	0	0	125

Table 7 – Housing Problems Table

Data Source: 2016-2020 CHAS

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Having 1 or more of four housing problems	1,585	745	280	170	2,780	680	510	240	100	1,530
Having none of four housing problems	800	1,620	2,935	1,455	6,810	390	1,125	2,995	2,505	7,015

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Household has negative income, but none of the other housing problems	0	0	0	0	0	0	0	0	0	0

Table 8 – Housing Problems 2

Data Source: 2016-2020 CHAS

3. Cost Burden > 30%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	1,040	1,100	575	2,715	169	260	250	679
Large Related	160	135	40	335	140	250	235	625
Elderly	89	37	140	266	410	195	345	950
Other	555	510	210	1,275	80	105	154	339
Total need by income	1,844	1,782	965	4,591	799	810	984	2,593

Table 9 – Cost Burden > 30%

Data Source: 2016-2020 CHAS

4. Cost Burden > 50%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	0	0	235	235	165	115	0	280

	Renter				Owner			
	0-30% AMI	>30-50 % AMI	>50-80 % AMI	Total	0-30% AMI	>30-50 % AMI	>50-80 % AMI	Total
Large Related	0	0	10	10	125	60	40	225
Elderly	39	29	70	138	290	135	55	480
Other	0	505	275	780	80	0	0	80
Total need by income	39	534	590	1,163	660	310	95	1,065

Table 10 – Cost Burden > 50%

Data Source: 2016-2020 CHAS

5. Crowding (More than one person per room)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	175	154	180	95	604	15	85	60	40	200
Multiple, unrelated family households	25	0	10	0	35	0	25	15	25	65
Other, non-family households	0	25	0	14	39	4	0	0	0	4
Total need by income	200	179	190	109	678	19	110	75	65	269

Table 11 – Crowding Information - 1/2

Data Source: 2016-2020 CHAS

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present								

Table 12 – Crowding Information – 2/2

Describe the number and type of single person households in need of housing assistance.

Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

What are the most common housing problems?

Are any populations/household types more affected than others by these problems?

Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

Discussion

NA-15 Disproportionately Greater Need: Housing Problems - 91.405, 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

0%-30% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,760	695	0
White	1,935	515	0
Black / African American	40	0	0
Asian	45	49	0
American Indian, Alaska Native	15	10	0
Pacific Islander	20	0	0
Hispanic	660	55	0

Table 13 - Disproportionally Greater Need 0 - 30% AMI

Data Source: 2016-2020 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4.Cost Burden greater than 30%

30%-50% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,815	1,190	0

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
White	2,095	995	0
Black / African American	0	0	0
Asian	24	4	0
American Indian, Alaska Native	60	0	0
Pacific Islander	65	35	0
Hispanic	520	130	0

Table 14 - Disproportionally Greater Need 30 - 50% AMI

Data Source: 2016-2020 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4.Cost Burden greater than 30%

50%-80% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,255	4,190	0
White	1,465	3,530	0
Black / African American	4	20	0
Asian	50	14	0
American Indian, Alaska Native	0	45	0
Pacific Islander	24	15	0
Hispanic	660	470	0

Table 15 - Disproportionally Greater Need 50 - 80% AMI

Data Source: 2016-2020 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4.Cost Burden greater than 30%

80%-100% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	605	3,625	0
White	465	2,900	0
Black / African American	4	10	0
Asian	30	65	0
American Indian, Alaska Native	0	10	0
Pacific Islander	0	0	0
Hispanic	95	490	0

Table 16 - Disproportionally Greater Need 80 - 100% AMI

Data Source: 2016-2020 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4.Cost Burden greater than 30%

Discussion

NA-20 Disproportionately Greater Need: Severe Housing Problems - 91.405, 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

0%-30% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,265	1,190	0
White	1,735	715	0
Black / African American	40	0	0
Asian	45	49	0
American Indian, Alaska Native	15	10	0
Pacific Islander	20	0	0
Hispanic	365	350	0

Table 17 – Severe Housing Problems 0 - 30% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4.Cost Burden over 50%

30%-50% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,255	2,745	0

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
White	855	2,235	0
Black / African American	0	0	0
Asian	14	15	0
American Indian, Alaska Native	25	35	0
Pacific Islander	30	75	0
Hispanic	300	350	0

Table 18 – Severe Housing Problems 30 - 50% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4.Cost Burden over 50%

50%-80% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	520	5,930	0
White	200	4,785	0
Black / African American	4	20	0
Asian	15	45	0
American Indian, Alaska Native	0	45	0
Pacific Islander	15	24	0
Hispanic	285	845	0

Table 19 – Severe Housing Problems 50 - 80% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4.Cost Burden over 50%

80%-100% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	270	3,960	0
White	155	3,210	0
Black / African American	4	10	0
Asian	30	65	0
American Indian, Alaska Native	0	10	0
Pacific Islander	0	0	0
Hispanic	74	510	0

Table 20 – Severe Housing Problems 80 - 100% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4.Cost Burden over 50%

Discussion

NA-25 Disproportionately Greater Need: Housing Cost Burdens - 91.405, 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	21,550	4,560	3,360	440
White	18,045	3,260	2,630	210
Black / African American	100	0	44	0
Asian	340	70	80	45
American Indian, Alaska Native	180	45	15	0
Pacific Islander	80	79	20	0
Hispanic	2,315	975	505	120

Table 21 – Greater Need: Housing Cost Burdens AMI

Data Source: 2016-2020 CHAS

Discussion

NA-45 Non-Homeless Special Needs Assessment - 91.405, 91.205 (b,d)

Introduction

Describe the characteristics of special needs populations in your community:

What are the housing and supportive service needs of these populations and how are these needs determined?

Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:

If the PJ will establish a preference for a HOME TBRA activity for persons with a specific category of disabilities (e.g., persons with HIV/AIDS or chronic mental illness), describe their unmet need for housing and services needed to narrow the gap in benefits and services received by such persons. (See 24 CFR 92.209(c)(2) (ii))

Discussion:

NA-50 Non-Housing Community Development Needs - 91.415, 91.215 (f)

Describe the jurisdiction's need for Public Facilities:

Orem has identified the following high needs for public facilities: parks and open spaces, libraries, walking and biking paths, senior centers, and youth centers.[1]

Public facilities are the primary element for neighborhood services delivery. It is essential to the long-term stability of neighborhoods that public facilities continue operating and providing services to residents. 2025 grant funds will be directed toward playground equipment in LMI parks. In future years of the strategic plan, the priorities listed above will continue to inform CDBG budget decisions. Council and city staff have already made tentative plans to use CDBG funds for tree planting and beautification of public trails and roads in LMI neighborhoods in future years of the strategic plan.

With the growing population, regional community service organizations are experiencing increased demand for supportive services, including domestic violence shelters, elderly care, assistance for individuals with mental and physical challenges, homeless support, and other human services. The Orem CDBG Program collaborates with Provo, Utah County, and Lehi to provide a regional application process for public facility applications to be considered each year. The priorities listed above will inform the projects funded over the next five years regionally.

How were these needs determined?

In preparation for this Consolidated Plan, MAG and the other Utah Valley Consortium members conducted consultation and public participation outreach efforts to identify community needs. This process is explained in sections PR-10 and PR-15 of this plan.

Describe the jurisdiction's need for Public Improvements:

Orem has identified the following high needs for improvements: street improvements, sewer/water improvements, sidewalk improvements, and accessibility improvements on public streets.[1]

While no public improvement projects are being undertaken in the first year of the strategic plan, the priorities listed above will inform projects undertaken throughout the five year plan. Orem is somewhat limited in the public improvement projects it can undertake because there are fewer LMI neighborhoods for this strategic plan than there were over the previous strategic plan. LMI neighborhoods are determined by the percentage of LMI residents in a census tract (see the updated LMI neighborhoods map in the appendices).[2] This is the case because the economic makeup of the city is gradually changing. As such, the city plans to leverage its funds more heavily toward public facilities or

neighborhood improvements, which are listed in the previous section of this screen. However, the city still plans to use some CDBG dollars for public improvements over the course of the strategic plan. Any such undertakings will be done as internal projects conducted by city departments.

How were these needs determined?

In preparation for this Consolidated Plan, MAG and the other Utah Valley Consortium members conducted consultation and public participation outreach efforts to identify community needs. This process is explained in sections PR-10 and PR-15 of this plan.

Describe the jurisdiction's need for Public Services:

As the population grows in Orem, the demand for services also continues to increase. Orem has identified the following high needs for public services: senior services, mental health services, homelessness services, and utility assistance.[1]

the growing population, regional community service organizations are experiencing increased demand for supportive services, including domestic violence shelters, elderly care, assistance for individuals with mental and physical challenges, homeless support, and other human services. The Orem CDBG Program collaborates with Provo, Utah County, and Lehi to provide a regional application process for public service applications to be considered each year. The priorities listed above will inform the projects funded over the next five years regionally.

How were these needs determined?

Housing Market Analysis

MA-05 Overview

Housing Market Analysis Overview:

Orem is dedicated to fostering economic growth, with numerous organizations working to support the community's economic success. This section of the plan examines market conditions in Orem and highlights ongoing efforts to address economic development needs. A more in-depth analysis of the housing market is available in the Utah Valley HOME Consortium Consolidated Plan.

The City's population is projected to grow by 13.1% between 2020 and 2050, surpassing 110,000 residents.[1] This rapid expansion presents opportunities to cultivate safe, vibrant neighborhoods, support thriving businesses, and expand diverse housing options.

Orem has approximately 30,239 total households. 18,113 units are owner-occupied units and 12,126 renter-occupied units (p. 159).[2] In 2010, 65% of homes sold in Orem were under $200,000; while in 2018, this was true of only 14% of homes sold. In addition to prohibitively high housing costs over the last several years, since 2011, housing supply has no longer met demand. In their most recent General Plan, Orem cites land constraints, restrictive zoning ordinances, and rising construction costs as the primary factors affecting insufficient housing supply.[3] The City In their most recent Moderate-Income Housing Study, the City has established the following moderate income housing strategies to address unaffordability: accessory apartments, affordable senior housing, establishing a housing and transit reinvestment zone, developing transit station area plans, and waiving, reducing, or eliminating impact fees related to moderate income housing.[4]

MA-10 Housing Market Analysis: Number of Housing Units - 91.410, 91.210(a)&(b)(2)

Introduction

All residential properties by number of units

Property Type	Number	%
1-unit detached structure	17,175	54%
1-unit, attached structure	3,275	10%
2-4 units	4,060	13%
5-19 units	3,795	12%
20 or more units	2,715	9%
Mobile Home, boat, RV, van, etc	570	2%
Total	***31,590***	***100%***

Table 31 – Residential Properties by Unit Number

Data Source: 2016-2020 ACS

Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	4	0%	280	2%
1 bedroom	70	0%	1,695	14%
2 bedrooms	1,470	8%	5,805	48%
3 or more bedrooms	16,190	91%	4,395	36%
Total	***17,734***	***99%***	***12,175***	***100%***

Table 32 – Unit Size by Tenure

Data Source: 2016-2020 ACS

MA-15 Housing Market Analysis: Cost of Housing - 91.410, 91.210(a)

Introduction

Cost of Housing

	Base Year: 2009	Most Recent Year: 2020	% Change
Median Home Value	207,400	296,900	43%
Median Contract Rent	790	945	20%

Table 33 – Cost of Housing

Data Source: 2000 Census (Base Year), 2016-2020 ACS (Most Recent Year)

Rent Paid	Number	%
Less than $500	1,059	8.7%
$500-999	5,925	48.7%
$1,000-1,499	3,835	31.5%
$1,500-1,999	1,060	8.7%
$2,000 or more	300	2.5%
Total	***12,179***	***100.0%***

Table 34 - Rent Paid

Data Source: 2016-2020 ACS

Housing Affordability

MA-45 Non-Housing Community Development Assets - 91.410, 91.210(f)

Introduction

In conjunction with the Needs Assessment, the Market Analysis provides the basis for the Strategic Plan and the programs and projects to be administered. Most of the data tables in this section are populated with data developed by the Census Bureau based on the 2019-2023 American Community Survey (ACS).

Economic Development Market Analysis

Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	265	71	1	0	-1
Arts, Entertainment, Accommodations	4,150	4,220	11	12	1
Construction	3,878	2,185	11	6	-5
Education and Health Care Services	7,504	7,124	20	20	0
Finance, Insurance, and Real Estate	2,250	2,089	6	6	0
Information	1,956	1,907	5	5	0
Manufacturing	3,334	3,522	9	10	1
Other Services	1,021	1,422	3	4	1
Professional, Scientific, Management Services	4,456	4,034	12	11	-1
Public Administration	0	0	0	0	0

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Retail Trade	5,664	7,400	15	20	5
Transportation and Warehousing	841	778	2	2	0
Wholesale Trade	1,452	1,443	4	4	0
Total	36,771	36,195	--	--	--

Table 45 - Business Activity

Data Source: 2016-2020 ACS (Workers), 2020 Longitudinal Employer-Household Dynamics (Jobs)

Labor Force

Total Population in the Civilian Labor Force	51,130
Civilian Employed Population 16 years and over	49,145
Unemployment Rate	3.85
Unemployment Rate for Ages 16-24	15.33
Unemployment Rate for Ages 25-65	2.02

Table 46 - Labor Force

Data Source: 2016-2020 ACS

Occupations by Sector	Number of People
Management, business and financial	14,145
Farming, fisheries and forestry occupations	2,530
Service	4,720
Sales and office	12,630
Construction, extraction, maintenance and repair	3,600
Production, transportation and material moving	2,670

Table 47 – Occupations by Sector

Data Source: 2016-2020 ACS

Travel Time

Travel Time	Number	Percentage
< 30 Minutes	34,772	79%
30-59 Minutes	7,514	17%
60 or More Minutes	1,744	4%

Travel Time	Number	Percentage
Total	***44,030***	***100%***

Table 48 - Travel Time

Data Source: 2016-2020 ACS

Education:

Educational Attainment by Employment Status (Population 16 and Older)

Educational Attainment	In Labor Force		
	Civilian Employed	Unemployed	Not in Labor Force
Less than high school graduate	1,880	75	695
High school graduate (includes equivalency)	4,910	240	1,500
Some college or Associate's degree	11,710	280	3,565
Bachelor's degree or higher	13,710	255	3,145

Table 49 - Educational Attainment by Employment Status

Data Source: 2016-2020 ACS

Educational Attainment by Age

	Age				
	18–24 yrs	25–34 yrs	35–44 yrs	45–65 yrs	65+ yrs
Less than 9th grade	110	195	330	425	245
9th to 12th grade, no diploma	1,070	615	525	575	270
High school graduate, GED, or alternative	5,455	2,635	1,650	2,370	1,980
Some college, no degree	8,385	4,280	2,760	3,855	2,620
Associate's degree	1,475	1,750	1,160	1,765	825

	Age				
	18–24 yrs	25–34 yrs	35–44 yrs	45–65 yrs	65+ yrs
Bachelor's degree	1,565	5,030	3,100	4,015	2,250
Graduate or professional degree	44	1,055	1,460	2,485	1,875

Table 50 - Educational Attainment by Age

Data Source: 2016-2020 ACS

Educational Attainment – Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	27,563
High school graduate (includes equivalency)	26,651
Some college or Associate's degree	31,462
Bachelor's degree	42,721
Graduate or professional degree	71,039

Table 51 – Median Earnings in the Past 12 Months

Data Source: 2016-2020 ACS

Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

Based on the data in the above table, the highest share of jobs and workers fall into four categories (in descending order by # residents employed): 1. Education and Health Care 2. Retail 3. Professional, Scientific, and Management 4. Arts, Entertainment, and Accomodations.

Describe the workforce and infrastructure needs of the business community:

Orem has a highly capable and educated population, with Utah Valley University and Brigham Young University supplying a steady stream of well-trained graduates familiar with the local business landscape. These institutions are identified as key assets in building a skilled workforce that supports business innovation and expansion. However, a significant challenge is retaining this talent—many graduates leave the city due to high housing costs and limited affordable living options for early-career

professionals. Approximately 78% of Orem's workers live outside the city, while 77% of residents work elsewhere, creating a mismatch between the residential and working populations (p. 8).[1]

The city acknowledges this issue and plans to develop strategies to retain graduates and support high-growth sectors like software development, project management, and market research by improving affordability and quality-of-life factors. These strategies are explored in more detail in the 2022 Economic Development Strategic Plan cited below.

Infrastructure needs are primarily focused on improving use of available commercial space and improving transportation. Orem has some underutilized but marketable office spaces, such as the Canyon Park Tech Center, which has undergone $12 million in renovations to support growing businesses. The presence of UTOPIA Fiber, a high-speed broadband network, is also a significant advantage for tech-driven and remote businesses. However, the lack of a clear, walkable city center makes it difficult for businesses to benefit from foot traffic or interconnected commercial activity. Additionally, Orem faces limited developable land, with only 3% zoned for residential development, constraining both housing and office development capacity (p. 8).[2]

To better utilize these assets and correct for present weaknesses, the Economic Development Strategic Plan calls for better inventory tracking of commercial properties, enhanced multimodal transportation, and revitalization of State Street to address placemaking and accessibility issues (State Street is a major thoroughfare in the city, but it is not walkable by any means). These improvements aim to support both existing and new businesses by enhancing the physical and functional environment of the city.

Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

Several planned or ongoing public and private sector initiatives in Orem are expected to have a significant economic impact during the planning period by influencing job creation, business attraction, and the need for expanded support systems.

One major initiative is the $12 million renovation of the Canyon Park Technology Center, a sizable commercial facility positioned to house a range of technology-focused and innovative businesses. This investment has already created quality office space that is being marketed to new and expanding companies. The city views Canyon Park as a central asset in its efforts to incubate and retain local businesses, particularly those emerging from the Utah Valley Business Resource Center and the local universities (p. 6, 23–24).

Additionally, the presence and continuing growth of Utah Valley University, the largest university in the state, represents an anchor institution that significantly affects workforce dynamics. The university's

expanding student population and degree programs continue to generate a pipeline of skilled labor. However, high housing costs and limited affordable office space threaten the ability to retain these graduates locally (pp. 5, 8–9, 16).

These developments, while positive, underscore key needs for workforce development and infrastructure. Specifically, the city plans to:

- Retain talent by increasing housing affordability and creating more pathways for students and graduates to find employment locally (p. 9).
- Develop more flexible and modern business spaces, such as coworking facilities and mixed-use flex zones, particularly for startups and light industrial firms (pp. 24–25).
- Enhance broadband infrastructure, with UTOPIA Fiber identified as a critical asset to support remote work and high-tech companies (p. 6, 26).
- Build out capital access and small business support systems, including leveraging existing financial tools like revolving loan funds and microloan programs to help entrepreneurs grow and reinvest (pp. 23–24).

Finally, to attract new businesses and support job growth, the city is pursuing a Target Industry Analysis and preparing to implement a strategic business attraction campaign, both of which aim to diversify Orem's economic base beyond retail and service sectors (pp. 19–21). These efforts will require continued investment in property development, infrastructure improvements, and inter-agency coordination.[1]

How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

According to the City of Orem Economic Development Strategic Plan (2022), the current workforce in Orem is highly educated, young, and healthy, which aligns well with many of the employment opportunities in the city. Educational attainment levels in Orem exceed both state and national averages, with a strong supply of graduates from Utah Valley University and nearby Brigham Young University. These institutions produce a steady stream of well-trained individuals who are familiar with the local business environment and prepared to contribute in high-skill sectors such as technology, entrepreneurship, and business services (p. 5).

However, despite this educational advantage, there is a misalignment between the workforce's qualifications and the types of jobs most readily available in Orem. The local economy is currently dominated by service-related industries, particularly retail, restaurant, and other lower-wage service occupations (p. 6). As a result, many residents seek employment outside of the city to find jobs that better match their skills and education. As discussed above, 77% of Orem residents work outside city limits, and about 78% of workers in Orem commute in from other areas (p. 9).

This gap suggests that while Orem's workforce is capable of supporting more advanced industries, there is a shortage of local employment opportunities in fields that fully utilize those skills. To address this, the city's strategic plan recommends diversifying its industry mix, attracting higher-wage industries, and creating better pathways for local graduates to remain in the community through workforce retention strategies and business support programs (pp. 8–9, 16, 19).[1]

Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.

The City of Orem Economic Development Strategic Plan (2022) highlights several workforce training initiatives supported by educational institutions and community partners that align with the goals of economic development and would support the jurisdiction's Consolidated Plan by strengthening workforce readiness and access to employment.

Utah Valley University, located in Orem, is a key partner in workforce development. The plan encourages continued collaboration between the city and university leadership to connect students with practical education opportunities, including internships, capstone projects, and mentorship programs involving local businesses. These efforts are intended to help retain talent in the city and ensure students are prepared for careers in target industries (p. 16).

Mountainland Technical College is another workforce development partner. The city intends to work with this institution, along with Utah Valley University and the BYU Rollins Center for Entrepreneurship and Technology, to support local businesses and enhance job readiness among students and residents (p. 16).

The plan promotes expanded use of the Utah Valley Business Resource Center, which offers incubation and acceleration services for new businesses and entrepreneurs. These programs include business plan competitions, peer-to-peer networking, and mentorship support, all of which contribute to building a skilled and entrepreneurial workforce (pp. 24–25).

Additionally, the city invests in partnerships with regional and state economic development organizations, such as the Mountainland Association of Governments, which manages workforce development and small business loan programs that can be leveraged for local training and economic inclusion (pp. 21, 23).

These workforce training initiatives support the Consolidated Plan by addressing economic opportunity and self-sufficiency, particularly for underserved populations. By fostering collaboration between the city, educational institutions, and economic development partners, Orem aims to build a pipeline of

skilled workers ready to meet the demands of a changing economy while ensuring inclusive access to employment opportunities.[1]

Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

Discussion

Orem is committed to economic development and growth, and many organizations are doing their part independently and collaboratively to ensure the economic success of our community and residents. Agencies across the City are investing in transportation planning and development, small business development centers, entrepreneurship support, workforce training and development, and community development. Orem will continue their partnership with regional economic development organizations and other applicable stakeholders to determine and address gaps and identify funding sources for strategic action related to regional priorities.

MA-50 Needs and Market Analysis Discussion

Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

There are three areas with concentrations of households in Orem with one or more of the 4 housing problems. The four housings problems are lack of complete kitchen facilities, lack of plumbing facilities, severely crowded, or severely cost-burdened occupants. See appendix for a visual representation of the geographic distribution of these concentrations. In all three of the areas, severe cost burden was by far the most prevalent housing problem. As high as 93% of low income households in one of these census tracts had at least one of the four severe housing problems, and as high as 54% of moderate income households in one of these census tracts had at least one of the four severe housing problems.[1]

Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")

What are the characteristics of the market in these areas/neighborhoods?

Are there any community assets in these areas/neighborhoods?

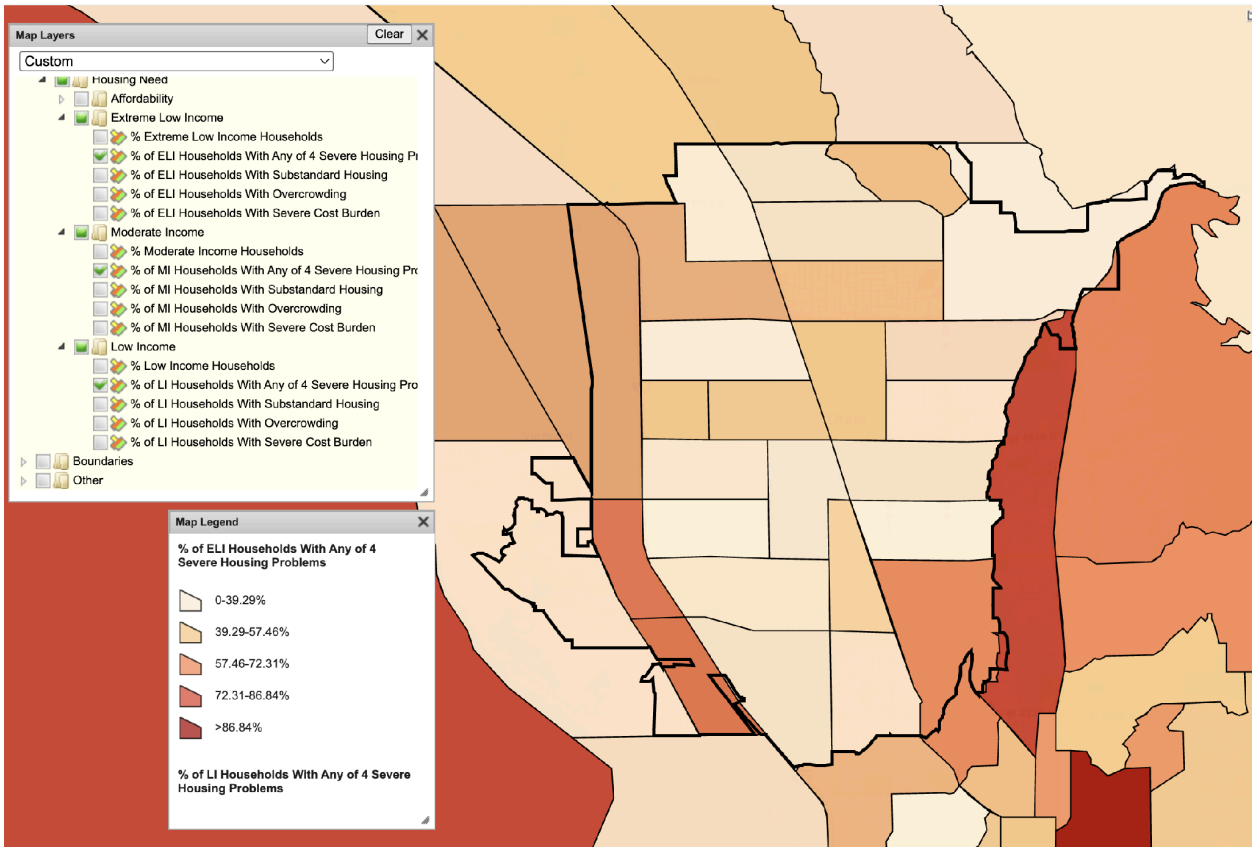
One of the greatest assets Orem has is the abundance of parks and recreational attractions. Orem has 40 parks and other recreational attractions (Figure 7.1).[1] Several of these fall within the areas discussed in this section, including Timpanogos Park and Cherry Hill Park. There are also several health facilities within these areas, including the Central Orem Intermountain Health Clinic, and Revere Health, which houses several different specialties at their Central Orem location.

Are there other strategic opportunities in any of these areas?

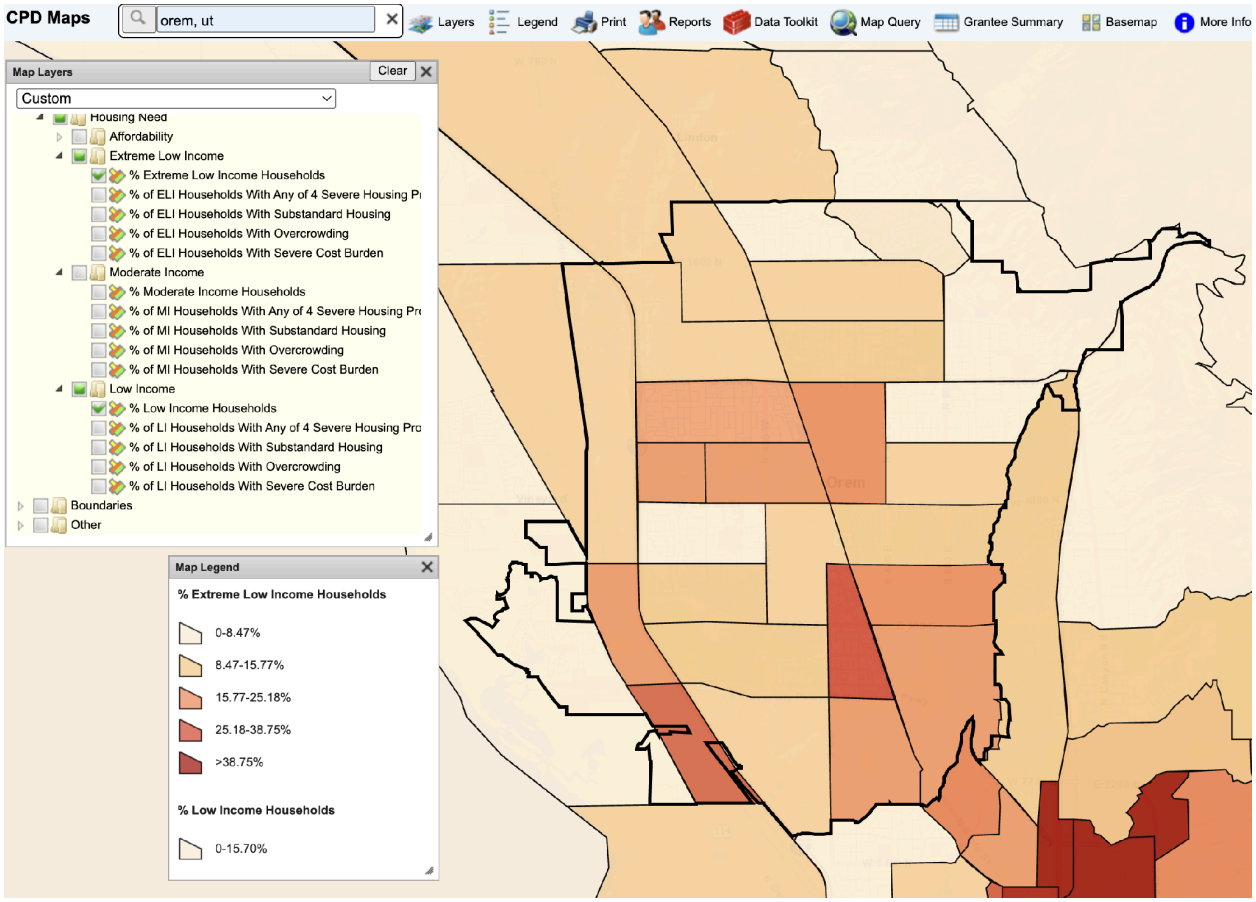
The central census tracts discussed border I-15, which is the primary North-South corridor through the state. The southern census tracts discussed border University Parkway, which is the major East-West corridor through Orem and into Provo. This area is the central business district of the city, as well as the county. This strategic positioning offers ample opportunity to grow LMI businesses. State Street, which is the primary surface street running through Orem, has already been identified by the city as a strategic opportunity for revitalization and growth, due to its centrality and connectedness to the entire city (p. 32).[1] This street runs adjacent to both areas discussed in the section.

Orem also encourages and supports projects that target low- and moderate-income populations, such as those analyzed in this portion of the Consolidated Plan. Our program will continue to promote the

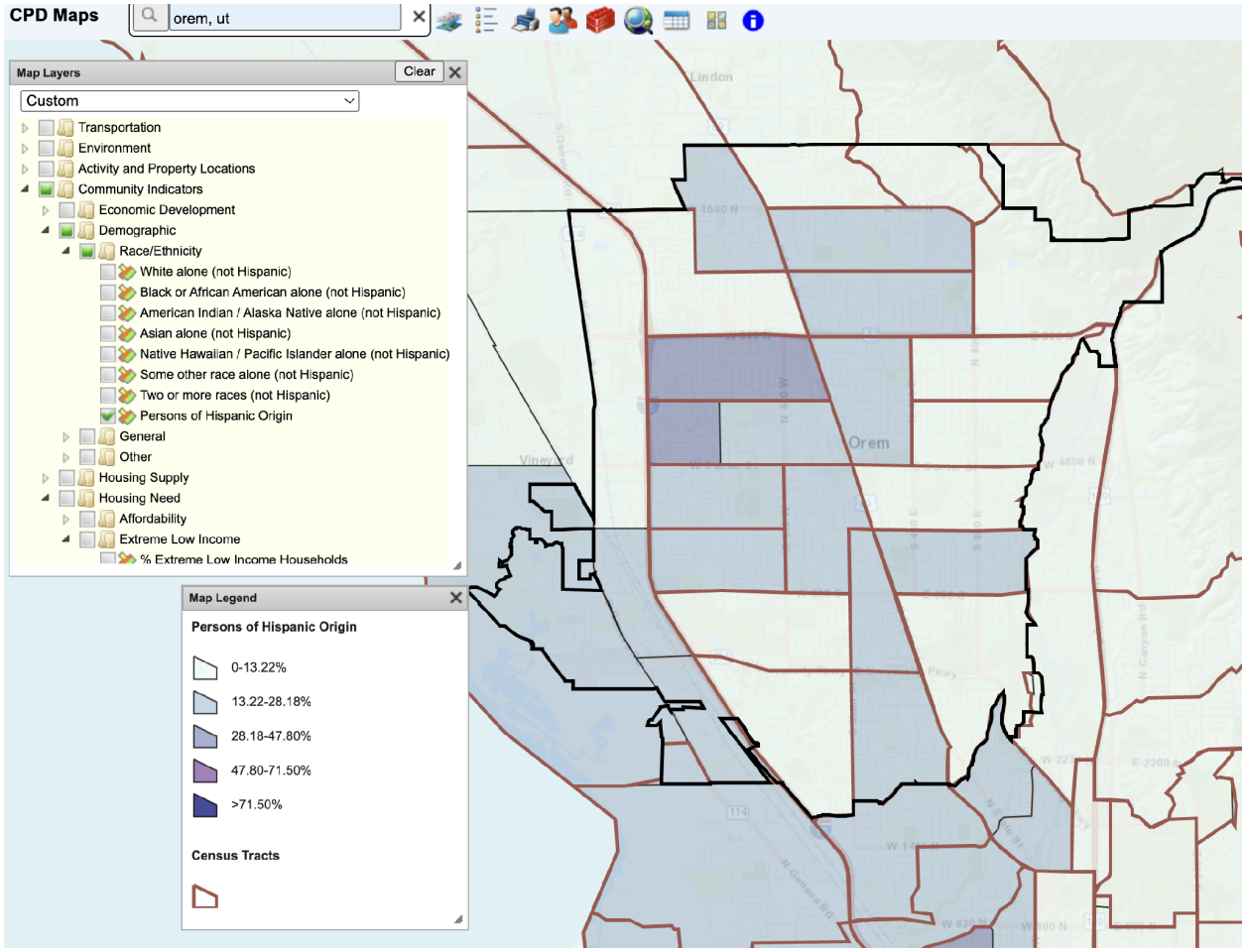
strategic use of CDBG funds to maximize benefit low- and moderate-income populations and other populations in need of community services and amenities.



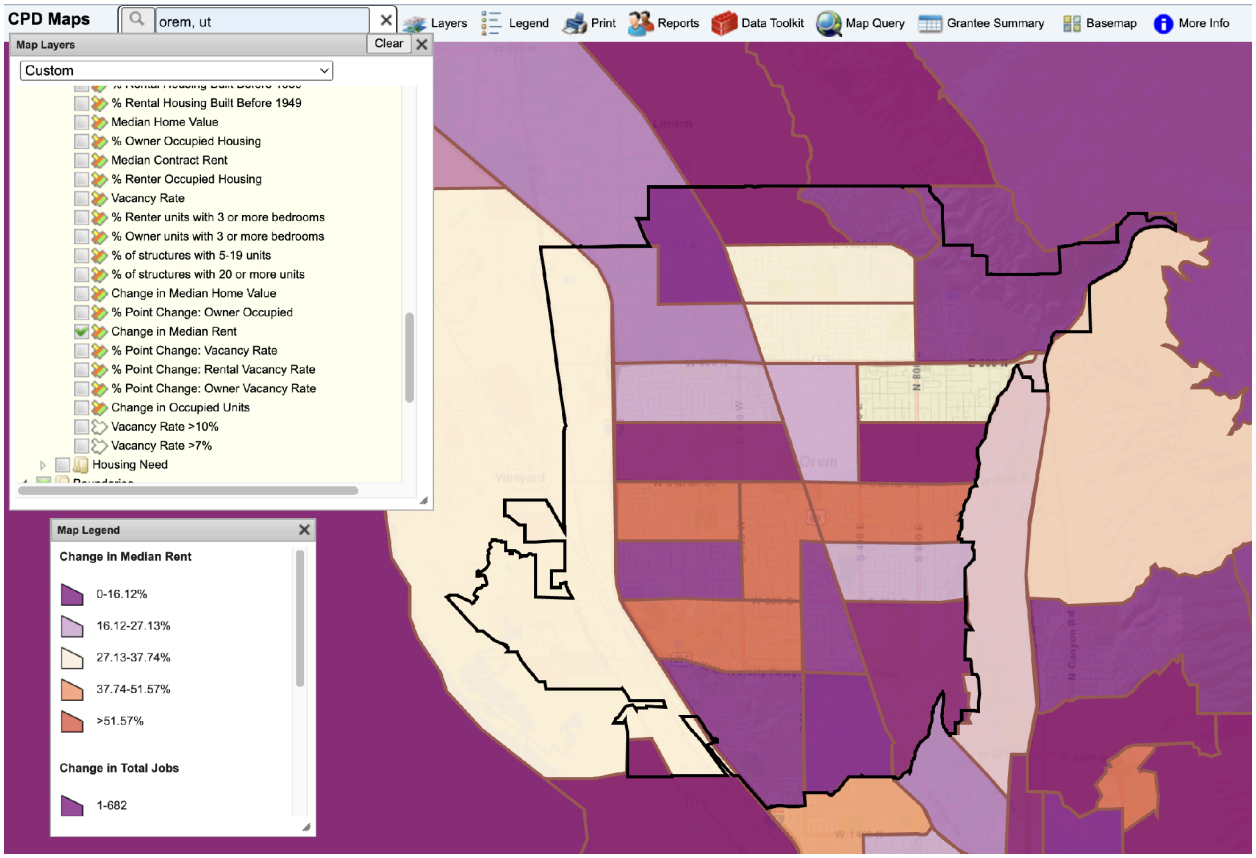
Orem concentration of housing problems



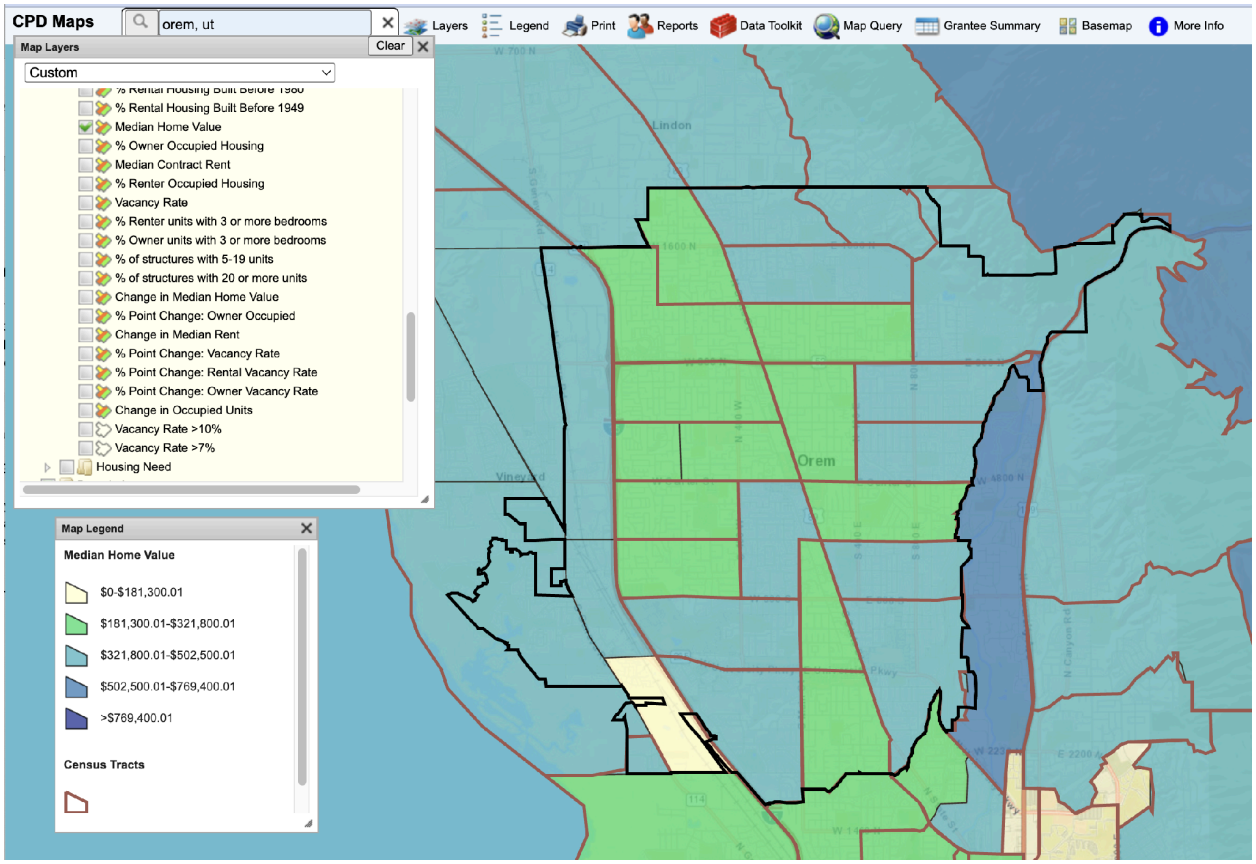
Orem concentration of low income families



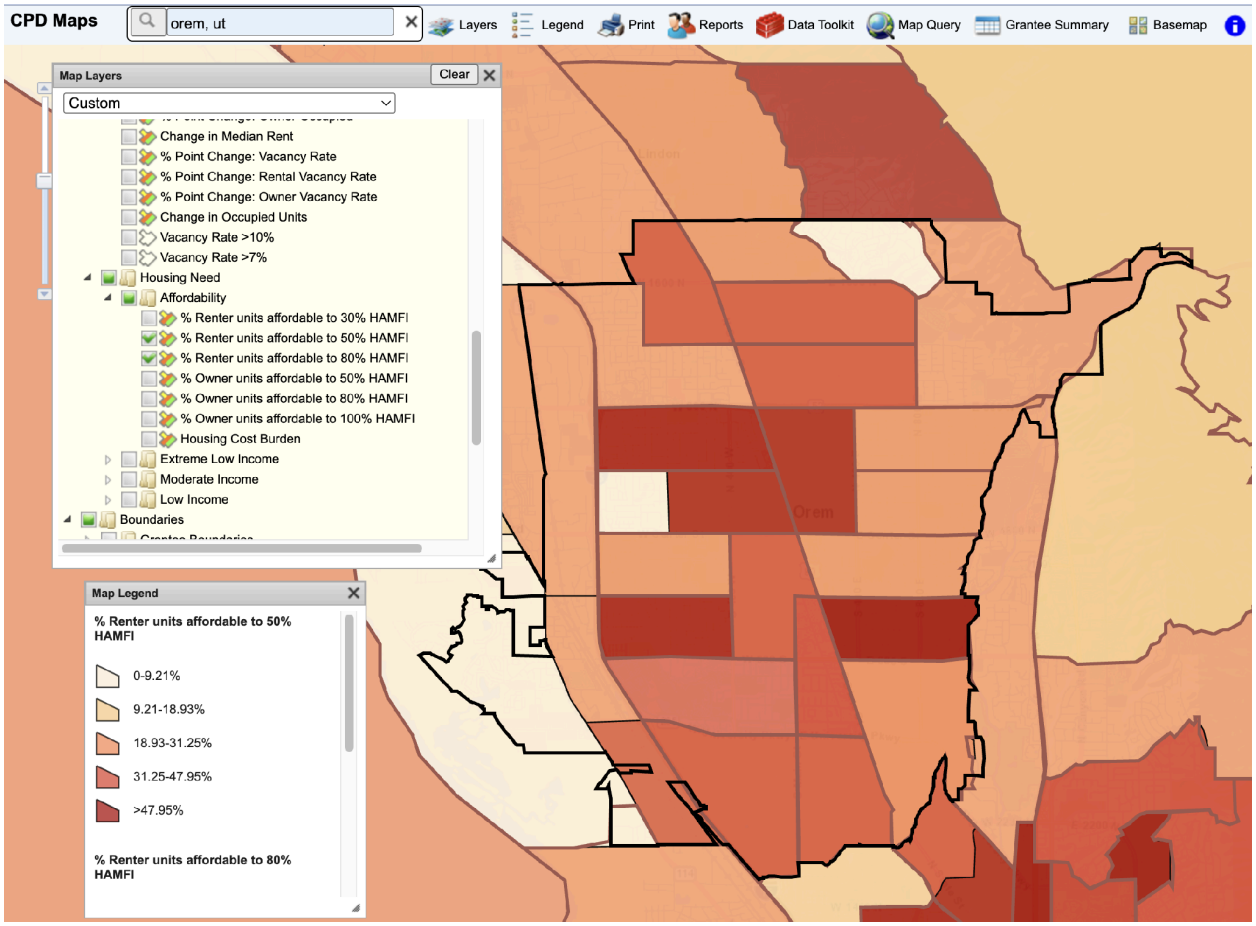
Orem Hispanic household concentration



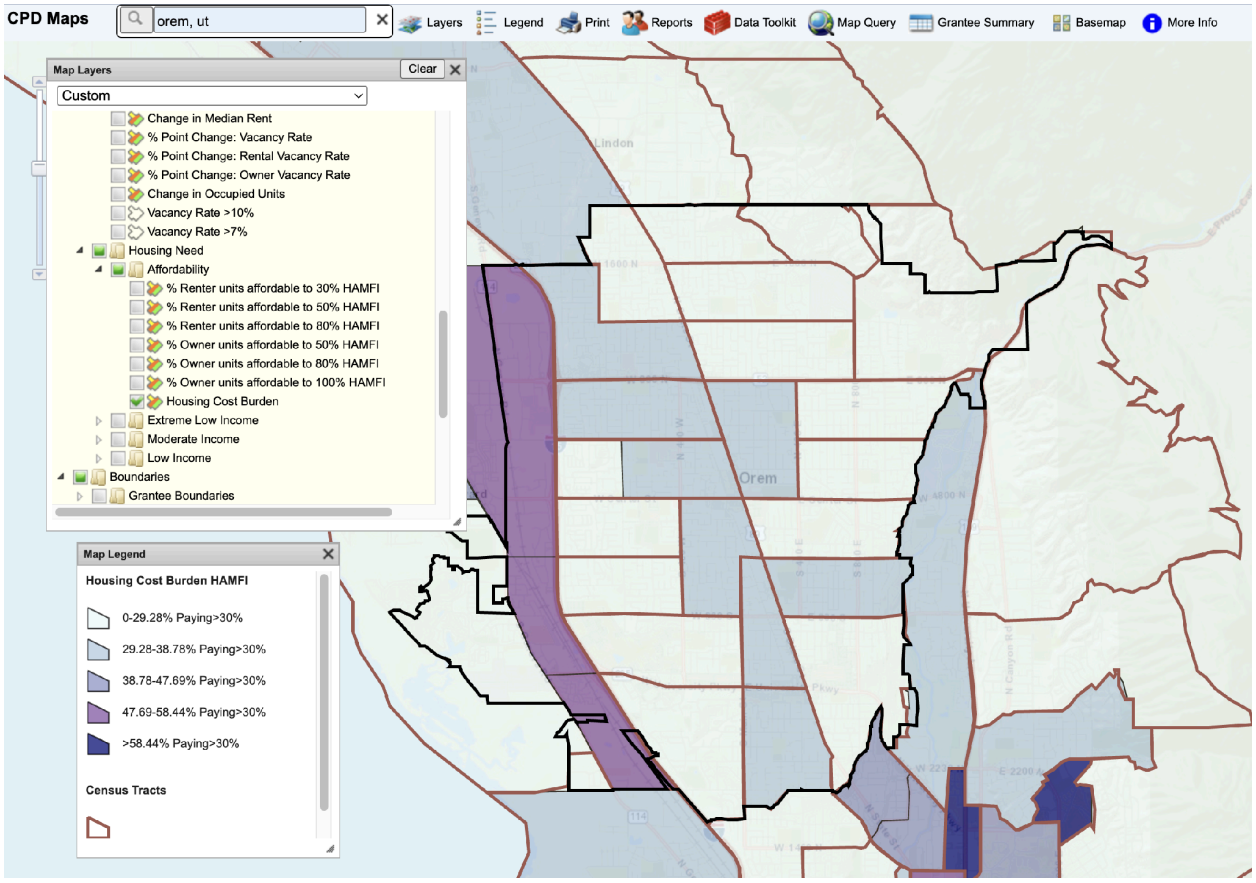
Orem change in median rent



Orem median home value



Orem owner and renter units affordable to 50-80% HAMFI



Orem housing cost burden

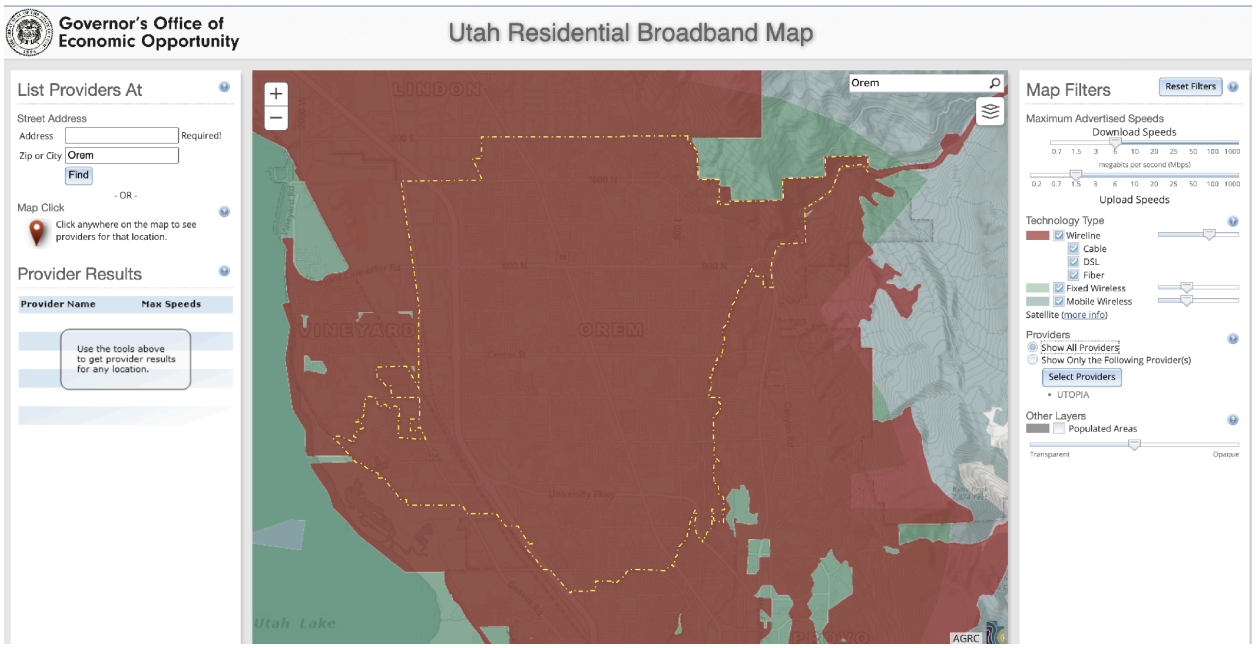
MA-60 Broadband Needs of Housing occupied by Low- and Moderate-Income Households - 91.210(a)(4), 91.310(a)(2)

Describe the need for broadband wiring and connections for households, including low- and moderate-income households and neighborhoods.

Orem is highly connected. The city's Economic Development Plan boasts that Orem is known as a high-speed fiber UTOPIA with high quality broadband," and lists broadband as a primary infrastructure asset (p. 67).[1] The UTOPIA in question refers to UTOPIA Fiber, which is an "open-access fiber-optic network that was founded by 11 Utah cities in 2004 with the mission to bring fiber-optic connection to every resident and business in their communities."[2] UTOPIA Fiber is a consortium funded by those 11 cities, including Orem, that fund and own the fiber network infrastructure, so UTOPIA is a municipal open access network. As of 2023, the entire city of Orem is fully built out with UTOPIA fiber.[3] You can see the current availability of UTOPIA fiber, including the entirety of Orem, at UTOPIA's website.[4]

The Utah Governor's Office of Economic Opportunity provides information regarding internet availability. Please find a map attached from this state office confirming that 100% of Orem is covered by wireline, specifically fiber optic cables.[5]

Describe the need for increased competition by having more than one broadband Internet service provider serve the jurisdiction.



Utah Governor's Office of Economic Opportunity Broadband Map

MA-65 Hazard Mitigation - 91.210(a)(5), 91.310(a)(3)

Describe the jurisdiction's increased natural hazard risks associated with climate change.

Orem City faces growing risks from natural hazards that are being intensified by the impacts of climate change. According to the Mountainland Association of Governments (MAG) Hazard Mitigation Plan, climate change is anticipated to alter precipitation patterns, increase temperatures, and exacerbate drought conditions, all of which can amplify the severity and frequency of natural hazards in Utah County.[1] For Orem specifically, this means a heightened threat of extreme heat events, increased wildfire risk due to prolonged droughts and higher temperatures, and more frequent and severe flooding caused by cloudburst storms. The Utah County Local Emergency Planning Committee (LEPC) similarly warns that climate variability will likely stress water resources and contribute to longer wildfire seasons.[2]

Earthquake risk also remains a significant concern for Orem, given its location near the Wasatch Fault. While seismic activity is not directly caused by climate change, the cascading effects of a major earthquake, such as disruptions to critical infrastructure during periods of extreme heat or drought, are likely to be magnified under changing climate conditions. These combined factors underscore the importance of proactive hazard mitigation planning that accounts for the evolving risk landscape.

Describe the vulnerability to these risks of housing occupied by low- and moderate-income households based on an analysis of data, findings, and methods.

Low- and moderate-income households in Orem are especially vulnerable to these hazards because they are more likely to live in older housing stock that lacks modern resilience features. The MAG hazard mitigation plan indicates that older homes in Orem, particularly those built before updated seismic and energy codes, are at higher risk of structural failure during earthquakes. Indeed, the hazard mitigation plan identifies building damage from earthquakes as the largest loss estimate of any natural disaster the city is likely to face, with 15,720 pre-1990 buildings at risk due to earthquake, and an additional 3,019 buildings at risk due to liquefaction (p. 198).[1]

Additionally, LMI residents often lack the financial resources to retrofit homes for fire or flood protection. Mobile home parks, which are more prevalent among LMI populations, are particularly susceptible to wind damage and flooding. These vulnerabilities necessitate targeted mitigation efforts to protect LMI households from the compounded risks of climate-related hazards.

Finally, the most pressing hazard for Orem as a whole is the "is the potential for wildland fire along the east bench with associated secondary hazards such as mudslides" (p. 199).[2]This is because city assets, including the City Center and the Salt Lake Aqueduct and Central Utah Water lines, would be greatly affected by these hazards. These hazards would seriously affect all Orem residents, and the loss of access

to public buildings may disproportionately affect LMI residents due to their reliance on free and low-cost city services. The city is currently working to relocate these pipes and fortify the City Center against seismic activity.

Strategic Plan

SP-05 Overview

Strategic Plan Overview

This strategic plan identifies priority needs in Orem, available resources for addressing those needs, the institutional structure through which those needs will be met, and specific goals for the region. This portion of the Consolidated Plan also lays out the monitoring and reporting standards for the Orem CDBG program.

SP-10 Geographic Priorities - 91.415, 91.215(a)(1)

Geographic Area

Area Name:	Area Type:	Other Target Area Description:	HUD Approval Date:	% of Low/ Mod:	Revital Type:	Other Revital Description:	Identify the neighborhood boundaries for this target area.	Include specific housing and commercial characteristics of this target area.	How did your consultation and citizen participation process help you to identify this neighborhood as a target area?	Identify the needs in this target area.	What are the opportunities for improvement in this target area?	Are there barriers to improvement in this target area?

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Table 52 - Geographic Priority Areas

General Allocation Priorities

Describe the basis for allocating investments geographically within the state

No geographic areas have been targeted for allocation priority. Because of this, the only geographic criteria for fund distribution is that the project benefit residents of Orem City.

SP-25 Priority Needs - 91.415, 91.215(a)(2)

Priority Needs

Table 53 – Priority Needs Summary

1	**Priority Need Name**	Non-Housing Community Development
	Priority Level	High
	Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
	Geographic Areas Affected	
	Associated Goals	Public Facilities and Infrastructure Improvements Public Services Economic Development

	Description	Community development projects that specifically benefit low- and moderate-income individuals and families are a high priority for the Orem CDBG program. Non-housing community development projects will include public service, economic development, public facilities, and public infrastructure projects. These may cover, but are not limited to the following kinds of activities: neighborhood improvement, transportation, community amenities, water and sewer system improvements, beautification and tree planting along trails and roads, a facade improvement program for local buisnesses, and all kinds of public service activities ranging from homeless assistance, to mental health services, to youth services.
	Basis for Relative Priority	Priority is assigned based on the level of need that is demonstrated by the data that has been collected during the preparation of the Plan, specifically in the needs assessment and market analysis; the information gathered during the consultation and citizen participation process; and the availability of resources to address these needs.
2	**Priority Need Name**	Affordable Housing
	Priority Level	High

	Population	Extremely Low Low Moderate Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
	Geographic Areas Affected	
	Associated Goals	Affordable Housing
	Description	Affordable housing is high priority need in Orem and may include but is not limited to rental assistance, homeowner assistance, unit rehabilitation, unit or land acquisition, public housing, and lead paint mitigation.
	Basis for Relative Priority	Priority is assigned based on the level of need that is demonstrated by the data that has been collected during the preparation of the Plan, specifically in the Needs Assessment and Market Analysis; the information gathered during the consultation and citizen participation process; and the availability of resources to address these needs.

3	**Priority Need Name**	Neighborhood Revitalization
	Priority Level	High
	Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
	Geographic Areas Affected	
	Associated Goals	Neighborhood Revitalization
	Description	Neighborhood Revitalization is a high priority in Orem. The primary project contributing to this priority need will be code enforcement. Other project and activities may include, but are not limited to, addressing slum and blight, and neighborhood cleanups.

	Basis for Relative Priority	Priority is assigned based on the level of need that is demonstrated by the data that has been collected during the preparation of the Plan, specifically in the needs assessment and market analysis; the information gathered during the consultation and citizen participation process; and the availability of resources to address these needs.

Narrative (Optional)

SP-30 Influence of Market Conditions - 91.415, 91.215(b)

Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	
TBRA for Non-Homeless Special Needs	
New Unit Production	
Rehabilitation	
Acquisition, including preservation	

Table 54 – Influence of Market Conditions

SP-35 Anticipated Resources - 91.420(b), 91.215(a)(4), 91.220(c)(1,2)

Introduction

Based on past allocations, Orem expects to receive approximately $569,942 each year in CDBG funding. Orem also receives about $25,000 per year in program income from Critical Home Repair loan repayments, though this is a rough estimate based on the current loans in repayment, several of which may finish repayments before the Consolidated Plan ends. Additionally, Orem budgeted all prior year funding, totaling to $246,274, in the FY25 budget on top of the expected allocation and program income. This leads to an expected five-year total of $2,972,710 of available CDBG funding.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan $	Narrative Description
			Annual Allocation: $	Program Income: $	Prior Year Resources: $	Total: $		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	569,542	25,000	246,274	840,816	2,378,168	Orem anticipates an annual allocation of about $569,542. The city also receives about $25,000 per year in program income from Critical Home Repair loan repayments. Orem also has a relatively large amount of prior year funds this year due to recent repayments. We have budgeted the entire FY25 allocation and the entirety of prior year funds for FY25. This leaves about $2,378,168 expected for the remainder of the Con Plan (four years' worth of annual allocations, plus the expected program income for those four years).

Table 55 - Anticipated Resources

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

The City expects grant sub-recipients to leverage additional fund contributions from both private and public organizations when possible. The Orem CDBG Citizen Commission considers leveraged funds when making grant funding decisions.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

There is no publicly owned land that will be used to address the needs in the plan.

Discussion

Orem City will continue to leverage CDBG funds to gain the highest impact possible.

SP-40 Institutional Delivery Structure - 91.415, 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served
OREM	Government	Economic Development Non-homeless special needs neighborhood improvements public facilities public services	Jurisdiction
Mountainland Association of Governments	Government	Economic Development Non-homeless special needs Planning neighborhood improvements public facilities public services	Region

Table 56 - Institutional Delivery Structure

Assess of Strengths and Gaps in the Institutional Delivery System

The institutional delivery system is comprised of local jurisdictions, private industry, non-profit organizations, and other public institutions. Organizations receive funding each plan year based on community need and the organization's ability to complete projects that align with CDBG program goals. This flexibility allows Orem to align community needs with available resources throughout the 5-year plan period. Although there is some uncertainty as to who will carry out the consolidated plan goals from year to year, Orem and MAG maintain close relationships with jurisdictions and service providers to ensure that community needs and CDBG program goals are met.

Availability of services targeted to homeless persons and persons with HIV and mainstream services

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
Homelessness Prevention Services			
Counseling/Advocacy	X	X	
Legal Assistance	X		
Mortgage Assistance	X		
Rental Assistance	X		
Utilities Assistance	X		
Street Outreach Services			
Law Enforcement	X	X	
Mobile Clinics	X		
Other Street Outreach Services			
Supportive Services			
Alcohol & Drug Abuse	X	X	
Child Care	X		
Education	X	X	
Employment and Employment Training	X	X	
Healthcare	X	X	
HIV/AIDS	X		X
Life Skills	X	X	
Mental Health Counseling	X	X	
Transportation	X	X	
Other			

Table 57 - Homeless Prevention Services Summary

Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)

The Mountainland Continuum of Care coordinates services and referrals among Continuum members and meets monthly to discuss regional issues and priorities and identify and correct weaknesses in service provision and coordination. Volunteers and Continuum members perform a yearly point-in-time count to identify homeless individuals and families in the region. These data guide service providers in determining best outreach efforts to targeted populations. The Continuum also distributes a resource guide annually detailing the public service resources available to homeless persons, specifically chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. This guide is disbursed throughout the community as a whole and specifically to service providers who provide target and mainstream services.

Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above

As discussed above, the Continuum of Care provides an ongoing forum for service providers to coordinate efforts and identify and correct any gaps in the service delivery system. This process requires strong regional collaboration. Any gaps in the system are addressed within the Continuum setting, in continuum subcommittees, and among service providers.

Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

Members of the Utah Valley HOME Consortium are creating consolidated plans concurrently, thus improving coordination of planning and strategy creation. This initial step will guide all participating jurisdictions over the next 5 years. The region also has an active Continuum of Care with members that provide many of the services identified in this plan as being high priority.

SP-45 Goals - 91.415, 91.215(a)(4)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Public Facilities and Infrastructure Improvements	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $622,050	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 5500 Persons Assisted
2	Public Services	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $499,620	Public service activities other than Low/Moderate Income Housing Benefit: 2500 Persons Assisted
3	Economic Development	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $200,000	Facade treatment/business building rehabilitation: 4 Business
4	Affordable Housing	2025	2029	Affordable Housing		Affordable Housing	CDBG: $274,000	Homeowner Housing Rehabilitated: 30 Household Housing Unit
5	Neighborhood Revitalization	2025	2029	Non-Housing Community Development		Neighborhood Revitalization	CDBG: $807,500	Housing Code Enforcement/Foreclosed Property Care: 16500 Household Housing Unit

Table 58 – Goals Summary

Goal Descriptions

1	**Goal Name**	Public Facilities and Infrastructure Improvements
	Goal Description	Orem will continue improving infrastructure in low- and moderate-income neighborhoods and will pursue other projects in this category as well, such as building public facilities, beautification of existing trails and roads, and additional city amenities and service facilities that benefit low- and moderate-income individuals and families.
2	**Goal Name**	Public Services
	Goal Description	Provide funding for public services needed in the community.
3	**Goal Name**	Economic Development
	Goal Description	The City will promote economic development by pursuing and funding projects that create, attract, and retain jobs and increase economic activity and opportunity to low- and moderate-income individuals.
4	**Goal Name**	Affordable Housing
	Goal Description	The City will provide affordable housing through single family home rehabilitation, and potentially other affordable housing efforts including homeowner or rental assistance.
5	**Goal Name**	Neighborhood Revitalization
	Goal Description	The City will pursue neighborhood revitalization efforts primarily through code enforcement through the police department. Other neighborhood revitalization projects, including neighborhood cleanups, may be pursued in future years.

Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)

An estimated 30 households will be provided continued livable affordable housing through the Critical Home Repair program, which provides single family home rehabilitation. The City has no plans to build any new affordable housing with CDBG funds at this time.

SP-65 Lead-based Paint Hazards - 91.415, 91.215(i)

Actions to address LBP hazards and increase access to housing without LBP hazards

In the Mountainland Region, lead-based paint testing is available through the Utah Valley Consortium of Cities and County. Equipment for lead-based paint testing was purchased with CDBG Small Cities funding, and the Consortium works closely with the Housing Authority of Utah County.

Mountainland Association of Governments has recently taken over responsibility for weatherization and repair services to pre-1978 units occupied by low- and moderate-income residents, and lead-based paint testing is completed as a precaution.

The Utah County Health and Justice Center sells a crayon for $2.00 that when rubbed on the paint will indicate if lead is present. The crayon can be purchased at the Environmental Health Department, Suite 2600 151 S. University Avenue, Provo, Utah 84601. In the event of a positive result, the county will provide instruction about where one can go to receive more information and assistance. Utah County does not currently offer removal or rehabilitation services.

Another lead-based paint resource is the Utah Department of Environmental Quality. They provide information about Utah's Lead-Based Paint Program, access to information about prevention of lead-based paint poisoning, and contact information for agencies and contractors that are certified ins afe removal or rehabilitation of lead-based paint.

Any future grantees receiving CDBG funds to purchase and renovate properties are responsible for testing and mitigating lead hazards within the property.

How are the actions listed above related to the extent of lead poisoning and hazards?

If lead-based paint is detected during the testing process that is required before work on a home or public facility is begun, mitigation is required to combat lead poisoning and associated hazards.

How are the actions listed above integrated into housing policies and procedures?

Any Orem CDBG-funded project will be evaluated with respect to lead-based paint hazards. If hazards do exist the sub-grantee must take all measures necessary to eliminate the risk of contamination. This is specifically included in the Orem Critical Home Repair program's policies and procedures.

The Orem CDBG Program encourages projects that reduce the risk of lead-based paint poisoning either by awareness programs or removal programs.

SP-70 Anti-Poverty Strategy - 91.415, 91.215(j)

Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

The limited incomes of many residents within the Utah Valley Consortium cities have left them with insufficient means to meet an adequate standard of living. In a strategic effort to reduce the number of households living in poverty and to prevent at-risk households from moving into poverty, it is necessary to support the most vulnerable populations, including the chronically homeless, homeless families, food-insecure families and individuals, the disabled, victims of domestic violence, and the low-income elderly.

The Consortium's anti-poverty strategy is the unifying thread that ties the housing, homeless, public housing and non-housing community development strategies together as one comprehensive plan for reducing the number of families that fall below the poverty level. The strategic plan, goals and objectives promote self-sufficiency and empowerment.

Provo City, as Lead Entity, will coordinate efforts among Consortium members and partner organizations to collaborate in combining available resources to assist families and individuals overcoming poverty.

These partners include neighborhood residents, representatives of social service agencies, business, churches, nonprofit agencies and developers, lenders and other for-profit entities.

Key Goals of the Anti-Poverty Strategy, and Five-Year Strategic Goals:

- Provision of adequate and affordable housing
- Neighborhood stabilization
- Elimination of substandard housing
- Availability of special needs housing

Through these goals the aim is to close the gap in a number of socioeconomic indicators, such as improving housing affordability, school readiness of young children, employment skills of at-risk adults, and access to transportation for low-income households.

How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan

The social service delivery strategy provides focus on programs that support education, counseling, prevention programs, case management and other capacity building functions. Consortium members seek to reduce the number of poverty-level families by supporting social service development programs that facilitate the creation or retention of job opportunities.

The funding of housing rehabilitation, construction, and down payment/rental assistance for affordable housing provides families and individuals in poverty an opportunity to obtain a safe, decent, and affordable place to live.

SP-80 Monitoring - 91.230

Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

To meet HUD requirements the City will conduct both an on-site monitoring visits and "desk-top" monitorings, whereby the subrecipient is not visited, and their grant is monitored only by review of the information in City files. Each subrecipient will be monitored once annually. A desk-audit is completed each time a subrecipient submits a draw, which is typically on a monthly or quarterly basis. This includes assuring that performance goals and objectives of the Consolidated Plan are being achieved through the sub-grantee's projects and programs, reviewing the subrecipient's contract, comparing the scheduled timeframe and budget to draw down requests, ensuring that invoices match drawdown requests, and if necessary, taking appropriate actions to address performance problems.

Program Monitoring Goals:

1. To review subrecipient agencies to determine if services are being delivered in accordance with contract requirements as to type of services and number of units of service.
2. To review records of subrecipient agencies to determine if systems are in place to properly document the provision of services, client eligibility, and compliance with any other contract requirements.

Fiscal Monitoring Goals:

1. To review subrecipient agencies to determine if expenditures of allocated funds are being made in accordance with contract requirements.
2. To review records of subrecipient agencies to determine if systems are in place to properly document financial transactions, the use of allocated funds, use of program income, and any other contract requirements.

In addition to monitoring sub-grantees, the City monitors its own performance to ensure the CDBG program is meeting the goals and objectives outlined in this Consolidated Plan. This begins with providing technical assistance to sub-grantees from their first point of contact with staff (pre-application stage) where they are encouraged to ask questions about the grant and the application process. Once applications are submitted, they are reviewed and evaluated for compliance with the Consolidated Plan's goals and objectives by staff and the CDBG Citizen Advisory Committee. Local residents have the opportunity to review the Annual Action Plan prior to the CDBG Citizen Advisory Committee approving the Annual Action Plan. The Plan is then submitted to HUD for their review. Once approved, the City prepares contracts for each sub-grantee, providing for an additional check to ensure the approved projects and programs funded meet the goals and objectives. Throughout the life of the grant, staff

meets with and provides technical assistance to sub-grantees to ensure that they continue to meet program requirements. As each sub-grantee submits drawdown requests and the required reports, staff has the opportunity to review the project implementation to ensure each sub-grantee is utilizing funds in a timely manner. In addition, CDBG staff reviews and updates IDIS periodically to ensure a high level of performance and compliance is met.

Expected Resources

AP-15 Expected Resources - 91.420(b), 91.220(c)(1,2)

Introduction

Based on past allocations, Orem expects to receive approximately $569,942 each year in CDBG funding. Orem also receives about $25,000 per year in program income from Critical Home Repair loan repayments, though this is a rough estimate based on the current loans in repayment, several of which may finish repayments before the Consolidated Plan ends. Additionally, Orem budgeted all prior year funding, totaling to $246,274, in the FY25 budget on top of the expected allocation and program income. This leads to an expected five-year total of $2,972,710 of available CDBG funding.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan $	Narrative Description
			Annual Allocation: $	Program Income: $	Prior Year Resources: $	Total: $		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	569,542.00	25,000	246,274.17	840,816.17	2,378,168.00	Orem anticipates an annual allocation of about $569,542. The city also receives about $25,000 per year in program income from Critical Home Repair loan repayments. Orem also has a relatively large amount of prior year funds this year due to recent repayments. We have budgeted the entire FY25 allocation and the entirety of prior year funds for FY25. This leaves about $2,378,168 expected for the remainder of the Con Plan (four years' worth of annual allocations, plus the expected program income for those four years).

Table 59 - Expected Resources – Priority Table

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

The City expects grant sub-recipients to leverage additional fund contributions from both private and public organizations when possible. The Orem CDBG Citizen Commission considers leveraged funds when making grant funding decisions.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

There is no publicly owned land that will be used to address the needs in the plan.

Discussion

Orem City will continue to leverage CDBG funds to gain the highest impact possible.

Annual Goals and Objectives

AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Public Facilities and Infrastructure Improvements	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $33,334.00	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 1000 Persons Assisted
2	Public Services	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $85,431.00	Public service activities other than Low/Moderate Income Housing Benefit: 870 Persons Assisted
3	Economic Development	2025	2029	Non-Housing Community Development		Non-Housing Community Development	CDBG: $101,369.00	Other: 0 Other
4	Affordable Housing	2025	2029	Affordable Housing		Affordable Housing	CDBG: $74,000.00	Homeowner Housing Rehabilitated: 10 Household Housing Unit
5	Neighborhood Revitalization	2025	2029	Non-Housing Community Development		Neighborhood Revitalization	CDBG: $161,500.00	Housing Code Enforcement/Foreclosed Property Care: 3500 Household Housing Unit

Table 60 – Goals Summary

Goal Descriptions

1	**Goal Name**	Public Facilities and Infrastructure Improvements
	Goal Description	The $33,334 under the Public Facilities and Infrastructure Improvements goal in 2025 is dedicated to the LMI Parks Equipment Replacement project, which will also be funded from several previous years. This project will use the entirety of the existing unencumbered prior year funding in addition to $33,334 from FY25. The portions of each prior year's funding being dedicated to this project will be reflected in amendments to each prior year annual action plan.
2	**Goal Name**	Public Services
	Goal Description	Public services funded in 2025 include projects from outside organizations as well as internally through the city.
3	**Goal Name**	Economic Development
	Goal Description	The entirety of the $101,369 going toward Economic Development in 2025 is for the final repayment for a Section 108 loan that has been in repayment for several years now. The loan was taken out to assist car dealerships during the pandemic. Because the activity is a Section 108 loan repayment, there are no goal outcome indicators associated with it.
4	**Goal Name**	Affordable Housing
	Goal Description	The $74,000 going toward Affordable Housing this year is being used to rehabilitate single family homes in Orem, both through the Orem Critical Home Repair Program run out of MAG, and through the Fuller Center for Housing, which is a nonprofit in the community providing the same service.
5	**Goal Name**	Neighborhood Revitalization
	Goal Description	

AP-35 Projects - 91.420, 91.220(d)

Introduction

The following five projects (with administration as a sixth) will encompass all 2025 activities pursued by Orem City. These projects cover all five of the strategic goals for this Consolidated Plan.

#	Project Name
1	LMI Parks Equipment
2	Public Services
3	Section 108 Loan Repayment
4	Single Family Home Rehabilitation
5	Neighborhood Revitalization
6	Administration

Table 61 – Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

Allocation priorities were made through the citizen participation process and consultation with city council, city staff, and local nonprofit service providers. The primary obstacle to addressing underserved needs is limited funding, as well as limited allowable CDBG uses.

AP-38 Project Summary

Project Summary Information

1	**Project Name**	LMI Parks Equipment
	Target Area	
	Goals Supported	Public Facilities and Infrastructure Improvements
	Needs Addressed	Non-Housing Community Development
	Funding	CDBG: $33,334.00
	Description	This will be a project to replace aging playground equipment at Cherry Hill Park.
	Target Date	12/31/2026
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 1000 LMI residents of the Cherry Hill neighborhood that regularly use the park will benefit.
	Location Description	Cherry Hill Park: 240 E 1800 S Orem, UT 84058
	Planned Activities	This will be a project to replace aging playground equipment at Cherry Hill Park.
2	**Project Name**	Public Services
	Target Area	
	Goals Supported	Public Services
	Needs Addressed	Non-Housing Community Development
	Funding	CDBG: $85,431.00
	Description	The following public services will be funded this year: Orem Police Department Victim Services, Orem Police Department Homeless Services, Neighborhood Cleanups through the Police Department/Community Services Department, Health Services through Rocky Mountain University Foundation, Tax Assistance through Utah Tax Help Services, and Youth Services through Big Brothers Big Sisters.
	Target Date	6/30/2026

	Estimate the number and type of families that will benefit from the proposed activities	Approximately 870 LMI residents will benefit from the various public services funded this year.
	Location Description	Nonprofits throughout Orem, as well as internally through the Orem Police Department. See above for a full list of nonprofits funded this year.
	Planned Activities	The following public services will be funded this year: Orem Police Department Victim Services, Orem Police Department Homeless Services, Neighborhood Cleanups through the Police Department/Community Services Department, Health Services through Rocky Mountain University Foundation, Tax Assistance through Utah Tax Help Services, and Youth Services through Big Brothers Big Sisters.
3	**Project Name**	Section 108 Loan Repayment
	Target Area	
	Goals Supported	Economic Development
	Needs Addressed	Non-Housing Community Development
	Funding	CDBG: $101,369.00
	Description	This is the final installment in a Section 108 loan repayment for car dealership assistance.
	Target Date	6/30/2026
	Estimate the number and type of families that will benefit from the proposed activities	No families directly benefitted from the original car dealership assistance project the loan was used for; the goal outcome indicator was related to businesses served and jobs created/retained. Similarly, no families will directly benefit from this loan repayment project.
	Location Description	Repayment will take place administratively through Orem City and MAG.

	Planned Activities	This is the final installment in a Section 108 loan repayment for car dealership assistance. There is no goal outcome indicators included below, as this is not required for this type of project/activity.
4	**Project Name**	Single Family Home Rehabilitation
	Target Area	
	Goals Supported	Affordable Housing
	Needs Addressed	Affordable Housing
	Funding	CDBG: $74,000.00
	Description	This project will cover two single family home rehabilitation activities being undertaken this year: one through the Orem Critical Home Repair Program administered by MAG, and one through the local nonprofit the Fuller Center for Housing.
	Target Date	12/31/2026
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 10 LMI families in Orem will benefit.
	Location Description	The homes that will be rehabilitated have not yet been selected. The only location-related criteria is that the home must be within Orem City.
	Planned Activities	This project will cover two single family home rehabilitation activities being undertaken this year: one through the Orem Critical Home Repair Program administered by MAG, and one through the local nonprofit the Fuller Center for Housing.
5	**Project Name**	Neighborhood Revitalization
	Target Area	
	Goals Supported	Neighborhood Revitalization
	Needs Addressed	Neighborhood Revitalization
	Funding	CDBG: $161,500.00

	Description	The Orem Police Department will undertake code enforcement activities in qualified LMI target neighborhoods.
	Target Date	6/30/2026
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 3500 households within the LMI target neighborhoods in the city will benefit.
	Location Description	Neighborhood Revitalization activities are limited to the three census tracts in Orem that qualify as at least 51% LMI. Please find a map of these census tracts in the appendices.
	Planned Activities	The Orem Police Department will undertake code enforcement activities in qualified LMI target neighborhoods.
6	**Project Name**	Administration
	Target Area	
	Goals Supported	
	Needs Addressed	
	Funding	CDBG: $133,908.00
	Description	Administration of the CDBG Program.
	Target Date	6/30/2026
	Estimate the number and type of families that will benefit from the proposed activities	N/A
	Location Description	Mountainland Association of Governments (MAG)
	Planned Activities	Administration of the CDBG Program.

AP-50 Geographic Distribution - 91.420, 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

All infrastructure projects will be directed within target LMI census tracts. A map of these census tracts can be found in the appendices. Other infrastructure projects will be considered if they are able to qualify their specific service area as LMI. Otherwise, all infrastructure projects will be limited to approved LMI census tracts on an area basis.

All public service and Critical Home Repair projects serve limited clientele groups from all areas in the city, which are either presumed benefit or are individually verified as LMI.

Geographic Distribution

Target Area	Percentage of Funds

Table 62 - Geographic Distribution

Rationale for the priorities for allocating investments geographically

Infrastructure projects must serve LMI neighborhoods, which is why specific neighborhoods have been designated as LMI. Public service projects were awarded by the Orem CDBG Citizen Commission, which determined funding based primarily on demonstration of need and the city's priorities, not geographic location.

Discussion

The only geographic criteria for funding for FY25 is that the project benefit LMI residents of Orem.

Affordable Housing

AP-55 Affordable Housing - 91.420, 91.220(g)

Introduction

One Year Goals for the Number of Households to be Supported
Homeless
Non-Homeless
Special-Needs
Total

Table 64 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through
Rental Assistance
The Production of New Units
Rehab of Existing Units
Acquisition of Existing Units
Total

Table 65 - One Year Goals for Affordable Housing by Support Type

Discussion

AP-85 Other Actions - 91.420, 91.220(k)

Introduction

This section will identify other actions to be taken in the FY2025 CDBG Program.

Actions planned to address obstacles to meeting underserved needs

One of the primary obstacles to meeting underserved needs of residents is the availability of funding. Orem expects grant recipients to leverage grants to obtain additional funds.
Coordination with jurisdictions and public service providers decreases duplication of efforts and increases effectiveness of service delivery.

Actions planned to foster and maintain affordable housing

Single Family Home Rehabilitation efforts are planned for this year to maintain affordable housing for LMI residents. Please see the list of projects for more details.

Actions planned to reduce lead-based paint hazards

In the Mountainland Region, lead-based paint testing is available through the Utah Valley Consortium of Cities and City. Equipment for lead-based paint testing was purchased with CDBG Small Cities funding. The Consortium works closely with the Housing Authority of Orem. As the housing authority provides weatherization or repair services to any pre-1978 units, lead-based paint testing is completed as a precaution.

The Utah County Health & Justice Center sells a crayon for $2.00 that when rubbed on the paint will indicate if lead is present. The crayon can be purchased at the Environmental Health Department, Suite 2600 151 S. University Avenue, Provo, Utah 84601. The Wellness Clinic at the Utah County Health Department offers several laboratory tests for a discounted cash price on a walk in basis. In the event of a positive result the City will provide instruction about where one can go to receive more information and assistance. Orem does not currently offer removal or rehabilitation services.

Actions planned to reduce the number of poverty-level families

Orem is dedicated to reducing the number of households living in poverty through targeted programs aimed at improving the economic well-being of individuals and families. Recognizing that poverty is a complex issue, the City acknowledges that effective solutions must be multifaceted and tailored to diverse household needs. The strategies outlined in this plan are designed to work collectively, rather than in isolation, to create a comprehensive approach to poverty alleviation.

Orem will continue working in partnership with other agencies to combine resources and empower

individuals and families with the tools they need to overcome poverty. The City's strategy incorporates CDBG goals and focuses on increasing income opportunities, supporting small business growth, and advancing workforce development.

Actions planned to develop institutional structure

The mission of the Utah CDBG program is to improve the quality of life for low and moderate in residents, by increasing access to decent and attainable housing, improving their living environment, and expanding their economic resources. CDBG staff continually work to provide qualified applicants with funding for programs and projects that address the priorities outlined in the Consolidated Plan.

Staff work with the non-profit community serving Orem to identify the needs of the low and moderate-income residents of the community and coordinates with them to address gaps in the delivery system. We believe that by combining the resources available to the City with those of local jurisdictions and the non-profit organizations these gaps will begin to close. CDBG staff has worked to establish partnerships with these community stakeholders to combine resources for a coordinated response, providing a widespread approach to address the current gaps in services.

Applicants may include non-profit agencies, governmental and quasi-governmental agencies and housing authorities. To expand upon this mission, Orem has incorporated a proactive approach of providing assistance to the organizations on the front lines, providing help to the at-risk population. CDBG staff regularly participate in HUD trainings to stay up to date on best practices and regulations.

Actions planned to enhance coordination between public and private housing and social service agencies

Orem relies on private organizations and local jurisdictions to administer CDBG projects compatible with the goals of this plan. Through electronic, in-person, and mail outreach efforts throughout the year, MAG staff collaborate with these organizations to identify and support projects that address community needs. MAG also participates in the regional Continuum of Care, which consists of many non-profit service providers, housing authorities, and local jurisdictions.

Discussion

Through the actions identified in this section of the plan, the City continually strives to implement the most effective program possible to create viable communities.

Program Specific Requirements

AP-90 Program Specific Requirements - 91.420, 91.220(l)(1,2,4)

Introduction

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

Community Development Block Grant Program (CDBG)
Reference 24 CFR 91.220(l)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	0
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
Total Program Income:	**0**

Other CDBG Requirements

1. The amount of urgent need activities	0
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income.Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	62.00%

Orem receives a small amount of program income each year through Critical Home Repair loan repayments, usually about $23,000 per year. Program income received is always drawn down before regular entitlement funds. As such, the city does not plan to have any unused program income before the start of this program year. All program income received during Q4 will be drawn down immediately thereafter for Q4 activity draws.

Orem returned a substantial amount of funds over the last year to the line of credit. I entered a zero for this question above, because the entirety of these returned funds, as well as all other unused and unencumbered prior year funds, have been budgeted into the LMI Parks Equipment project being undertaken this year. $33,334 of FY25 funds is also being put toward this project. I am currently working on amendments to all affected prior year annual action plans to officially reprogram these funds.

Finally, the percentage of this year's funds directly serving is only 62% because the administration cost for this year as well as the Section 108 loan repayment cost were not included as serving LMI persons directly. I will calculate overall benefit between this year and the next two years. The percentage for each of the next two years should be 80%, because we will be done repaying the Section 108 loan, so we will only have the 20% of each year's grant going toward administration that will not be serving LMI persons directly. As such, the combined percentage over the next three years will be 74%.

Attachments

Citizen Participation Comments

No comments were received during official public hearings. Please see documentation for public hearings, and comments received from local service providers and citizens via survey in the appendices.

Grantee Unique Appendices

OREM CONSOLIDATED PLAN

2025-2029 Table of Contents

MAG
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Other Plans Consulted Throughout

1. Utah Valley Home Consortium Housing Market Analysis 2024
2. Utah Valley Home Consortium Housing and Homeless Needs Assessment 2024

   *The two plans above are very large files and IDIS could not support them, so they are not included in the appendices. They are available in full for your reference via email.
3. MAG Comprehensive Economic Development Strategy
4. Orem Economic Development Strategic Plan
5. Orem Moderate Income Housing Study

Sources By Consolidated Plan Section

Citizen Participation

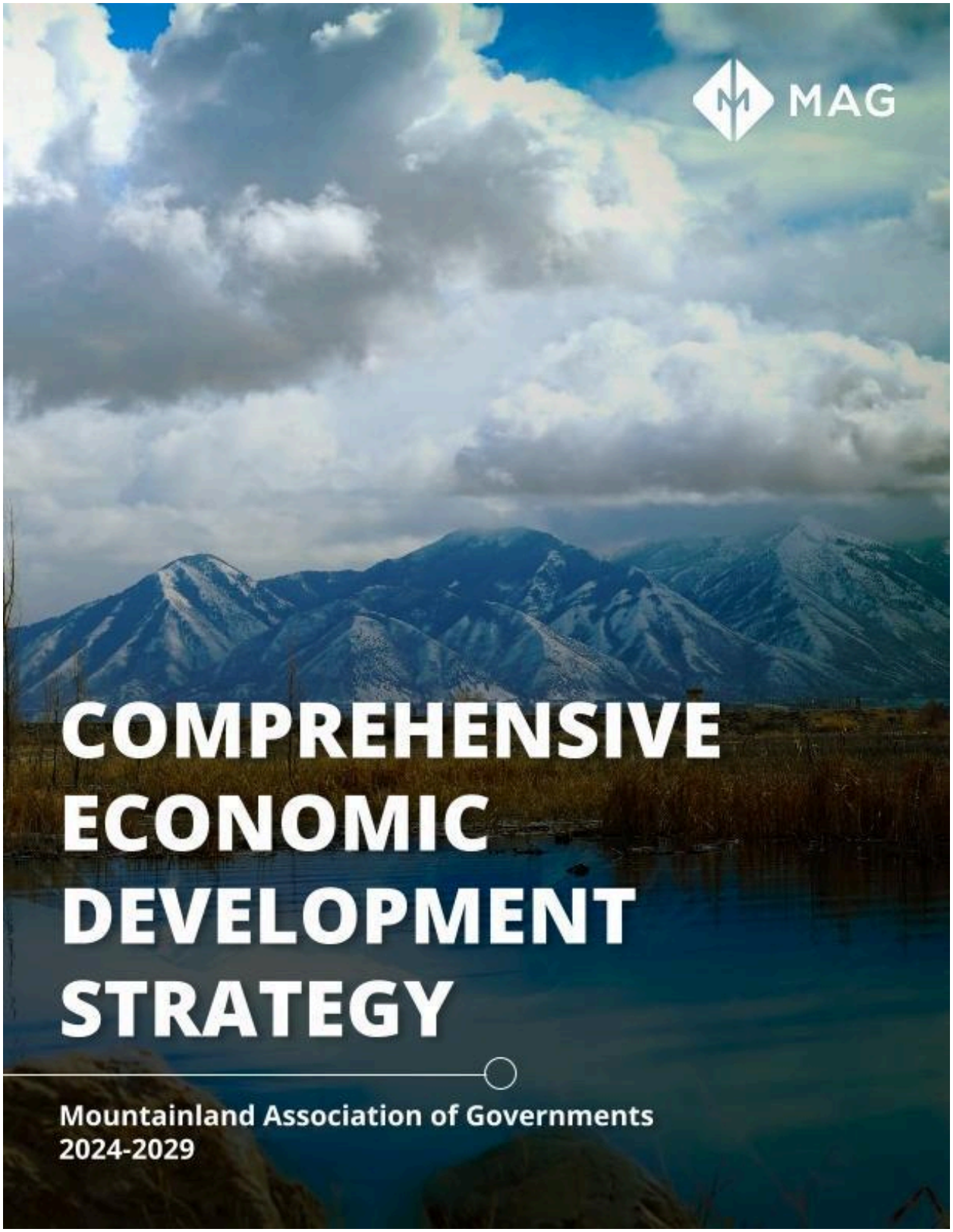
- Spanish and English citizen survey responses
- December 10: Initial public hearing
- May 29: Final public hearing
- Local service providers survey responses

NA-50

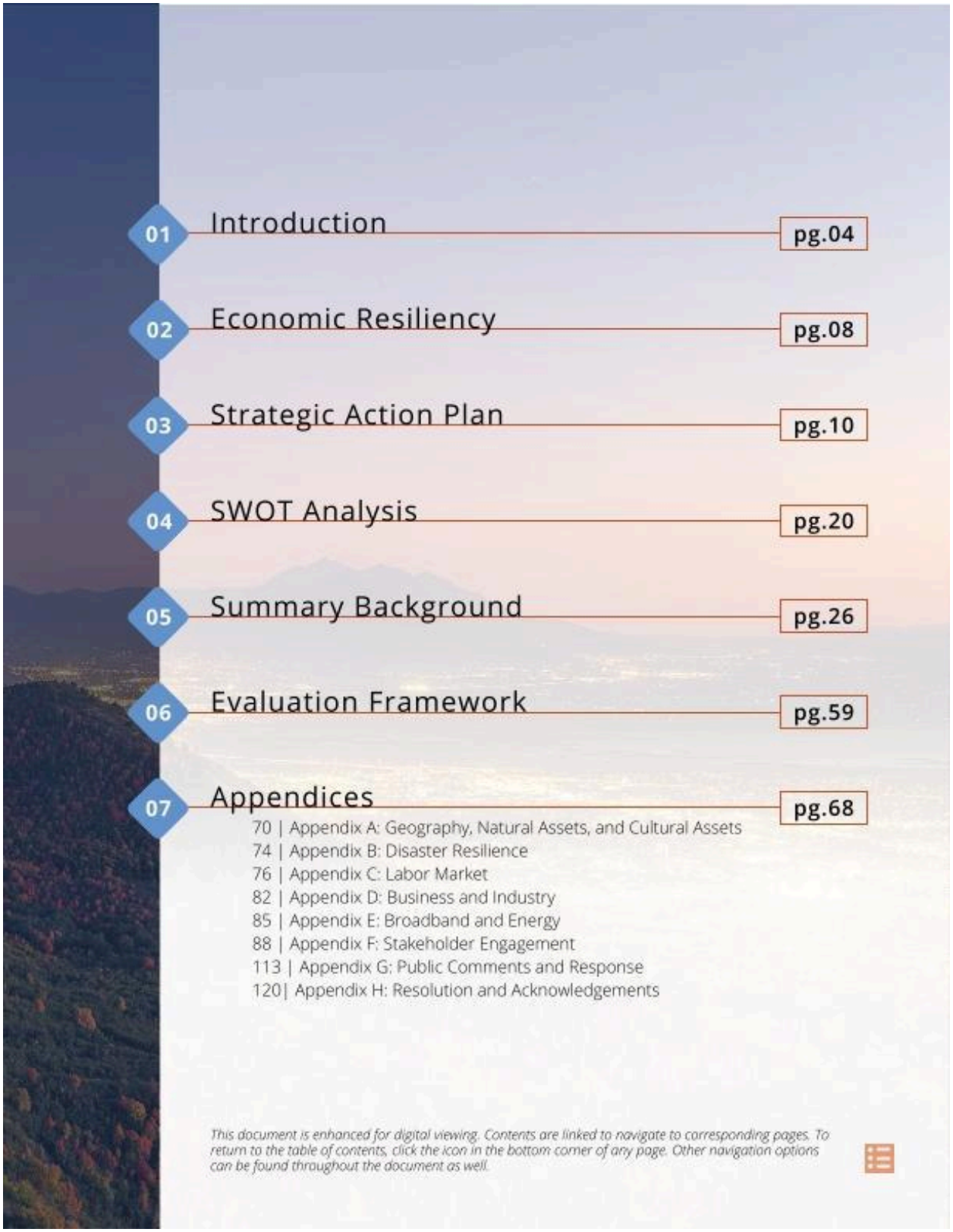
- Orem LMI census tracts map

MA-45

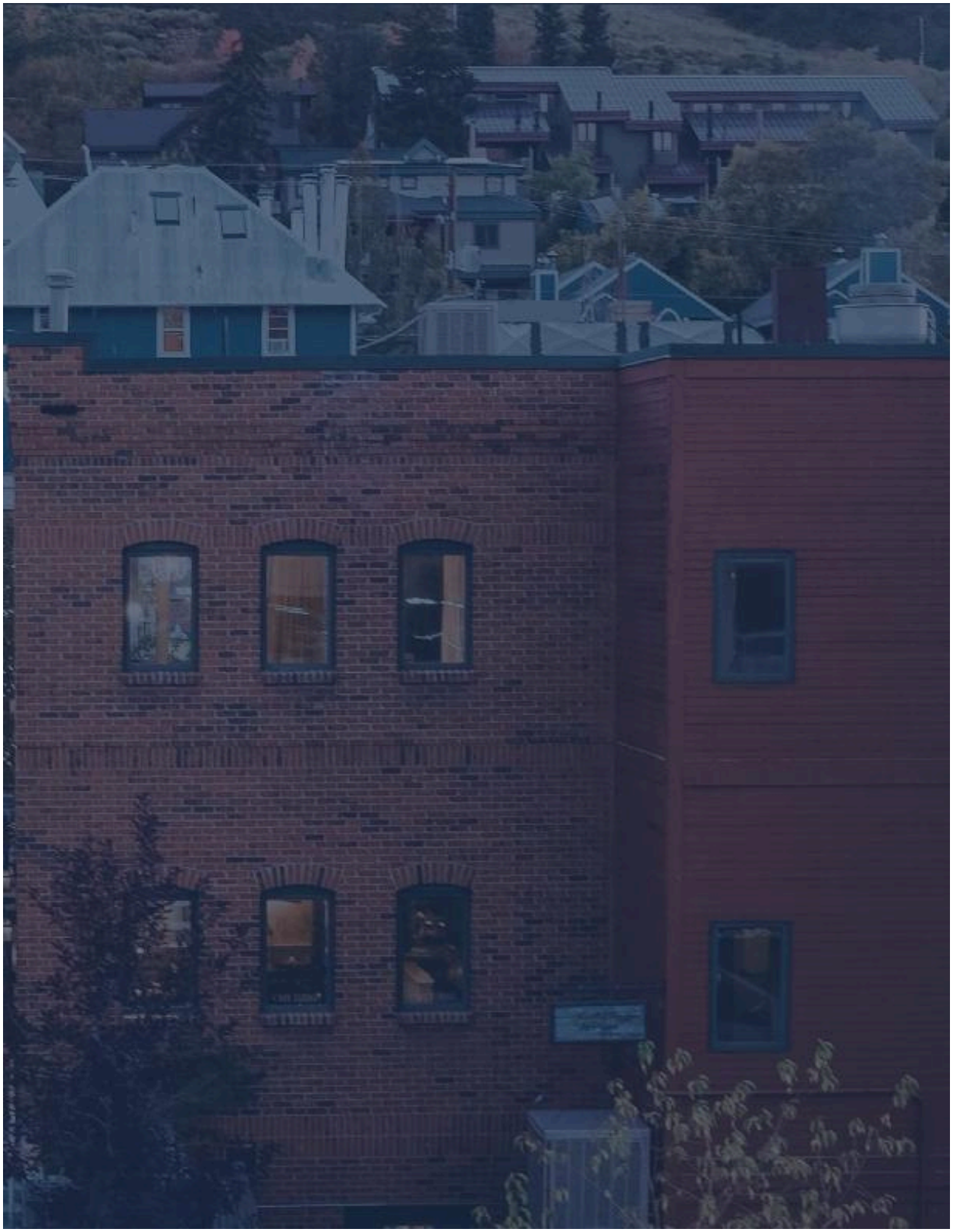
- Home area profile analysis
- Work area profile analysis
- Orem unemployment
- Orem travel time


MAG
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
Mountainland Association of Governments
2024-2029


MAG
Expert Resources. Enriching Lives.


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INTRODUCTION



ABOUT THE CEDS

This Comprehensive Economic Development Strategy is a document for the Mountainland Economic Development District (MEDD), updated every five years, that charts a course for our region's future. It allows hundreds of partners throughout the region to align around shared priorities. This alignment positions our region to leverage investment from local and federal governments. The strategy identifies regional needs, actions necessary to address those needs, and organizations with the ability to lead those actions.

HOW WILL THE CEDS BE USED?

Educate **-** The plan will be used to engage elected officials and business leaders to help amplify the vision and provide support through actions.

Invest **-** The strategy will be used to leverage greater investment in regional priorities by providing data and rationale that can be used to obtain grants to fund implementation and align federal and states' legislative agendas to collaboratively solicit funding.

Collaborate **-** The work will engage organizations and departments within jurisdictions to break down silos and leverage resources to the greatest extent possible to elevate one another's work.

ABOUT THE MEDD REGION

Utah's Montainland Region is a stunning and diverse geographic area located within the heart of the state. The region is characterized by its breathtaking landscapes, with majestic mountain ranges, fertile valleys, and pristine lakes that collectively create a picturesque tableau. The region is known for its natural beauty and recreational opportunities offering year-round activities and attractions that speak to those of all walks of life. Home to small towns and large urban centers alike, this region balances its rural charm with urban development, boasting a thriving economy and a strong educational presence at its core.

The region's rapid growth in population over the past years has seen these assets strengthen, accruing the nickname "The Silicon Slopes" for its leadership in technology and innovation. This growth has also challenged the region in many ways, including stretching infrastructure and transportation capacity, the housing market, and environmental resources. Rising to these challenges has and will continue to require a coordinated approach that reflects the diversity of life the region has to offer. The Mountainland Region of Utah seamlessly blends the natural splendor of the Rocky Mountains with the modern amenities of its urban centers, making it a truly unique and captivating part of the state, one that will only continue to grow and adapt.

STAKEHOLDER ENGAGEMENT

In developing this CEDS, the MEDD sought to engage a diverse set of stakeholders including elected officials, government staff, economic developers, business organizations, educational institutions, healthcare facilities, and other community partners, as well as the public. More than 250 individuals and organizations were engaged in the process. MEDD hosted workshops in each county for key stakeholders, conducted a public survey, held a strategy session with the CEDS Committee and regional leadership.

On-site workshops focused on developing a regional vision and identifying the region's strengths, weaknesses, opportunities, and threats. The public survey focused on gathering insights and perspectives on the four focus areas of the CEDS and their impact on residents and workers. The strategy sessions set goals and built a framework for success.

EQUITY

The region approaches the CEDS with a dedication to increased equity and inclusion. The EDA describes this as "a set of strategies and targeted approaches to serve populations that may have been underserved by traditional methods to economic development."

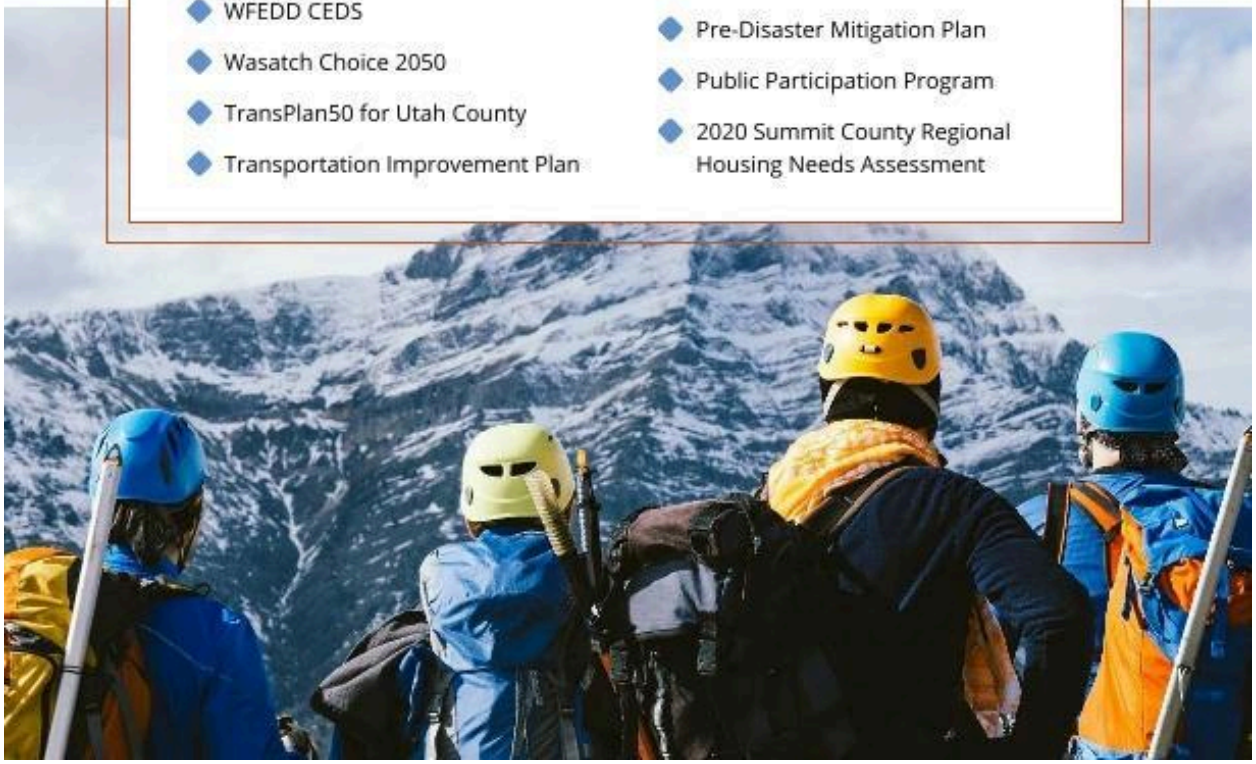
GUIDING DOCUMENTS AND ALIGNMENT

The state of Utah, surrounding regions, and localities within the MEDD region have provided a strong base from which to build the next steps for economic resiliency. In March 2023, the State of Utah released the Coordinated Action Plan for Economic Vision 2030. That plan seeks to align the CEDS of all seven (7) of Utah's regions. A set of "common core" data elements are included throughout the document. The MEDD region also included recommendations from the plan in strengthening local unified connections, identifying opportunities for potential collaboration with other regions, and prioritizing actions that align with the Unified Economic Opportunity Commission's Utah Economic Vision 2030.

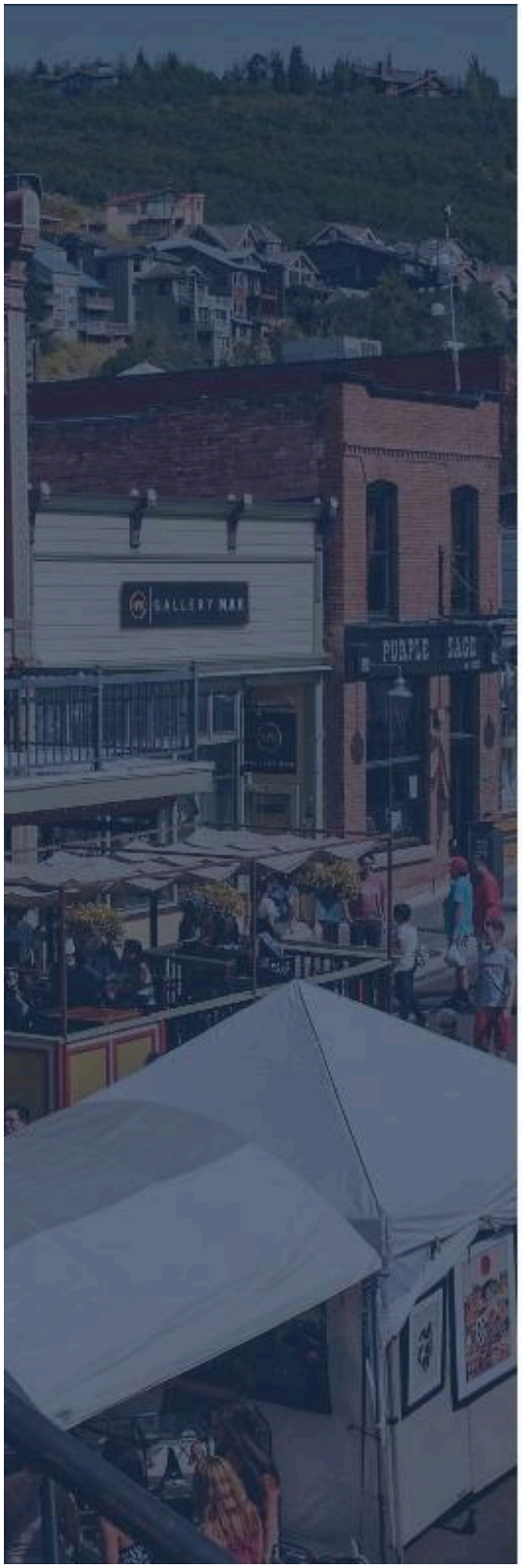
The symbol above is used to highlight Utah "common core" data elements.

In developing this CEDS, the MEDD region considers many relevant planning documents (linked throughout). These include but are not limited to:

- Utah Economic Vision 2030
- Coordinated Action Plan
- Envision Utah 2021
- 2018 MEDD CEDS Update
- COVID-19 Economic Recovery & Resiliency Plan
- WFEDD CEDS
- Wasatch Choice 2050
- TransPlan50 for Utah County
- Transportation Improvement Plan
- Corridor Preservation Program
- Station Area Planning Program
- Unified Transportation Plan
- Unified Planning Work Program
- State of Utah CEDS
- Regional Hazard Mitigation Plan
- Pre-Disaster Mitigation Plan
- Public Participation Program
- 2020 Summit County Regional Housing Needs Assessment




ECONOMIC RESILIENCY



OUR APPROACH

This CEDS is developed to strengthen the economic resiliency of the region. The MEDD has focused all strategies on resiliency and approaches integral to resiliency: equity and alinment.

The process requires the ability to anticipate risks, evaluate how those risks might impact underserved populationss and key economic assets, and build capacity to respond to shocks and disruptions that may arise due to:

01 ***Events or downturns in the national or global economies that impact consumer spending and demand for local goods and services;***

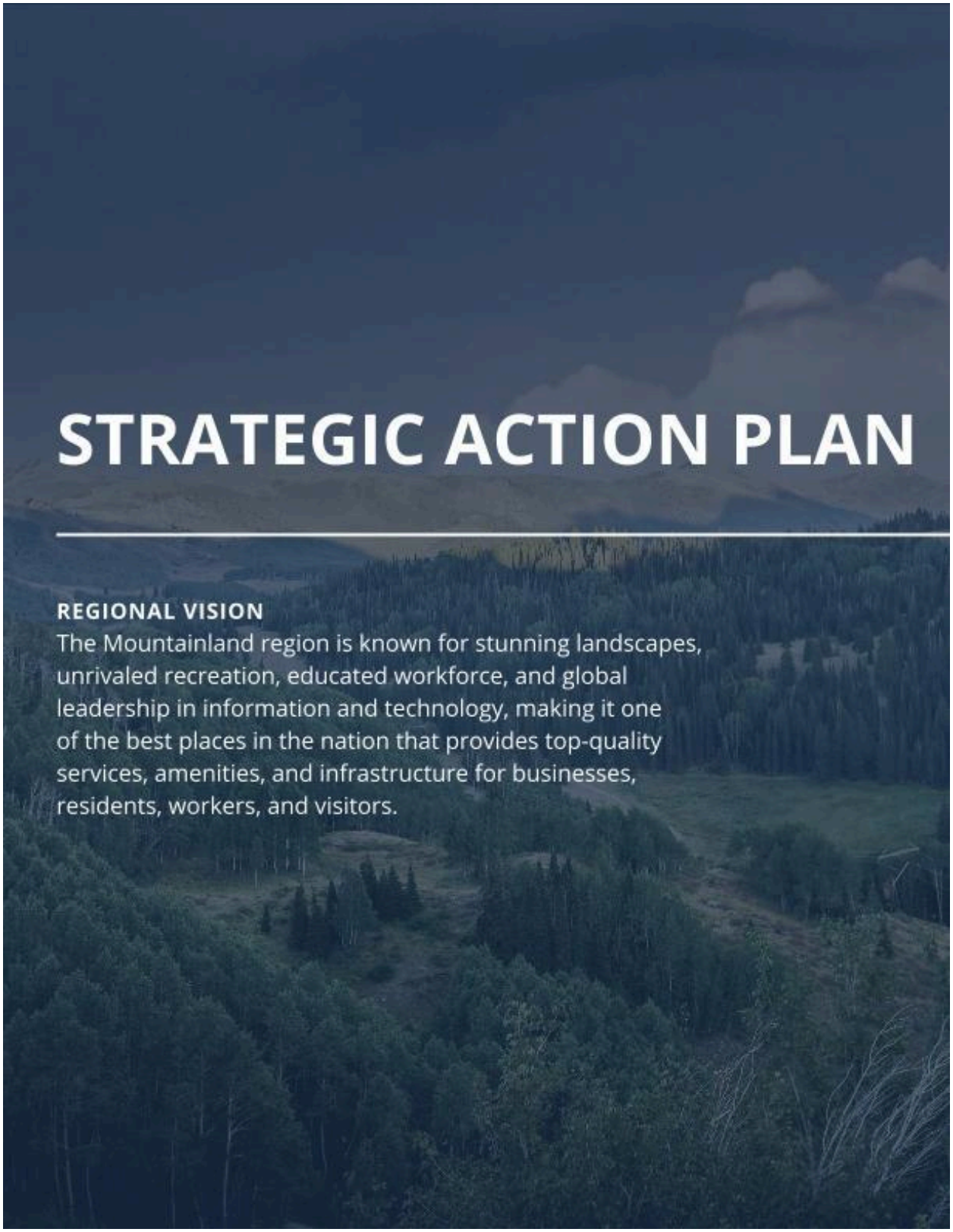
02 ***Downturns in a region's major industries; and/or***

03 ***Disasters (natural or man-made), climate change, loss of a major employer, or other external shock.***

This CEDS recognizes and adopts the resiliency strategies outlined in the COVID-19 Recovery and Resiliency Plan (2021) and the Pre-Disaster Mitigation Plan. The plans are maintained with regular updates.

The MEDD region is dedicated to increased equity and inclusion. Efforts were made to engage a diverse set of stakeholders to inform the process. Strategies and background cite how regional goals affect underserved populations and communities. The deliberate efforts this CEDS makes to incorporate more equitable approaches will provide a solid base for project planning to ensure more accessibility and economic stability.

Strengthened collaboration and information sharing are significant themes throughout the MEDD's goals and objectives as MAG positions itself as a convener and trusted information source for the region. The intentionality of alignment in planning and implementation aims to increase capacity, durability, and flexibility in the regional economy.


STRATEGIC ACTION PLAN
REGIONAL VISION
The Mountainland region is known for stunning landscapes, unrivaled recreation, educated workforce, and global leadership in information and technology, making it one of the best places in the nation that provides top-quality services, amenities, and infrastructure for businesses, residents, workers, and visitors.


TRANSPORTATION
NATURAL RESOURCES
LIVABILITY
REGIONAL COLLABORATION

TRANSPORTATION

THE PROBLEM: ***The MEDD region is experiencing complex transportation and infrastructure challenges intensified by accelerated population growth and business activity.***

IMPACT

Business: Businesses are reliant on supply chains and distribution of products. The traffic congestion and lack of connectivity across key areas of the region increase business costs and extend delivery times. Customers and other business visitors experience these transportation challenges when traveling.

Workforce: The distance between housing and jobs is a challenge. Both traffic congestion and lack of access to nearby public transit options increase commute times. Some workers may not be able to drive, while others find it difficult to own, maintain, and provide fuel for vehicles. Workers opting for other forms of transportation (such as biking or walking) may often find safety risks with the swell of vehicle traffic and lack of adequate sidewalks and bike lanes.

Environment: Regional growth has increased traffic significantly. With more vehicles traveling, air pollution is a growing concern.

APPROACH

Resiliency: To strengthen long-term economic resiliency, MEDD aims to assist counties and cities in the development of efficient and safe transportation as well as opportunities that do not require a commute outside of the community.

Equity: To improve access and alleviate demand on existing infrastructure, MEDD will facilitate the development of strategic partnerships to identify gaps in service, offer more transportation choices, and encourage closer proximity between housing and public multimodal transit. This intentionality aims to increase equity across localities, populations, and income levels.

Alignment: Regional stakeholders agreed to prioritize a collaborative approach to addressing these challenges. This goal considers and builds upon current transportation plans and progress. There is potential for further alignment within the region and with the Wasatch Front Economic Development District.



Explore Data | SWOT Analysis | Engagements

#1 – Provide a safe, connected, and accessible regional transportation network to meet current and future needs.

1.1: Expand public transit infrastructure, access, and awareness.

- **1.1.1:** Create a concise, data-driven, and easy-to-understand campaign about how public transit positively impacts health, congestion, quality of life, air pollution, and resource management.
- **1.1.2:** Plan and prioritize development that increases proximity between public transportation and housing development.
- **1.1.3:** Increase regional investment in public transit to speed up the development of new infrastructure and close the gap in our current needs and anticipated demand.
- **1.1.4:** Explore investment and incentive options to increase public transit ridership and aid first/last mile transportation.

1.2: Align regional efforts to improve and execute transportation plans that minimize congestion, increase connectivity, and anticipate future trends.

- **1.2.1:** Develop an advocacy plan to garner support with the UTA, local, county, and state governments for updated transit policies, transportation plan adoption, and coordination.
- **1.2.2:** Evaluate current transportation plans and increase collaboration between the region, UDOT/UTA, and experts to address challenges and efficiently move forward on studies and projects.
- **1.2.3:** Increase regional investment and planning for high-quality, active transit facilities with consistent design standards across jurisdictions.
- **1.2.4:** Engage with workforce, especially commuters, to ensure their needs are being met.

The evaluation framework outlines timelines, metrics, and resources to aid the MEDD in achieving the goals described in this strategy

See Evaulation Framework

NATURAL RESOURCES

THE PROBLEM: ***Accelerated population and tourism growth is straining the region's natural resources and water supply, increasing air and water pollution, and threatening the availability of open spaces.***

IMPACT

Business: Pollution has a significant impact on businesses, especially in the tourism and agriculture industries. Pollution affects natural and recreational attractions and can result in lower crop yields. The ever-increasing economic and population boom in the region threatens the availability of land as well, with developers and businesses searching for suitable property for operations. Diminished water quality and/or supply have negative effects on businesses, especially those businesses that are dependent upon water to produce goods. Pollution created by or present in businesses can worsen conditions and put businesses at risk of litigation.

Workforce: Employees and students breathing polluted air are more likely to get sick and experience reduced cognitive performance. This is especially impactful for children, which may further strain employee attendance and stress. The increase in healthcare spending affects both employees and businesses. The recreational assets, open spaces, and overall quality of life that serve to attract and retain workers are in danger of diminishing due to the region's rapid growth.

Environment: Population growth and increased development has led to habitat loss, decreased air and water quality, fragmentation, and the depletion of water resources. Polluted air, water, and land cause significant damage to plants and wildlife. Climate change and development near environmentally sensitive areas may increase the likelihood of natural disasters like flooding, landslides, avalanches, and wildfires, potentially devastating nearby communities.

APPROACH

Resiliency: The Mountainland Association of Governments maintains a hazard mitigation plan to reduce or prevent damage caused by natural disasters and to minimize conditions which would have an undesirable impact on the region's citizens, economy, and environment. This CEDS will build upon that plan with increased focus on the balance between development and the environment. Sustainable tourism is also a growing priority in the region to build resiliency.

Equity:
Marginalized groups are more likely to be affected by climate change, pollution, and degradation of natural resources. By protecting natural resources for all residents, MEDD protects the health, safety, and quality of life for at-risk groups.

Alignment: This goal seeks to align the region's hazard mitigation plan with area strategies and initiatives for green energy, environmental protection, and sustainable tourism. MEDD also seeks to work with Wasatch Front Economic Development District to build cooperative air and water quality improvement strategies.



#2 – Balance regional growth, tourism development, and the protection of natural resources.

2.1: Use current data, best practices, and planning to catalyze action among regional partners.

- **2.1.1:** Engage local universities and experts to complete a study on air and water pollution and the impacts of regional growth on the environment.
- **2.1.2:** Convene regional partners to review and plan action based on data, best practices, and the hazard mitigation plan.

2.2: Expand sustainable tourism initiatives.

- **2.2.1:** Convene regional tourism partners to catalyze sustainable tourism, tourism development, and tourism diversification while ensuring actions complement local culture and needs
- **2.2.2:** Work with appropriate agencies and entities on recreation management plans
- **2.2.3:** Strengthen support for tourism-related business resiliency and development.

2.3: Advocate for local governments to manage development with incentives, updated zoning and building codes, and code enforcement.

- **2.3.1:** Compile and distribute information to stakeholders regarding potential incentives for the use of green energy sources and alternatives to vehicle transportation.
- **2.3.2:** Provide stakeholders with best practices to prioritize open spaces through incentives and green space requirements.
- **2.3.3:** Promote the adoption and enforcement of codes that reduce pollution and limit development near environmentally sensitive or protected areas.

The evaluation framework outlines timelines, metrics, and resources to aid the MEDD in achieving the goals described in this strategy

See Evaulation Framework

LIVABILITY

THE PROBLEM: ***Changing dynamics in the region have created significant challenges for equitable access to and affordability of housing, education, childcare, and healthcare. These challenges are being compounded by the increased costs that local governments face in providing services.***

IMPACT

Business: Issues related to housing, education, childcare, and healthcare are creating a ripple effect on businesses as it relates to workforce attraction and retention. Beyond workforce, these issues are also impacting consumers.

Workforce: Workers are finding it increasingly difficult to find affordable housing near their jobs. Inaccessible and cost-prohibitive childcare is constraining worker availability. Educational pathways are not always well-aligned with current and future market needs, and the price of education continues to rise. The accelerated population growth in the region also strains worker access to healthcare.

APPROACH

Resiliency: Planning for the future of housing, education, childcare, and healthcare in the MEDD region is critical for long-term resiliency. As rapid growth continues, the region needs to take swift and forward-looking action.

Equity: MEDD aims to increase equitable access and affordability of housing, education, childcare, and healthcare.

Alignment: Affordable housing challenges are not unique to the MEDD region. In general, it is a national trend, but one that is heightened in the MEDD and surrounding regions. MEDD seeks to align efforts through collaboration.



#3 – Improve quality of life to support the region's workforce and communities.

3.1: Coordinate regional efforts to address housing challenges.

- **3.1.1:** Provide resources to cities and counties for the completion of housing studies and strategic plans.
- **3.1.2:** Organize stakeholder planning sessions to address housing issues and share data, best practices, and other relevant housing-related information.
- **3.1.3:** Advocate for legislation that would allow local government the option to use a wider range of housing tools.
- **3.1.4:** Empower local governments to strategically address zoning concerns and prioritize residential development sites near amenities and transportation hubs.

3.2: Increase equitable access and affordability of quality education and childcare that meets the needs of students, families, and businesses.

- **3.2.1:** Increase regional investment in early childhood education, K-12 schools, and childcare availability, access, and affordability.
- **3.2.2:** Expand and support collaboration between educational institutions, local governments, and businesses to align pathways with market needs and retain students in regional occupations.

3.3: Assess and address barriers to health and safety of residents, workers, and visitors.

- **3.3.1:** Increase awareness of existing health and wellness program
- **3.3.2:** Create a regional asset map of healthcare and emergency service locations, capacity, and services.
- **3.3.3:** Evaluate HPSA score and identify most common needs such as urgent care, pharmacies, mental health care, and substance abuse resources.
- **3.3.4:** Increase regional participation in training for needed healthcare and emergency services occupations.

The evaluation framework outlines timelines, metrics, and resources to aid the MEDD in achieving the goals described in this strategy

See Evaulation Framework

REGIONAL COLLABORATION

THE PROBLEM: ***Stakeholders stressed the importance of addressing the perceived lack of collaboration and consensus on vision.***

IMPACT

Business: In the previous sections, we have outlined each focus area's impact on business. Lack of coordinated regional efforts to expand economic diversification, build on regional industry clusters, or increase global competitiveness.

Workforce: Many employees travel across jurisdictions to work. When counties and municipalities aren't coordinating, the region struggles to serve a commuting workforce.

Environment: Stakeholders attributed this lack of collaboration to protective mentalities, siloed information and initiatives, political divisions, and a disconnect in values among local governments and residents. This perceived dissonance creates an environment in which problem-solving and progress on a regional level may be inhibited, compounding existing challenges.

APPROACH

Resiliency: Collaboration enhances the ability to respond to changes and disruptions by increasing agility and access to support and resources.

Equity: MEDD's approach to this goal will provide a platform for a diverse group of stakeholders to engage in regional collaboration.

Alignment: MEDD seeks to solidify a vision and effectively support regional coordination. Alignment, collaboration, and communication will be improved across the three counties as well as with state, federal, and other agencies, including the Wasatch Front Economic Development District.



#4 – Accelerate problem-solving and build economic resiliency through increased collaboration.

4.1: Improve coordination between regional stakeholders, surrounding regions, and the state.

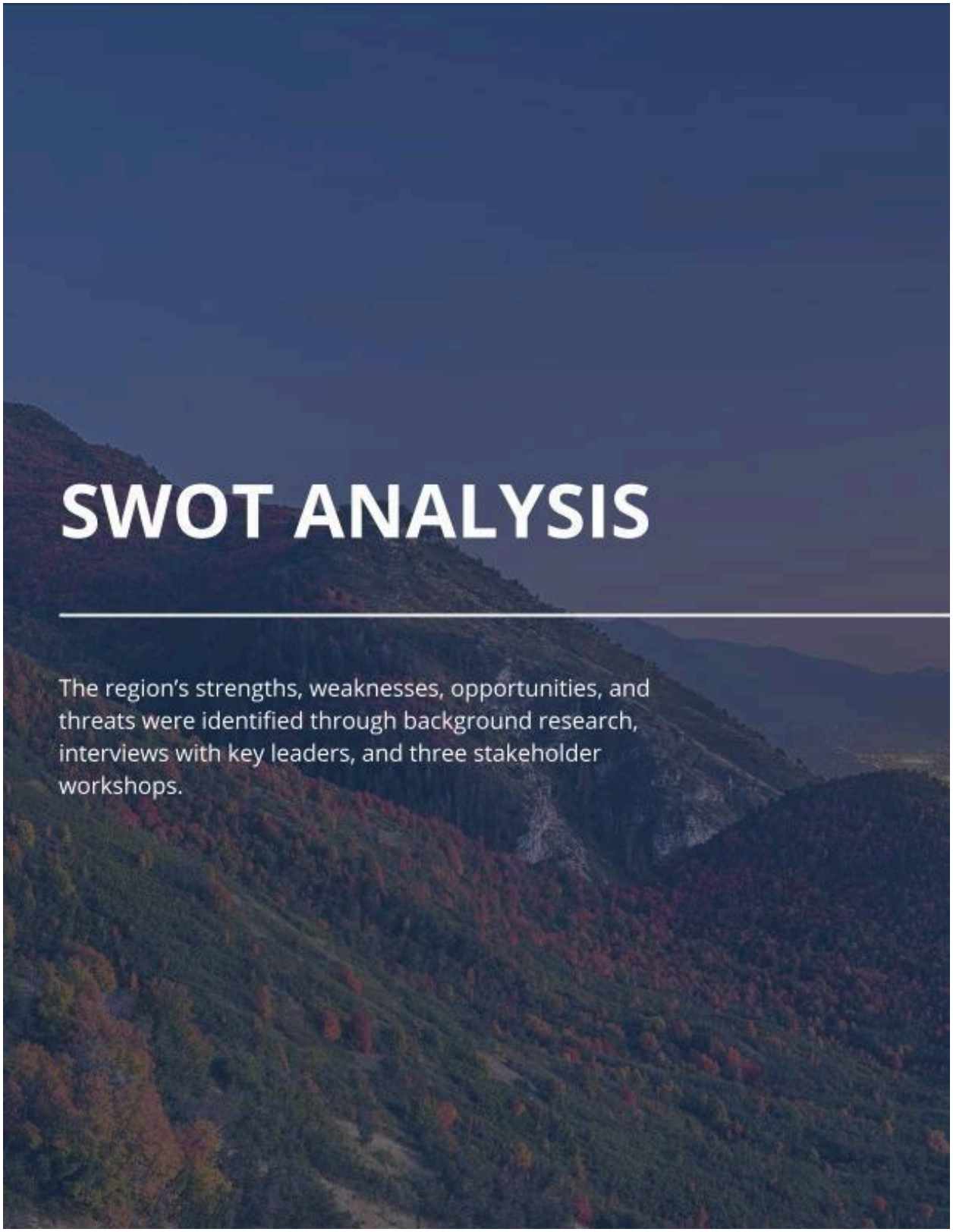
- **4.1.1:** Increase communication and host quarterly meetings to discuss and coordinate approaches to priority issues and advance the achievement of the goals outlined in this CEDS.
- **4.1.2:** Partner with regional economic development organizations and other applicable stakeholders to determine and address gaps in data and coordinate data sharing.
- **4.1.3:** Identify funding sources for strategic action related to regional priorities.
- **4.1.4:** Work with neighboring regions and the state to identify and overcome legislative and process barriers to progress.

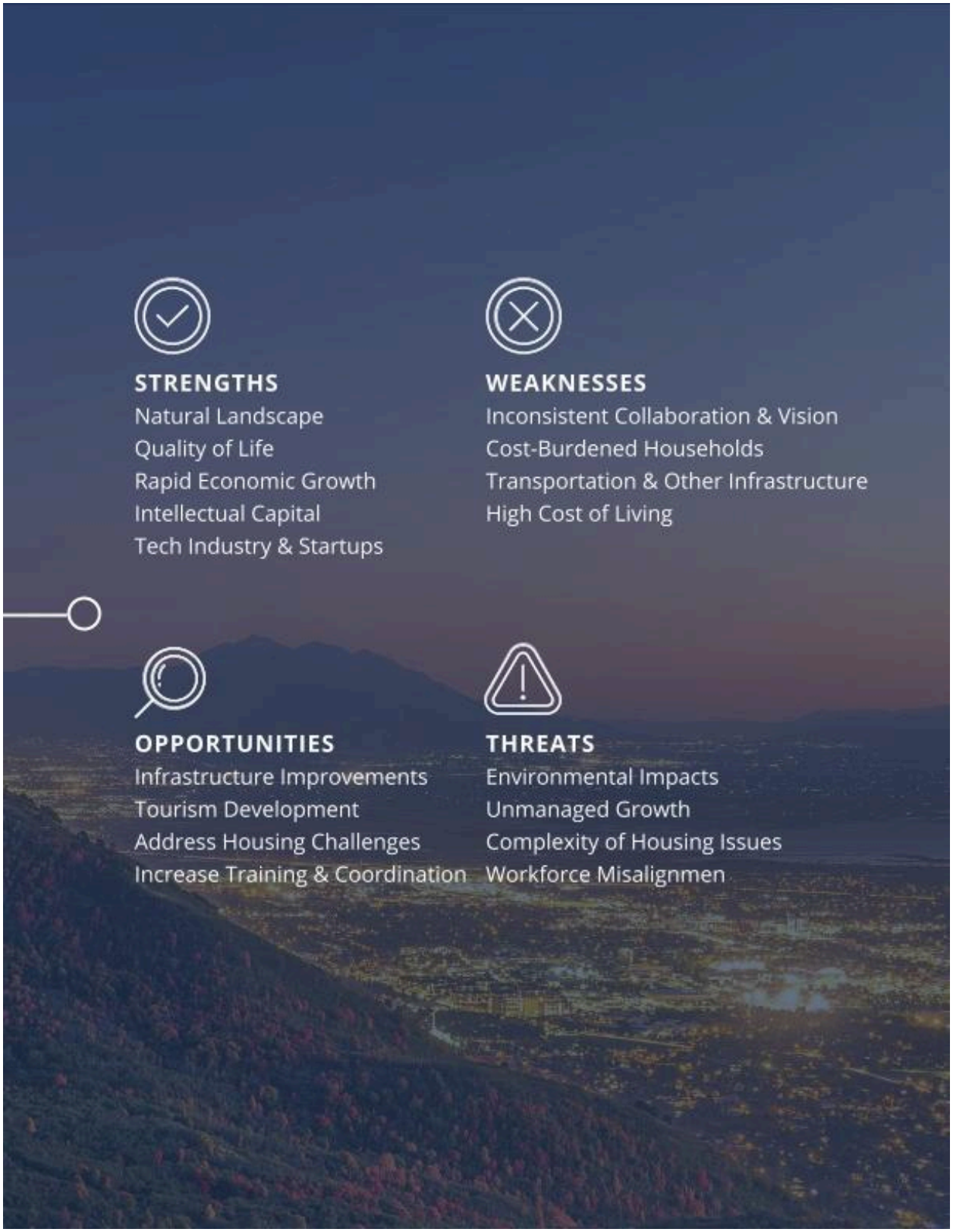
4.2: Advance efforts to further diversify the regional economy and increase competitiveness.

- **4.2.1:** Continue to foster an effective entrepreneurship ecosystem with increased focus on diversity, inclusion, and access to business support programs.
- **4.2.2:** Work with regional universities and other innovation partners to provide technology transfer and commercialization resources.

The evaluation framework outlines timelines, metrics, and resources to aid the MEDD in achieving the goals described in this strategy

See Evaulation Framework


SWOT ANALYSIS
The region's strengths, weaknesses, opportunities, and threats were identified through background research, interviews with key leaders, and three stakeholder workshops.


STRENGTHS
Natural Landscape
Quality of Life
Rapid Economic Growth
Intellectual Capital
Tech Industry & Startups
WEAKNESSES
Inconsistent Collaboration & Vision
Cost-Burdened Households
Transportation & Other Infrastructure
High Cost of Living
OPPORTUNITIES
Infrastructure Improvements
Tourism Development
Address Housing Challenges
Increase Training & Coordination
THREATS
Environmental Impacts
Unmanaged Growth
Complexity of Housing Issues
Workforce Misalignmen

STRENGTHS

NATURAL LANDSCAPE

The area's landscape, with its towering peaks and lush valleys, is by far the most recognized strength of the region. These natural spaces are magnetic for both tourists and residents. Various seasonal attractions, recreational activities, and family-friendly amenities are a clear fit to leverage natural assets for economic success.

QUALITY OF LIFE

Overall quality of life is another strength of the region. It is a desirable location for people to live or relocate. The region has a good mix of rural and urban areas, amenities, and economic opportunities. Stakeholders view the area as a safe place where citizens lead healthy and active lifestyles.

RAPID ECONOMIC GROWTH

In terms of both job growth and GRP, the region is booming, with strong indicators for continued growth into the future. The region has also seen increased diversification of its industry mix.

INTELLECTUAL CAPITAL

The region boasts a largely young and educated workforce. Area educational institutions are an obvious contributor to this strength. The growth and retention of tech industry businesses and startups may be influencing this trend, as well as benefiting from it. Another unique strength related to intellectual capital is the extensive language diversity among the region's population. With 130 languages spoken and approximately 40% of the population speaking a second language, the region is primed to do business in international markets.

TECH INDUSTRY & STARTUPS

The tech industry has significant traction in the MEDD. With strong tech-based knowledge occupation clusters and employment share, as well as demonstrated success for entrepreneurs, the region presents an attractive opportunity for tech startups.

WEAKNESSES

INCONSISTENT VISION & LACK OF COLLABORATION

A strongly perceived lack of consensus exists throughout the region, which stakeholders attribute in part to protective mentalities, siloed environments, and political divisions. When asked to rank weaknesses, stakeholders overwhelmingly listed inconsistent vision and lack of collaboration in their top four (4), referencing a lack of coordination across jurisdictions. Many stakeholders pointed to contributing factors such as a lack of awareness among elected officials and a disconnect in values among counties and residents.

COST-BURDENED HOUSEHOLDS

The MEDD region has a significant share of cost-burdened households. This means that more than 30% of household income is being used for housing (rent, mortgage, utilities). A quarter of home-owners with a mortgage are considered cost-burdened. That number rises to nearly half of renters, with 1 in 5 renters considered "extremely cost burdened", spending 50% or more of their income on housing costs alone. Stakeholders note a serious need for housing that workers and residents can afford.

TRANSPORTATION & OTHER INFRASTRUCTURE

Stakeholders report a lack of adequate investment in transportation, with a particular weakness of public transit. There is a lack of connectivity across key areas of the region, compounded by other challenges such as traffic congestion. The MEDD region appears to be strong in broadband access but lacking updates to water, sewer, and power infrastructure.

HIGH COST OF LIVING

Stakeholders report a rising cost of living disproportional to wages. Contributing factors were noted such as the affordability and accessibility of housing and childcare.

OPPORTUNITIES

INFRASTRUCTURE IMPROVEMENTS

Transportation improvements are a top priority within the region. The issue has become a clear necessity to support and sustain the mobilization of workforce, supply chains, and consumers. In particular, the region has an opportunity to strengthen and expand public transit options.

ADDRESS HOUSING CHALLENGES

If the MEDD region takes measures to strategically address current housing challenges, they could remove barriers and better meet the needs of not only low-income residents and seniors, but a wide cross-section of workers. Opportunities exist to provide education, strengthen collaboration, smooth processes, and increase the housing supply.

TOURISM DEVELOPMENT

The region has a significant opportunity to create positive economic impact through tourism development. To draw tourists, stakeholders expressed their desire to see the region become a destination for recreation and arts with everything from catalyzing professional sports to theatre, filmmakers, and digital media groups. Tourism-related businesses are integral to this effort. Building upon current assets, the MEDD region is already planning to expand tourism infrastructure, downtown development, trail systems, and open spaces. Utah is confirmed as the 2034 Winter Olympics preferred host. This will be a significant opportunity for tourism in all three counties in the region. The preservation and protection of natural resources is critical to support this opportunity.

INCREASE TRAINING AND COORDINATION

Regional alignment could be improved across the three counties and with state, federal, and other agencies. The MEDD region has the opportunity to solidify a vision, strengthen communications, and organize efforts to pursue funding for outlined priorities. In order to effectively support regional coordination, the MEDD could expand access to training for economic development organizations, government officials, and adjacent stakeholders.

THREATS

ENVIRONMENTAL IMPACTS

The MEDD region is at risk of natural disasters (wildfires, drought, storms, and more). The natural resources that set the region apart could be affected by natural disasters, but also exist under the threat of overuse, pollution, and poor management. Stakeholders were particularly concerned with water supply and quality, air quality, and overuse of natural recreational assets.

UNMANAGED GROWTH

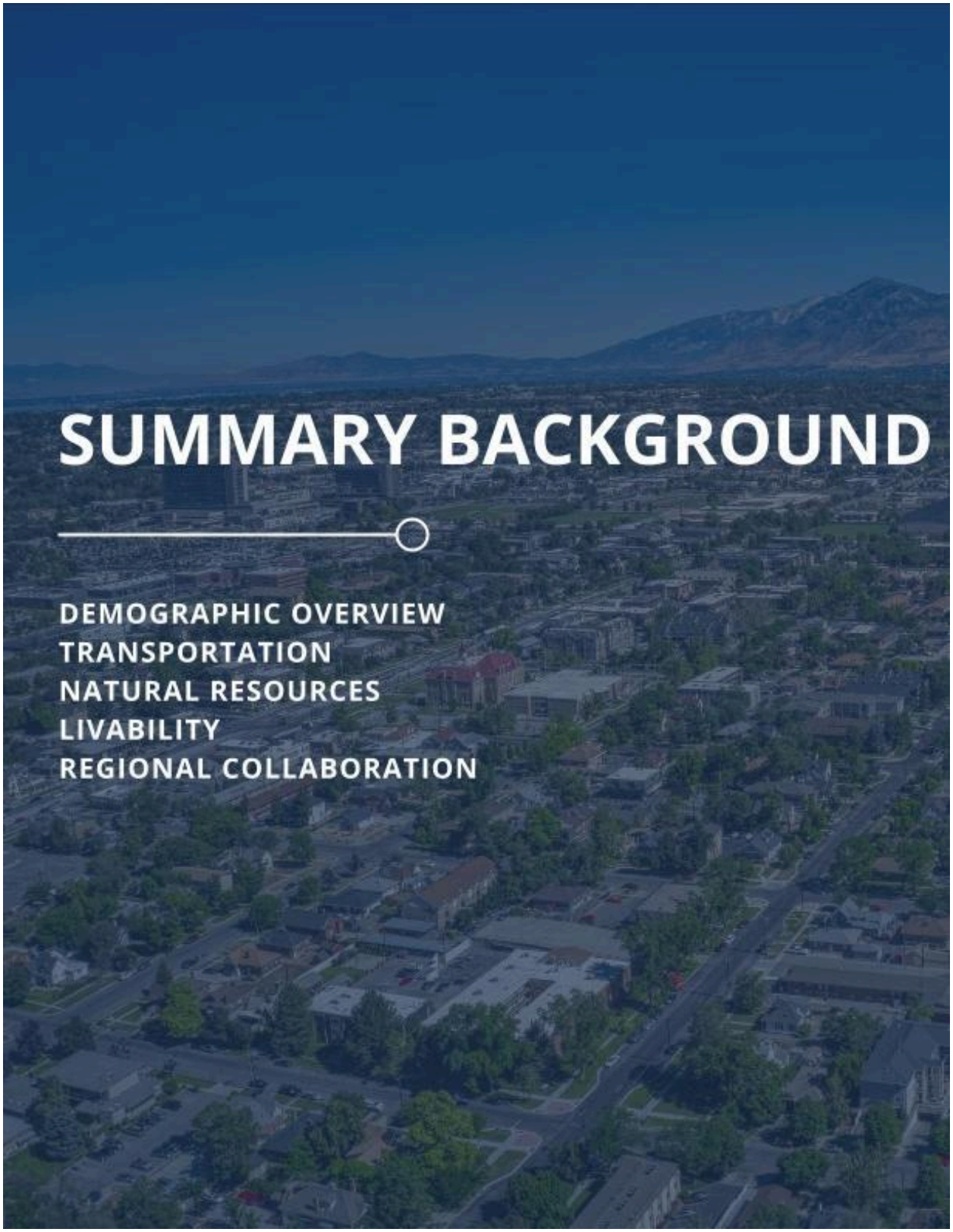
Regional growth is outpacing and straining transportation, infrastructure, municipal services, housing, and more. Stakeholders report that some public officials are resistant to growth and lack education on managing growth. Government entities throughout the region may not adapt and make necessary adjustments to account for the rapid economic and population growth that is expected to continue.

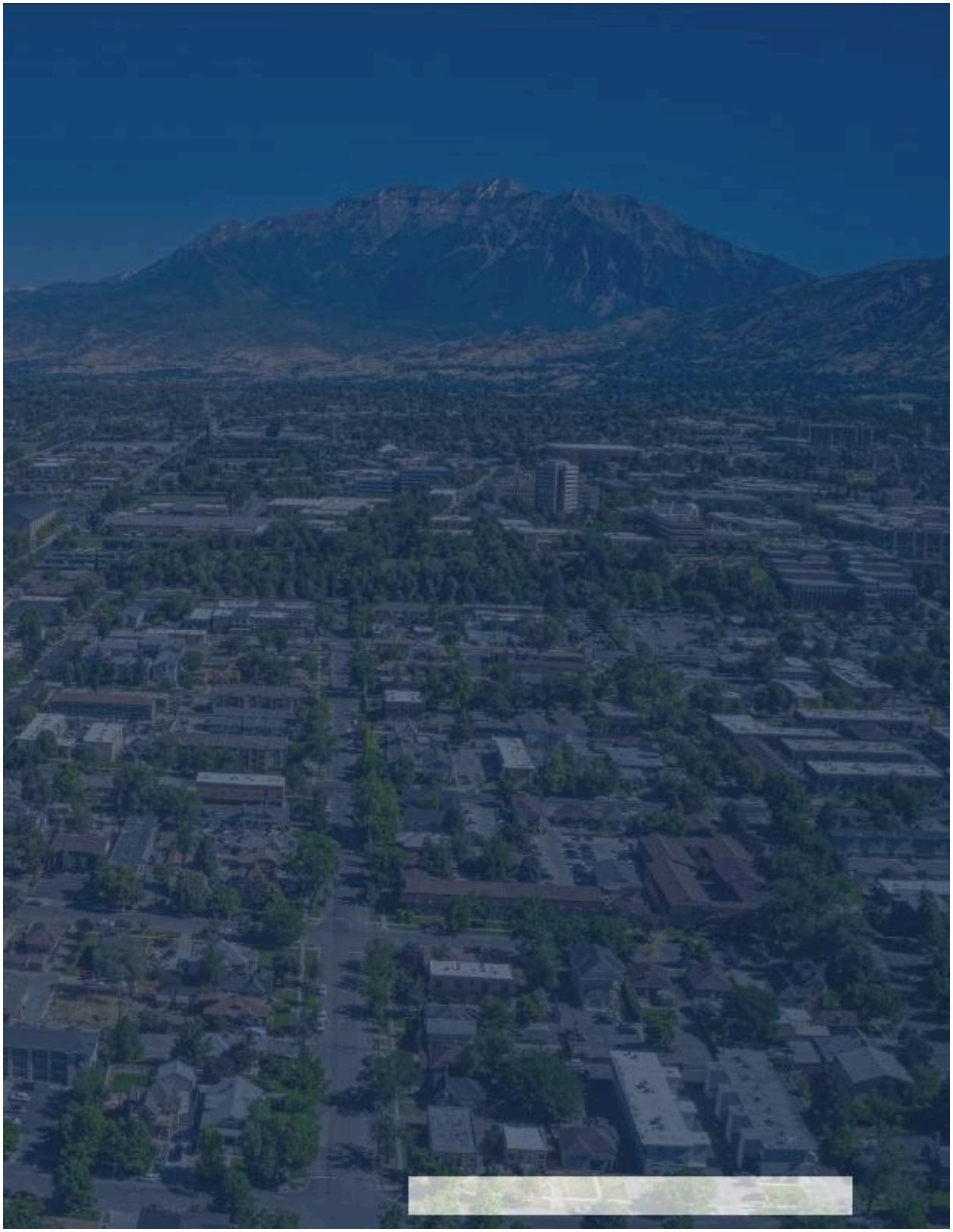
COMPLEXITY OF HOUSING ISSUES

The complexity of housing issues can be daunting. A variety of market factors are at play, many of which are beyond the control of regional leaders. While other actions could be taken to curb the crisis, stakeholders expressed serious concerns that some MEDD communities are unwilling to tackle housing challenges. If the housing market continues to strain supply and affordability and no action is taken, the region could face great economic hardship.

WORKFORCE MISALIGNMENT

The workforce in the region is young and educated, but the available job types and employer expectations may not align with the current skills and expectations of workers. Stakeholders report that students (including Exchange Visitors with J-1 visas) are leaving the area post-graduation. A geographic mismatch is also at play here, with workers and jobs in different locations, worsened by barriers such as accessing and affording transportation, housing, and/or childcare.


SUMMARY BACKGROUND
DEMOGRAPHIC OVERVIEW
TRANSPORTATION
NATURAL RESOURCES
LIVABILITY
REGIONAL COLLABORATION

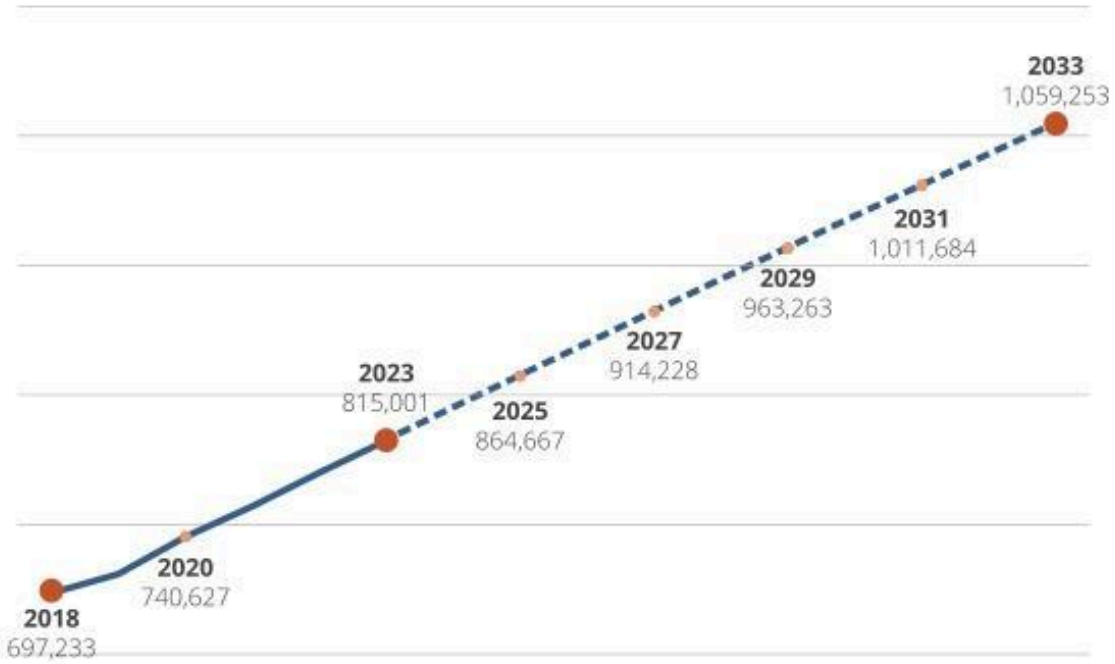


DEMOGRAPHIC OVERVIEW

POPULATION

Exhibit 1: MEDD Population Projections: 2018 – 2033

Source: Lightcast Economic Overview Report 2023

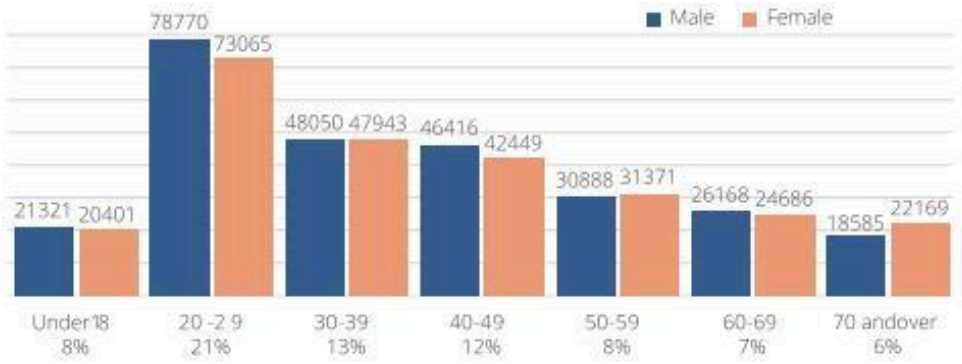


The MEDD region of Utah has seen rapid growth over the past five years and is forecasted to see continued steady growth at that same rate over the next 10. All development strategies for the region should take this growth into consideration, ensuring that the region experiences managed and healthy growth that supports both current and future residents.

Exhibit 2 displays the age and gender breakdown of the MEDD. It displays the number of males and females in each age group, as well as the percentage of the total population each age group makes up.

Exhibit 2: MEDD Population Breakdown by Age and Gender

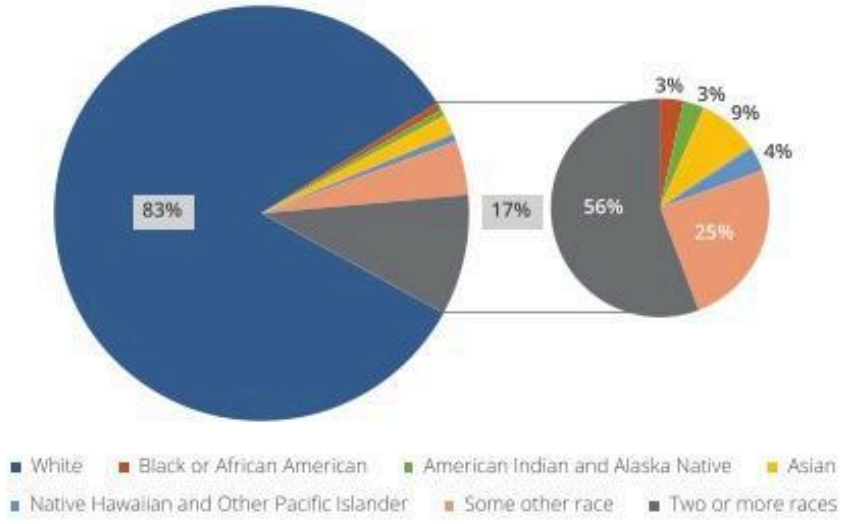
Source: ACS S0101 Age and Sex



RACE AND ETHNICITY

According to an analysis run by EMSI Lightcast, racial diversity is low in the region. The national average for an area this size is 311,003 racially diverse people, while the region only has 121,725 racially diverse individuals. Ensuring that communities are welcoming to and inclusive of residents of all racial and ethnic backgrounds is an important consideration in terms of quality of life, but may also lead to more vibrant, innovative, and entrepreneurial communities.[1]

Exhibit 3: Racial Breakdown of Total Regional Population

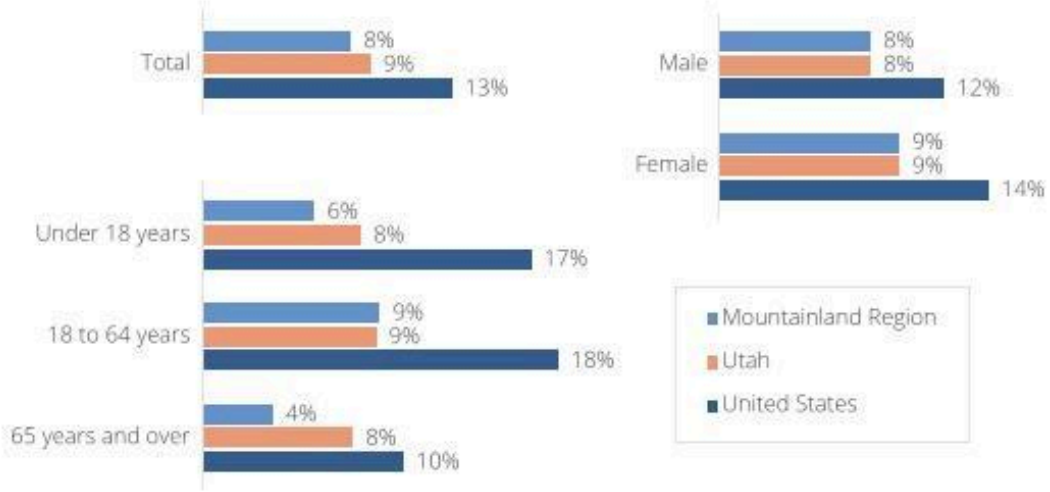


1 https://www.nber.org/papers/w17640

POVERTY

Exhibit 5: 2021 MEDD Percent of Population Reported Falling Below Poverty Line in the Past 12 Months

Source :2021 ACS 5-Year Estimates S1901 Income in the Past 12 Months



INCOME AND WAGES

Exhibit 6: Percent change in Median Household Income by County

Source: American Community Survey INCOME IN THE PAST 12 MONTHS (IN 2021/2016 INFLATION-ADJUSTED DOLLARS) 5-Year Estimates

	2021	2016	% Change
Summit County	$116,351	$91,470	27.2%
Wasatch County	$94,044	$71,337	31.8%
Utah County	$82,893	$64,321	28.9%

Exhibit 7: MEDD Population by Reported Annual Wages, 2022

Source: American Community Survey

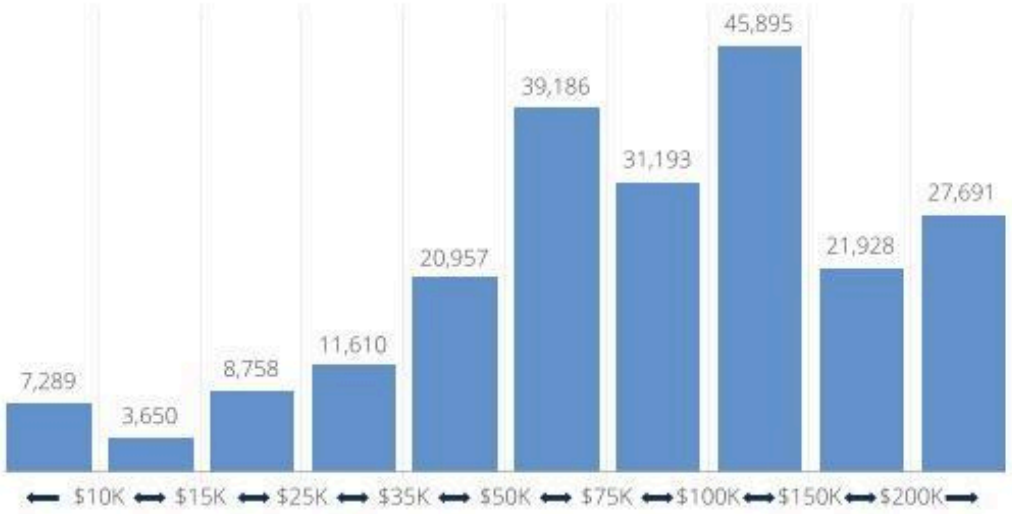


Exhibit 8: Living Wage Calculations

Source: MIT Living Wage Calculation, 2023

	1 Adult			2 Adults (both working)		
Children	0	1	2	0	1	2
Summit County	$18.83	$38.83	$50.04	$14.29	$21.52	$27.17
Wasatch County	$17.22	$36.77	$47.35	$13.68	$20.49	$25.92
Utah County	$17.73	$35.60	$46.03	$13.71	$19.90	$25.30

These living wage calculations are based on the hourly income for a full-time worker in the given region, or 2,080 hours annually. The hourly rate is calculated per person, meaning in a household with 2 adults who are both working, the two incomes would each need to be earning the wage displayed. According to the American Community Survey's 2021 5-year estimates, the average household size in the Mountainland region range from 3.5 in Summit county, 3.7 in Wasatch County, and 3.9 in Utah County. This suggests that the average household requires between $40 and $50 an hour, or $83,200 and $104,000 annually to sustain a living wage, with single parents the most heavily burdened.

TRANSPORTATION

HIGHWAYS AND INTERSTATES

Three Interstates run through the Mountainland region, with I 15 running through Utah County, and I 80/84 running through Summit County.

Exhibit 9: Interstates by County

	Summit	Wasatch	Utah
US Highways	US 189	US 6, US 40, US 189	US 89, US 6
State Roads	SR 32, SR 35, SR 65, SR 150, SR 224, SR 248, SR 319	SR 32, SR 35, SR 113, SR 224, (SR 150)	SR 52, SR 68, SR 73, SR 74, SR 75, SR 77, SR 92, SR 96, SR 114, SR 115, SR 145, SR 146,

Exhibit 10: Map of Utah Interstates

Source: utah.com/maps-brochures/maps-state-highway-map



Utah County's Transportation Plan TransPlan50 has developed a long-range regional transportation focused on urban Utah County. It includes projects for a coordinated system of roadway, transit, and active transportation facilities through the year 2050. The plan has been updated regularly and has been expanded through the Regional Transportation Plan to reflect progress, population growth, and changing environmental factors and priorities of the Mountainland Region, with 4 primary goals: enhanced roadway grid network; expanded freeways, expressways, and arterials; robust regional transit system; and connected active transportation network.

MAG also oversees multiple transportation planning and support programs. This includes the Station Area Planning Program, which is responsible for certifying city-led Station Area Plans (SAP), which are mandated for cities with FrontRunner, TRAX/Streetcar, or BRT stations. Other programs include the Corridor Preservation Program and the a number of projects under the Transportation Improvement Program, a 5-year funded construction program that MAG provides about 300 million of the 1.7 billion dollar funding.

RAILROADS

Utah County is served by the Union Pacific Railroad, which operates freight rail services throughout the county. The rail line is part of a larger network that connects various regions within Utah and across the United States. This key transportation asset plays a crucial role in transporting goods and materials across the country, and its operations in Utah County support local industries and businesses. The rail line facilitates the transportation of commodities such as agricultural products, raw materials, finished goods, and more.

Exhibit 11: Map of Union Pacific Rail Service Nationwide

Source: Union Pacific

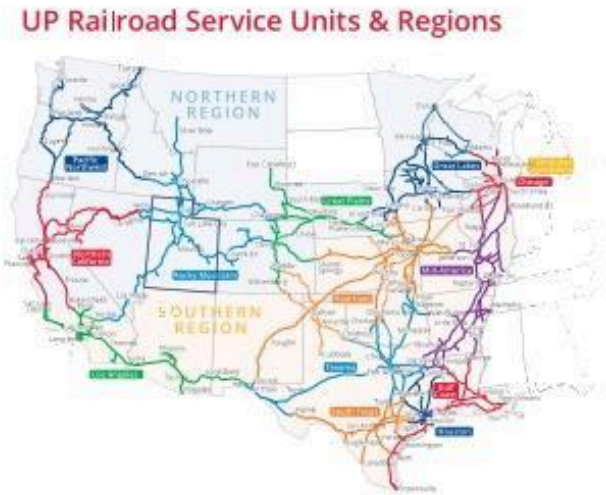


Exhibit 12: Map of Utah Railroads

Source: SGID Open Data Downloads and API





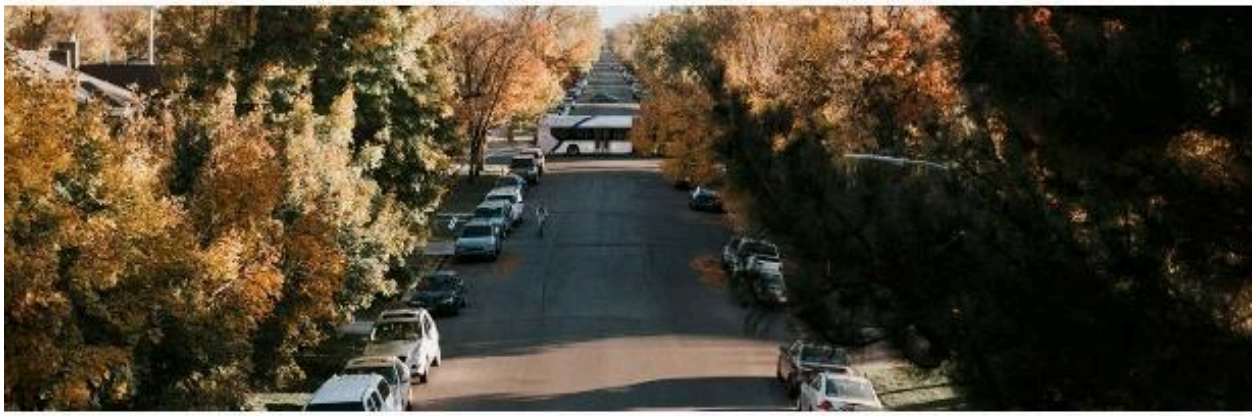
AIRPORTS

Utah County is home to the Provo Municipal Airport (PVU) which serves a catchment area that extends far beyond the Mountainland region. PVU is Utah's second busiest commercial airport and offers airline service that connects passengers to destinations nationwide. The airport has two runways; its primary runway is 8,600 feet long and its secondary runway is 6,600 feet long. The airport has a Fixed-Based Operator (FBO) that provides services to private, corporate, and general aviation aircraft, with offerings including fueling, hangar space, and maintenance facilities. In 2022 PVU opened a fourth passenger gate in its 70,000 square foot passenger terminal, allowing the airport to be served by two commercial service carriers, Allegiant Air and Breeze Airways. With its recent growth, PVU now offers nonstop service to 12 U.S. destinations and sees more than 420,000 passenger enplanements. As of 2023, PVU commercial service offerings link the Mountainland region to these twelve cities:

- Austin
- Chicago
- Houston
- Las Vegas
- Nashville
- Orange County
- Orlando
- Phoenix (PHX & AZA)
- Portland
- San Diego
- San Francisco

Additionally, Wasatch County is served by the Heber Valley Airport (Russ McDonald Field) (36U). This general aviation airport accommodates private and charter aircraft and is primarily used for recreational flying and private aviation activities. It is important to note, the greater region is well-served by Salt Lake City International Airport (SLC), which is approximately a 30–40-minute drive from Summit County. SLC is the largest airport in Utah and offers a wide range of domestic and international flights. The airport features three terminals and serves as a hub for Delta Air Lines, which offers numerous domestic and international flights. In 2019, prior to COVID-19, SLC recorded over 26 million passengers, making it one of the busiest airports in the western United States. Popular destinations include:

- Los Angeles
- Denver
- Chicago
- Atlanta
- New York
- Seattle
- Europe
- Latin America
- Asia



PUBLIC TRANSIT

A larger number of vehicles on the road causes increased strain, including traffic congestion and pollution. Personal vehicles can be costly and vary frequently with the price of fuel, parking fees, maintenance, and insurance premiums. According to the American Public Transportation Association's (APTA) Transit Savings Report, individuals who ride public transit instead of driving can save an average of $13,000 annually, or $1,100/month. Public transit fares are more consistent and therefore easier to budget. Each of the three counties in the region has public transit assets. Increased public transit, improvements, and connectivity between counties may be on the horizon.

Utah County

Utah County operates a public transportation system called the Utah Valley Express (UVX), which is a bus rapid transit (BRT) system. The UVX system serves the cities of Provo and Orem, and runs along designated corridors with dedicated bus lanes, providing faster and more efficient transportation. The system has several routes, including connections to major transit hubs, universities, and commercial areas.

Wasatch County

High Valley Transit operates as a public transit provider in Wasatch County, offering fixed bus routes and a "micro" ride service that offers flexible pickup and drop off locations. High Valley Transit began in Summit County and has recently expanded to include Wasatch County.

The Utah Transit Authority (UTA) also provides limited bus services connecting some areas in Wasatch County, primarily serving the town of Herber City. UTA's Route 6 connects Herber City to neighboring Park City and Salt Lake City.

Summit County

In 2021, Summit County created High Valley Transit in response to an identified need to expand transit options beyond Park City. High Valley Transit operates as an independent transit district formed by Summit County but overseen by a board of trustees. The service provides fixed bus routes and a "micro" ride service offering flexible pickup and drop off locations.

Park City remains served by Park City Transit System, which provides free transportation within city limits. Additionally, the UTA bus system provides regional connections to and from locations in the county.



Utah County
Utah County offers various multi-modal transportation options, including bike and walking trails. The county has an extensive network of bike lanes and paths, providing safe routes for cyclists. The Provo River Parkway Trail is a popular trail that runs along the Provo River, offering scenic views and recreational opportunities for walkers and cyclists. The Murdock Canal Trail is another prominent trail in Utah County, providing a multi-use path for hiking, cycling, and horse-back riding. Additionally, the Provo River Delta Restoration Project aims to create a park incorporating the location's natural assets and featuring trails and recreational amenities.

Wasatch County
Over the past decade, Wasatch County has a growing emphasis on multi-modal transportation and recreational trails. Herber Valley is known for its scenic beauty and offers several walking and biking trails. The Herber Valley Trails Initiative aims to build on these assets to develop a comprehensive trail system throughout the county, connecting several communities to multimodal transit options. The existing Midway City trail system, which includes the Dutch Hollow Trail and the Homestead Trail also offer walking and biking options in the county. For scenic landscapes, Jordanelle State Park offers additional opportunities for walking, hiking, and biking.

Summit County
Summit County is known for its extensive multi-modal transportation options, including cycling and walking trails. Park City, a popular tourist destination within the county, has an extensive network of biking and walking trails, including the famous Park City Rail Trail, which spans approximately 28 miles. Beyond Park City, the Summit County trail system includes notable trails such as the Round Valley Trail System, Glenwild Loop, and Historic Union Pacific Rail Trail. The County's commitment to multi-modal transportation is detailed in the Summit County Non-Motorized Transportation Plan, which aims to enhance and expand the existing network.

The plan aims to establish a network of regional trails that span the county and connect with Salt Lake and Wasatch counties. In 2020, there was a significant increase in trail usage compared to previous years. This surge in usage is believed to be a result of the "Stay Safe, Stay Home" measures and social distancing practices during the pandemic, as residents sought safer ways to stay active and maintain their health.

Additionally, there are local Active Transportation (AT) plans in place for various areas, including Eagle Mountain, Lehi, Orem, Pleasant Grove, Provo, South Utah County, Summit County, and Wasatch County. These localized plans likely outline specific strategies and initiatives to promote and enhance active transportation within each respective area.

COMMUTING PATTERNS

Exhibit 12: Regional Commuting Patterns Between Counties Within the Region

Source: Lightcast Commuting Patterns Report, 2022

	Summit Outbound	Wasatch Outbound	Utah Outbound
Summit Inbound	X	3,505	2,233
Wasatch Inbound	849	X	1,983
Utah Inbound	1,868	2,356	X

Exhibit 13: Top 10 Counties by Net Commuters In and Out of Mountainland Region

Source: Lightcast Commuting Patterns Report, 2022

	Inbound Commuters	Outbound Commuters	Net Commuters
Salt Lake	54,733	93,312	-38,579
Cache	4,059	2,485	1,574
Davis	8,091	6,987	1,104
Sanpete	1,914	847	1,067
Box Elder	1,701	679	1,022
Juab	1,811	846	966
Carbon	1,396	584	812
Uintah	1,159	526	632
Sevier	946	553	393
Mesa	17	409	-392

ALIGNMENT

Trans50

Active Transportation Plan

Regional Transportation Plan (RTP)

Technical Assistance to Governments Program (TAG)

Transportation Improvement Program (TIP)

CLIMATE AND ENVIRONMENTAL SUSTAINABILITY

Utah County

Utah County faces several environmental challenges, including air pollution and water quality issues. The region experiences episodes of high levels of particulate matter and ozone pollution, primarily due to industrial emissions, vehicle exhaust, and geographical factors like inversions. The county is also facing water pollution concerns caused by urban runoff, agricultural activities, and industrial discharges.

Wasatch County

Wasatch County, known for its scenic beauty and outdoor recreational opportunities, is facing environmental concerns related to rapid urbanization and its impact on natural resources. The county's population growth and increased development has led to habitat loss, fragmentation, and the depletion of water resources.

Summit County

Summit County, located in the mountainous region of Utah, faces several environmental challenges, including forest health and wildfire risks. The county is susceptible to wildfires due to a combination of factors, including dry conditions, dense vegetation, and the proximity of human settlements to forested areas. One of the county's largest cities, Park City, has established 6 key sustainability principles in an effort to better support the region's environmental needs and face growing challenges. These include:

- **Park the car**
- **Reusable vs. Single-Use**
- **Buy local**
- **Embrace your heritage**
- **Leave no trace**
- **Respect for animals**

WATER AND SEWER

The region relies on various water sources, including rivers, lakes, reservoirs, and groundwater. Major sources include the Colorado River, the Provo River, and local reservoirs like Deer Creek Reservoir and Jordanelle Reservoir. Water treatment is typically managed by local water districts, municipalities, and in some instances special service districts. These entities oversee the operation, maintenance, and planning of water systems within respective jurisdictions.

Given the arid nature of Utah, water conservation and sustainability efforts are crucial. The Utah Department of Environmental Quality is focused on supporting local and regional efforts of water related environmental stewardship. Regular monitoring and testing are conducted to identify potential contamination issues, and efforts are being made across the state to protect water quality through regulations, watershed management, and pollution prevention strategies. Additionally, the state agency provides additional public education campaigns, water-efficient landscaping practices, and the implementation of water reuse and recycling technologies.Baseline water stress measures a region's ratio of total water withdrawals to available renewable surface and groundwater supplies. Withdrawals include domestic, industrial, irrigation, and livestock water use. It is expressed as a percentage of the total flow available annually and serves as a good indicator for broader water risks. Higher water risk can lead to depletion of surface and groundwater resources and increased competition among users, resulting in water shortages.

Exhibit 14: Baseline Water Stress

Source: Aqueduct Water Risk Atlas

	Major Basin	Minor Basin	Stress Level
Summit County	Great Basin	Weber	Low-Med (10-20%)
Wasatch County	North America, CO	Strawberry	High (40-80%
Utah County	Great Basin	Spanish Fork	High (40-80%)

CLIMATE CHANGE AND EQUITY

The growth of the MEDD region and climate change both have implications for certain populations. Often due to socioeconomic status, housing challenges, location, transportation issues, and access to services, poor and marginalized groups are disproportionally at risk of displacement and exposure to negative impacts of climate change.[2]

SUSTAINABLE TOURISM

Few industry clusters are more important to the diverse economy of the state of Utah than tourism. The industry struggles with disruptions to travel, tourism, and labor force. To build sector resiliency and sustainability, the MEDD region has partnered with the Wasatch Front Economic Development District to form a Wasatch Range Leisure & Hospitality Coalition. Through this effort, collaborative workforce-centered tactics are already being advanced to support the industry. The coalition is also working to increase access to tourism assets through transit, trail, and gateway improvements as well as adaptive improvements for people with disabilities.

The MEDD region aims to build on the strength of the coalition's efforts, as well as those happening within the region at the local level, especially the sustainable tourism efforts underway in Summit County. Utah has been confirmed as the preferred host of the 2034 Winter Olympics. The region needs to assess and prepare for the opportunities and threats that come with this honor. The impact of the event will disrupt the normal ebb and flow of tourism with a more abrupt influx and exit of visitors. The balance of accommodating visitor demands on infrastructure and amenities with protection of resources and long-term sustainability is critical.

The Arts, Entertainment, and Recreation industry grew regionwide in this time period, with the smallest growth seen in Summit County. It should be noted that of all the counties in the region, Summit County's economy is the most reliant on tourism-related industries, with the two industries displayed above constituting the county's largest industries by number of jobs. This suggests that, because the sector is already well-developed, there is less opportunity for growth proportionally, compared to Wasatch and Utah Counties.

Similarly, Summit County was the only county to experience a decline in number of jobs in the Accommodation and Food Services Industry. This may be relate to the county's pre-existing dependence on the industry when compared to the other counties in the region, and the devastating and lasting blow to the Tourism economy nationwide that resulted from the COVID-19 Pandemic. Wasatch and Utah counties experienced growth in the industry of 33% and 26%, respectively.

2 *Social Dimensions of Climate Change, The World Bank https://www.worldbank.org/en/topic/social-dimensions-of-climate-change#:~:text=Certain%20social%20groups%20are%20particularly,and%20other%20socially%20marginalized%20groups*

ALIGNMENT

Utah Integrated Report on Water Quality

Utah Agricultural Statistics Annual Report

Wasatch Mountain State Park

Utah County Environmental Health

Heber Valley Sustainability Efforts

Exhibit 15: Visitor Spending by County, 2022

Sources: Kem C. Gardner Policy Institute University of Utah, US Census Bureau

	Visitor Spending	Spending Per Capita
Summit County	$1,400,000,000	$33,209
Wasatch County	$200,000,000	$5,877
Utah County	$900,000,000	$1,281

Exhibit 16: State Defined Key Tourism Industry Sectors, GRP Contribution

Source: Lightcast Regional Economic Report, 2023

	Jobs 2022	GRP Earnings 2022	Industry GRP Contribution 2022
Performing Arts, Spectator Sports, & Related Industries	1,553	$175,375,711	$259,713,021
Museums, Historical Sites, and Similar Institutions	616	$19,229,139	$34,300,953
Amusement, Gambling, and Recreation Industries	7,037	$279,870,128	$356,578,264
Accommodation	4,414	$245,587,832	$517,790,916
Food Services and Drinking Places	25,753	$674,083,262	$1,153,090,098



Exhibit 17: Arts, Entertainment, and Recreation Industry Growth 2017-2022

Source: Lightcast Regional Economic Report, 2023

	2017 Jobs	2022 Jobs	% Change in Jobs	2022 GRP
Summit County	3,842	4,207	9%	$314,080,530
Wasatch County	307	407	35%	$25,907,113
Utah County	3,254	4,592	41%	$310,640,595

Exhibit 18: Accommodation and Food Services Industry Growth 2017-2022

Source: Lightcast Regional Economic Report, 2023

	2017 Jobs	2022 Jobs	% Change in Jobs	2022 GRP
Summit County	6,462	6,099	(6%)	$580,060,257
Wasatch County	1,195	1,587	33%	$99,571,645
Utah County	17,825	22,480	26%	$991.249,112

LIVABILITY

HOUSING

Housing Types

The housing mix across the region is dominated by single-family, largely detached, homes. Wasatch county has the highest percentage of single-family homes at nearly 90%. Studies have shown that neighborhoods and communities with high percentages of this type of housing are more susceptible to economic downturns. Efforts to diversify the housing mix are likely to improve economic sustainability. However, communities largely dependent on tourism are also heavily impacted by the state of the economy regardless of their housing mix.

Exhibit 19: Share of Units by Structure Density

Source: ACS 5-Year 2017-2021

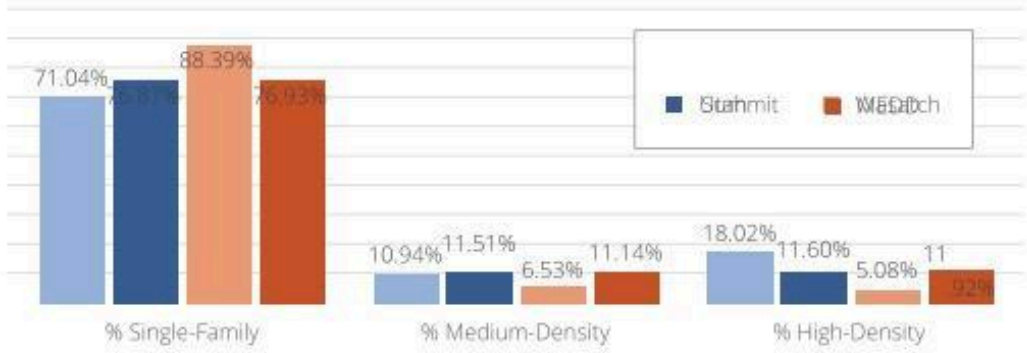


Exhibit 20: Regional Housing Units by Tenure

Source: ACS 5-Year 2017-2021

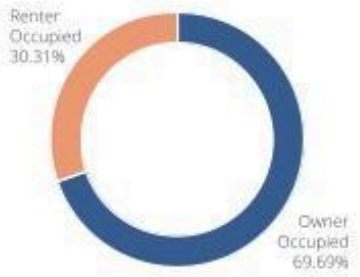


Exhibit 21: County-level Housing Units by Tenure

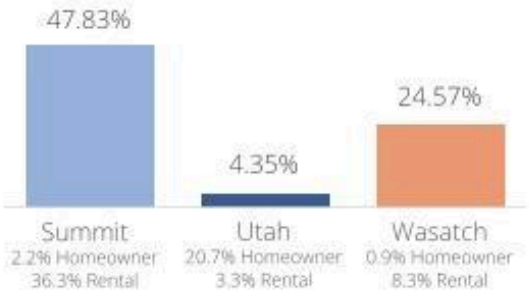
Source: ACS 5-Year 2017-2021

	Summit	Wasatch	Utah
Owner-occupied	79.47%	76.70%	68.54%
Renter Occupied	20.53%	23.30%	31.46%

As a region, housing tenure is slightly higher than the national ratio of 65:35 own-to-rent. In Summit and Wasatch Counties has a larger percentage of owner-occupied units, which is not uncommon in tourism and resort areas where much of the rental units are occupied only during peak seasons.

Exhibit 22: Vacancy Rates by County

Source: ACS 5-Year 2017-2021



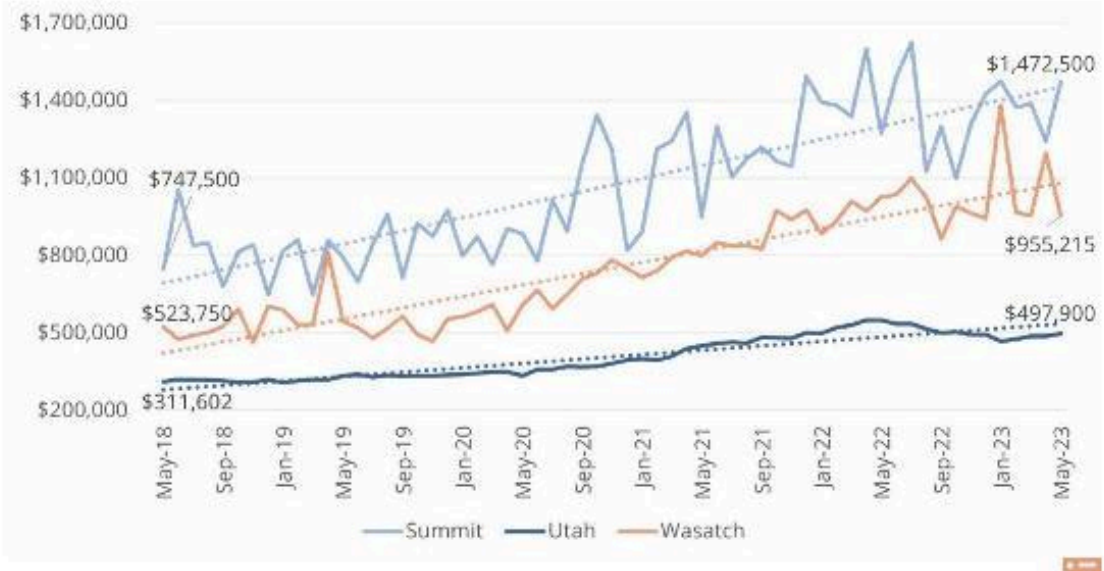
The for-sale market is extremely tight throughout the MEDD region, with estimated vacancy rates below 1% in Utah and Wasatch Counties. The rental market, however, shows significant differences between the counties. This is likely related to the seasonal workforce that make up a large percentage of renters around the tourism and resort areas in Summit and Wasatch Counties. The lack of available supply within the housing stock is likely to continue to drive up pricing in both the rental and for-sale markets.

Home Prices

Home prices have significantly increased in recent years. Exhibit 4 shows the month-to-month changes in median home sale price. In Utah county, where there are considerably more homes purchased in a given month, the monthly figures seem more stable, but even here the median sale price for a home has risen by nearly $200,000 in just five years. In the heavy tourist areas, these increases are even greater, as demonstrated by the median sale price in Summit County, that has nearly doubled in the same five-year period.

Exhibit 23: Median Home Sale Price by County

Source: Redfin, MLS



Monthly Rents

The cost to rent in the region is also quite high, where the median gross rent across was estimated in 2021 to be between $1,199 and $1,634 for the three-county region. Utah County, with its significantly higher population of year-round residents, offers the lowest rent in the region. Given the trends in charged rent over the recent years, current rent prices are likely to be higher than the estimates represented in Exhibit 24.

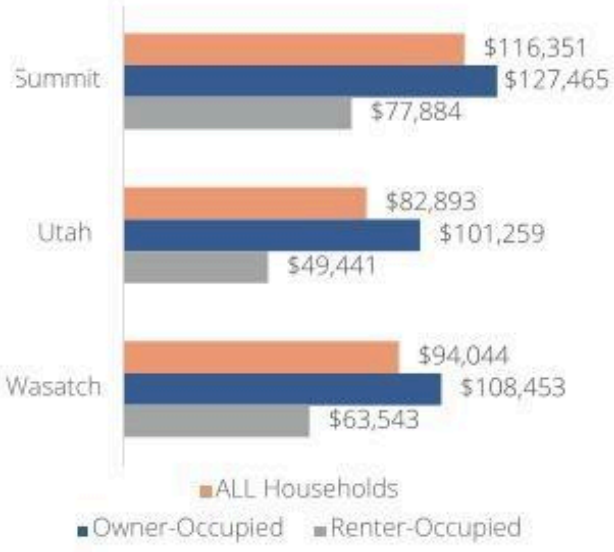
Exhibit 24: County Market Asking Rent by Bedroom

Costar™ 2023

	Summit County	Wasatch County	Utah County
Overall	$1,175	-	$1,010
Studio	$1,278	$1,218	$905
1 bedrooms	$1,379	$1,222	$1,032
2 bedrooms	$1,942	$1,578	$1,394
3 bedrooms	$1,873	$2,311	$1,616

Exhibit 25: County Median Household Income by Tenure

Source: ACS 5-Year 2017-2021



Throughout the MEDD region, incomes for renter-occupied households fall significantly under those of owner-occupied households. The difference is most stark in Utah County where renter-occupied households earn less than half of owner-occupied household earnings. This discrepancy in incomes is significant, in part, because housing costs for renters are not proportionately lower than those for owners.

As Exhibit 26 demonstrates, housing costs for renters is not significantly lower than housing costs for homeowners. The market for rental units places a disproportionate burden on renters. Likely, this imbalance is due a supply of rental units that is insufficient to meet demand, thereby driving up rent.

Housing Cost Burden Analysis

The Department of Housing and Urban Development (HUD) determines that a household spending more than 30% of their household income on housing costs is considered housing cost burdened. This means that the cost of housing is likely causing the household difficulty in affording other necessities such as food, clothing, transportation, and medical care. Households spending more than 50% of their income on housing costs are considered "extremely cost burdened."

Throughout the MEDD region, roughly a quarter of households with a mortgage meet the definition of housing cost burdened. These figures are slightly higher than the state figure of 23%. This is a significant percentage and is likely limiting the economic conditions of thousands of the region's residents.

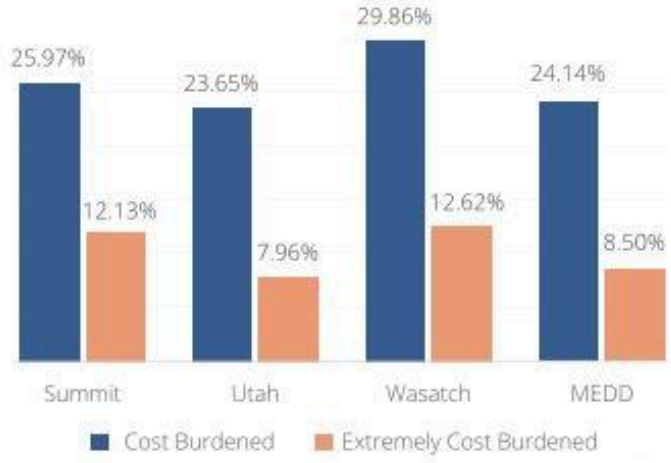


Exhibit 26: Median Monthly Housing Costs by Tenure

Source: ACS 5-Year 2017-2021

Exhibit 27: Share of Housing Units with a Mortgage that are Cost Burdened

Source: ACS 5-Year 2017-2021

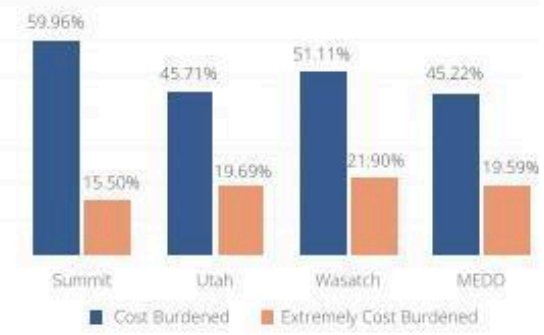


However, the effect of housing costs disproportionately affects renting households, for which nearly half face challenges in affording basic necessities of everyday life. The full effect of housing costs appears even more stark when looking at extreme cost burden. As Exhibit 28 demonstrates, roughly one-in-every-five renting households throughout the region are spending more than half of their income on housing costs. This stands in comparison to a national figure of over 40% of renter households experiencing housing cost burden from 2019-2021, per the American Community Survey.[3]

The strength of the regions' cost burden data in comparison to national figures should not dissuade partners and stakeholders from taking action to reduce the occurrence of housing cost burden.

Exhibit 28: Share of Renter Households that are Cost Burdened

Source: ACS 5-Year 2017-2021



Unsurprisingly, the households most likely to face housing cost burden are those within the lowest income brackets. But even households earning up to $75,000 per year are somewhat likely to struggle to afford necessities.

Exhibit 29: Share of Owner-Occupied Housing Cost Burdened Households by Income

Source: ACS 5-Year 2017-2021



3 https://www.census.gov/newsroom/press-releases/2022/renters-burdened-by-housing-costs.html#:~:text=DEC,by%20the%20U.S.%20Census%20Bureau.

Exhibit 30: Share of Renter-Occupied Housing Cost Burdened Households by Income

Source: ACS 5-Year 2017-2021



Utah County

Utah County, encompassing cities like Provo, Orem, and Lehi, has witnessed substantial growth in the housing market. The median home price in Utah County has been steadily increasing over the past few years, reflecting the strong demand and limited housing supply. As of the latest available data, the median home price in Utah County has increased by approximately 8% compared to the previous year. This increase in housing sales prices can be attributed to factors such as population growth, a thriving job market, and the relative affordability of homes in the area. Utah County offers a diverse range of housing options, including single-family homes, townhouses, and apartments, catering to various buyer preferences and budgets.

The high demand for housing in Utah County has created a competitive market, often resulting in shorter average days on the market and multiple offers on desirable properties. The rental market in areas like Provo remains strong due to the presence of Utah Valley and Brigham Young University.

Wasatch County

Wasatch County, encompassing cities like Heber City and Midway, has experienced significant growth in its housing market, particularly due to its scenic location and recreational opportunities. The median home price in Wasatch County has also witnessed an upward trend, with an increase of approximately 10% compared to the previous year.

The desirability of the area, proximity to Park City, and availability of outdoor activities contribute to the higher housing sales prices. Wasatch County offers a range of housing options, including single-family homes, luxury properties, and vacation rentals, attracting both primary residents and buyers looking for second homes. The demand for housing, especially for vacation properties, has led to a competitive market and the potential for price appreciation.

ALIGNMENT

Wasatch County Housing Needs Assessment

Wasatch County Moderate Income Housing

Summit County
Summit County, encompassing cities like Park City and Coalville, is known for its renowned ski resorts and outdoor recreational amenities, attracting buyers from both within and outside the state. The housing market in Summit County is characterized by higher-end properties, and the median home price has seen a significant increase of approximately 12% compared to the previous year. The popularity of Summit County as a tourist destination, coupled with its proximity to Salt Lake City, contributes to the strong demand and higher housing sales prices. The county offers a variety of housing options, including luxury homes, condominiums, and vacation rentals, catering to the preferences of upscale buyers.

The market in Summit County has experienced notable interest from out-of-state buyers looking for second homes or investment properties.

FAMILY SUPPORTS

As home to a diverse resident population in terms of age and household structure, the Mountainland Region aims to support families and households at all stages of life through public programming and community partnerships.
These services are essential for the advancement of economic development goals as they represent key segments of the workforce as well as allowing for those who may otherwise be serving as caretakers in a non-professional capacity to participate in the workforce, expanding economic activity and household incomes regionwide.

Childcare[4]
Residents or households who make up to 85% of the State Median Income may be eligible for subsidized childcare. Childcare assistance is paid directly to childcare providers on behalf of qualifying families and is eligible for renewal every 12 months.

Families may use a state-sponsored interactive tool to search for eligible childcare providers in the geography of their choice. This tool also allows families to see information about a provider's license type, quality rating, and information about accepted subsidies.

To support childcare providers, the State of Utah facilitates a quality rating system. Providers may advance through the four levels of quality by meeting criteria in five categories. Providers who score high may qualify for higher subsidies or additional grant funding to support pay for childcare employees or other key functions of the childcare operation.

The state of Utah is also embarking on the development of a new Childcare Solutions and Workforce Productivity Plan.

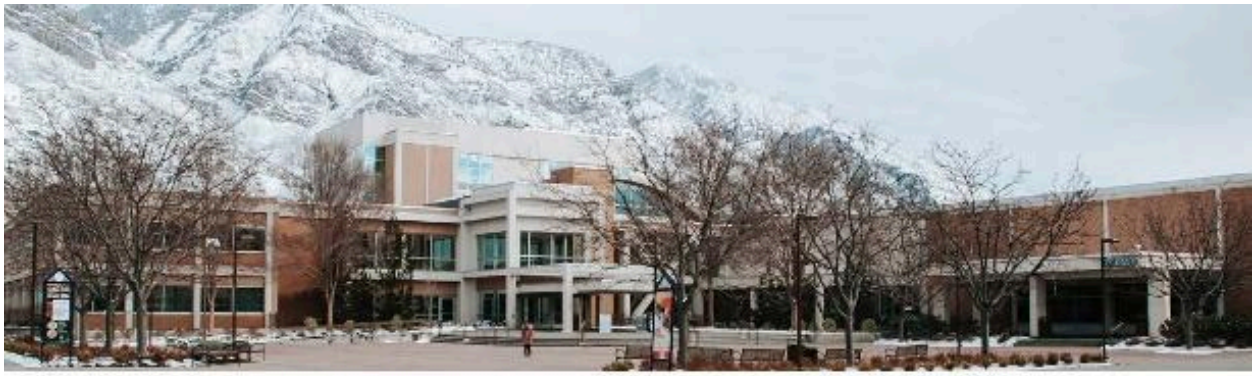
Aging[5]
The Mountainland region aims to provide comprehensive options for aging to residents and caregivers. MAG Aging and Family Services serves as the region's key agency for support regarding aging. The agency connects residents and caregivers to programming including meal services, utility assistance, transportation assistance, community engagement opportunities, and more.

MAG Aging and Family Services also focuses on educational and support services for caregivers of aging residents, who may require targeted programming to provide quality care and manage the emotional demands of caregiving.

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4 *References: Childcare Assistance Overview, Childcare Provider Search Tool, Utah Childcare Quality System Factsheet*

5 *Regional Aging and Family Services*



EDUCATION

Higher Education

Utah, Wasatch, and Summit Counties are home to notable educational institutions that cater to a diverse range of students.

Brigham Young University (BYU), located in Provo, is a private university owned and operated by The Church of Jesus Christ of Latter-day Saints. With total enrollment at nearly 35,000, BYU offers a wide range of academic programs across various disciplines. The university's extensive and celebrated programming includes business, engineering, education, health sciences, law, humanities, fine arts, social sciences, accounting, entrepreneurship, nursing, engineering, and law.

Utah Valley University is the largest public university in the state of Utah, located in Orem. Total enrollment as of fall 2021 was 41,262 undergraduate and graduate students. The university prides itself as being one of only a small number of universities that offers a dual-mission model, combining a traditional teaching university with vocational programs typical of a community college. UVU reports that 30% of students are nontraditional (25+ years old), 17% support at least one child, and 37% of students are first generation, alongside 12,080 high school concurrent enrollment students as of fall 2019.

K-12 Education

When analyzing the school districts in Utah County, Wasatch County, and Summit County relative to the state of Utah and the rest of the United States, the region stands out as highly-ranked and high-performing.

In Utah County, Alpine, Nebo, and Provo school districts have consistently been recognized as top-performing districts. With a strong emphasis on academic achievement, it has achieved high graduation rates, test scores, and college readiness indicators. According to recent data, the district's graduation rate is above the state average of 90%, showcasing its commitment to student success.

Wasatch County School District, located in Wasatch County, has also demonstrated commendable performance. While specific statistics may vary, the district has consistently placed among the top districts in Utah, with students showcasing high levels of proficiency in various subjects. The district's commitment to providing quality education is evident in its students' achievements.

In Summit County, Park City and South Summit school districts have also achieved noteworthy success. Park City School District has received recognition for its exceptional educational standards. It has consistently boasted high graduation rates and college acceptance rates, positioning it as one of the top-performing districts in the state.[6]

6 *Findings based on analysis from the Utah State Board of Education 'Utah School Report Card(s)'*

In terms of performance, there is variation among test score results in the region's districts. Based on 2023 data released by the Utah State Board of Education[7], Wasatch School District achieves the highest proficiency markings, with roughly 60% proficiency across subject areas.

School performance in the region has been studied relative to household income and threats to public health. Researchers at the University of Utah found that lower test scores at Utah schools were correlated to poorer air quality among school locations and student populations, which was in turn correlated to low-income households among the student population.[8]

The Unified Economic Opportunity Commission reports that only 34% of Utah kindergartners have access to full-day programs compared to an average of 82% across the U.S. The UEOC also reports that full-day kindergarten students achieve between two and four times the academic progress of half-day kindergarten students.

Exhibit 31: School District Spending Per Student, Teacher/Student Ratio, and Average Teacher Pay

Source: Utah School Spending Report Fiscal Year 2021-2022

School District	Per Student Spending	Teacher-Student Ratio	Average Teacher Pay
Alpine	$8,972	24.4	$54,995
Nebo	$9,798	22.9	$39,916
Provo	$13,410	18.6	$57,806
Wasatch	$11,828	23.2	$50,650
Park City	$22,629	14.6	$64,513
South Summit	$15,179	19.5	$56,998
School District Average	$14,300	19.3	$59,056

7 https://www.schools.utah.gov/data/reports
8 https://www.mdpi.com/1660-4601/17/18/6931

Exhibit 32: School District RISE Assessment Scores (Grades 3-8)

Source: Utah State Board of Education

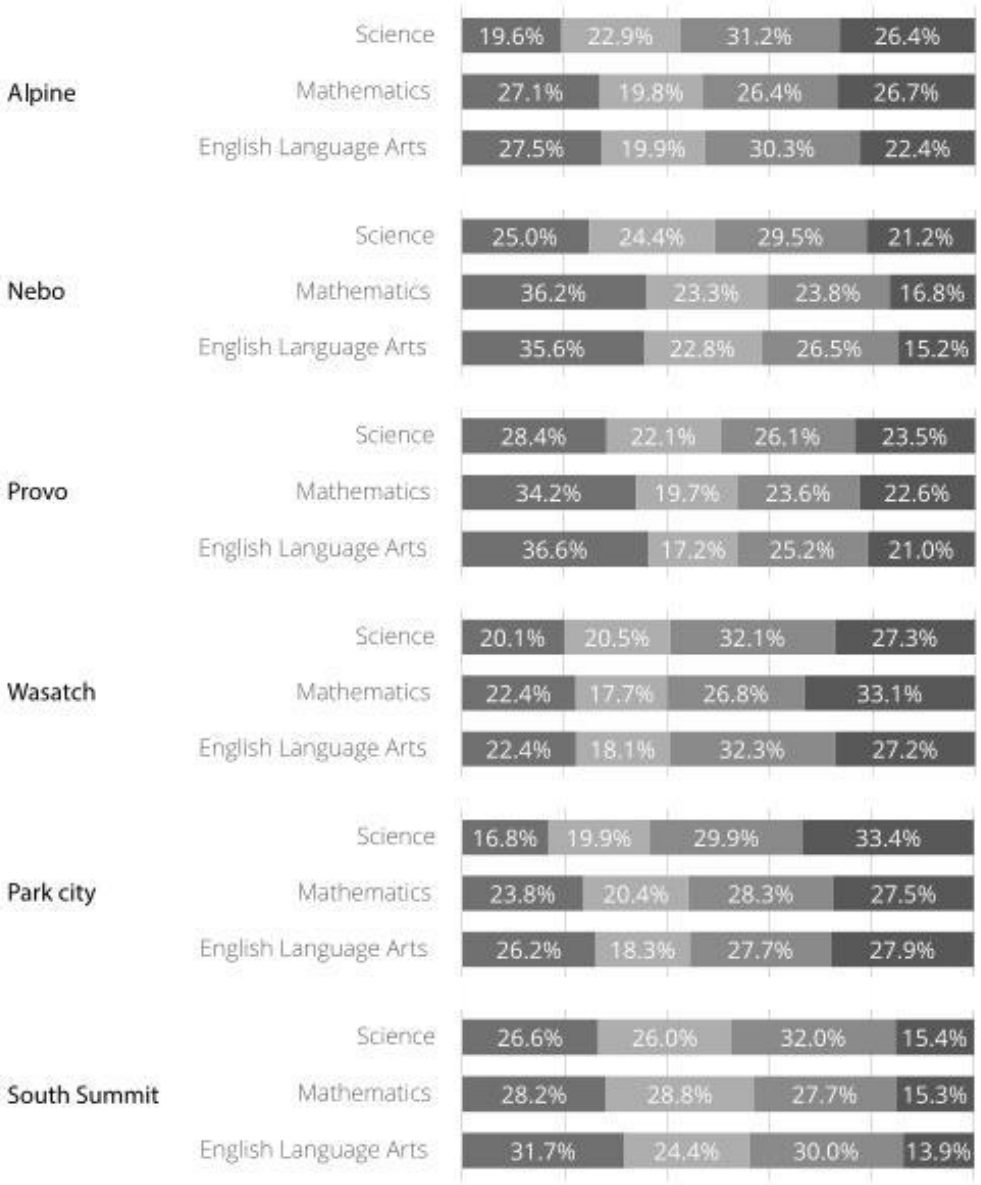


Exhibit 33 MEDD Educational Attainment Levels

Source: ACS S1501 Educational Attainment

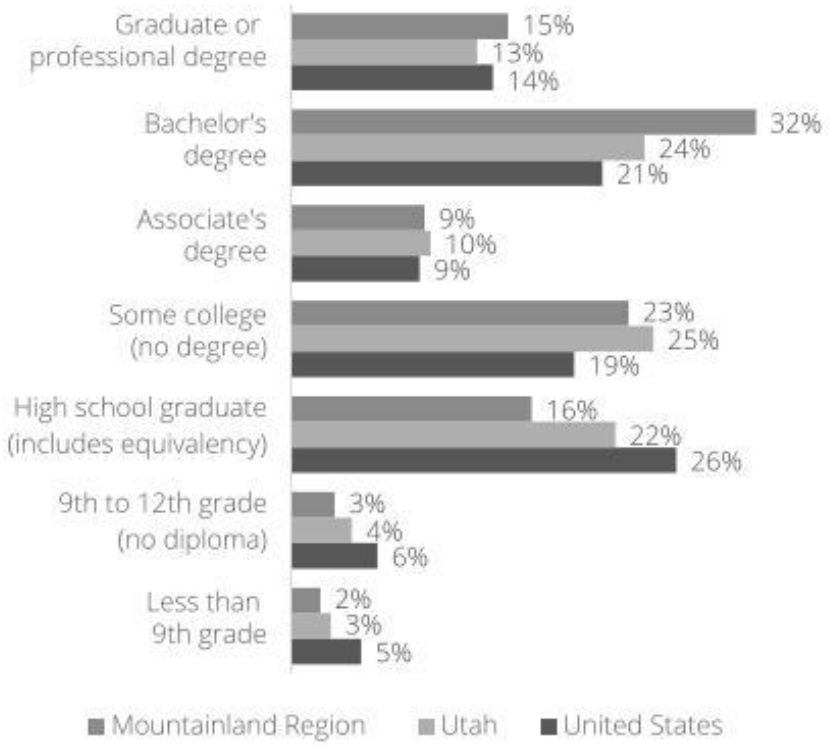
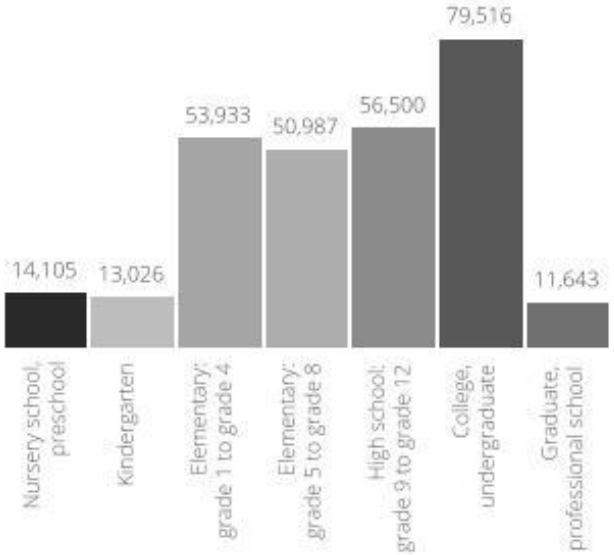


Exhibit 34: Regional School Enrollment

Source: Lightcast 2023



HEALTHCARE

Healthcare infrastructure is a critical component of quality of life and population health, which in turn informs economic development efforts and priorities. Healthcare access is tied to talent development and retention and speaks broadly to the strength of service provision throughout the region.

Additionally, healthcare represents a top industry and many jobs in the region. The strength of the healthcare industry in the region has an impact beyond health outcomes.

Population Health Indices

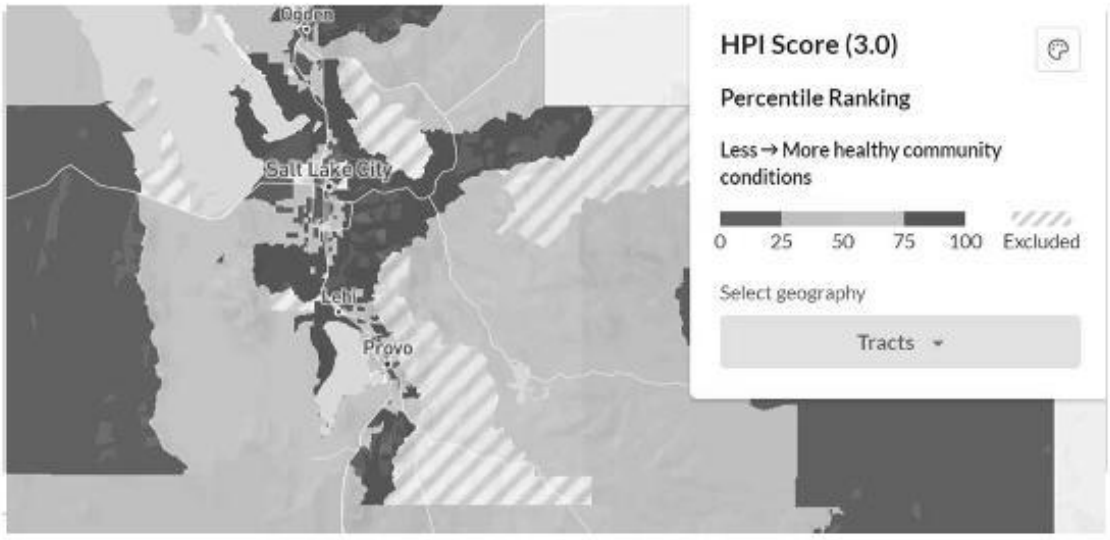
A number of federal and state indices exist to measure population health, typically accounting for a number of factors including life expectancy, prevalence of various types of diseases, behaviors linked to health outcomes such as smoking and movement, environmental factors such as pollution, and socioeconomic factors such as educational attainment and poverty.

The Robert Wood Johnson Foundation supports one such index through the University of Wisconsin's Population Health Institute. The program, known as County Health Rankings and Roadmaps, measures US counties based on data described above and ranks counties based on how they perform against other counties in the same state. In this index, Utah County ranks fourth of all counties in the state, Wasatch County ranks first, and Summit ranked third. When compared to state and national figures, these counties are reported fewer people uninsured (Wasatch's rate matched the state figure), higher levels of physical activity, and fewer behaviors linked to poor health outcomes, including excessive drinking and physical inactivity, especially when compared with national figures.

Another index, the Utah Healthy Places Index provided through the Utah Department of Health & Human Services in partnership with the Public Health Alliance of Southern California, combines 20 characteristics into a single score and visualizes the data using an interactive map. Some areas are excluded from analysis based on the geography used to visualize the data, but the region generally scores high, with some lower scores concentrated around Provo.

Exhibit 35: Image of Utah Healthy Places Index Interactive Map

Source: Utah Healthy Places Index



Hospitals and Medical Centers
The region is home to several hospitals and medical centers with notable healthcare providers including Intermountain Health and University of Utah Health.

Utah County
Utah County contains the regions most concentrated supply of hospitals and medical centers, including Utah Valley Hospital in Provo, a renowned medical center offering comprehensive healthcare services. Intermountain Health operates seven hospitals in Utah county.

Wasatch County
Wasatch County is served by the Heber Valley Hospital, a modern facility that provides a wide range of medical services to the local community.

Summit County
Summit County is home to the Park City Hospital, a critical access hospital that offers emergency care, surgical services, and various outpatient services.

Primary Care, Specialty Centers, & Clinics

Primary care services are available in all three counties, with numerous clinics and healthcare providers offering family medicine, internal medicine, and general practitioner services. These providers play a crucial role in providing comprehensive and preventive healthcare services to individuals and families.

The three counties have numerous specialty centers and clinics that provide specialized care in areas such as cardiology, orthopedics, oncology, pediatrics, and more. These centers offer a range of diagnostic, treatment, and preventive services to address specific healthcare needs.

Community health centers, rural health clinics, and veteran's medical centers exist to address gaps in healthcare access among potentially vulnerable populations, and can be located using state resources.

Utah, Wasatch, and Summit counties also have resources dedicated to behavioral and mental health services. These include counseling centers, psychiatric facilities, and outpatient programs that address various mental health conditions and provide support for individuals and families.

Local Government Initiatives

Utah County, Wasatch County, and Summit County are independently engaged in efforts to promote public health through local government initiatives and efforts. These efforts range from mosquito abatement to vaccination clinics and are primarily responsive to resident needs. Local health departments may be valuable partners in the implementation of the CEDS.

PUBLIC SAFETY

According to an analysis by EMSI Lightcast, the region has 8.79 property crimes per 1,000. This figure falls well below the national average national rate of 17.8 per 1,000, indicating a relatively safe regional environment.

REGIONAL COLLABORATION

Throughout the CEDS planning process, stakeholders frequently discussed regional collaboration. The state of Utah is also pushing for collaboration through unified connections. In its role as a convener, MAG is working to build awareness, trust, and transparency among a network of key stakeholders including government officials, economic developers, business leader, educational institutions, healthcare, and other civic and community organizations. In addition to the region-wide collaboration outlined in the strategic action plan, MAG will also be convening an Economic Advisory Group for the state's Regional Economic Collaborative.

COMPETITIVE ADVANTAGES AND DISADVANTAGES

The MEDD region vital to state of Utah's economy. Among the seven regions in the state, MEDD is the fastest growing and performing well across the indicators outlined in the Coordinated Action Plan.

The MEDD Region is strongest in the "International" indicator, which includes global trade and export of products and services, direct foreign investment, cultural amenities, ethnic influences, languages spoken, access to world markets, learning opportunities, awareness of region worldwide, and ease of travel. The number of multilingual households in Utah is increasing with about 15% speaking a language other than English at home. About 40% of the population of Utah County speaks a second language.

The "Intellectual Capital" and "Investment" indicators were tied as other strengths of the region. "Innovation" and "Interest" followed, with "Infrastructure" listed as the region's weakest indicator. However, the MEDD region is performing comparatively well among other regions in the state across all six indicators. The plan highlighted the MEDD region's top performance for Broadband Adoption Index, Average High-Tech Industry Employment Share, and Tech-Based Knowledge Occupation Clusters.

The region's weakest performance was related to the share of cost-burdened households, patent technology diffusion index, which measures the rate at which technology is adopted by a population, and 2019 Visitor Spending per Capita.

The largest disadvantages of the region are due to its massive population growth rate straining the capacity of infrastructure and other community supports. Each municpality in the region is responsible for the development and maintenance of its own infrastructure. The Coordinated Action Plan suggests that the region prioritize investment in housing, transportation, childcare, connection with educational institutions, open space, economic mobility, and underserved populations.

ECONOMIC DIVERSITY

The state of Utah is prioritizing target industries such as Advanced Manufacturing, Aerospace and Defense, Financial Services, Life Sciences and Healthcare, and Software and Information Technology. The Coordinated Action Plan noted the MEDD Region possesses a large number of subsectors in each of these industries.

INNOVATION AND ENTREPRENEURSHIP

The MEDD region has a strong entrepreneurship ecosystem. Businesses can access a variety of resources such as:

- Orem Business Alliance
- American Fork Chamber
- Eagle Mountain Chamber
- Heber Valley Chamber
- Point of the Mountain Chamber
- Payson and Santaquin Area Chamber
- Pleasant Grove-Lindon Chamber
- Spanish Fork and Salem Chamber
- Springville Mapleton Chamber
- Utah Valley Chamber
- Park City Chamber
- Orem Small Business Development Center
- UVU Business Resource Center
- SMART Lab
- University of Utah Manufacturing Extension Partnership
- Utah SCORE
- Governor's Office of Economic Development (GOED)
- Economic Development Corporation of Utah (EDCUTAH)
- Mountainland Small Business Loan Program
- Business Loans of Utah
- Orem City Revolving Loan Fund
- Utah Microloan Fund

Exhibit 36: New Business Starts

Source: US Chamber of Commerce

	2021	2020	2019	2018	2017
Summit County	,439	1,248	1,114	1,141	973
Wasatch County	933	765	711	688	604
Utah County	15,705	12,460	12,848	11,473	10,657
Total	18,077	14,473	14,673	13,302	12,234

Exhibit 36: Innovation Index Capacity Profile Summary

Source: StatsAmerica Innovation Intelligence Data

Index	Score	Key Takeaways
Human Capital & Knowledge Creation	164.5 (high)	Patterns of establishment formation and composition indicate a high level of business competitiveness. **Top measures:** • Bachelor's degree attainment • Average High-Tech Industry Employment Share
Business Dynamics	178.8 (high)	Patterns of establishment formation and composition indicate a high level of business competitiveness. **Top measures:** • Average High-Tech, Early-in-Life-Cycle Establishment Ratio • Traded Sector Establishment Births to All Establishment Ratio
Business Profile	147.6 (high)	The relative availability of resources for entrepreneurs and businesses is high in this area. **Top measures:** • Average Annual High-Tech Industry Venture Capital (scaled by GDP) • Average Annual Venture Capital Deals (scaled by GDP)
Employment & Productivity	128.9 (high)	Industry performance in Mountainland Economic Development District indicate a high level of positive outcomes from existing economic activity. **Top measures:** • Job Growth to Population Growth Ratio • Patent Diversity
Economic Wellbeing	164.0 (high)	As measured by residential internet connectivity and income, this area has a high standard of living. **Top Measures:** • Broadband Adoption Barriers • Change in Annual Wage and Salary Earnings per Worker

OPPORTUNITY ZONES

The Federal Qualified Opportunity Zone (QOZ) program spurs economic development by offering tax incentives for investment into designated economically distressed census areas. Individuals who make investments through special funds in these zones can defer or eliminate federal taxes on capital gains. All five (5) of the MEDD region's QOZs fall within Utah County.9 The census tracts are 49049002400, 49049002400, 49049002500, 49049002801, and 49049002802.

About the MEDD Region's QOZs:[10]

- These QOZs are home to approximately 17,000 people, about 3% of the county's total population.
- All five of the QOZs in Utah County are **over 235 miles away** from the closest EDA University Center.
- There are **no** EDA funded Revolving Loan Funds serving areas of any of the Utah County QOZs.
- There are **no** EDA grants that are either located within or clearly intended to support the Utah County QOZs.
- Four of the five QOZs in Utah County **are** HUD 2019 Low-Income Housing Tax Credit Qualified Tracts.
- Four of the five QOZs in Utah County **are** qualified 2018 SBA HUBZone Census Tracts.

Exhibit 38: Map of Opportunity Zones

Source: Opportunity Database Online

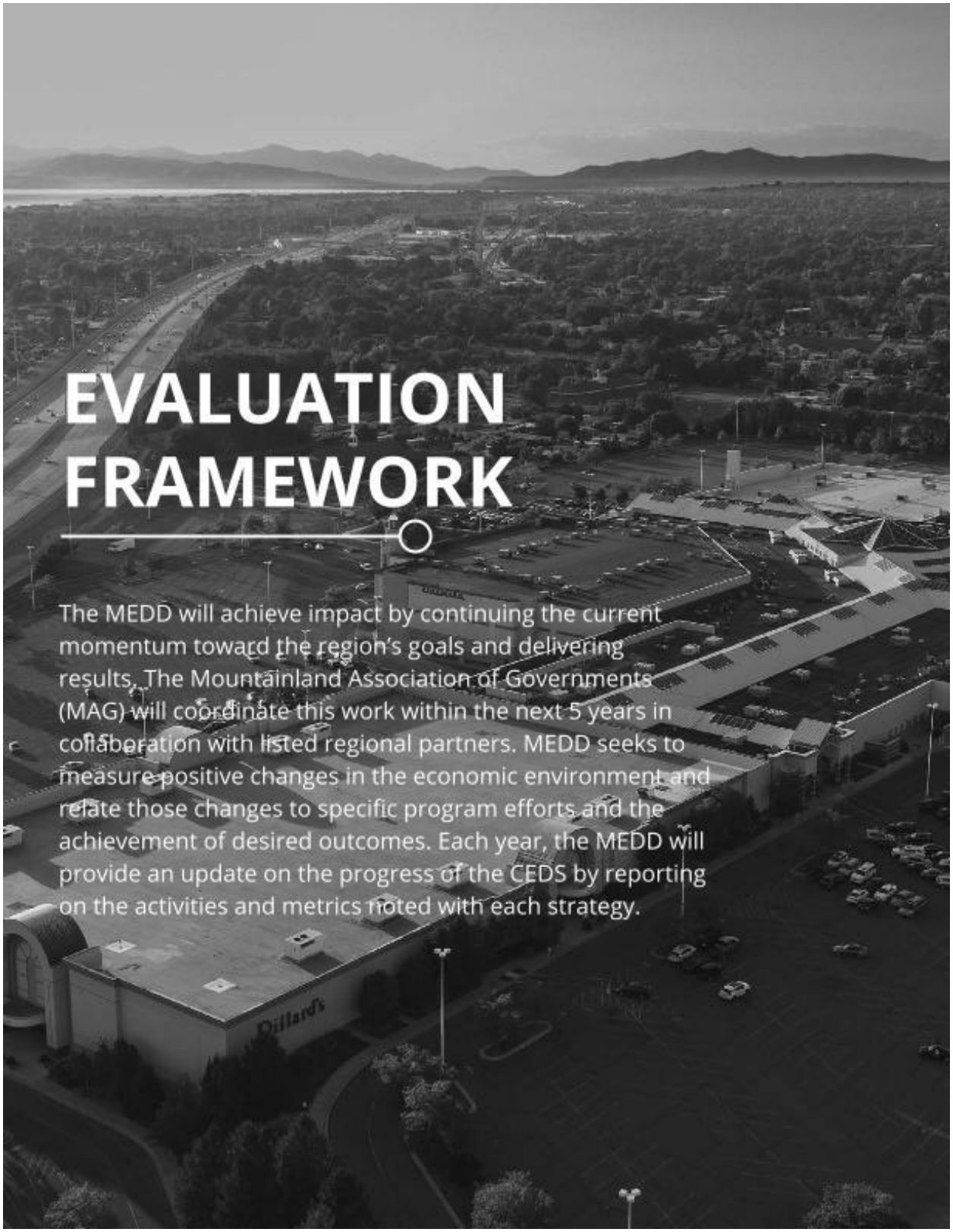


Exhibit 39: Regional Opportunity Zone Data Overview

Source: Stats America

	County	Median Household Income	Below Poverty Line	Median Home Value	Edu High School	Median Age
All of Utah	N/A	$76K	9%	$330K	93%	31
Utah OZ Average	N/A	$43K	19%	$195K	88%	25
49049000400	Utah	$62K	7%	$215K	82%	28
49049002400	Utah	$40K	15%	$288K	94%	24
49049002500	Utah	$34K	23%	$203K	89%	24
49049002801	Utah	$40K	21%	$160K	81%	26
49049002802	Utah	$38K	30%	$111K	94%	25

9 *https://opportunitydb.com/location/utah/utah-county/*
10 *https://www.statsamerica.org/opportunity/map.aspx*


EVALUATION FRAMEWORK
The MEDD will achieve impact by continuing the current momentum toward the region's goals and delivering results. The Mountainland Association of Governments (MAG) will coordinate this work within the next 5 years in collaboration with listed regional partners. MEDD seeks to measure positive changes in the economic environment and relate those changes to specific program efforts and the achievement of desired outcomes. Each year, the MEDD will provide an update on the progress of the CEDS by reporting on the activities and metrics noted with each strategy.

GOAL 1

Provide a safe, connected, and accessible regional transportation network to meet current and future needs.

COLLABORATORS:

MAG (lead)
UDOT
UTA
HVT
City/County Planning and Development
State legislature
Neighboring EDDs

RESOURCES:

SB 185 State Infrastructure Bank Fund for Greenfield Areas
Traffic studies
Infrastructure grants
Local Administrative Advisor

CATALYSTS:

HB 44 Corridor Funding
SB462 Station Area Plans for Transit-Oriented Development (TOD)
SB217 Housing and Transit Reinvestment Zones (HTRZs)
SB 185 trail efforts and extended deadlines for opting into transit sales tax
SB 260 Transportation Funding Requirement changes
2034 Winter Olympics

UTAH LEGISLATURE HIGHLIGHT

Summary: Transit Specific Development
https://le.utah.gov/interim/2023/pdf/00002747.pdf

STRATEGY: 1.1: Expand public transit infrastructure, access, and awareness.	TIMELINE: Long-term (4-5 years)

OBJECTIVES:

- 1.1.1: Create a concise, data-driven, and easy-to-understand campaign about how public transit positively impacts health, congestion, quality of life, air pollution, and resource management.
- 1.1.2: Plan and prioritize development that increases proximity between public transportation and housing development.
- 1.1.3: Increase regional investment in public transit to speed up the development of new infrastructure and close the gap in our current needs and anticipated demand.
- 1.1.4: Explore investment and incentive options to increase public transit ridership and aid first/last mile transportation.

OUTCOMES:	METRICS:
Reduced traffic, increased transit options, community utilizing transit options and providing feedback	Public transit investment, number of bus routes, ridership on current routes, miles of light rail, first/last mile transportation service/options

STRATEGY: 1.2: Align regional efforts to improve and execute transportation plans that minimize congestion, increase connectivity, and anticipate future trends.	TIMELINE: Medium-term (2-3 years)

OBJECTIVES:

- 1.2.1: Develop an advocacy plan to garner support with the UTA, local, county, and state governments for updated transit policies, transportation plan adoption, and coordination.
- 1.2.2: Evaluate current transportation plans and increase collaboration between the region, UDOT/UTA, and experts to address challenges and efficiently move forward on studies and projects.
- 1.2.3: Increase regional investment and planning for high-quality, active transit facilities with consistent design standards across jurisdictions.
- 1.2.4: Engage with workforce, especially commuters, to ensure their needs are being met.

OUTCOMES:	METRICS:
Future-focused transportation planning in coordination with UDOT, strong partnership with UTA, reduced traffic, regional transit connections completed, community utilizing transit options and providing feedback	Transit facilities investment, number of collaborative meetings (and attendance), plan evaluations completed, advocacy plan completed, number of engagements, commuter data

GOAL 2

Balance regional growth, tourism development, and the protection of natural resources.

COLLABORATORS:

MAG (lead)
Wasatch Range Leisure & Hospitality Regional Coalition,
DNR,
Utah Department of Environmental Quality,
Utah County Environmental Health,
county health departments,
Wasatch Mountain State Park,
Utah Department of Cultural and Community Engagement,
Utah Office of Tourism,
Utah Office of Outdoor Recreation,
Visit Park City,
Visit Heber Valley,
Explore Utah Valley,
Summit County Historical Society,
county and municipal utilities,
local planning departments,
Institute of Outdoor Recreation and Tourism at Utah State University,
other regional universities

RESOURCES:

SB 118 Water Efficient Landscaping Incentives
Agriculture Optimization Grant
Potential to access TRT
Utah Outdoor Rec Regional Projects
Local Technical Assistance Grants
Red Emerald Resilience industry webinar series
Utah Dark Skies toolkit
Agritourism toolkit
Forever Mighty Responsible Tourism Initiative

CATALYSTS:

State Scenic Byway Committee
Red Emerald Strategic Plan
Military Installation Development Authority
2034 Winter Olympics

STRATEGY: 2.1: Use current data, best practices, and planning to catalyze action among regional partners.	TIMELINE: Short-term (0-1 year)
OBJECTIVES: • 2.1.1: Engage local universities and experts to complete a study on air and water pollution and the impacts of regional growth on the environment. • 2.1.2: Convene regional partners to review and plan action based on data, best practices, and the hazard mitigation plan.	
OUTCOMES: Greater understanding of environmental impacts, strong Hazard Mitigation Plan, awareness and action among regional partners	**METRICS:** Number of meetings (and attendance), study and plan progress

STRATEGY: 2.2: Expand sustainable tourism initiatives.	TIMELINE: Medium-term (2-3 years)
OBJECTIVES: • 2.2.1: Convene regional tourism partners to catalyze sustainable tourism, tourism development, and tourism diversification while ensuring actions complement local culture and needs. • 2.2.2: Work with appropriate agencies and entities on recreation management plans. • 2.2.3: Strengthen support for tourism-related business resiliency and development.	
OUTCOMES: Established regional definition of sustainable tourism established and accepted tourism plans,	**METRICS:** ADR, TRT, park visitor and capacity ratio, tourism and recreation management plans completed, tourism industry data trends

STRATEGY: 2.3: Advocate for local governments to manage development with incentives, updated zoning and building codes, and code enforcement.	TIMELINE: Long-term (4-5 years)
OBJECTIVES: • 2.3.1: Compile and distribute information to stakeholders regarding potential incentives for the use of green energy sources and alternatives to vehicle transportation. • 2.3.2: Provide stakeholders with best practices to prioritize open spaces through incentives and green space requirements. • 2.3.3: Promote the adoption and enforcement of codes that reduce pollution and limit development near environmentally sensitive or protected areas.	
OUTCOMES: Intentional and responsible growth management	**METRICS:** Best practices and incentive information compiled, communication statistics (meetings, presentations, and other dissemination), incentive and code adoption

GOAL 3

Improve quality of life to support the region's workforce and communities.

COLLABORATORS:

MAG (lead)
Elected officials,
Unified Economic Opportunity Commission,
Talent Ready Utah Board,
Mountainland Head Start,
Utah Works,
other statewide organizations,
regional housing authority,
HUD,
Health Department,
Educational Institutions

RESOURCES:

Attainable Housing Grants
Deeply Affordable Housing Fund
Rural Single-Family Home Land Revolving Loan Program
Rural Single-Family Housing Rehabilitation
Olene Walker Housing Loan Fund
HB 477: Full-day kindergarten funding
First Children's Finance
Data and information, especially related to housing and childcare
State and local health department data
Rural Communities Opportunity Grant (RCOG)

CATALYSTS:

HB 364: Housing Affordability Amendments, including tax credits for developing or preserving affordable rental units
HB 406 and SB 174 on Land Use, Development, and Management
Childcare Solutions and Workforce Productivity Plan
$9.5 Million allocated to ongoing Targeted Workforce Development to increase training for high-demand industries, including healthcare

STRATEGY: 3.1: Coordinate regional efforts to address housing challenges.	TIMELINE: Short-term (0-1 year)
OBJECTIVES: • 3.1.1: Provide resources to cities and counties for the completion of housing studies and strategic plans. • 3.1.2: Organize stakeholder planning sessions to address housing issues and share data, best practices, and other relevant housing-related information. • 3.1.3: Advocate for legislation that would allow local government the option to use a wider range of housing tools. • 3.1.4: Empower local governments to strategically address zoning concerns and prioritize residential development sites near amenities and transportation hubs.	
OUTCOMES: Robust housing data, tools, and best practices are available to regional partners, Cities and counties have adopted actionable plans to address housing challenges	**METRICS:** Best practices and housing tool information compiled, number of planning sessions (and attendance), communication outreach statistics (presentations and other dissemination), funding and other resources secured for housing studies and strategic plans

STRATEGY: 3.2: Increase equitable access and affordability of quality education and childcare that meets the needs of students, families, and businesses.	TIMELINE: Long-term (4-5 years)
OBJECTIVES: • 3.2.1: Increase regional investment in early childhood education, K-12 schools, and childcare availability, access, and affordability. • 3.2.2: Expand and support collaboration between educational institutions, local governments, and businesses to align pathways with market needs and retain students in regional occupations.	
OUTCOMES: More affordable and accessible childcare and education, better alignment between educational institutions and regional partners, increased	**METRICS:** Childcare investment, K-12 investment, number of meetings (and attendance), student retention

STRATEGY: 3.3: Assess and address barriers to the health and safety of residents, workers, and visitors.	TIMELINE: Long-term (4-5 years)
OBJECTIVES: • 3.3.1: Increase awareness of existing health and wellness programs • 3.3.2: Create a regional asset map of healthcare and emergency service locations, capacity, and services. • 3.3.3: Evaluate HPSA score and identify most common needs such as urgent care, pharmacies, mental health care, and substance abuse resources. • 3.3.4: Increase regional investment in training for needed healthcare and emergency services occupations.	
OUTCOMES: Increased awareness of healthcare needs and gaps, strengthened coordination between health departments and regional partners	**METRICS:** Communication outreach statistics (meetings, presentations, and other dissemination), regional investment in healthcare training, HPSA score evaluation completed

GOAL 4

Strengthen regional collaboration to support strategic actions, build resiliency, and increase economic competitiveness.

COLLABORATORS:

MAG (lead)
Economic Development Directors,
Chambers,
DWS,
Other NGOs,
Unified Economic Opportunity Commission,
Governor's Office of Economic Opportunity,
Utah Capital Investment Board, Utah Works,
Talent Ready Utah,
Utah International Trade and Diplomacy,
World Trade Center Utah,
Governor's Office of Planning and Budget,
Educational Institutions, and
other regional partners

RESOURCES:

Rural Communities Opportunity Grant (RCOG)
Rural Coworking and Innovation Center Grant
Rural Economic Development Tax Increment Financing (REDTIF)
Rural Employment Expansion Program
Equity-free Small Business Innovation Research
Small Business Technology Transfer
Manufacturing Modernization Grant
Utah Motion Picture Incentive Program

CATALYSTS:

Utah Innovation Lab
SB 36 Professional Licensing Amendments
CEDS Submission to EDA

STRATEGY: 4.1: Improve coordination between regional stakeholders, surrounding regions, and the state.	TIMELINE: Short-Term (0-1 year)

OBJECTIVES:

- 4.1.1: Increase communication and host quarterly meetings to discuss and coordinate approaches to priority issues and advance the achievement of the goals outlined in this CEDS.
- 4.1.2: Partner with regional economic development organizations and other applicable stakeholders to determine and address gaps in data and coordinate data sharing.
- 4.1.3: Identify funding sources for strategic action related to regional priorities.
- 4.1.4: Work with neighboring regions and the state to identify and overcome legislative and process barriers to progress.

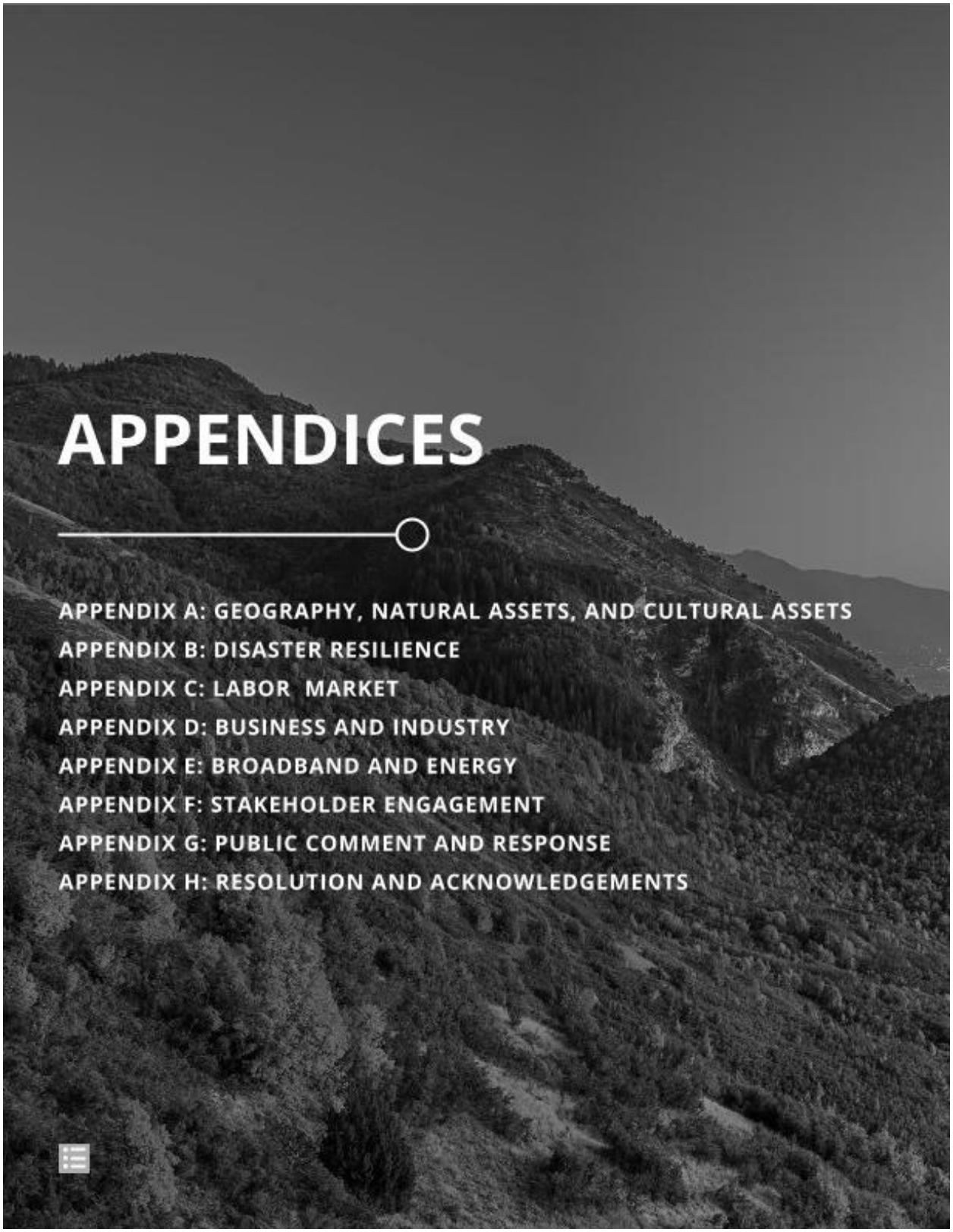
OUTCOMES:	METRICS:
Cohesive regional vision and plan, Increased availability of shared data resources, Resources available to make progress on plan objectives	Number of meetings (and attendance), data access, funding source list

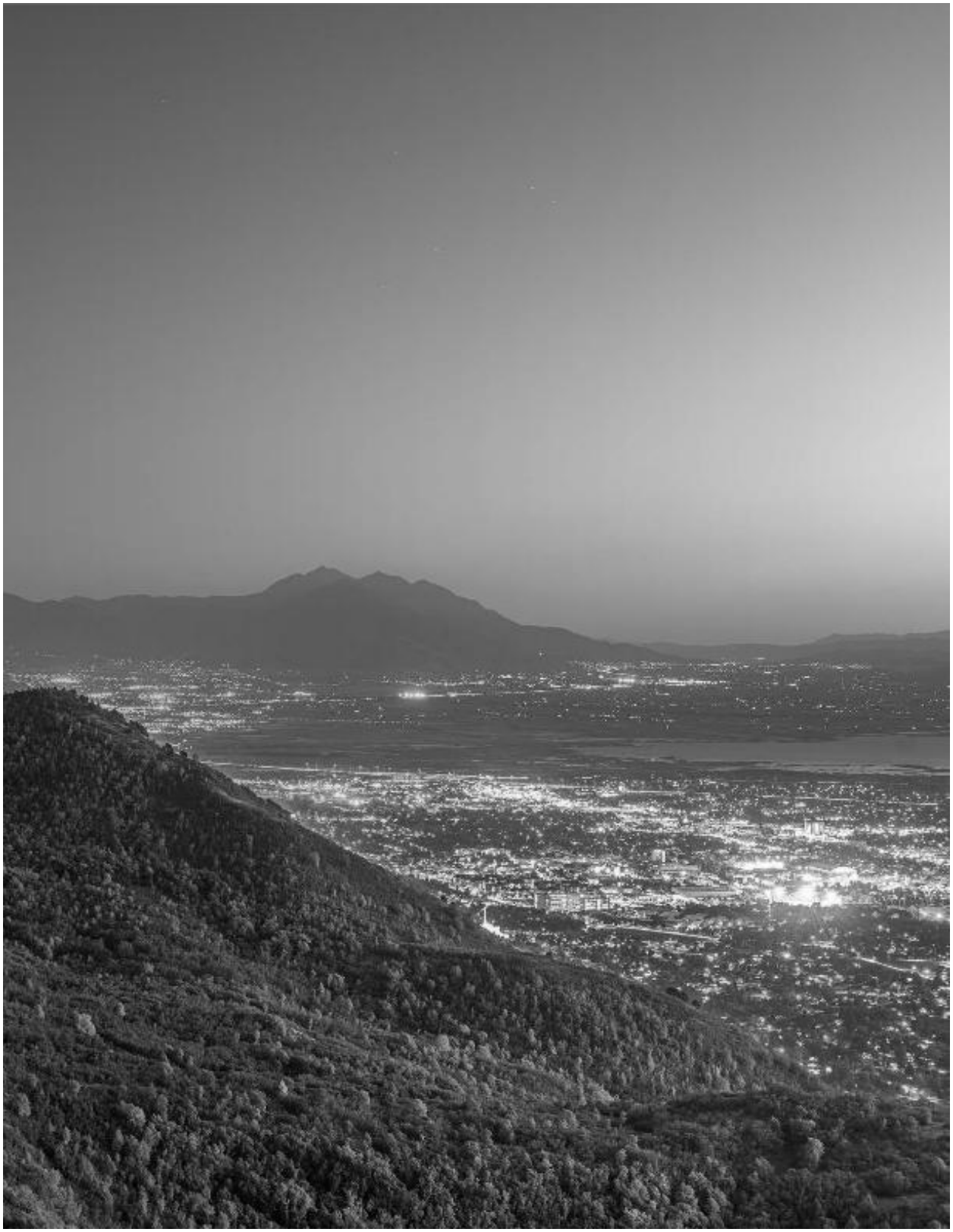
STRATEGY: 4.2: Advance efforts to further diversify the regional economy and increase competitiveness.	TIMELINE: Long-term (4-5 year)

OBJECTIVES:

- 4.2.1: Continue to foster an effective entrepreneurship ecosystem with increased focus on diversity, inclusion, and access to business support programs.
- 4.2.2: Partner with the private sector to expand intrapreneurship education, resources, and initiatives.
- 4.2.3: Work with regional universities to provide technology transfer and commercialization resources.
- 4.2.4: Convene regional, state, and federal partners to develop international marketing materials, resources, and subsidies for trade missions.

OUTCOMES:	METRICS:
Strong and diverse business ecosystem that provides resources to new and existing businesses, drives innovation, and collaborates for economic success.	Number of meetings (and attendance), Wage growth by sector, Business start-ups, Business tenure/retention, GRP, number of small, minority-owned, women-owned, and veteran-owned businesses, marketing materials developed


APPENDICES
APPENDIX A: GEOGRAPHY, NATURAL ASSETS, AND CULTURAL ASSETS
APPENDIX B: DISASTER RESILIENCE
APPENDIX C: LABOR MARKET
APPENDIX D: BUSINESS AND INDUSTRY
APPENDIX E: BROADBAND AND ENERGY
APPENDIX F: STAKEHOLDER ENGAGEMENT
APPENDIX G: PUBLIC COMMENT AND RESPONSE
APPENDIX H: RESOLUTION AND ACKNOWLEDGEMENTS

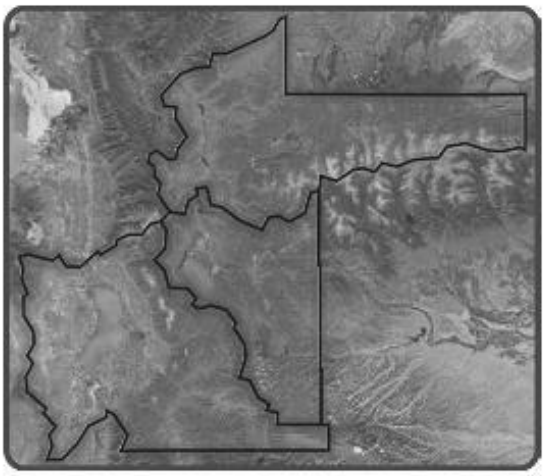


APPENDIX A

GEOGRAPHY, NATURAL ASSETS, AND CULTURAL ASSETS

GEOGRAPHY

As you enter the MAG region from any direction, the striking views of towering mountains are impossible to miss. Just a short journey through the region provides a jaw-dropping experience with lush valleys and waterways contrasting with the snowy peaks. A distinction can be seen between what is considered the "Wasatch Front" and the "Wasatch Back".



ALIGNMENT

Utah Agricultural Statistics Annual Report

Wasatch Mountain State Park

Utah County Environmental Health

Heber Valley Sustainability Efforts

Wasatch County History

Summit County Historical Society

Utah County History

Visit Park City

Visit Heber Valley

Explore Utah Valley

Utah County

- Borders the Wasatch Mountains on the east
- Utah County's elevation varies, with the valley floors at around 4,500 to 5,500 feet (about 1,372 to 1,676 meters) and mountain peaks within the county reaching elevations of over 11,000 feet (about 3,352 meters).
- The highest point is Mt. Nebo at 11,928 ft. and the lowest point is at the Jordan River Flood Plain at 4,480 ft.
- Major bodies of water include Utah Lake, which is both the state and the country's largest freshwater lake, and the Provo River.
- Average temperatures in the wintertime range from lows in the teens and highs in the mid-20s and 30s
- Average temperatures in the summertime range from lows in the mid-40s and 50s and highs in the mid-70s and 80s

Wasatch County

- Lies between Wasatch and Uinta mountains
- The county's mountain ranges include the Wasatch Mountain Range and the Uinta Mountains, with Mount Timpanogos overlooking the Heber Valley
- The elevation in Wasatch County varies significantly, with the valley floors around 5,500 feet (1,676 meters) and mountain peaks reaching elevations of over 11,000 feet (3,352 meters).
- Water flows through into the Great Basin or Uinta Basin, ultimately ending up in Colorado River
- Other bodies of water include the, Jordanell Reservoir, Strawberry Reservoir, Deer Creek Reservoir and the Provo River
- Average temperatures in the wintertime range from lows in the teens and highs in the mid-20s and 30s
- Average temperatures in the summertime range from lows in the mid-40s and 50s and highs in the mid-70s and 80s

Summit County

- "Utah's Summit" with the Wasatch and Uinta Mountains bordering the county
- Uinta Mountains give birth to the Weber, Provo, and Bear rivers that flow into the Green River.
- The county holds the Snyderville Basin, home to many of its residents
- Summit County's elevation varies greatly. It encompasses high mountain peaks, with elevations ranging from around 6,000 feet (1,828 meters) in valleys to over 10,000 feet (3,048 meters) in the mountainous areas.
- Major bodies of water include the Rockport Reservoir, Echo Reservoir, and Weber River
- Average temperatures in the wintertime range from lows in the teens and highs in the mid-20s and 30s
- Average temperatures in the summertime range from lows in the mid-40s and 50s and highs in the mid-70s and 80s

NATURAL ASSETS

Utah County

Utah County is blessed with diverse natural assets. It is home to the iconic Mount Timpanogos, a prominent peak in the Wasatch Range, offering breathtaking views and opportunities for hiking, camping, and climbing. The county also encompasses parts of the scenic Provo River, renowned for its trout fishing and recreational activities. Utah Lake, the largest freshwater lake in the state, provides opportunities for boating, fishing, and birdwatching. The county's scenic beauty, including its canyons, forests, and natural landscapes, make it a popular destination for outdoor enthusiasts.

- Alpine Loop Scenic Backway
- Bridal Veil Falls
- Cascade Springs
- Deer Creek Reservoir State Park
- Fifth Water Hot Springs
- Maple Lake
- Mount Nebo
- Mount Timpanogos
- Lindon Marina
- Payson Lakes
- Provo River
- Rock Canyon Park
- Stewart Falls Trail
- Sundance Mountain Resort
- Utah Lake State Park
- Uinta-Wasatch-Cache National Forest
- Timpanogos Cave National Monument
- American Fork Canyon

Wasatch County

Wasatch County boasts stunning natural assets that attract visitors from near and far. The county is nestled in the Wasatch Mountains, offering picturesque mountain ranges, including the Uinta Mountains to the east. The area is known for its world-class skiing and snowboarding resorts. The county is also home to the Jordanelle State Park, encompassing the Jordanelle Reservoir, where visitors can enjoy water sports, camping, and hiking. The diverse wildlife, including elk, deer, and various bird species, adds to the natural charm of the county.

- Utah Crater
- Alpine Loop Scenic Backway
- Soldier Hollow Nordic Center
- Jordanelle State Park
- Memorial Hill
- Stewart Falls Waterfall
- Wasatch Mountain State Park
- Cascade Springs

Summit County

Summit County is renowned for its spectacular natural assets, primarily driven by its mountainous terrain and pristine landscapes. The county encompasses parts of the Uinta-Wasatch-Cache National Forest, offering an abundance of recreational opportunities such as hiking, mountain biking, and fishing. The Park City area within Summit County is particularly famous for its ski resorts, including Park City Mountain Resort and The Canyons Resort. The county also hosts the Sundance Film Festival, taking advantage of its beautiful surroundings and promoting the intersection of arts and nature.

- Echo State Park
- Rockport State Park
- Wasatch Mountain State Park
- Park City Mountain Resort
- Deer Valley Resort
- Park City Mountain
- Utah Olympic Park
- Woodward Park City[11]

11 The summary of natural resources was informed by document and website review from regional tourism organizations.

CULTURAL ASSETS

Utah County Highlights

Utah County has a rich cultural heritage with several notable assets. The county is home to two major universities, Utah Valley University (UVU) and Brigham Young University (BYU) Brigham Young University offers diverse cultural events, including theatrical performances, art exhibits, and music concerts. The Monte L. Bean Life Science Museum, located at BYU, showcases various exhibits on natural history and biodiversity. The county also hosts the various cultural festivals and city celebrations, including celebrations of Polynesian and Scottish culture, Pioneer, Steel, Strawberry and Onion Days. Notably among these is the Timpanogos Storytelling Festival, which celebrates the art of storytelling and folklore.

- Thanksgiving Point
- Hale Center Theater
- BYU Performing Arts
- Sundance Summer Theatre
- The Hive Collective
- Utah Valley Symphony
- Utah Valley University Performing Arts
- UVU Noorda Center for the Performing Arts
- BYU Museum of Art
- Daughter's of Utah Pioneers Museum

Wasatch County Highlights

Wasatch County boasts cultural assets that reflect its Western heritage and recreational lifestyle. The county is known for its western-themed events, including major rodeo events. The historic Heber Valley Railroad offers scenic train rides and recreates the atmosphere of the Old West. The county also has a vibrant arts community, with galleries and art events showcasing the works of local artists. The annual Swiss Days in Midway celebrates the area's Swiss heritage through traditional music, food, and crafts.

- Heber Valley Railroad
- Wasatch Mountain Music Festival
- Soldier Hollow Sheepdog Competition
- Heber Valley Choir and Orchestra
- Swiss Days Annual Festival
- Timpanagos Valley Theatre
- Wasatch Camerata Chamber Singers

Summit County Highlights

Summit County embraces a diverse range of cultural assets, influenced by its history and mountain resort culture. Park City, located in Summit County, is renowned for its Sundance Film Festival, attracting filmmakers and artists from around the world. The county is home to the Kimball Art Center, which exhibits contemporary art and hosts art events and workshops. Park City also offers a vibrant dining and entertainment scene, with numerous restaurants, bars, and live music venues. The county celebrates its mining heritage through events like Miners' Day, featuring parades and activities that honor the area's mining history.

- Park City Museum
- Mountain Town Music
- Summit County Museum
- Park City Film
- Utah Conservatory
- Utah Film Studios
- George Eccles Salt Lake 2002 Olympic Winter Games Museum
- Sundance Institute

APPENDIX B

DISASTER RESILIENCE

Disaster mitigation can protect lives and properties. MAG, at the request of the local jurisdictions in Summit, Utah, and Wasatch counties, created a plan that helps those participating access disaster funding, both before and after a disaster occurs. Mitigation reduces or prevents the damage caused by natural disasters such as earthquakes and wildfires. It involves actions taken before a disaster occurs rather than during disaster response. Participation in this plan makes jurisdictions and organizations eligible to apply for FEMA grants and receive post-disaster funds.

The Regional Pre-Disaster Mitigation Plan aims to increase awareness among city and state officials, agencies, and the public regarding the risks posed by various hazards in Utah jurisdictions, and how to mitigate these risks. The participating counties include Summit, Utah, and Wasatch. The plan focuses on regional hazards such as:

- air quality,
- algal blooms,
- climate change,
- severe weather,
- drought,
- pests,
- and radon gas.

The goal of the plan is to promote proactive measures to prevent or reduce vulnerability and risk associated with these hazards.

Utah County faces several likely hazards, including hail, fire, winter weather, wind, and avalanches. Flooding is a regular occurrence in the county. Wildfires are frequent, with most fires happening in late summer and early fall. Smoke from wildfires out of state cause additional air quality issues. Human activities contribute to over half of the fires in the county. The rapid development of foothills and alluvial fans often leads to landslides and debris flows, especially after wildfire events. In terms of earthquakes, while Summit and Wasatch counties may experience some damage, Utah County is expected to see mass movement along the bench areas, liquefaction near the lake, and other structural impacts for earthquakes with a magnitude of 5.0 and above. Due to its mountainous terrain, Utah County is particularly susceptible to severe weather, especially winter weather events. These hazards highlight the need for preparedness and resilience strategies in the county.

Wasatch County in Utah faces several high-likelihood hazards, including hail, winter weather, and avalanches. Flooding is a regular occurrence, especially as development expands in areas like Heber Valley, along the shores of Deer Creek and Jordanelle Reservoirs, and along river and stream corridors. Wildland fires are a common event in the county, with multiple fires occurring each year. Landslides also happen nearly every year along the benches and hillsides. Earthquakes above 3.0 on the Richter scale are rare in the county, with minor events occurring monthly but generally going unfelt. Due to its mountainous terrain, Wasatch County is particularly vulnerable to severe winter weather, which has caused the most injuries and property damage. Wind, on the other hand, is responsible for significant crop damages in the county. It is crucial to prioritize preparedness and mitigation measures to address these hazards effectively.

Summit County in Utah faces several significant hazards with high impact potential. The most likely hazards include winter weather, high winds, drought, and wildfires. Flooding in the county is often caused by snow melt or severe thunderstorms, exacerbated by impervious soils resulting from wildfires or drying out. Wildfires are frequent and pose imminent danger to residents, as the county is located within the Wildland Urban Interface. Landslides are common and can occur without warning, leading to destructive outcomes. The region is also at risk of earthquakes, particularly along the Wasatch Fault. Severe weather events like blizzards, heavy snowstorms, and ice storms, as well as avalanches, are a concern, especially in tourism-centered areas. Currently, Summit County is experiencing a severe drought, leading to inadequate pasture and water for cattle, poor air quality, dust problems, and dry streams and ponds. These hazards highlight the need for proactive measures to mitigate risks and enhance resilience in the county.

To ensure the maintenance of the plan, MAG will make it accessible on its website, along with risk maps and a comment section on the Pre-Disaster Mitigation landing page. Additionally, hazard maps will be featured at their annual Open House, where each city presents its long-range plan. MAG actively monitors the progress of mitigation strategies by contacting each jurisdiction every two years. This assessment aims to determine if any modifications are necessary for the plan. The results of these evaluations will be shared with the Executive Council. Updates on the progress of the plan can be expected in 2024 and 2026. This periodic evaluation and review process ensure the plan remains relevant and effective in addressing hazards and mitigating risks.

APPENDIX C

LABOR MARKET

Exhibit 40: Total Employed Workforce by County

Source: Lightcast Industry Employment Table, 2023

	All Industries Employment
Summit County	32,637
Wasatch County	13,292
Utah County	1,840,325
MEDD Region Total	1,886,254

OCCUPATIONS AND JOB POSTINGS

Exhibit 41: MEDD Top Occupations by Employment, 2022

Source: Lightcast Occupations Table Report, 2023

Occupation Description (SOC)	Jobs 2022	Median Annual Earnings	Median Hourly Earnings
Office & Administrative Support (43)	49,742	$35,169	$16.91
Sales & Related (41)	35,382	$31,225	$15.01
Management (11)	32,686	$78,591	$37.78
Educational Instruction & Library (25)	30,478	$55,269	$26.57
Food Preparation & Serving Related (35)	27,438	$25,138	$12.09
Construction & Extraction (47)	26,024	$45,336	$21.80
Business & Financial Operations (13)	21,890	$57,611	$27.70
Production (51)	19,801	$34,935	$16.80
Transportation & Material Moving (53)	19,617	$32,352	$15.55
Computer & Mathematical (15)	18,855	$75,839	$36.46

Exhibit 42: Stem Occupations as a Percentage of All Jobs

Source: Lightcast Occupation Tables

STEM Occupation Group	Jobs 2022	% of STEM Jobs	% of All Jobs
Computer Occupations	17,426	72.26%	4.61%
Mathematical Science Occupations	1,265	5.25%	0.34%
Engineers	2,211	9.17%	0.59%
Drafters, Engineering Technicians, and Mapping Technicians	1,307	5.42%	0.35%
Life Scientists	462	1.92%	0.12%
Physical Scientists	257	1.07%	0.07%
Social Scientists and Related Workers	567	2.35%	0.15%
Life, Physical, and Social Science Technicians	620	2.57%	0.16%
	24,115		**6.38%**

LABOR FORCE PARTICIPATION

Overall, the regional labor force participation rate, at 70.4% for the population 16 years and older, is higher than both the national average (6.8% above) and the state average (1.8% above).

Exhibit 43: Regional Labor Force Participation Rate by Sex

Source: American Community Survey 5-Year Estimates S2301 Employment Status

Female labor participation rates represent the greatest disparity between state and national trends in the region. Overall female labor participation falls 5.1% below the national average and 3.9% below the state average. The disparity becomes greater for women with children, whose labor participation rate is 15.8% below the national average and 7.4% below the state average.

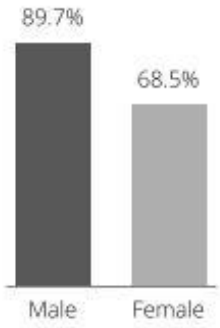


Exhibit 44: Regional Labor Force Participation Rate by Race

Source: American Community Survey 5-Year Estimates S2301 Employment Status

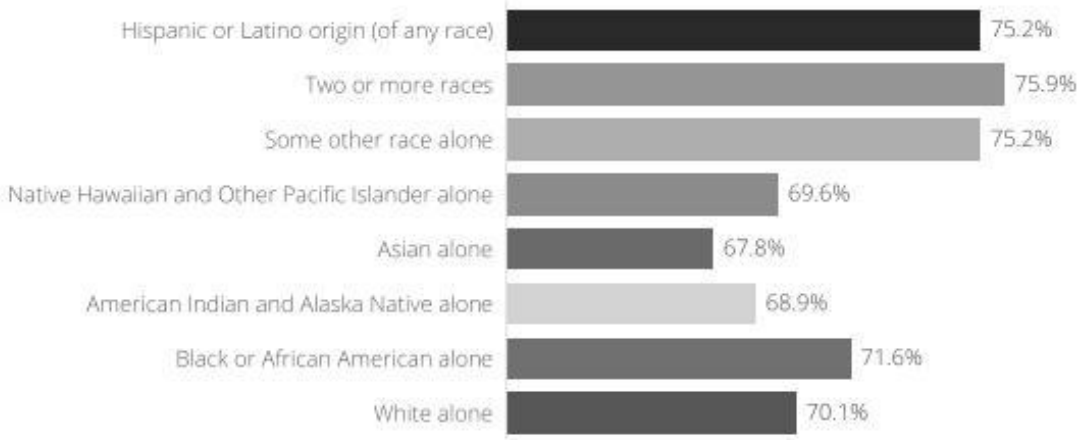


Exhibit 45: Regional Labor Force Participation Rate by Educational Attainment

Source: American Community Survey 5-Year Estimates S2301 Employment Status

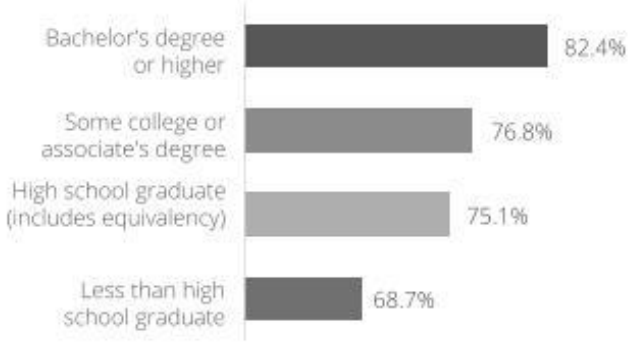
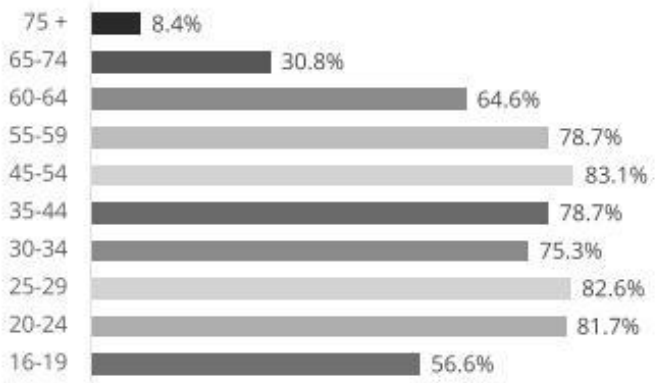


Exhibit 46: Regional Labor Force Participation Rate by Age

Source: American Community Survey 5-Year Estimates S2301 Employment Status

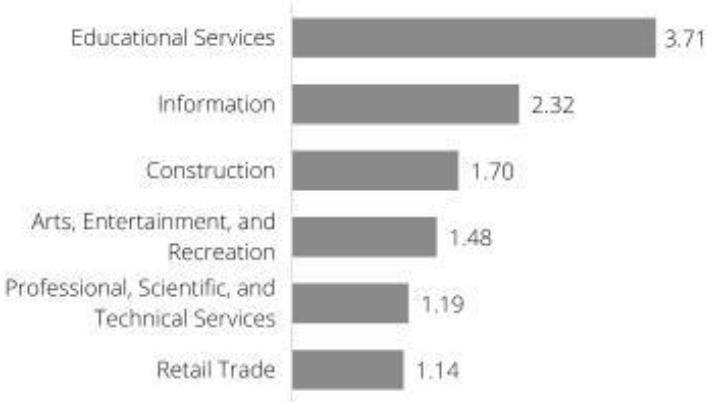


TOP OCCUPATION LOCATION QUOTIENT

Employment Concentration is a measure of an industry's presence in an area based on the area's size and national data on that industry. A score of 1 would indicate that an industry is the expected size (in terms of employment numbers) for the size of the study area, with scores greater than 1 indicating an especially large presence of that industry in the region. Conversely, a score of less than 1 indicates that the industry has a smaller presence than expected based on national data.

Exhibit 47: Regional Industries with Employment Concentration Greater Than 1.0

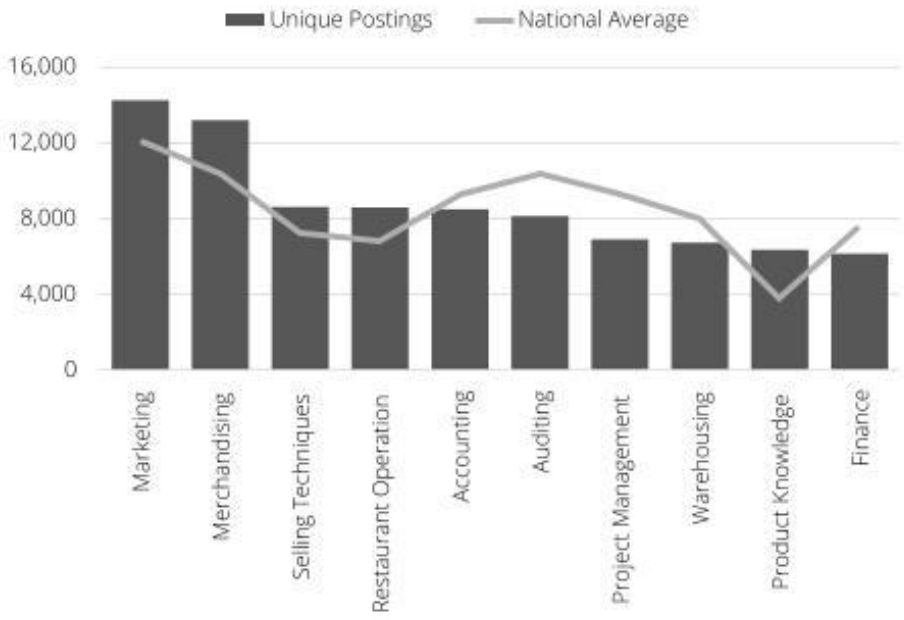
Source: EMSI Lightcast 2023



MOST IN-DEMAND SKILLS

Exhibit 48: Regional Top-Demanded Specialized Skills

Source: Lightcast 2023



JOB POSTINGS

Exhibit 49: Regional Top Posted Occupations

Source: Lightcast 2023

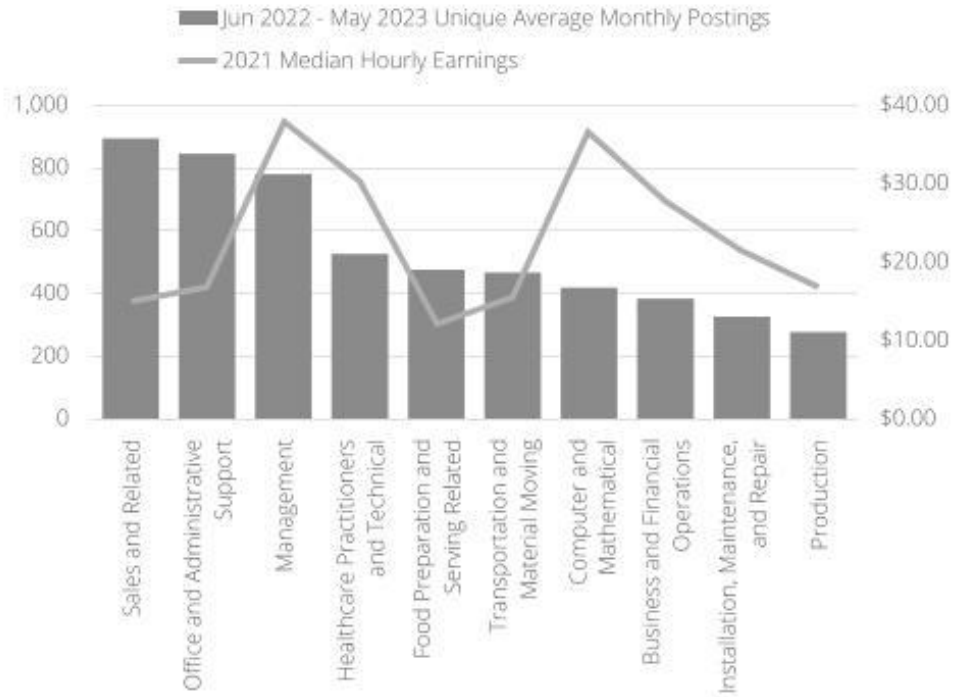


Exhibit 40: Jobs by County

Source: Lightcast Industry Tables, 2023

	Total Jobs, 2022
Summit County	32,639
Wasatch County	13,292
Utah County	331,810
MEDD Region Total	377,741

APPENDIX D

BUSINESS AND INDUSTRY

GROSS REGIONAL PRODUCT (GRP)

Exhibit 50: Regional Growth Year Over Year

Source: Bureau Economic Analysis 2023

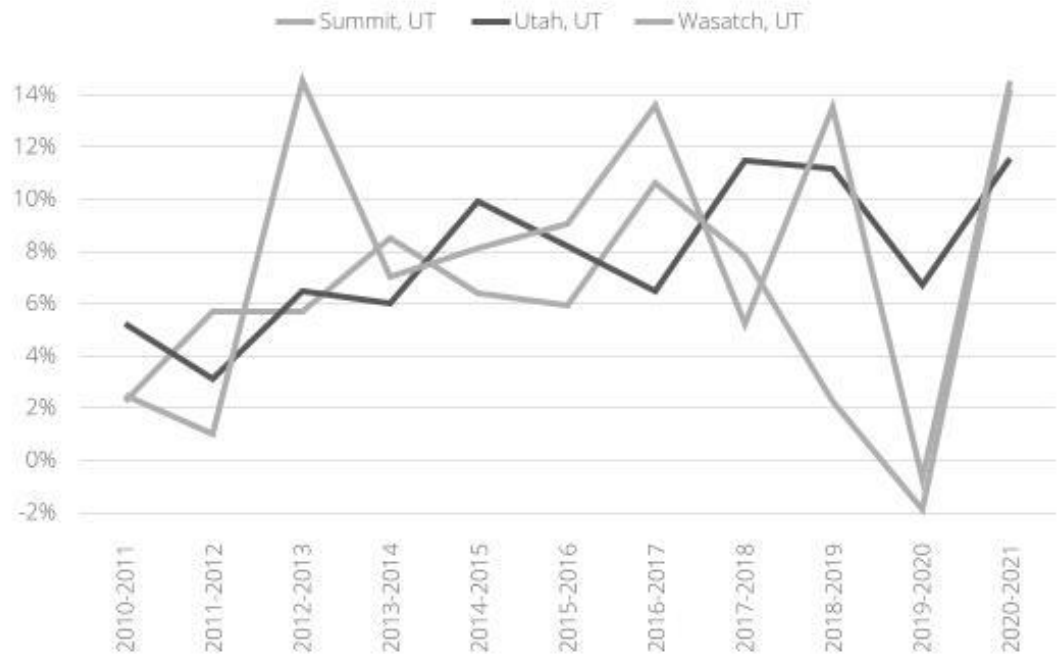


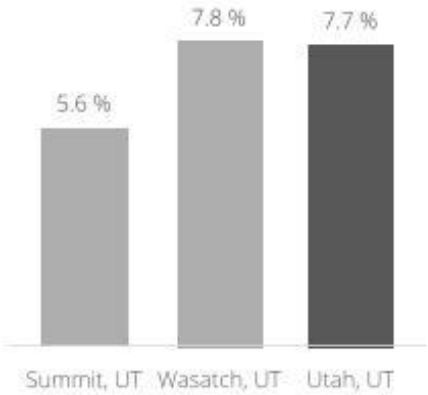
Exhibit 51: GRP Per Capita

Source: Bureau Economic Analysis 2023, US Census Bureau ACS 2021

	GRP Per Capita
Summit County	$111,038
Wasatch County	$41,584
Utah County	$56,134
MEDD Region Total	$58,646

Exhibit 52: Annualized Compound GRP Growth 2011-2020

Source: Bureau Economic Analysis 2023



TOP INDUSTRIES

Exhibit 53: MEDD Largest Industries by Employment

Source: Lightcast Industry Tables, 2023

Industry Description (NAICS)	Jobs 2022	Average Earnings	Location Quotient
Retail Trade (44)	42,096	$46,574	1.14
Government (90)	39,984	$62,126	0.73
Health Care & Social Assistance (62)	38,531	$58,750	0.80
Construction (23)	37,066	$73,024	1.70
Educational Services (61)	36,919	$31,953	3.71
Professional, Scientific & Technical Services (54)	31,966	$103,806	1.19
Accommodation & Food Services (72)	29,059	$27,942	0.95
Manufacturing (31)	25,483	$75,150	0.87
Administrative & Support & Waste Management & Remediation Services (56)	21,241	$53,322	0.89
Information (51)	16,680	$139,247	2.32

Exhibit 54: MEDD Largest Industries by GRP

Source: Lightcast Industry Tables, 2023

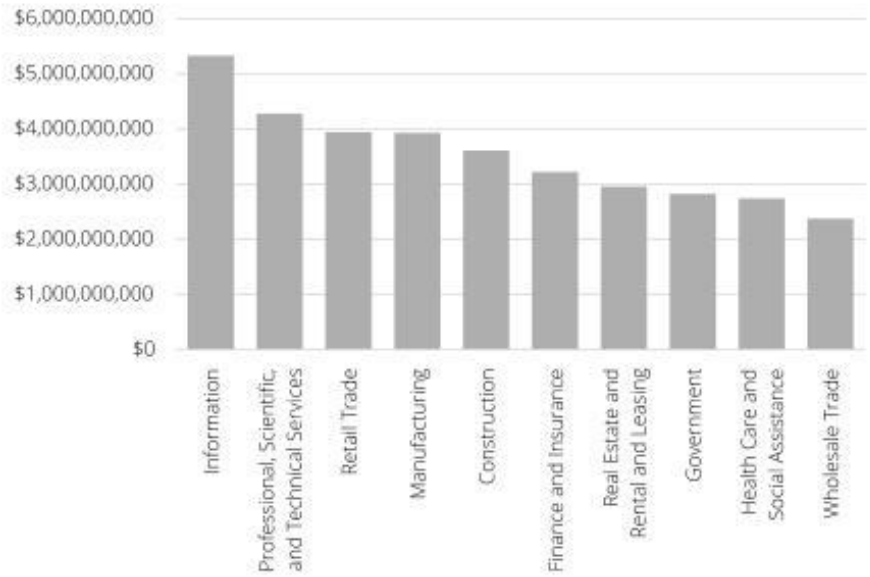
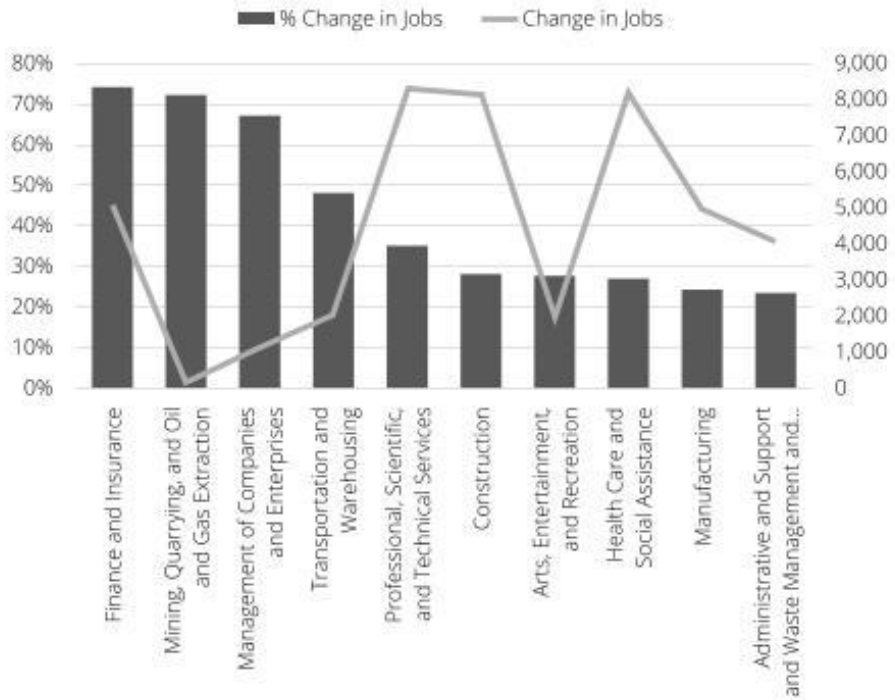


Exhibit 55: MEDD Top Growing Industries by Employment

Source: Lightcast Industry Tables, 2023



APPENDIX E

BROADBAND AND ENERGY

UTAH STATE'S BROADBAND INVESTMENT

The state has made expanding broadband access a priority over the past several years, including research projects to identify target regions, creating coordinating bodies to support regions, and leveraging state and federal funds to implement plans.

As communities across the nation invest in updated broadband infrastructure in response to the digitization of daily life after the COVID-19 pandemic, fiber optic technology is regarded as a resilient technology with exponentially greater capacity than cable or DSL. Many state and federal programs are recommending that communities invest in infrastructure that can achieve speeds only possible through fiber-optic technology or powerful wireless technology at close range.

Installing fiber-to-the-home is costly, especially in communities without the cost-savings associated with density. In less dense areas, local governments may incentivize broadband providers to invest in broadband infrastructure buildout to ensure that communities remain connected. The online, interactive version of the mapping tool created by Broadband Now shows the region's current availability of fiber service to consumers. The map shows limited availability of fiber beyond the most densely populated parts of the region.

It should be noted that while available data may convey that broadband availability is limited, significant investment has been made in recent years, and some buildouts may be in-process.

Broadband Utopia: UTOPIA Fiber is a fiber optic infrastructure owned by 11 Utah cities. Utilizing light to transfer information, it generates extremely fast and reliable communication technology. Fiber has been deployed in Utah County cities including Orem, Lindon, Cedar Hills, Payson, Pleasant Grove, and Woodland Hills.

Utah Broadband Outreach Center: The Utah Broadband Outreach Center (UBOC) was established to promote and facilitate broadband expansion throughout the state. UBOC provides resources, tools, and technical assistance to communities, businesses, and individuals, aiming to bridge the digital divide.

Utah Broadband Project: The Utah Broadband Project, a collaboration between the Governor's Office of Economic Development and the Department of Technology Services, has been instrumental in expanding broadband infrastructure. They have worked on mapping, planning, and implementing broadband projects to improve access across the state. These mapping efforts help policymakers and stakeholders prioritize investments and develop strategic plans for broadband expansion.

Of the Economic Development Districts in the state of Utah, the MEDD region ranks the strongest on the Broadband Infrastructure and Adoption Index.[12]

12 *Coordinated Action Plan (page 71) details the five variables included in the index.*

ENERGY

The energy infrastructure serving Utah County, Wasatch County, and Summit County in Utah consists of a combination of electricity generation, transmission, and distribution systems, as well as natural gas and petroleum infrastructure. Here's a detailed outline of the energy infrastructure in these counties:

Electricity Generation

The Intermountain Power Plant located in Millard County is a major coal-fired facility that supplies electricity to Utah County, Wasatch County, and Summit County. It has a generating capacity of approximately 1,800 megawatts. Several natural gas power plants are scattered throughout the region. One notable facility is the Summit County Power Plant in Wanship, which has a capacity of around 570 megawatts. There are also several renewable energy projects in the area. Utah County has solar farms and wind farms, while Wasatch County and Summit County have wind farms that contribute to the local energy mix.

Electricity Transmission

The region is connected to the broader electricity grid through an extensive network of transmission lines. Major transmission lines, such as the 345 kV lines operated by Rocky Mountain Power, traverse the counties, enabling the transfer of electricity from power plants to local substations.

Electricity Distribution

The distribution grid consists of power lines and associated infrastructure that delivers electricity to homes, businesses, and other consumers. Local distribution utilities, such as Rocky Mountain Power, operate and maintain the distribution systems in these counties. Local substations receive electricity from the transmission lines and further step down the voltage to levels suitable for residential and commercial use.

Natural Gas Infrastructure

Natural gas is supplied to the region through an extensive network of pipelines. These pipelines transport natural gas from production areas and interconnect with local distribution systems. Local natural gas distribution systems distribute the gas to residential, commercial, and industrial customers. Utility companies, such as Dominion Energy, manage and maintain the natural gas distribution infrastructure.

Petroleum Infrastructure

There is a refinery located in North Salt Lake (Salt Lake County), which processes crude oil into various petroleum products such as gasoline, diesel, and jet fuel. The refinery serves the local market, including Utah County, Wasatch County, and Summit County. Petroleum products are stored in tanks and transported via pipelines, trucks, and rail to distribution terminals, fuel stations, and other consumers throughout the region.[13]

13 *The overview of the energy infrastructure in the region was informed by document review, including information from the Utah Office of Energy Development.*



Alternative Energy Sources

While local data is not available, according to the US Energy Information Administration, alternative energy sources (hydroelectric, wind, geothermal, biomass, and solar) only account for 2% of total energy source use across the state of Utah. The Utah Office of Energy Development has a voluntary Renewable Portfolio Standard, which says that by 2025, 20% of retail electricity sales should come from renewable energy sources.

According to findings from Envision Utah, a nonprofit, nonpartisan community partnership that includes members of both the private and public sectors, there are encouraging prospects for increased alternative energy sources in Utah:

- Though solar power currently represents a small fraction of Utah's electricity generation, there is significant potential for larger, utility-scale projects. The Bureau of Land Management has identified three solar energy zones suitable for energy production in Beaver and Iron Counties.
- Utah has several utility-scale wind projects. The best wind resources are concentrated in the southwest, but other locations scattered throughout the state have good, though limited, potential to produce wind energy.
- Utah is one of just six states with developable, utility-scale geothermal resources. Utah currently has about 70 megawatts of geothermal capacity installed. Drilling to confirm that the resources can be developed into energy could be expensive, however, so future development may be modest.
- While hydroelectric facilities currently generate the largest percentage of renewable energy used in Utah, new hydro projects are unlikely to be developed further because of environmental concerns. However, there is some potential for small "micro-hydro" projects to generate power in canals, water lines, or other water sources.[14]

Utah Transmission Study 2020

In 2020, the Utah State Legislature approved funding for a study to identify transmission constraints hindering access to Utah's in-state resource potential. The goal of the transmission study was to better identify transmission constraints that limit access to Utah's energy resource potential. Provide strategies to address such constraints, and consider the costs, economic impact, and technical feasibility of the proposed strategies.

The Five Key Findings of the report include:

- Utah has excellent electric generation potential and development activity, but future generation buildouts will increase congestion on the transmission grid.
- Future generation additions in Utah are likely to be limited by transmission constraints on key paths in Southern and Central Utah.
- Transmission expansion along Utah's north-south backbone system will be required to address the grid constraints and to support the levels of generation and storage buildout envisioned in this study.
- A transmission buildout in Utah can help tap into state resource potential.
- In-state transmission and power generation investment can cause major economic benefits to accrue to Utah, suggesting new jobs and economic growth as potential reasons to unlock Utah's resource potential with transmission expansion.[15]

14 https://yourutahyourfuture.org/topics/energy/item/38-background-energy-in-utah
15 https://energy.utah.gov/energy-information/transmission/

APPENDIX F

STAKEHOLDER ENGAGEMENT

STAKEHOLDER WORKSHOPS

Introduction

On June 13th and 14th, TPMA, in collaboration with the Mountainland Association of Governments (MAG), conducted three workshops in the Mountainland Economic Development District (MEDD) as a part of an ongoing project to update the region's Comprehensive Economic Development Plan (CEDS). Over 150 key stakeholders were invited to participate, and 42 attended. The workshops took place in each of the three counties in the region: Wasatch, Summit, and Utah County. Over the course of the three sessions, stakeholders worked individually and collaboratively to identify the greatest strengths, weaknesses, opportunities and threats the region is facing, as well as what a shared vision for the future may look like.

This summary covers the highlights of the three sessions in aggregate. While this is by no means the extent of the ideas and feedback the team received, it is a reflection of the powerful consensus that emerged across the board, across professions, identities, and geography.

Visioning Themes

Participants were asked to spend the first few minutes of the workshop thinking and talking about what their vision for the Mountainland Region would look like. Five years from now, when the next CEDS update is in the works, what should the region have achieved or be known for? Four themes emerged from this brainstorming:

- Natural Resources: open spaces, stunning landscapes, and the conservation and protection of those places
- Housing Advancement: housing that is affordable for the region's workforce, supported by an increase in density, supply, and variety
- Community: a place where residents can feel welcome, united, and connected to the deep history and heritage of the region
- Transportation: a region with high quality, accessible transportation options, including robust public transit

The vision developed from the workshops is:

> ***"The Mountainland region is known for stunning landscape, unrivaled recreation, high-level education, skilled workforce, and global leadership in information and technology, making it one of the best places in the nation that provides top-quality services, amenities, and infrastructure for businesses, residents, workers, and visitors."***

SWOT Prioritization

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Natural Resources and Recreation: seasonal attractions, natural geography, open spaces, and recreation with family-friendly amenities, all of which improves quality of life and attracts tourism	**Regional Vision:** competition between entities, lack of aligned values and communication between leaders and residents, and limited collaboration between cities and counties	**Infrastructure and Transportation Improvements:** public transportation connectivity and joint efforts in transportation collaboration including UTA/UDOT	**Environmental:** natural resources require better preservation/ management efforts, especially regarding water and air quality as well as light pollution
Quality of Life: the region is a desirable location for people to live and relocate with a balance of rural and open spaces while remaining close to large metro areas, as well as excellent recreational amenities and opportunities	**Housing:** increasing housing costs are limiting the regional workforce's ability to live in the area, disconnects between developers, planners, and residents is causing a lack of affordable/ attainable housing, particularly in Wasatch & Summit.	**Recreational assets and tourism development:** regional recreational and natural spaces that can be expanded, improved upon, or created, including arts destinations, professional sports, parks, and trail systems	**Lack of transport options:** public transit availability and supply is currently inadequate, and increased traffic is straining transportation infrastructure, with growth outpacing infrastructural improvements
Rapid economic growth: both in GRP and jobs resulting in a strong economy, alongside strong indicators for future growth and diversification of regional industries and employment.	**Transportation and Infrastructure:** lacking necessary levels of investment, particularly public transit which lacks 1st/last mile connect. Traffic congestion is worsening alongside a need for other infrastructural updates to meet increased demand	**Improving housing problem:** by removing barriers, increasing housing supply and density through mixed use, infill development to meet low income, workforce, and senior housing needs.	**Housing:** some communities unwilling to address affordability needs or consider increased density while population growth is pushing up market prices. The region's workforce is facing more and more strain to afford housing costs.

How Might We

The last activity participants were asked to engage in pushed the groups to take the priorities they identified through the SWOT analysis, and form questions asking "how might we" leverage strengths, address weaknesses, pursue opportunities, and mitigate threats. These ideas fell into 5 primary categories, listed below with three key goals for each.

Natural Resources and Recreational Assets
How might we...

- Strategically preserve historic properties
- Ensure open space preservation and management; work with appropriate agencies and entities on recreation management plans for lakes, canyons, etc.
- Mitigate potential environmental concerns through conservation, GIS mapping, water treatment technologies, and regional coordination

Transportation
How might we...

- Shift the culture of transportation to provide better public transit options for the region, encouraging residents to choose public transportation rather than utilizing it only when they must
- Increase investment in public transport to move the development of new infrastructure further up the schedule to close the gap in our current needs, getting ahead of demand
- Remove barriers to allow increased collaboration between the region and UDOT/UTA to allow studies and projects to move forward more efficiently

Business and Workforce
How might we...

- Diversify the economy at large, alongside tourism and recreation opportunities
- Improve cities and counties' abilities to tell their story and market themselves more effectively to potentially businesses
- Better engage with the workforce, especially commuters, to ensure their needs are being met

Housing
How might we...

- Create more attainable housing opportunities for all levels of income; prioritize creating more density, strategically addressing zoning concerns, ensure residential developments have access to grocery stores and transportation hubs
- Work better with builders to ensure housing needs are being met and development costs are stable enough to allow for more attainable housing
- Help the state be better informed on housing issues and organize sufficient planning sessions to improve housing issues collaboratively

Leadership, Collaboration, and Community
How might we...

- Allow MAG to fully serve as a forum for regional collaboration
- Form a cohesive vision for the region that can be supported across the community with a commitment to inclusion and diversity as well as investment in education, community support, and collaboration
- Provide better training for leadership in the public sector to improve their ability to pursue efficient and effective strategies and funding

Follow-up

A follow-up survey was sent to participants to obtain any additional feedback. Of respondents, 75% attended the session held in Orem and 25% attended the session in Park City.

Feedback encouraged alinment with (1) Utah's Guiding Our Growth, (2) Your Utah, Your Future, and (3) Utah Valley Visioning. The importance of transportation, public transit, affordable housing, and collaboration. It was noted by one participant that the influx of seasonal workers in Summit County has been a significant issue, especially regarding J1 workers and the lack of adequate housing. This participant did not feel that there was adequate discussion of the topic during the workshop. Another participant asked how elected officials can be more involved with the CEDS in the future and remarked that it can be frustrating for local government employees to not be able to carry out action plans due to municipal lawmakers preventing growth and development.

STRATEGY SESSION

Introduction

The Mountainland Association of Governments (MAG) held a virtual workshop with the CEDS Committee to develop goals and objectives. Prior to the workshop, participants were given a draft of the SWOT analysis and overview of feedback from the stakeholder workshops. The session was held via Zoom and utilized Google Jamboard for collaborative work. Nine (9) members of the CEDS Committee attended.

Approach

Participants were asked to create objectives to address the issues outlined in the SWOT analysis. They were then asked to consider all objectives among the group and vote to elevate three in each focus area.

After the top goals were identified, participants were asked to come up with action steps the region should take to achieve the goals.

Transportation and Infrastructure

1: Get the first-mile/last-mile transportation to allow more ridership.

- Enhance and/or establish micro transit throughout all 3 counties (either UTA, HVT, or collaboration)
- Create shuttles for specific groups or locations like the hospital, strip malls, medical centers.
- Purchase last mile vehicles or shuttles to workplaces.
- Invest in network of high-quality active transport facilities that is connected with physical separation from vehicular traffic and consistent design standards across jurisdictions.
- Create a concise, data-driven, digestible pitch on how transit positively impacts health, congestion, quality of life, air pollution, resource management, community, etc
- Show how public transport is cost effective and largely supported by the population to get political support.
- Survey employers to ascertain the need for first/last mile transportation. Then follow through with shuttles as needed.
- Take surveys to find out what stops people from using public transportation and what their viewpoint of public transportation
- Create rebate/subsidy program for e-bikes for all residents
- Cities to create first and last mile connectivity that is pushed up to a regional and UTA level for implementation
- Make the active transportation/trails network EXTENSIVE. Give these modes priority in transportation corridors.
- Consider funding one entity to provide first/last mile service to pool resources
- provide grants to local governments providing last mile service
- Work closely with UTA with last to bring the last mile program that has been started in SL county to this region.

2: Build the political will and public support to prioritize transit.

- Incentives such as free or discounted bus, rail, or transit passes, reimbursements, partial payments or pre-tax payroll should be implemented.
- Allocate increased sales tax distribution to counties/cities to fund last mile transportation solutions.
- Public transit is often viewed as an "after thought." Can developer incentives be tied to the development of public transit infrastructure?
- Create a data-based presentation using storytelling to message the benefits of mass transit that can be customized and used by cities to educate local elected officials
- Educate local city councils on the benefits of mass transit i.e. removes cars off the roads, less traffic
- Work with the local legislatures to encourage them to appropriate funds to finish public transportation.
- WFRC and MAG create one vision plan for public transit that becomes the statewide plan that is pushed to UTA, and the State
- Sign on to a joint resolution that supports transit policies

3: Incentivize public transportation through making it easier and more efficient for the user.

- Work with UTA to help public transportation to be more timely and efficient in my area.
- Focus on developing transit oriented development around high-quality/high-frequency transit. Not just adding more transit.
- Utilize TIF or EDTIF incentives as a tool to force businesses to provide passes for workers
- Free fares for all public transportation. More schedules for connecting buses.
- Free fares for public transportation.
- Free wifi on busses and heated bus stops to incentivize workforce ridership.
- For counties that have not adopted the 4th and 5th transportation quarters--go through process to adopt for enhanced transit funding (to provide decreased or fare-free).

Natural Resources

1: Balance open space with growth and development.

- Growth is going to happen, so, let's grow responsibly with a combination of different housing densities and open spaces.
- State legislation that mandates open space preservation or development based on the size of a development
- Identify community priorities for the types of lands to acquire/preserve (ie. agricultural, sensitive lands, wetlands, areas in high density areas) and how we want to use them.
- Incentivize open space or trail development through density bonuses
- Open space bonding by out public to provide additional funding sources.
- A group that identifies existing/potential green spaces and best practices for community green spaces is formed, they identify and acquire green spaces making them parks, etc
- Open spaces and trails need to connect from county to county. A "Ridge to Rivers" collaboration.
- provide incentives or matching funding for open space purchases
- Ensure local governments have local control over development
- Can the legislature provide $ for green space acquisition?
- Inventory open space in our entire region and create a unified plan for preservation.
- Identify open space areas and areas for ag protection and help preserve these area.
- Legislative mandate for a minimum requirement for open space and allow cities to add to additional requirements
- Need to de-silo the themes - they're interrelated and desired outcomes cannot be realized until considered collectively and respective resources are pooled.
- Buy green spaces next to water - rivers, steams and ponds to preserve access, safety and use of precious water resources.

2: Make Utah lake a more attractive venue for recreation and build a regional vision for its future.

- Need greater awareness and exposure to best practices within and outside of our region, in terms of policies, funding, design, etc.
- Better lake-side amenities/infrastructure.
- There are plans and proposals that are valid to address concerns about Utah Lake. The problem is funding. How can we get state/federal funds to execute a project?
- The carp in the lake must go or become agriculture.
- Work with the county to get more resources for the preservation of the lake.
- Find a billionaire investor whose only focus in life is restoring Utah Lake :) Or create a comprehensive funding strategy.
- Get buy-in from all regions of Utah County on a unified county wide plan to responsibly develop and utilize Utah Lake. Protect its natural beauty while utilizing its economic benefits
- Utah Lake needs clean water coming from sewage processors to remain good for recreation.
- Stop studying Utah Lake, Clean the Lake up and create a regional plan to upgrade all the amenities
- A regional view of Utah Lake and its future use has to consider east west connectivity.
- Consider 'cap and trade' program, where 'dirty' industry critical to the economy pays into a fund, which is then used to strategically add to/enhance natural resources elsewhere
- Can we connect Wakara Way project with the rest of the surrounding areas?

3: Identify the greatest threats/causes of air pollution and identify solutions in the region.

- Can we incentive more EV vehicles, solar power, reduce green house emission through tax credits?
- Have local universities study air pollution and water pollution to see where the sources are. They can also test solutions. Has this already been done?
- Utilize MAG as part of the transportation arm to address pollution to bring all regional partners to the table to create solutions
- Conduct a pollution audit and produce action plan to address threats
- Find ways in the community to have more EV charging stations.
- Can we create public campaigns focused on educating citizens on various solutions to mitigate air pollution?
- Vehicle emissions account for 40% of air pollution. Provide a local system to encourage "work from home" days when air quality is in the medium range so it doesn't get bad.
- Extensively incentivize alternatives to individual vehicles.
- Research the benefits of a traffic congestion mitigation tax
- Create cheap scrubbers for industrial and car exhaust.
- Cycling infrastructure needs to be developed as protected lanes if we are going to gain any real mobility improvement in this area.

Livability

1: Protect local control, supporting the community and sense of place.

- Can we seek to understand the various viewpoints of developers serving in the state legislation and refrain from name calling?
- Bar developers serving on zoning committees. Conflict of interest.
- Can local government lawmakers strive for an open mindset to seek to understand the reasoning and intent behind state legislation with regards to community and sense of place?
- We need to stick together on local control issues. The legislature dangles carrots before one entity, while stripping away local control in another, so the support isn't there.
- Include professional staff in the conversations, not just elected officials.
- Advertise and hold each city days celebration as an important, annual community event.
- Promote ethical behavior awareness by prosecuting unlawful behavior like embezzling and other white collar crime.
- Pass legislation that does not allow state legislature to bypass local entities
- All municipalities and counties unified in addressing any state legislation that takes away local control
- Collaborate with our local state legislators to rollback state mandates to local municipalities and stop new ones from being passed.
- Decisions concerning growth and planning must occur at the local level. Propose legislation that keeps control locally.
- Local control comes w/ a responsibility. State can and should play a key role, but should be based on outcomes w/ local control as to how those outcomes are achieved.
- Can we work with our local legislators and the ULCT to protect local control?

2: Have a more equitable and collaborative relationship between cities, the state, and developers to achieve high-quality, livable communities.

- Have a welcome packet or committee visit for new move ins to any city so they know more about how the city runs and what it is known for: history, city days, farmer's market, etc
- Work together on a shining example of a well-planned, highly functional, economically vibrant, equitable, mobile, and affordable community, then replicate
- Force developers to be part of the answer vice providing incentives or reduction in fees. Hold them accountable for their development
- Developers are influencing state policies that affects local government in ways that often do not support livable communities. Better checks and balances are needed.
- Real estate is a market issue. Zoning ordinances can nudge varied development.
- Stop electing developers to state legislation
- Weaken/disarm the developer lobby at state legislature
- Many cities I've talked to realize that growth is coming, but their residents are against growth. They are asking the state to come in and "be the fall guy". Education for the public is key.
- Can we meet quarterly with the county and cities to coordinate and strategize?

3: Address affordable/attainable housing for all income levels and near transportation networks.

- Institute deed restrictions. Without the deed restrictions we cannot ensure that affordable product remains affordable into the future.
- Can we zone that a percentage of a new housing development will be dedicated to affordable housing ie. 10% of a project?
- Allow local entities to regulate short term rentals accordingly
- Implement a statewide 10% Low to Moderate Income housing allocation on all development over 10 homes or 10 apartments
- The use of AI could be used to determine the correct ratio between the types of jobs (wages paid) and the households needed to support them.
- We need to incentivize builders to build affordable / attainable housing so their business remains profitable.
- Lobby for legislation to allow for inclusionary zoning, so local governments can require a certain amount of affordable housing (at least 20%) for each development project.
- Cities to work with UTA to create zoning around transportation networks that require an LMI component
- Work with the city and developers to provide affordable housing in areas where a robust public transportation system is in place.
- We should have a better understanding of the role that institutional investors play in the housing market.
- Pricing housing to no more than 30% of a households income requires a subsidy? Where should that subsidy come from? Tax cuts vs. Subsidies?
- Find out what state and local programs that are available for developers to fund affordable housing and not just high density housing.
- Jobs to housing balance needs to be more clearly defined and acted upon.
- Incentivize affordable housing

Regional Cooperation

1: Work as a region to forge strategic partnerships at the county, state, and legislature.

- If the public insists that city, county, and state representatives work together (or not get re-elected) then we can forge partnerships. When it becomes important, it will happen.
- Under MAG, create a regional team that includes cities and counties that address legislative and regional questions.
- Sign on to a regional policy agenda addressing critical issues and advocate for those policies at the state level
- Can we meet quarterly to work on strategic goals?
- Regional partnerships should focus on framework building strategies that will allow for difficult conversations.
- Consider working together on a set of high-priority projects as opposed to trying to address macro-issues at the regional scale.
- Utilize MAG to help facilitate regularly scheduled meetings with key stakeholders in the region.
- Have a group of city/county managers and planners meet regularly to discuss and research shared problems. Have them invite professional to present different solutions.
- We should use XSP strategies to help the region plan for an uncertain future. The use of AI data should also be integrated.
- MAG should assume the role as a regional coordinator. It has to be a neutral organization to get buy-in from everyone.
- Create a regional educational/training forum
- What does the term " Coordination Role" mean with regards to MAG? Economic development strategies should remain local.
- Have make assume the regional economic development coordination role and identify if the Northern Utah Economic Alliance is a good model or could serve as a framework

2: Can we investigate best practices, education/training & technologies to get the best solutions

- Have local universities research specific problems and the current and future solutions available. Make sure they interview leading professionals for their input and ideas.
- We need to have a dedicated resource that can investigate solutions for cooperation, implement them, and manage them. It can't just be a job task.
- Collaborate with the Silicon slopes business to keep up with the latest technology available and provide that information to the local municipalities.
- Work closely with MTECH, UVU and the school districts to provide ongoing training for businesses that are already established.
- MAG as a regional Economic Development Organization to create sub groups to investigate best practices and then report back to the group as a whole
- State is working to de-silo resources to affect local change that would otherwise be beyond their resources and capacity (e.g. regional opportunity team). Build upon this.
- Coordinate with BYU, UVU, MATC to investigate best practices and latest research
- I've seen programs require partnerships between key stakeholders as a requirement of grant applications, with great success. Could help if adequately funded.
- Can MAG create a training program that uses best practices and cutting-edge technologies to teach leaders in the three counties how to create good solutions?

3: Can we have MAG assume the regional coordination role for economic development issues

- Having been to MAG meetings, the content is very important. However, most don't pay attention. We need to have those who are supposed to coordinate work appropriately w/ MAG.
- Have MAG meet quarterly with ED professionals.
- If MAG assumes the role of economic development for the region then they need to have meetings with the economic developers in the cities, not the mayors also EDCUtah & GOEO.
- Continue the MEDD to focus on collaborative issues. This is a great MAG forum for continued conversations.
- In order to become a regional EDO, MAG will need to hire more people to address all the diverse issue, i.e. business recruitment, retention, advocate for development, marketing and more
- MAG sets goals and objectives based on input from the cities and others to coordinate working meetings where the city developers and elected officials work together.

These objectives were considered alongside the data and themes of other stakeholder input to provide initial draft strategies. The drafted strategies were shared with MEDD staff and leadership in advance of the evaluation workshop.

EVALUATION WORKSHOP

Introduction

The Mountainland Association of Governments (MAG) hosted a virtual workshop with a small group of regional leaders to determine how each strategy would be measured for ongoing evaluation. Prior to the workshop, participants were given a draft of strategies based on data and previous stakeholder engagements. Five (5) CEDS Committee members attended with representation from Summit, Wasatch, and Utah counties. The session was held via Zoom and utilized Google Jamboard for collaborative work.

Approach

Participants reviewed and discussed the draft strategies. They were asked to provide feedback and revisions. Participants were then separated into two (2) small groups to discuss and collaborate on one focus area per group. For each focus area, they were asked to identify outcomes, metrics, timelines, collaborators, resources, and catalysts. Prompts included:

- Describe the outcome of success.
- What metrics do we need to measure success?
- Who is already monitoring these metrics?
- What is a reasonable timeline to accomplish this?
- Who could be a driving force in this effort?
- Who could provide strong support to move this forward?
- What is on the horizon that might spur progress?
-

After debriefing with all session participants, this activity was repeated with the other two focus areas. After the second breakout activity, participants discussed key takeaways, any lack of consensus, items of greatest difficulty, and any other concerns.

Results and Follow-up

Only minor changes were suggested for the draft strategies. Results of the session were integrated into this document's Evaluation Framework.
Following the session, participants received an email thanking them for their participation, asking for additional feedback and revisions, and reminding them of the survey deadline. Participants were given the opportunity to review the full CEDS draft before posting for public comment.

SURVEY

Introduction

The Mountainland Association of Governments (MAG) launched a 2-week survey to gather additional insights into the themes presented in the workshops and initial strategy session. The survey received 220 completed responses. Survey results were analyzed and compared with data from research and previous stakeholder feedback.

Instrument

Section 1: Transportation

1. Which of the following best describes your role in the Mountainland Region?
    - General Public
    - Business Owner/Manager/Leader
    - Nonprofit/Community Organization Leader or Staff
    - Educational Institution Leader or Staff
    - Healthcare and Emergency Services Leader or Staff
    - Economic Development/Business Organization Leader or Staff
    - Government Official Leader or Staff
2. In which county do you live?
    - Summit
    - Wasatch
    - Utah
    - I do not live in the MEDD region.
3. In which county do you work?
    - Summit
    - Wasatch
    - Utah
    - I do not work in the MEDD region.
4. Please select your top 2 priorities regarding transportation & infrastructure in your region.
    - Route expansions for public transit
    - Increased ridership for public transit
    - Reduced cost of public transit
    - Reduced traffic
    - Faster transportation routes
    - Expanded options for multi-modal transit (walking, cycling, etc.)
    - Other
5. Current public transportation options meet the needs of the community.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
6. I can easily and efficiently travel throughout my region.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
7. To what degree do transportation challenges impact the ability of workers to travel for employment?
    - Scale 1=No Impact, 3=Moderate Impact, 5=Major Impact
8. To what degree do transportation challenges impact the ability of local residents and visitors to travel for recreation or basic needs (like groceries)?
    - Scale 1=No Impact, 3=Moderate Impact, 5=Major Impact
9. Please leave any additional comments you have about transportation & infrastructure in your community.

Section 2: Natural Resources

1. Please select your top priority regarding natural resources in your region
    - Enhanced natural disaster preparedness programming
    - Expanded pollution mitigation & reduction efforts
    - Manage tourism surrounding natural assets
    - Stronger protections and/or restrictions surrounding natural assets
    - Other
2. I utilize my community's outdoor amenities (i.e., parks, trails, waterways)
    - Almost daily
    - About once per week
    - Multiple times per month
    - Multiple times per year
    - Less frequently than twice per year
3. Natural disasters and/or natural hazards threaten local business operations in my community.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
4. My community is prepared for natural disasters.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
5. My community is taking appropriate steps to mitigate pollution.
    - Scale 1=Agree, 3=Neutral, 5=Disagree

6. To what degree does population, business, or tourism growth threaten your community's natural resources?
    - 1=No Impact, 3=Moderate Impact, 5=Major Impact
7. Please leave any additional comments you have about natural resources in your community.

Section 3: Livability

1. Please select your top 3 priorities to improve quality of life in your region.
    - Increased wages
    - Increased access to jobs
    - Improved housing affordability
    - Greater access to affordable healthcare
    - Greater access to affordable higher education
    - Increased funding for K-12
    - Greater diversity among residents
    - Increased access to affordable early education and childcare options
    - Increased access to open spaces
    - Increased public safety
    - Other
2. To what degree does the lack of affordable housing impact your community?
    - Scale 1=No Impact, 3=Moderate Impact, 5=Major Impact
3. To what degree does the lack of accessible and affordable childcare options impact your community?
    - Scale 1=No Impact, 3=Moderate Impact, 5=Major Impact
4. To what degree does the lack of healthcare access and affordability impact your community?
    - Scale 1=No Impact, 3=Moderate Impact, 5=Major Impact
5. My community is welcoming to people of all backgrounds.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
6. Entry-level jobs in my community pay a livable wage.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
7. Please leave any additional comments you have about education & workforce opportunities in your community.

Section 4: Collaboration

1. Please select your top 2 priorities regarding collaboration in your region.
    - Improved coordination of municipalities within my county
    - Improved coordination between Utah, Summit, and Wasatch Counties
    - Improved coordination between the region and the state of Utah
    - Improved coordination between leaders and subject matter experts
    - Improved coordination between economic development professionals
    - Coordination between educational institutions and businesses
    - Other
2. Public officials in my community regularly communicate their activities to businesses and community members.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
3. Public officials in my community are collaborative.
    - Scale 1=Agree, 3=Neutral, 5=Disagree
4. Please leave any additional comments you have about local government & collaboration in your community.
5. What are the most important issues facing local businesses from an economic development perspective? (Please select up to 3)
    - Transportation infrastructure
    - Availability of attainable housing for employees
    - Recruiting a qualified workforce
    - Retaining Workers
    - Cost of doing business (labor costs)
    - Cost of doing business (non-labor costs, e.g. overhead, materials)
    - Supply chain issues
    - Energy infrastructure
    - Water infrastructure
    - Air/water quality
    - Communications infrastructure (including broadband)
    - Limited economic incentives (e.g. tax rebates, subsidies, etc.)
    - Access to capital
    - Other



Other

Select all subjects for which you have professional expertise or experience.

- Education
- Healthcare
- Housing
- Transportation
- Economic Development
- Diversity, Equity, and Inclusion
- Environment and Natural Resources
- Government Policy
- I do not have professional expertise or experience in any of the above subjects.

Name (optional)

Email (optional)

SURVEY RESULTS

Participant Demographics

Exhibits 56 & 57: Survey Participant Residential and Employment Locations

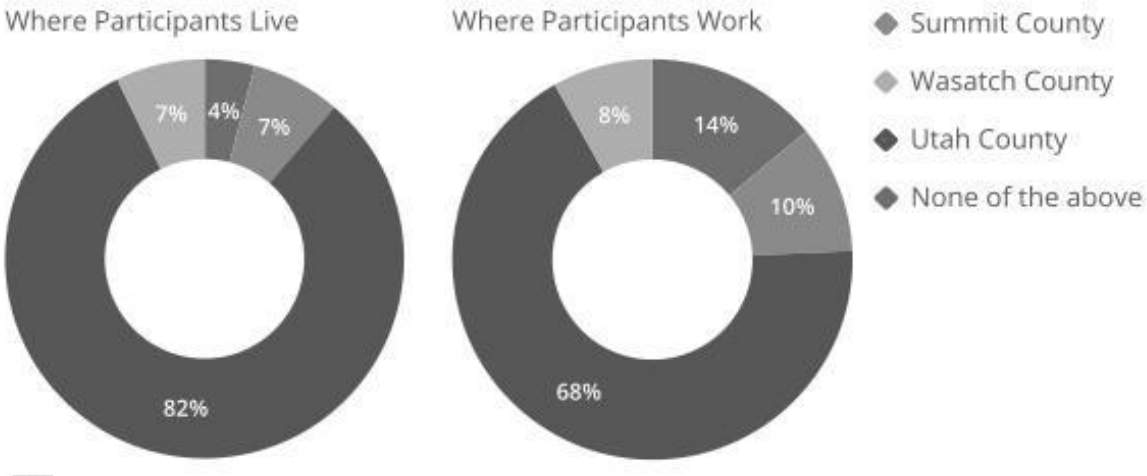


Exhibit 58: Survey Participant Self-Identified Stakeholder Type

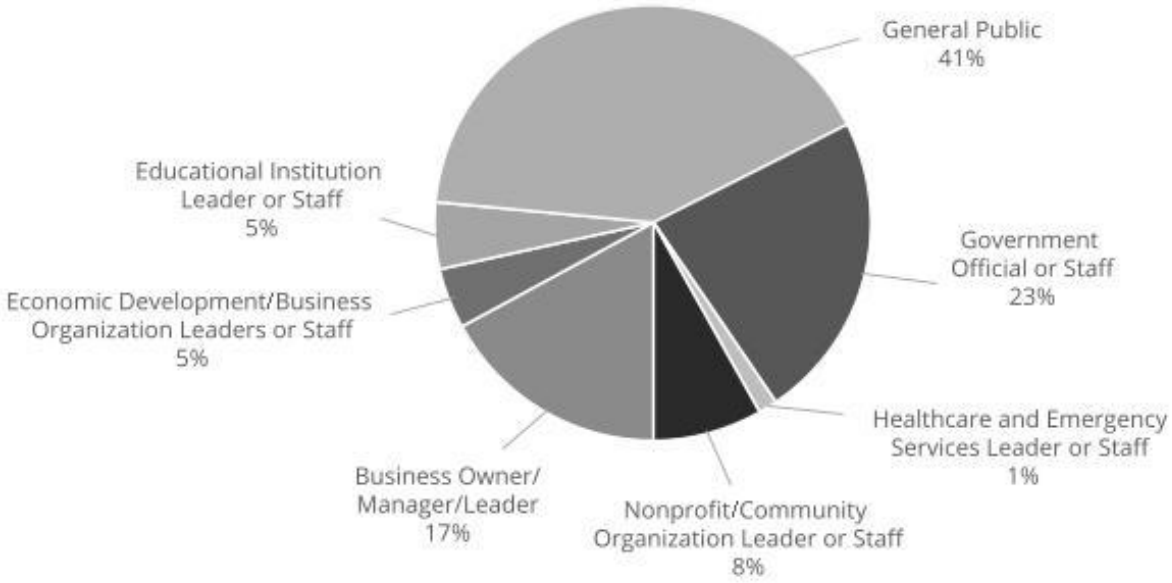
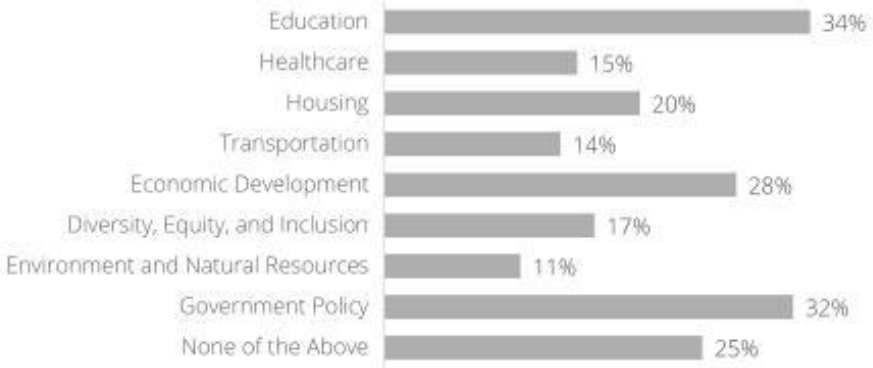


Exhibit 59: Survey Participant Self-Identified Area of Expertise



Transportation & Infrastructure

Priority Rankings

Participants were asked to select their top 2 priorities regarding transportation and infrastructure in the region.

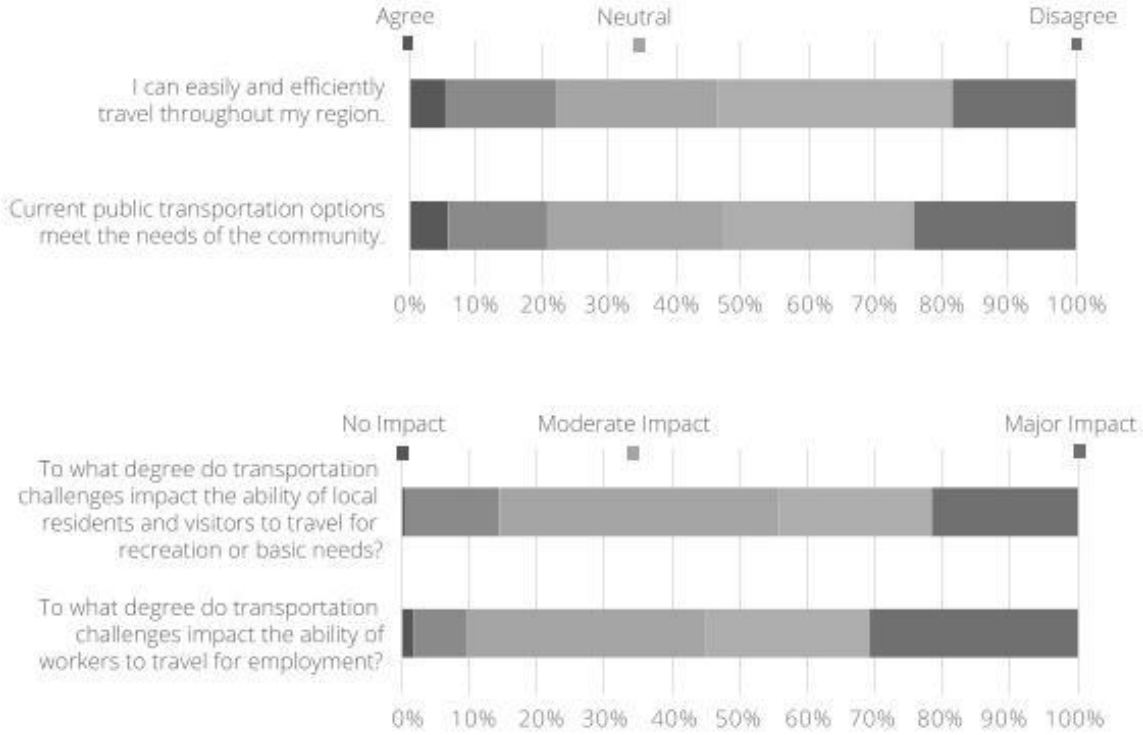
Exhibit 60: Survey Participant Transportation & Infrastructure Priority Rankings

Priority	# Selected
Reduced traffic	147
Faster transportation routes	104
Route expansions for public transit	89
Expanded options for multi-modal transit (walking, cycling, etc.)	45
Increased ridership for public transit	21
Reduced cost of public transit	14

Additional Transportation Questions

Participants responded to each question on a sliding scale from 1 to 5.

Exhibit 61: Survey Participant Transportation & Infrastructure Likert Scale Responses



Experts' Opinions

Those that identified themselves as having expertise in transportation identified similar priorities, with reduced traffic and faster transportation routes as their top two. However, they were less likely than the participants overall to agree that transportation challenges majorly impact the ability of workers to travel for employment. 32% of those with transportation expertise rated it a 4 or 5 in terms of impact, as opposed to 55% of total participants.

Additional Comments

Participants' additional comments primarily focused on improving infrastructural supports for highway a major corridor travel, in addition to a focus on multimodal transport accessibility such as bike lanes and public transit extensions. Interest in public transit focused on expanding into Utah County, with light rail and Front Runner cited most often.

Natural Resources

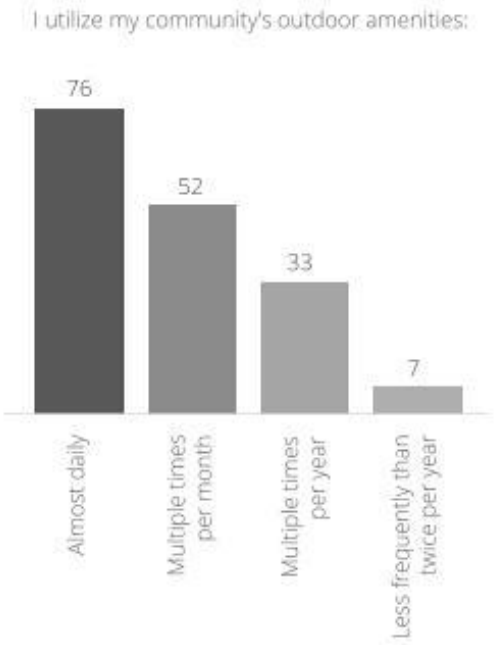
Priority Rankings and Outdoor Amenity Usage

Participants were asked to select their top priority regarding natural resources in the region. They were also asked how often they use their communities' outdoor amenities.

Exhibit 62: Survey Participant Natural Resources Priority Rankings

Priority	# Selected
Expanded pollution mitigation & reduction efforts	77
Stronger protections and/or restrictions surrounding natural assets	51
Enhanced natural disaster preparedness programming	41
Manage tourism surrounding natural assets	30

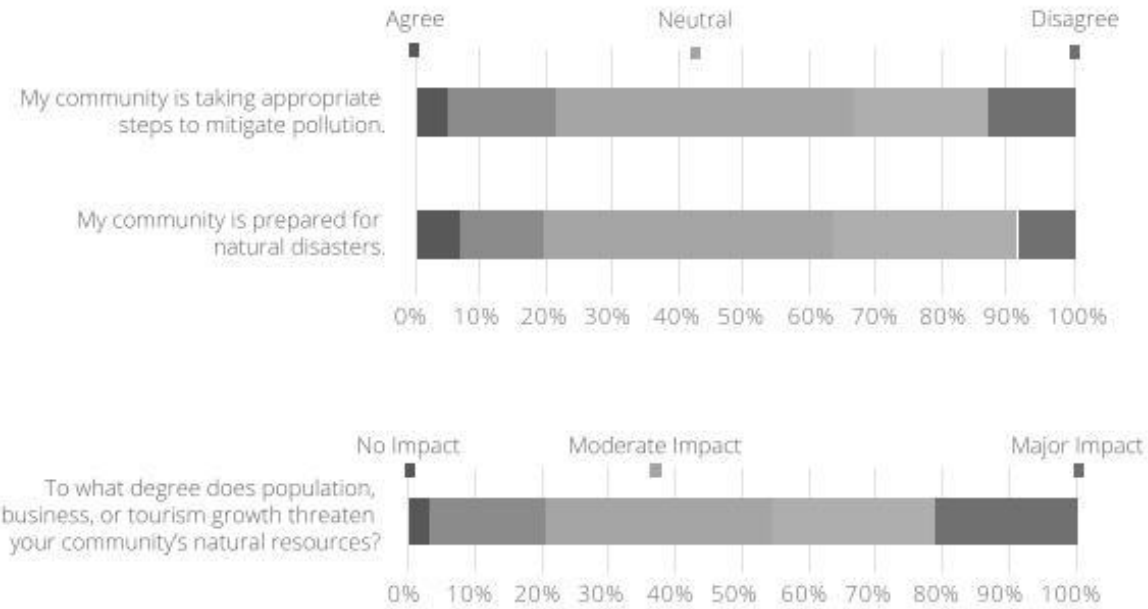
Exhibit 63: Survey Participant Reported Outdoor Amenities Utilization



Additional Natural Resources Questions

Participants responded to each question on a sliding scale from 1 to 5.

Exhibit 64: Survey Participant Natural Resources Likert Scale Responses



Experts' Opinion

Those that identified themselves as having expertise in natural resources and environmental issues reported slightly different priorities, with stronger protections and/or restrictions and managing tourism ranked highest. Experts largely agreed with the overall participants' Likert scale responses.

Additional Comments

Additional comments regarding natural resources focused primarily on environmental concerns and development planning. Many participants expanded upon concerns regarding water availability and quality, as well as the health and safety implications regarding worsening air quality. Participants also expressed a desire for future development planning to prioritize the preservation of green spaces and local wildlife protections, noting that rapid population growth is putting a strain on resources and potentially leading to a lack of forethought in development.

Quality of Life

Priority Rankings

Participants were asked to select their top 3 priorities regarding quality of life in the region.

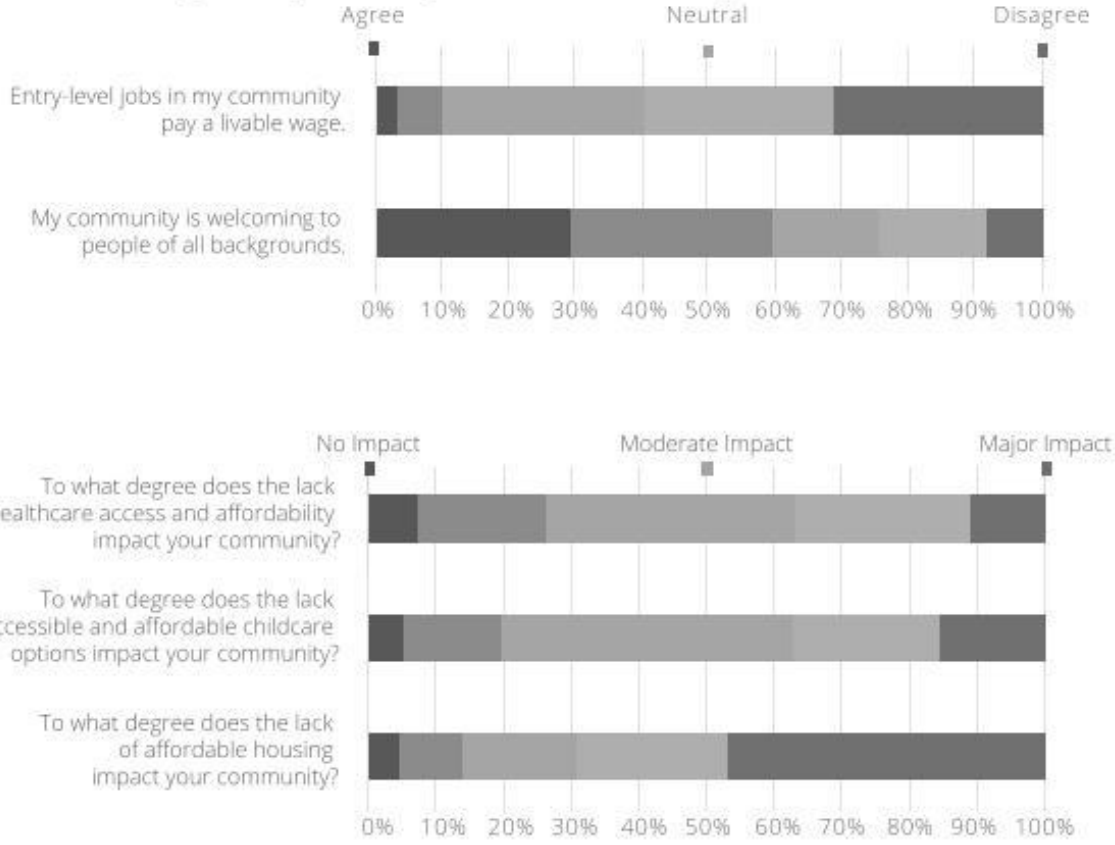
Exhibit 65: Survey Participant Quality of Life Priority Rankings

Priority	# Selected
Improved housing affordability	149
Increased wages	106
Increased access to open spaces	78
Increased public safety	62
Greater access to affordable healthcare	52
Increased funding for K-12	49
Increased access to jobs	38
Increased access to affordable early education and childcare options	29
Greater diversity among residents	25
Greater access to affordable higher education	17

Additional Quality of Life Questions

Participants responded to each question on a sliding scale from 1 to 5.

Exhibit 66: Survey Participant Quality of Life Likert Scale Responses



Experts' Opinions

Experts in the relevant fields included in quality of life by and large agreed with the overall participants. The primary categories of expertise in this section included housing, healthcare, and DEI. In all three cases, experts responded within a few percentage points of the general respondents' on associated Likert scale questions.

Additional Comments

Additional comments regarding quality of life spanned several areas, including education, childcare, and housing. Educational opportunities, especially for young children, were a noted priority, as was the need for additional resources and funding to be funneled towards public schools in the region. Housing affordability was also key, especially for workforce and in more densely populated areas and bedroom communities with less workforce opportunities immediately available to residents.

Collaboration

Priority Rankings

Participants were asked to select their top 2 priorities regarding collaboration in the region.

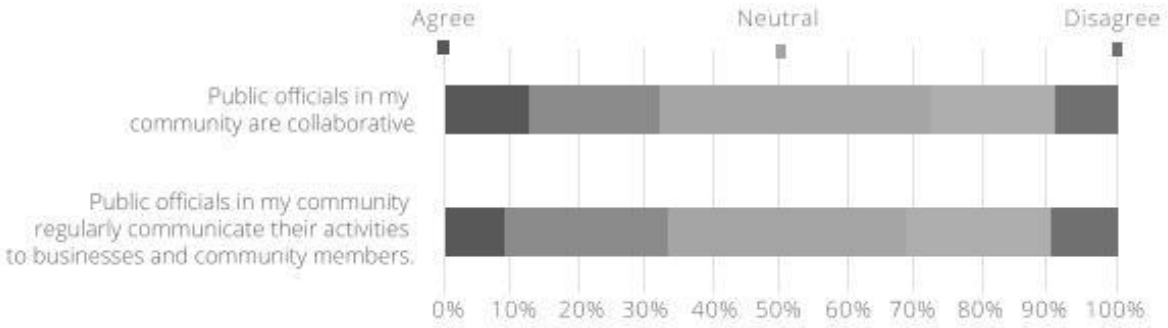
Exhibit 67: Survey Participant Collaboration Priority Rankings

Priority	# Selected
Improved coordination of municipalities within my county	106
Improved coordination between the region and the state of Utah	87
Increased access to open spaces	78
Improved coordination between economic development professionals	68
Improved coordination between leaders and subject matter experts	67
Coordination between educational institutions and businesses	52
Improved coordination between Utah, Summit, and Wasatch Counties	43

Additional Collaboration Questions

Participants responded to each question on a sliding scale from 1 to 5.

Exhibit 68: Survey Participant Collaboration Likert Scale Responses



Additional Comments

Additional comments regarding collaboration focused on a few main areas. Participants largely agreed that vertical communication and collaboration (between state, county, and city leadership) needs significant improvement. Also noted was a need for increased city cooperation and support for local businesses, especially regarding navigating regulations and obstacles as they arise. Many participants expressed a need for increased transparency and communication to the general public, and that outreach could be expanded upon to better educate residents.

Business Challenges

Participants were asked what challenges facing local businesses were most important from an economic development perspective (up to 3)

Exhibit 69: Survey Participant Business Challenges Priority Rankings

Challenge	# Selected
Retaining workers	94
Availability of attainablehousing for employees	90
Transportation infrastructure	89
Recruiting a qualified workforce	70
Cost of doing business (labor costs)	66
Cost of doing business (non-labor costs, e.g. overhead, materials)	53
Limited economic incentives (e.g. tax rebates, subsidies, etc.)	27
Air/Water quality	23
Supply chain issues	22
Communications infrastructure (including broadband)	16
Water infrastructure	14
Energy infrastructure	6

APPENDIX G

PUBLIC COMMENT

The 30-day public commenting period opened on November 1, 2023 and closed on December 1, 2023. Comments were gathered via a survey form which provides both structured and open-ended response opportunities. The survey included the following eleven (11) questions:

1. Which of the following best represents your role in the Mountainland Region? (Multiple choice)
2. In which county do you live? (Multiple choice)
3. In which county do you work? (Multiple choice)
4. Please describe your level of support for the regional vision. (Likert scale)
5. Please provide your general feedback for Goal 1: Provide a safe, connected, and accessible regional transportation network to meet current and future needs. (Open ended)
6. Please provide your general feedback for Goal 2: Balance regional growth, tourism development, and the protection of natural resources. (Open ended)
7. Please provide your general feedback for Goal 3: Improve quality of life to support the region's workforce and communities. (Open ended)
8. Please provide your general feedback for Goal 4: Accelerate problem-solving and build economic resiliency through increased collaboration. (Open ended)
9. Please share any additional feedback about the Comprehensive Economic Development Strategy. Reference page numbers whenever possible. (Open ended)
10. Name (Optional)
11. Email address (Optional)

A total of eighteen (18) responses were collected. Of those responses, some participants only answered questions regarding their locational relationship with the region (questions 1-3). Approximately 10 participants answered all or most questions.

The CEDS Committee assessed all feedback provided. Each comment submitted for questions 4-9 is listed on the following pages alongside icons indicating its status as accepted, reviewed, or flagged. We appreciate all of the feedback submitted for this process. All comments submitted are considered to improve the strategy and the collaborative process used to develop it.

Accepted – Comment has provided feedback that was either integrated within the CEDS or is considered to be fully aligned with the CEDS.

Reviewed – Comment has been reviewed and considered. While the opinions expressed are important and respected, no specific action is needed at this time.

Flagged – Comment warrants more in-depth discussion among MEDD leadership and key stakeholders to decide what, if any, action should be taken moving forward.

Comments included varying attitudes towards investment in public transit, all of which provide valuable perspectives related to regional identity and priorities. Ease of transit has been prioritized because of both the economic and sustainability implications, and these investments aim to improve quality of life and workforce participation.

Some respondents commented on the stakeholders engaged in developing the CEDS. The project team engaged a diverse cross-section of key stakeholders in each county. A public survey was distributed, which informed the goals and strategies included in the CEDS plan. The public has also been given the opportunity to provide feedback on the document over a 30-day period. Efforts were made to share the information as widely as project resources allowed. The project team considered all segments of the region's population when developing the plan and hopes that the strategies advance economic prosperity for all.

Finally, some respondents would argue that too much economic planning hinders the free market. The project team understands the importance of private enterprise to the region's economic success, and ultimately hopes to ensure that the region is a community where quality employers feel comfortable locating their businesses and workforce.

While some comments prompted immediate corrections within the document, others served as context and valuable considerations for how collaboration, implementation, and prioritization may occur moving forward. An annual review of the plan, adjustments, and reporting will be completed, allowing the opportunity for integrating suggestions where appropriate.

While the Mountainland Association of Governments is responsible for developing and maintaining the regional CEDS, the deployment of this CEDS requires that work on these objectives will be advanced by many organizations within the ecosystem and across practice areas. The purpose of this plan is to share information and better align efforts within the ecosystem with this strategy.

Status	Comment
	I believe that we need to invest in alternate ways of transportation than driving. We are in a valley with limited space, and we need to utilize the land we already have. We can only have so many parking lots where economically beneficial businesses and homes could be. Biking infrastructure and mass transit should take priority over freeways.
	The campaign is not needed - I think most people know the importance. Spend money on 1.1.2 thru 1.1.4
	Regional transportation would be great. We have made a lot of inroads into this area between Summit and Wasatch Counties. Any help from the legislator would be appreciated!!
	We don't need to spend millions of dollars on a campaign to tell people how beneficial public transportation is. People already know that it would be better for the environment, but they don't want to do it. People love their cars and their privacy. Not many people want to ride a bus or train with a bunch strangers when they can take their own car, do their own thing, and not be dependent on a schedule to get where they want to go.
	WE ALREADY HAVE TRANSPORTATION METHODS IN PLACE ALREADY. THEY ARE SERIOUSLY UNDERUSED. WE HAVE TO STOP SPENDING MONEY. THAT IS WHERE THIS CRAZINESS HAS TO START. WE REALLY DON'T WANT MORE PEOPLE MOVING HERE SO WHY SHOULD WE PAY TO FACILITATE THAT. MAYBE IF WE STOP DOING THAT THE MOTIVATION TO COME HERE WILL STOP AND WE CAN CONTINUE TO LIVE LIKE WE WANTED TO.
	I have lived in Provo, Springville and now Spanish Fork. As the Front Runner has come to Utah County, I have seen an increase in homelessness and begging on corners. I believe this is because of the lack of fare enforcement as well as the increase in access to our cities. I confess as I'm hearing plans to expand the Front Runner south I fear that homelessness will increase in Spanish Fork. I think this needs to be considered as the transportation network is expanded.
	Determine first who will ride this regional transit. Is there demand. Prioritize car travel for now. Mass transit is not practical for families with children
	I think we need a stronger and more reliable mass transit system. What we have is great, but busses only go so far. Whether it be clean busses, more frontrunner trains or a track system in Utah and Summit/Wasatch Counties we need to find a way to get around without flooding the valley with car exhaust.
	That sound alright, I suppose, depending upon the details. I think that the best transportation systems facilitate the private sector and keep-up with its free-market development. What I dislike is trying to crowd people against their will into public mass-transit, and to compel some people to pay for other people's fares, which is essentially legalized plunder. Let's not go there.
	Transportation plans should carefully analyze current public transportation shortfalls, ie UVX has taken over approx 3 lanes of traffic on university parkway. The busses are almost completely empty most of the day, everyday. However 3 lanes (which includes the center boarding area) remain mostly unused while traffic congests the driving lanes. Is the trade off actually working? Why not smaller busses using regular driving lanes utilized until there is a greater need? Cap university enrollment in respect to the cities/citizens these schools operate in, rather than continue to expand enrollment and campuses. Planning seems to be in-organic but rather following an agenda coming from outside of the local area. What is actually going on here?

Status	Comment
	I agree with the statement, although it is very broad. I think our priority should be on preserving the natural environment that surrounds us and to use the space we already have more efficiently.
	Focus on section 1.2.3 and where to invest - don't over-index on studies - keep them limited
	Not sure we need more tourism development in Summit County. At times we are overrun with tourists.
	Again, another expensive and useless study is not needed to tell us the impacts of growth. Tourism is great and makes money for businesses, but I don't think we need to spend billions of dollars to promote and advertise it. If the businesses that are making the money from the tourism want to advertise then they should pay for it, not the taxpayers. I do agree regulations need to be put on businesses to prevent and/or reduce pollution.
	AGAIN I THINK IF WE STOP SPENDING MORE AND MORE MONEY TO FACILITATE "GROWTH" IT WILL SLOW THE "GROWTH" DOWN. WE DON'T WANT ANY MORE "GROWTH". IT IS SERIOUSLY RUINING OUR STATE AND QUALITY OF LIFE IN UTAH!
	I don't think tourism development should be a top priority. It is a limited number of individuals who profit the most off tourism, yes it creates jobs but are the good paying jobs? Seasonal mostly? We should be working to balance regional growth and natural resources. Focus on making our region a nice place to live BEfORE making it a nice place to visit.
	While it is important to have businesses and attract businesses to the area, we need to keep it livable for the residents. People can't afford rent or mortgages. People can't afford insurance. Groceries have skyrocketed. These need to be looked at. Also, Utah is known for it's great outdoors, we need to protect it or it will not be here any more.
	I think that free citizens do this better than central planners. The plans of the few are inferior to the plans of the many. And environmentalism thrives best in free-market economies in which people earn ever-more than subsistence. The USA gave birth to the environmental movement, while the USSR was an environmental disaster.
	It doesn't appear that regional growth is being balanced. It appears there is a "growth mentality". Coming from a large city I recognize growth is a choice. It would seem according to Goal 2 that this choosing would consider the finite resources living in a high desert, sandwiched between 2 mountain ranges brings. Once destroyed it is gone forever. At some point there needs to be a thorough analysis of what population this valley can sustain BEFORE new growth initiatives are promoted. Making walkable communities with compressed populations doesn't assist with the burdening of resources. It is imperative this be addressed. It's LONG overdue.

Status	Comment
	I think having an area in a community that is focused on socializing and recreation, and make sure it is easily accessible to everyone by walking, further making exercise and socializing easier.
	All parts of Goal 3 are important
	Our quality of life is awesome now! Not sure there is much room for improvement, unless you can stop development.
	Housing is definitely the number one issue facing the majority of the state right now. The prices are astronomical and not realistic for people given most of the wages in the state. The housing problem needs to be addressed in a very careful way. We can't just build, build, build without consequences. We need to think of the impact all of the building is going to have on water, electricity, and other resources. It seems like city governments are quick to approve new building projects just because of the tax increase that it brings to them, but they don't consider the long term costs to the current residents or resources.
	I GENUINELY FEEL THAT THE BEST WAY TO PROTECT OUR QUALITY OF LIFE IN UTAH IS TO SLOW THE GROWTH AND TO TRY TO RETURN TO OUR PREVIOUS LIFE STYLE. THE ONE WHERE WE KNEW OUT NEIGHBORS AND COULD AFFORD OUR OWN HOUSES. MAYBE WE SHOULD BE MORE CONCERNED ABOUT TAKING CARE OF THE PEOPLE THAT HAVE LIVED HERE FOR YEARS INSTEAD OF SPENDING MORE AND MORE TAX DOLLARS TO ATTRACT MORE PEOPLE. LOWER THE PROPERTY TAXES FOR SENIORS AND LONG TIME RESIDENTS. STOP THE GREED!!!
	Sure, but would like to make sure this is balanced with listening to what individual communities want. Not forcing high density housing into every city. Focus more on help for the inversions and water needs
	Again, we need to protect the quality of life of the residents. Housing is unaffordable. Period. End of statement. Housing is unaffordable. My husband and I both work over 40 hours and can not afford a mortgage. That is ridiculous. I pay 40% of my income to rent. I'd like my kids to be able to do fun things but can't afford it because after we pay rent, there is very little left. Something needs to be done.
	I think that the best way to improve quality-of-life is to leave markets free by helping people to ably defend their equal God-given (or natural) rights to both property and contract. This allows ever-increasing standards-of-living, as businesspeople steadily innovate toward more efficient, effective, well-customized ways to serve customers. Subjugating free markets to the heavy hand of oligarchs produces far worse results for everyone, except perhaps the ruling class.
	Quality of live is reflected in families and individuals thriving. They need clean air, clean water, and the means/ability to own private property. Cities direct that very well, and SHOULD be the driving force in directing what takes place within their city. While frontrunner has been successful in moving people North and south to SLC it has not alleviated I-15 (at 6 lanes on either side) at capacity. Again unrestricted growth must be addressed by each city - where these kinds of decisions are best understood.

Status	Comment
	I support collaboration between cities, counties, states, and all other areas.
	Same here - all parts of Goal 4 are important to execute.
	Collaboration is always good!
	I don't really know who all of these "stakeholders" are but I'm guessing it's the rich people and business owners who run the state. We are all citizens of Utah, so in my eyes, we are all "stakeholders" and we all have a right and a responsibility to make sure that things are being done the right way and in a way that is best for everyone. There definitely needs to be better communication between government and citizens. It seems like to many decisions that affect many people are being made behind closed doors, at the fancy restaurant, or out on the golf course with "the boys". That needs to stop.
	INCREASED COLLABORATION SOUNDS TO ME LIKE MORE MONEY SPENT ON MORE PEOPLE MAKING BIGGER AND BIGGER PLANS. LET THE MARKET WORK ON IT'S OWN. WE NEED LESS TALKING AND PLANNING AND MORE WORKING FOR THE EXISTING CITIZENS THAT ARE PAYING ALL THE TAXES. ENOUGH IS ENOUGH!
	I think it's great that the different counties talk together more frequently. Collaboration is always helpful.
	This goal is vague and unclear. Increased collaboration sounds more like increased red-tape caused by a concentration of power at the top telling cities what and how to build out.
	People need to speak to ALL of the residents, and encourage their input. I'm sick of only businesses' opinion mattering.
	I think that people can figure out how to do this without the heavy hand of political edicts involved. If there's a need for it, then one should be able to freely persuade enough people to do it on their own---perhaps not everyone, but enough. It's only bad ideas that require coercion.
	Collaboration with stakeholders who DO NOT have to live with the outcome of decisions is wrongheaded. Growth seems to be the goal. It's actually advantageous and very wise to know when to stop growing so we don't overtax the natural resources of an area.

Status	Comment
	I think it's a great outline. I support the call for density and would like to see more about transit oriented development.
	Studies should be short and time-bound. While I am an elected council-person, I have a demanding global position, and when I compare business initiatives vs government initiatives, I see too much time and not enough action. Prioritize the various elements of the goals and move forward appropriately.
	I JUST REALLY WISH YOU WOULD CONSIDER JUST LETTING THINGS SLOW DOWN AND WORK TO EASE THE BURDENS OF THE TAXPAYERS THAT LIVE HERE. WE ARE TAXED TO DEATH. WORK TO FACILITATE OUR LIVES AND THE COST OF LIVING WE ARE TRYING TO MAINTAIN!
	Page 28, the forecast for continued steady growth is unlikely. US Census shows an increase of 16,855 residents from July 2021 to July 2022 in the three counties and Summit county actually lost residents during this time, see Annual Estimates of the Resident Population for Counties in Utah: April 1, 2020 to July 1, 2022 (CO-EST2022-POP-49). Why not make a plan for slower population growth instead and emphasize quality of life over building huge transportation networks like the MAG Transplan50?
	4.1.4 - what is "progress". Make sure that this document actually serves what the public wants. "Progress" sounds like what is best for the developers who have the most to gain from all of these "goals"
	I'm not keen on any sort of central economic planning. We don't need to emulate Soviet commissars. Let's leave them on the ash-heap of history where they belong. Just defend people's rights to keep them free, and then let them figure out the rest as free people. Free-market solutions are always superior to heavy-handed political edicts.
	"Most of this is totally unknown by the citizens. Your method of getting the word out is not working. I have been to the citizen input meetings in Orem. Very poorly attended because most people were not informed. You don't have a true picture of what the people are thinking. My biggest concern is I am seeing this same kind of "planning" happening all across the country. That tells me it isn't organic. The Wasatch front ought to be MUCH more concerned about finishing resources in an arid land. Almost every other year the governor issues extreme drought warnings and restricted use of water. Why is there 1,000,000 people coming in our near future? They cannot come if there is no housing. It's like the movie Field of Dreams "if you build it they will come". It seems that is what is happening."

APPENDIX H

RESOLUTION AND ACKNOWLEDGEMENTS

RESOLUTION OF THE MOUNTAINLAND ECONOMIC DEVELOPMENT DISTRICT BOARD OF DIRECTORS

ADOPTION OF THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR THE MOUNTAINLAND ECONOMIC DEVELOPMENT DISTRICT: 2024-2029

WHEREAS, The Mountainland Association of Governments led an effort to develop a Comprehensive Economic Development Strategy (CEDS) in compliance with U.S. Economic Development Administration (EDA) regulations for the Mountainland Economic Development District, which includes the counties of Summit, Utah, and Wasatch in the State of Utah; and

WHEREAS, The CEDS is intended to act as a guide for improving economic resiliency, meeting business, workforce, and resident needs, and aligning local efforts with regional and state priorities; and

WHEREAS, The CEDS recommends a strategic action plan for strengthening the region's economy through collaboration to address transportation, balanced growth, environmental protections, sustainable tourism, talent development, childcare, health and safety, housing, entrepreneurship, business support, and industry diversification; and

WHEREAS, The Mountainland Association of Governments will continue to facilitate regional engagement on the CEDS and will develop an Annual Performance Report as required by the U.S. EDA; and

WHEREAS, The Mountainland Economic Development District Board of Directors has reviewed the draft CEDS and considered public input to produce a strategic vision that can serve as an effective tool for local governments and community stakeholders in their development work.

NOW, THEREFORE, BE IT RESOLVED, that the Mountainland Economic Development District Board of Directors adopts the Comprehensive Economic Development Strategy for the Mountainland Economic Development District for the period of 2024 through 2029 and authorizes the Mountainland Association of Governments to submit the CEDS to the U.S. EDA.

PASSED and ADOPTED this 18th day of December, 2023.

We would like to acknowledge the CEDS Committee, MAG staff, and consultants whose leadership provided structure and guidance throughout the collaborative process to develop the MEDD Comprehensive Economic Development Strategy.

CEDS COMMITTEE

Kendall Crittenden, County Council | Wasatch County
Dallin Koecher, Tourism and Economic Development Director | Wasatch County
Malena Stevens, County Council | Summit County
Jeffrey Jones, Economic Development and Housing Director | Summit County
Keith Morey, Economic Development Director | City of Provo
Kathi Lewis, Economic Development Director | City of Orem
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About TPMA

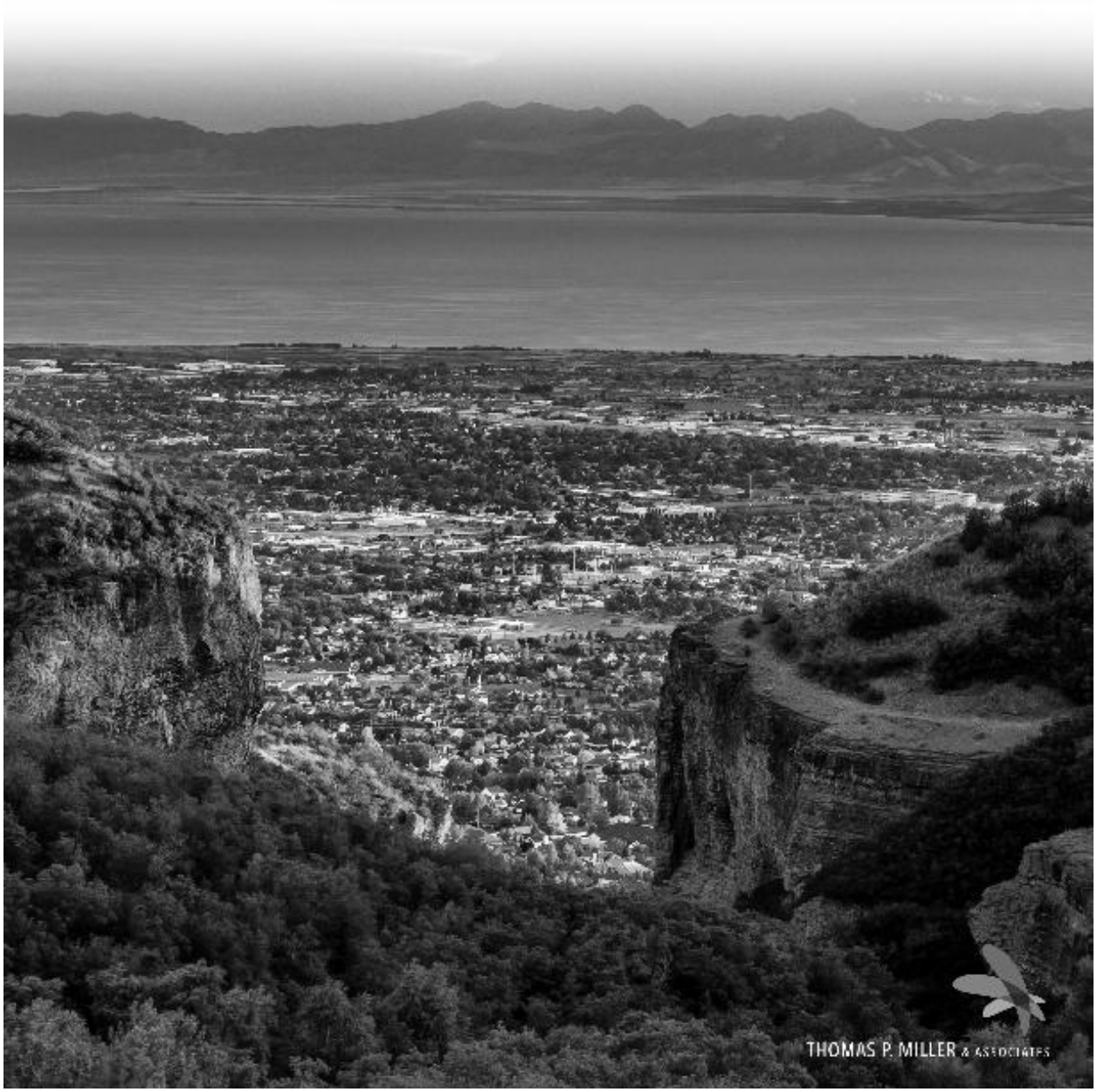
TPMA empowers organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change. TPMA provides professional consulting services and delivers transparent insights to the complete workforce, education, and economic development ecosystem that allows them to move forward, together. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. Our economic development approach aims to achieve community resiliency through economic diversity, resource alignment, and community vibrancy. TPMA's Economic Development and Community Resiliency Team provides expertise in assessing markets, identifying business sector opportunities, building innovation and entrepreneurial ecosystems, and conducting housing assessments to assist communities in developing solutions for local housing challenges consistent with community and economic development objectives. A variety of data sources were used to collect data for this Comprehensive Economic Development Strategy. Attempts were made to verify data as much as possible. Visit www.tpma-inc.com and follow TPMA on social media, including LinkedIn, Facebook, and Twitter.


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June 2022

City of Orem Economic Development Division

Economic Development Strategic Plan



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City of Orem, Utah | Economic Development Strategic Plan 3

Introduction

Orem, Utah

Nestled in the heart of Utah County, the City of Orem, Utah is a charming and proud community with a rich history and bright future. The fifth-largest municipality in Utah with 98,129 residents in 2020, Orem is known as a great place to live, raise a family, or start and grow a business. Often called the 'retail hub of Utah County,' Orem's economy has been known for its concentration of high-end retail establishments, a multitude of dining options, and its history of launching technology-enabled startups. To flourish in the mid-21st century, the city is poised to capitalize on existing assets and prepared to outline a vision for the future with intentionality and purposeful planning. With an evolving retail landscape in a post-COVID world, a growing population, and an emerging anchor in Utah Valley University increasing in regional prominence, the city is in position to take the appropriate steps to flourish in the next decade and beyond.

Pursuant to Orem City Code Section 22-1-10, the Economic Development Strategic Plan, as part of the Orem General Plan shall serve as an advisory guide only and is not a binding document.

Project Scope

In May 2021, the City of Orem released a Request for Proposal (RFP) soliciting the services of a professional consulting firm to conduct a comprehensive update to build upon the 2014 Economic Development Strategic Plan (EDSP). According to the RFP, the purpose of the project was to explore existing economic conditions and create an updated EDSP with economic development goals, strategies, implementation steps, and indicators of success that reflect the vast differences in the economic environment as well as the city itself. Thomas P. Miller and Associates (TPMA or the Project Team) was selected to conduct the EDSP in July 2021.

Process and Methodology

TPMA utilized an integrative methodology to develop the Economic Development Strategic Plan for Orem. The project consisted of three interconnected activities including analysis, alignment, and action.

The analysis phase of the project involved an extensive and comprehensive review of historical planning documents, a quantitative data scan and analysis, a retail gap analysis, best practice research, and numerous stakeholder engagement sessions to garner feedback and input from a wide cross-section of community leaders. To generate alignment, the project team considered existing physical and resource infrastructure that could facilitate a prosperous local community characterized by innovation, entrepreneurship, wealth generation, and resiliency. Lastly, the project team, informed by the results of the analysis and alignment phases, developed strategies and action steps for the city to consider in the short, medium, and long term to achieve a shared vision of Orem's economic future.

Defining an 'Economic Development Strategic Plan'

Economic Development Strategic Plans provide a community with an opportunity to envision their future and formulate the appropriate steps to achieve that desired future. A solid plan is critical for a prosperous future, long-term economic viability, and a high-quality of life for residents. When done correctly, the economic development strategic planning process facilitates conversations between public and private leaders, residents, students, faith leaders, optimists, skeptics, and other key community stakeholders.

Following a structure outlined by the International Economic Development Council, the project team has developed an economic development strategic plan that provides:

- A realistic appraisal of available resources, constraints, and opportunities;
- A formulation of a clear mission and shared vision;
- The development of achievable and measurable goals;
- The formulation and implementation of project action plans to reach these goals and identify who will champion them;
- The design of clear metrics of success.[1]

1 Girdwood, C. (2015). Introduction to economic development (Vol. 1). International Economic Development Council.

Summary of Findings

The key findings summarized below are informed by the project's discovery phase, the components of which are detailed in the appendices of this report. Document review, data analysis, focus groups, and interviews collectively provide insight into the current condition of Orem's economy. These findings are ultimately the basis for the recommendations provided at the conclusion of the report.

Highly Capable Population

A city's residents are its most important assets, and Orem is fortunate to attract residential and working populations that are well-prepared to contribute to the local economy in productive ways. Across a variety of metrics, Orem is young, healthy, educated, and growing rapidly.

When compared to the rest of the state and the country, educational attainment rates in Orem are exceptionally high; Utah Valley University and Brigham Young University are largely responsible for producing well-trained workers who are familiar with Orem's business environment and can positively contribute to its growing economy. An educated workforce is attractive to businesses which require highly skilled and well-educated workers, and the residents of Orem have much to offer.

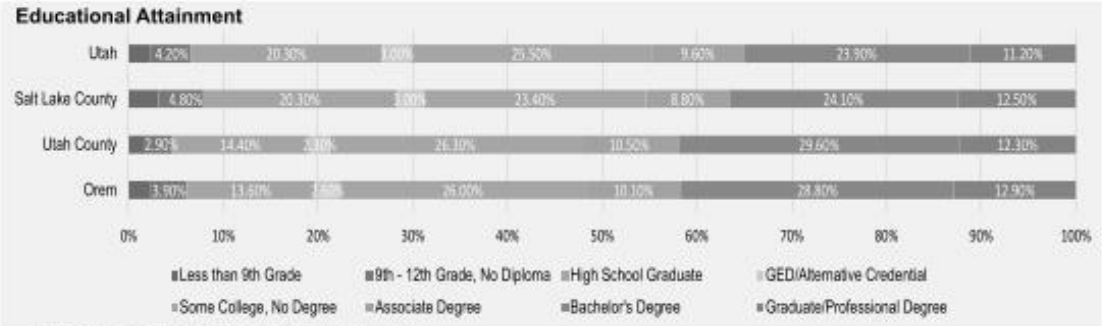


Figure 1: Educational Attainment. Source: Esri, 2021

Furthermore, the residents of Orem are young, active, and healthy. The median age of residents is just under 29 years, which is about 10 years younger than the national median. The population's health metrics compare favorably to both state and national averages. A prevalent recreational culture within the city is further reflected in the natural assets of the region – Mt. Timpanogos, for example, is a symbol of the energetic, adventurous culture which is demonstrated in the community's health and lifestyle habits. A healthy community improves all parts of the economy, and Orem is a very healthy city.

Health Metric	Utah County	Utah	U.S.
Average Male Life Expectancy (2019)	79.42	78.28	76.3
Average Female Life Expectancy (2019)	82.04	82.1	81.3
Obesity Population Percentage (2019)	31.40%	27.20%	42.40%
Smoking Population Percentage (2018)	7.00%	7.90%	14%
Diabetic Population Percentage (2019)	4.90%	8.50%	10.50%
Heart Disease Death Rate per 100,000 (2017-19)	300	286.4	317.4
Stroke Death Rate per 100,000 (2017-19)	71.4	69.5	72.3

Table 1: Orem Health Metrics. Sources: CDC; Utah's Public Health Indicator Based Information System

Many Marketable Assets for Business Attraction

In addition to a healthy, well-educated population, there are many characteristics of Orem's business environment that further benefit business development efforts. The City of Orem has a strong and well-established business startup culture; the resources available to emerging businesses support innovation and entrepreneurship. There's a history of high-performing technology companies starting in Orem, and the presence of entrepreneurs within the city contributes to its supportive business environment, which is attractive for up-and-coming companies.

Moreover, the city's strategic, central location affords businesses many geographic advantages. Only 45 minutes from Salt Lake City, Orem residents and businesses have easy access to a booming urban hub. As remote work becomes increasingly common, Orem's advantageous location could make it a prime location for businesses that prefer access to an urban center without the high rents and added hassle of metropolitan office space. Access to high-quality, reliable broadband services and high-speed UTOPIA Fiber increases the city's appeal to tech-focused or remote businesses.

Lastly, much of the built and natural environment is appealing to growing businesses. There exist some marketable, underutilized office spaces in the city that could be attractive to the right businesses. Canyon Park Tech Center, for example, has recently undergone a nearly $12 million renovation and is prepared to support businesses in a variety of industries. In addition, there are many quality-of-place amenities that are accessible for workers and residents within the city, like fitness centers, a library, trails, and more. Orem's active recreational culture can provide workers with a variety of leisure options to enjoy in their free time. Together, all these assets support a lively business environment in Orem, which can be marketed to target industries or businesses of interest.

Industry Mix and the Business Environment

Orem is anecdotally known as the "Retail Hub of Utah County," a distinction that is supported by many quantitative industry and occupation metrics. Service-related occupations are prevalent in the city, with a large share of Orem's working population finding employment in retail, restaurant, or other service industries.

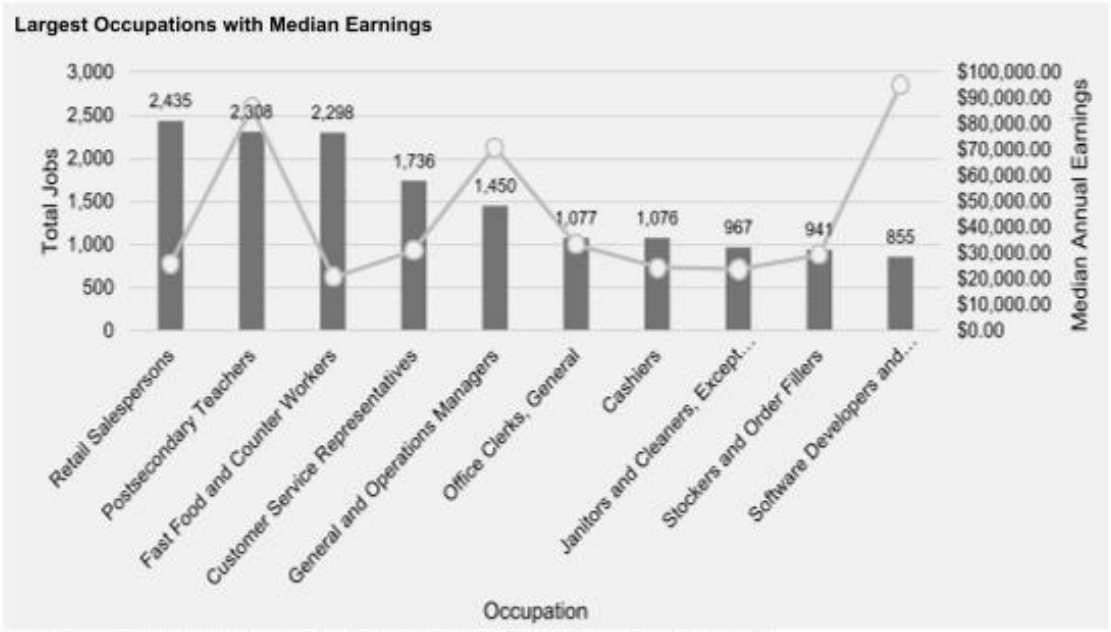


Figure 2: Top Occupations by Job Count with Median EarningsEducational Attainment. Source: EMSI, 2021.

A strong retail industry provides many benefits to the city; namely, retail businesses and restaurants improve the quality of life for residents and increase tax revenue collected by the city. It is important for communities to leverage their strengths in an economic development plan, and the retail industry is presently the cornerstone of Orem's economy. However, there are certainly dangers of overreliance on the retail industry. As housing costs rise and lodging becomes inaccessible for the working population, service industries might face staffing-related challenges. To keep the city from becoming overly dependent on retail or other service industries, the city's industry mix could be diversified through an intentional business retention, expansion, and attraction plan.

Some other developmental issues that are unrelated to housing are perceived to be hindering business growth as well, like the lack of a clear city center. A high-traffic, multi-lane highway intersects the city, and it's difficult for pedestrians to walk from business to business. University Place is home to a variety of retail vendors, but the mall is self-contained and is not well-connected to other parts of the town. Improvements to the built business environment could support the local business community while simultaneously creating a more enjoyable downtown area for residents to enjoy.

Reliance on Sales Tax Revenue

The primary goal listed in the 2014 EDSP was to "increase the sustainability of the City's tax base through increased property values." In part, this top-priority goal was put in place to help stabilize the city's tax base, leaving the city's budget and revenues less susceptible to economic downturns such as the one experienced in the years following the 2008 recession.

Fiscal Year	Sales Taxes	% of Total Revenues	Property Taxes	% of Total Revenues
FY15	$18,839,327	32.78%	$7,305,594	12.71%
FY16	$19,471,579	36.17%	$6,424,109	11.93%
FY17	$20,722,179	36.79%	$6,416,808	11.39%
FY18	$22,198,446	37.34%	$6,597,887	11.10%
FY19	$22,736,417	37.16%	$6,657,969	10.88%
FY20	$23,737,723	38.77%	$6,895,505	11.26%
FY21	$28,004,565	39.90%	$7,060,159	10.00%
FY22 (Estimate)	$30,805,022	45.53%	$7,278,289	10.76%

Table 2: City of Orem Taxes and Revenues

At the time of that plan's adoption, Orem had the highest percentage of its General Fund Revenues coming from sales taxes (34%) and the second-lowest percentage coming from property taxes (11%) when compared to the other cities in Utah County. The plan noted that most of these neighboring cities reported property taxes at around 20% of their General Fund Revenue, laying the groundwork for the top economic development goal of bolstering the property tax base.

The percentage of the city's revenues generated by property taxes has remained relatively constant since 2014. The reliance on sales tax, however, has steadily increased. Since Fiscal Year 2015, the percentage of the General Fund Revenue coming from sales taxes has increased dramatically, eclipsing the 45% mark in the estimates for Fiscal Year 2022 – an increase of over 13 percentage points since the last EDSP.

During the pandemic, sales tax revenues increased dramatically across most of the country. In fact, a report by the National Association of State Budget Officers shows that sales tax revenues grew by nine percent in FY21.[2] Utah was one of 42 states that reported year-over-year growth in sales taxes collected from summer of 2020 to summer of 2021.[3] There are a number of reasons for these increases (e.g., government stimulus checks and a shift in purchases from non-taxed service to taxable goods) including the move to begin collecting sales tax on out-of-state sales in the years leading up the pandemic. A ruling by the State Supreme Court 2019 helped bring this change about in Utah.

2 https://www.nasbo.org/reports-data/state-expenditure-report
3 https://www.forbes.com/sites/liztarmer/2021/11/30/sales-taxes-in-2022---issues-to-watch-for-online-retailers/?sh=49a7c24d4b5a

While this increase in sales tax revenue is certainly a positive in the short term, the recent surge in the amount of sales taxes collected is itself a representation of the volatility of this form of revenue. Sales tax is deeply connected to consumer spending habits and therefore the overall conditions of the economy. An over-reliance on sales tax revenues can make the city susceptible to economic shocks or trends that do not always favor the local economy.

Growth Constraints

Orem's population has grown rapidly in the last twenty years, and the effects of such growth can be seen in many areas of the economy. Efforts to increase residential development to accommodate the growing population are unable to keep up. There's very little developable land remaining within city limits; only 8% of the total land within the city is developable, with only 3% zoned for residential development.

The combination of a growing population and limited developable land makes for a tight housing market. Compared to state and national levels, the vacancy rate in Orem is exceptionally low. Due to high demand and limited supply, housing prices are very high – the median sale price of a home in Orem is nearly $200,000 greater than the average home value for the rest of the United States. Despite elevated housing prices, though, the data indicate that Orem residents are not any more burdened by housing costs than the average American. While the housing market is suitable for high-earning households, it is more inaccessible for much of the working population in Orem, which earns relatively low wages.



Figure 3: Median Sales Price of Owner-Occupied Units. Source: Redfin 2021

As a result of the types of available jobs in the city, the typical wages for those jobs, and the high housing costs, the residential and working populations in Orem are largely two different populations; approximately 78% of Orem's workers live outside of city limits, and about 77% of Orem residents work outside of city limits. Figure 4 shows the inflow of the working population and the outflow of the resident population for work. As of 2019, an estimated 46,763 workers lived in Orem, Utah. Of those, just over 10,500 individuals worked in the city and over 36,000 commuted elsewhere for work. According to these estimates from the U.S. Census Bureau, more Orem residents work jobs in Provo and Lehi (25.7% combined) than in their home city (22.6%). Conversely, many of the workers in Orem do not live within the city. There are about 49,000 workers employed in Orem, only about 10,500 of which live in the city.



Figure 4: Orem Commuting Patterns. Source: OntheMap 2019

While these commuting data alone do not provide a full explanation for the significant differences between the working and residential populations of the city, the tension between high housing costs and the prevalence of low-wage jobs is likely a major cause. Ultimately, many of Orem's workers must choose between paying high housing costs to live close to work or living affordably elsewhere and commuting.

Because Orem is unaffordable for many workers, it can be difficult to attract or retain the talent required by up-and-coming businesses in any industry. Utah Valley University, for example, graduates many talented students every year, many of whom are unable to stay in the city following graduation due to high costs of living. Ideally, an economic strategy would outline a plan for retaining this talent, which could help support some of the growing industries described throughout the report, like software developers, market research analysts, or project management specialists. This talent cannot be expected to stay in Orem without adequate support from the city, and an intentional effort to retain talent should be made.

Limited availability of developable land makes further growth difficult due to an inability to create new housing and office space. The combination of a growing population and this lack of undeveloped space creates a growing imbalance between supply and demand in the housing market. The result is the rapid increase in housing costs as shown in Figure 3. This furthermore creates opportunities for neighboring cities, like Lehi and Vineyard in recent years, to become more economically competitive due to their ability to develop housing for a working population.

Population growth, housing costs, and land availability are all important issues to consider in the development of an economic plan, as each impacts the opportunities that are available for economic growth. A lack of developable land limits the city's ability to accommodate residential growth, but also hinders their ability to develop Class A office space for businesses in target industries, like growing and emerging tech companies. Both are important to consider as Orem plans for its economic future.

Strong Economic Development Leadership

Orem is fortunate to be under the leadership of a well-trained and thoughtful economic development team. According to the 2022 Milken Institute Best-Performing Cities Index, the Orem-Provo MSA demonstrated the best economic performance among large cities for the second year in a row.[4] The city has a track record of successfully implementing strategic plans, and it can be expected that the individuals responsible for managing future development efforts can reliably achieve ambitious goals.

The city's fiscal strength is a testament to the high-quality work of its Economic Development Division. A variety of economic development tools are utilized by the economic development team, and many have been very successful in stimulating growth in the past. Tax increment financing programs, often referred to as RDAs in Orem, have been implemented and are helpful for supporting development within the city. Similar methods could be used in a future plan.

Ultimately, the economic development leadership can be expected to engage the community, explore suitable development options, and make measurable progress in realizing Orem's economic potential.

4 https://milkeninstitute.org/report/best-performing-cities-2022

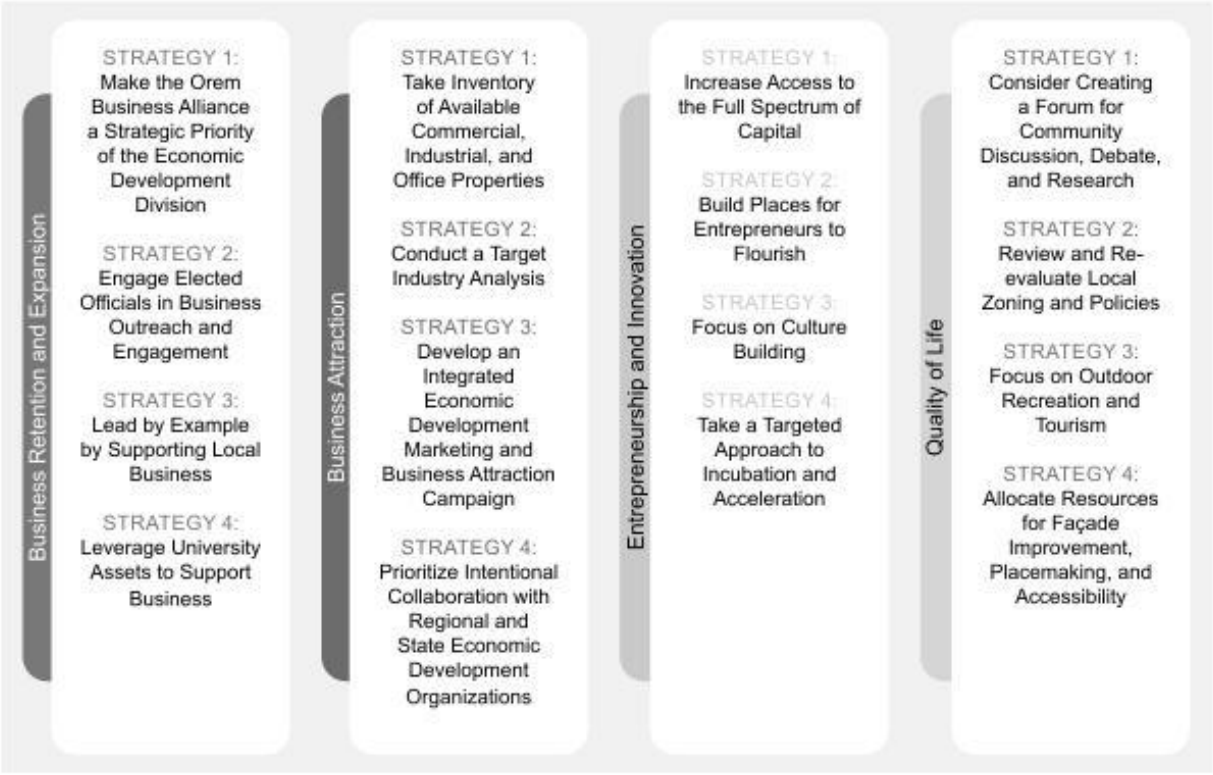


Strategic Framework

The International Economic Development Council defines economic development as a "program, group of policies, or set of activities that seeks to improve the economic well-being and quality of life for a community by creating and retaining jobs that facilitate growth and provide a stable tax base." For economic development organizations to be successful, best practices suggest they must focus on four key strategic areas: business retention and expansion, business attraction, entrepreneurship and innovation, and quality of life. As such, the project team has structured the strategic framework for this Economic Development Strategic Plan around those four foundations of classic economic development practice.

The following strategic framework was informed by a process and methodology presented earlier in this document. The project team relied on a discovery phase which included historical document review, a quantitative data scan and analysis, a retail demand analysis, interviews with City of Orem staff members, and numerous on-site visits. In addition, the strategic framework was developed after a multitude of stakeholder engagement sessions, conducted both online and in-person, which included the following: city leaders; elected officials; local, regional, and state economic development organizations; local business owners; students; and residents of Orem. The stakeholder sessions, which are summarized in Appendix I, were designed to both inform the strategic recommendations early in the process and affirm the recommendations at the conclusion of the planning process. A final session was held in May of 2022 to collect a final round of feedback and review the recommendations presented below.

The Strategic Framework | Four Focus Areas



FOCUS AREA 1:

Business Retention and Expansion

Efforts and action steps designed to facilitate local business retention and expansion opportunities should be at the core of any economic development strategy. From a cost-benefit standpoint, dedicating and deploying resources to existing businesses in a community makes good financial sense. A comprehensive and sophisticated approach to business retention and expansion allows a community to support business owners that have already made an investment in the community. Supporting your existing business base is the most economical way to facilitate both job retention and job creation.

Supporting the existing business base in Orem should be the primary mission of the Orem Economic Development Division. While the project team is encouraged by current efforts, this strategic plan outlines ways that the city can elevate and enhance activities that will support that existing business base and open doors for potential future expansions and job creation.



Photo courtesy of The Woodbury Corporation

Strategy 1: Make the Orem Business Alliance a Strategic Priority of the Economic Development Division

The Orem Business Alliance, embedded in the Economic Development Division, is a collaborative group of organizations across Orem "focused on building the local business community and supporting and uplifting Orem businesses by providing opportunity for business networking, advocating for small businesses, and connecting Orem businesses to valuable resources." In addition, the Orem Business Alliance regularly meets with business owners, hosts monthly Lunch & Learn and new business Meet and Greet events, offers informational webinars, facilitates ribbon cuttings for new businesses, and highlights member businesses through their annual Stand-Out Orem Business Awards.

Action Steps:

- Review and reevaluate business outreach goals
- Create an asset map of economic development service providers, programs, and resources
- Review, reevaluate, and update the business outreach retention and expansion strategy
- Purchase and utilize a CRM system to collect and analyze primary information; capture trends; track business visits, and economic development strategy and goals

Throughout the process, the project team repeatedly heard concerns about businesses leaving or startups 'outgrowing Orem.' Orem should take every step possible to continue to build strong relationships with local businesses to alleviate these losses, including Implementing more ambitious and intentional business outreach goals through the Orem Business Alliance. In addition, city leadership should investigate and adopt Business Retention and Expansion best practices from across the country, including the two cited below. Best practices suggest that each community should have a 'gateway organization' that businesses turn to when looking to overcome a challenge or take advantage of an opportunity. The Orem Economic Development Division should strive to be that trusted partner and facilitate meaningful connections to both public and private sector service providers. In addition, the Division should consider adopting a Customer Relations Management (CRM) system to track visits, inventory key businesses and contacts, and capture primary data on the local businesses. More importantly, this intelligence gathered through business outreach should remain confidential, but aggregate information should be used to identify trends and ultimately inform strategy, policy, and programming to best support the business community.

Best Practices:

Grenada Mississippi Economic Development District

The Grenada County Economic Development District (GCEDD) has made business retention and expansion a priority for the last eight years; as a result, they've helped local businesses create more than 2,000 new jobs. To support local businesses, the GCEDD offers training, leadership and mentorship programs, incentive programs, and research focused on improving the local business environment. Roundtable events, surveys, and targeted incentive programs are important components of their well-rounded business retention and expansion strategy.

Virginia Beach Department of Economic Development

As is evidenced by their website's homepage, the Virginia Beach Department of Economic Development is focused on attracting new businesses, growing existing businesses, and supporting entrepreneurs in their efforts to start businesses. Some of their attractive workforce characteristics are highlighted, their top industries are showcased, and their strategic location is emphasized – all on the website's homepage. The Department provides other resources throughout the site that provide information on the business environment, key industries, business districts, and quality-of-life information, all of which are helpful resources to showcase in a business attraction effort.

Strategy 2: Engage Elected Officials in Business Outreach and Engagement

Throughout stakeholder engagement sessions, the project team heard about a disconnect between the business community and elected officials in Orem. While we believe Orem's elected officials are committed to supporting the business community, we believe city staff can help create more intentional interactions between elected officials and business owners in the city. More intentional interactions enhance the likelihood that elected officials can make policy and budget related decisions that will support business and enhance their ability to reinvest in their companies and in their workforce.

Action Steps:

- Include city council members in business ribbon cuttings and outreach visits; promote these on social media and through other marketing channels
- Create an economic development bi-annual report for city staff, elected officials, and residents of Orem
- Present the economic development bi-annual report to elected officials in a City Council Work Session every six months

City leadership can take two complimentary approaches to facilitate better engagement between business owners and elected officials. First, the Economic Development Division should facilitate more opportunities for the mayor and city council members to join them on business outreach visits. This should not be used as a political tool, but rather an opportunity for council members to gain a firsthand perspective on the opportunities and challenges facing business owners in Orem. In addition, visits by elected officials should be used to promote and support businesses – the economic development team can promote and share information on the visits through social media and the city website to increase visibility for businesses.

Second, city leadership and the Economic Development Division should commit to creating a bi-annual report to inform city staff, elected officials, and residents of the Division's activities and outcomes. This report should be both informative and serve to inform future budget and policy-related decisions. Information for consideration can include the number of business visits, the types of businesses visited, common trends, common challenges, and actions taken to support businesses. In addition, the project team encourages business outreach practitioners to consider how they can calculate and track the impact of the business visit. Metrics could include referrals made, programs and events offered, financing secured, and jobs indirectly created.

Best Practice:

City of Birmingham Small Business Council

The City of Birmingham's Department of Innovation and Economic Opportunity has created a system for involving the city mayor and his administration in local business support efforts. Launched in 2019, the Small Business Council (SBC) assists and advises the mayor on small-business strategies and practical matters. The SBC comprises 22 small business owners, startup founders, and other ecosystem builders, all of whom provide unique insights into the city's business environment.

Strategy 3: Lead by Example by Supporting Local Business

For years, study after study has demonstrated how supporting local businesses ultimately enhances local and regional economies. According to the Small Business Administration (SBA), approximately 68% of money spent locally stays local. That percentage goes toward the following: local taxes, which support local school districts, fire, police, and critical public services; compensation for employees; and local support services like accounting, legal, marketing, etc.

Action Steps:

- Review city procurement policy with the city's procurement and budget manager; encourage the city to purchase from local vendors where appropriate
- Work with the regional Procurement Technical Assistance Center (PTAC) office to assist local businesses become approved government vendors
- Help major employers in Orem review and implement buy local procurement initiatives
- Continue supporting buy local campaigns, initiatives, and events through the Orem Business Alliance

The City of Orem's Economic Development Division is in prime position to not only actively promote a 'buy local' campaign and culture, but the city is also in position to lead by example. City leadership can take several steps to actively support local small business. First, city leadership, in partnership with the city procurement manager and budget manager, should review current city procurement policies and procedures to ensure more city supplies and services are purchased through local vendors. City government is an anchor employer and should take steps to buy local when it's both economically and practically appropriate. Additionally, city procurement managers should look for opportunities to purchase from business owners from historically underrepresented communities. Further, city leadership should work with other local businesses to develop local procurement policies of their own.

Finally, city staff should work with economic development partners and local business owners to create, and support buy local campaigns, events, and initiatives. The project team understands that buy local campaigns have existed in the past in Orem; the team suggests that buy local campaigns be reinstated. More importantly, our experience suggests that buy local campaigns are most effective when developed and supported at the local level. The Orem Business Alliance is in prime position to lead the charge to implement, and support buy local campaigns, events, and celebrations.

Best Practice:

Buy Newark

Newark's 'buy local' campaign is focused on increasing the number of purchases made by Newark residents within their own community. Their campaign employs three strategies: institute formal local preferences, build the capacity of local businesses; and cultivate relationships with the local business community. Collectively, these strategies attempt to retain local resources, improving the local economy as a result.

Strategy 4: Leverage University Assets to Support Business

Established as a vocational school in 1941, Utah Valley University has grown into the largest university in the state of Utah. Featuring accolades such as the number one school in Utah for alumni earnings, number 2 in the state of Utah for 'best bang for your buck,' and the number 3 ranking for best return on investment in the nation[5]. Utah Valley University is an anchor institution that most communities can only dream of. The City of Orem should continue to take steps to build synergy with the university by recognizing and leveraging the human and intellectual capital residing in the community every day.

In addition to Utah Valley University, Brigham Young University (BYU) sits just outside city limits. Founded in 1875 by religious leader Brigham Young, this private research university offers over 180 undergraduate majors and 64 master's programs to over 30,000 students[6]. The city should continue to foster strong partnerships with BYU, tapping into its research capability and capacity to support local Orem technology and manufacturing companies.

Action Steps:

- Continue to build strong partnerships with university leadership
- Work with university leaders and faculty at Utah Valley University and BYU to facilitate practical education opportunities with local businesses
- Connect educational organizations such as the UVU Entrepreneurship Institute, Mountainland Technical College, and the BYU Rollins Center for Entrepreneurship and Technology to support Orem businesses for capstone projects and internship opportunities
- Consistently engage with student population through networking events, pitch competitions, lunch and learns, and mentorship meet and greets.

To strengthen these university relationships Orem can consider creating and hosting annual Orem Business Alliance Lunch and Learns to connect Orem businesses to students and faculty. Orem leadership should work with organizations like the UVU Entrepreneurship Institute, Mountainland Technical College, and the BYU Rollins Center for Entrepreneurship and Technology. Students and faculty should have clear pathways to support businesses on capstone projects, obtain internships, and connect with potential professional mentors. The overarching goal should be to enable students and faculty to support Orem businesses but to also foster an environment that allows students and faculty to innovate, create, and take risks to create the next generation of great Orem businesses.

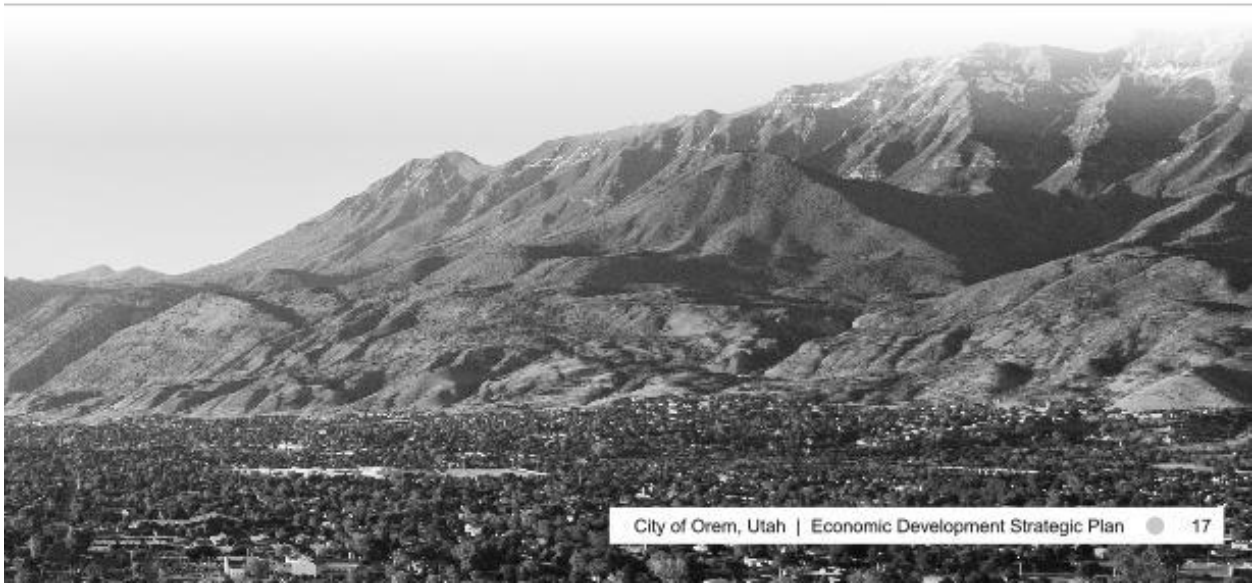


FOCUS AREA 2:

Business Attraction

While business retention and expansion efforts are crucial to the mission of the Orem Economic Development Division, an intentional business attraction campaign should also be designed to attract businesses that can capitalize on local assets and complement the existing business environment. The attraction of new businesses to the city will diversify the industry mix, add new jobs, and stimulate novel economic growth. An overreliance on any single industry places the community in a precarious situation; an economic shock –like a pandemic—could cause conditions to change and the local economy could become destabilized. A business attraction campaign would provide the city with the opportunity to explore the potential for new, growing industries to add value to the community.

Orem's business environment is home to many valuable assets; an abundance of human capital, available Class A office space, and a strategic location all give Orem a competitive advantage in business attraction efforts. The city should aim to understand which businesses would best complement the city's economy, and then should leverage its assets to attract targeted businesses to the area.



Strategy 1: Take Inventory of Available Commercial, Industrial, and Office Properties

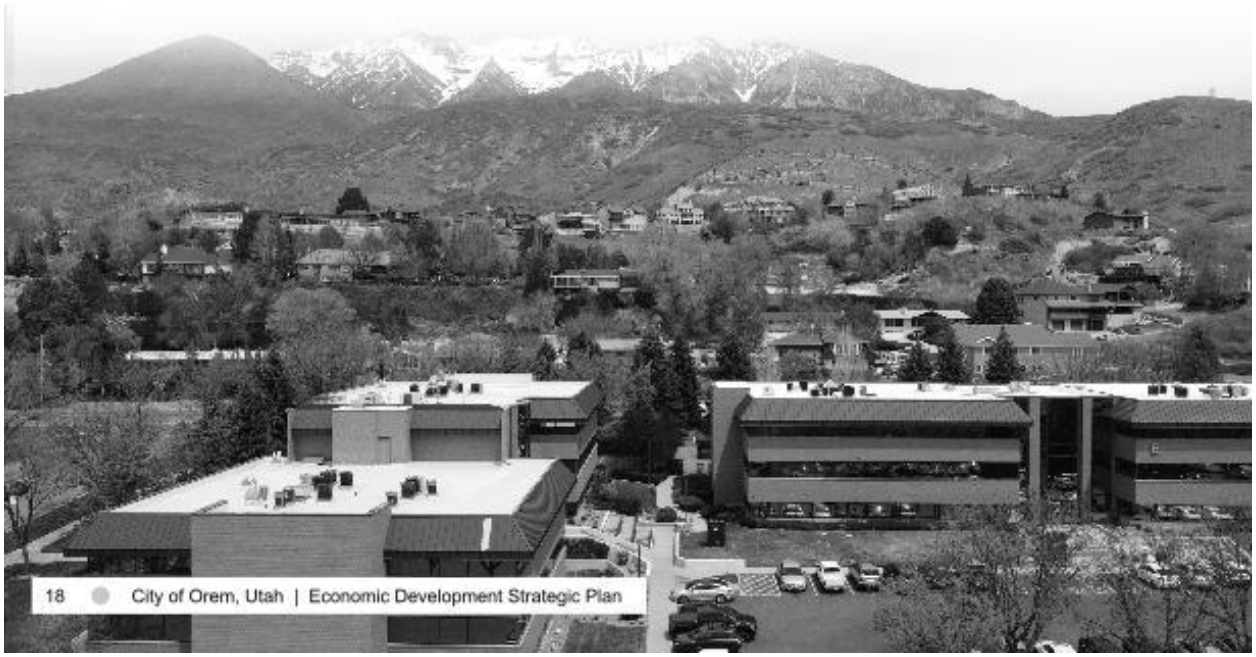
Repeatedly throughout the planning process, business and community leaders expressed concern about the growing inventory of vacant and underutilized commercial and retail space. In addition, the project team was informed of several parcels of land that were prime for development, but to date, no action has been taken. A common expression in economic development states that 'no product, no project.' In other words, if Orem does not have shovel-ready marketable land, or move-in ready quality commercial space, business attraction efforts will yield negligible results.

Action Steps:

- Prioritize ongoing land and building inventory and availability
- Conduct a market and cost analysis with a third-party service provider
- Showcase and list available land and space to a targeted audience via City Economic Development website
- Share monthly article postings on property in local newspapers, media, and showcase articles on the Economic Development website

The project team suggests that city leadership develop a formal process to inventory and catalog available land, and commercial and industrial space. This should be an ongoing exercise; it's paramount that economic development leaders have accurate and up-to-date insight on available land and buildings. This ongoing inventory should help inform development priorities in conjunction with both public and private sectors partners.

Further, city leadership should work with a third-party real estate advisory firm to conduct a market and cost analysis on available properties. This analysis should inform city leaders on the current market value of available land and space and help public partners and private developers and businesses ascertain development or redevelopment costs. In addition, the analysis should assess the status of infrastructure, to ensure that properties are marketable to potential tenants. Further, the analysis should provide a comparative analysis with similar cities to Orem competing in the business attraction game. Finally, city leadership should forge strong and sustainable relationships with the regional commercial real estate broker community, to ensure that both parties can successfully collaborate to market available properties.



Strategy 2: Conduct a Target Industry Analysis

No community can compete successfully for every business or industry. Before Orem can launch an extensive business attraction initiative, the project team strongly encourages city leadership to conduct a Target Industry Analysis. A Target Industry Analysis will enable Orem to better understand which industries best fit the economic assets and competitive advantages of the community, and which business types will contribute to achieving the community's vision for the future.

Action Steps:

- Review the quantitative data, qualitative data, and retail gap analysis in this report to inform the basis of a target industry analysis
- Develop an RFP soliciting professional firms to conduct a target industry analysis
- Hire a professional firm with experience conducting a Target Industry Analysis for the purpose of business attraction

To conduct a Target Industry Analysis city leadership can utilize some of the datasets presented in this plan, including the retail gap analysis, location quotient analysis, and industry and occupation trends. Further, by conducting more intentional and thorough business outreach visits to the existing business base, city leaders can supplement the quantitative analysis with a better understanding of the needs of the current businesses, including understanding potential suppliers, buyers, service providers, and strategic partners. Both tactics can be used to form the basis of a target industry strategy; however, the project team recommends that the city allocate resources in the future for a professional firm to conduct a more extensive and comprehensive report to increase clarity and to outline clear industry targets. More specifically, the project team recommends the city partner with a professional service firm with direct experience analyzing local market conditions and developing a target industry analysis for the purposes of business attraction.

Best Practice:

Economic Development Authority of Western Nevada

The Greater Reno-Sparks-Tahoe area is a fast-growing region in the United States, and its economic development authority is focused on attracting the right industries to the region. To ensure its industry attraction efforts were appropriately targeted, they conducted a targeted industry analysis which resulted in the identification of eight target industries. These industries include renewable energy, technology, advanced manufacturing, and others with potential for benefitting the regional economy.

Strategy 3: Utilize the Target Industry Analysis to Develop an Integrated Economic Development Marketing and Business Attraction Campaign

To successfully attract new business to the community, city leadership needs to dedicate resources to develop a comprehensive and integrated economic development marketing and business attraction campaign. Adequate resources are required to deploy the multitude of marketing tools required to connect with and influence both site selection firms and key business decision makers. An integrated approach should successfully position Orem as a competitive market for investment – this is achieved by product differentiation, price competitiveness, and market focus.[8]

Action Steps:

- Consider allocating appropriate resources to develop and execute a marketing and business attraction campaign
- Consider developing an RFP soliciting professional firms to develop and manage an integrated marketing campaign
- Focus marketing campaign on industries identified in the target industry analysis to assist in filling office space at University Place and Canyon Park Technology Center
- Consider identifying and purchasing lead generation software
- Identify and attend trade shows and conferences in identified target industries
- Plan and host annual or bi-annual familiarization and/or site selector tours

The qualitative and quantitative analysis in this plan can serve as the foundation for an integrated marketing campaign designed to position Orem as a competitive market. In particular, the SWOT analysis, Retail Gap Analysis, and the Industry and Occupation Analysis can inform the team how to position Orem appropriately. In addition, by completing Strategy 1 and Strategy 2 listed above, city leadership will be well-suited to begin developing a value proposition for site selectors and businesses to consider. While we believe this plan can inform early action and assist city staff in the development of a marketing campaign, the project team suggests that Orem hire a professional marketing firm to develop and execute the campaign – specifically a marketing firm with experience in economic development business attraction.

Best Practice:

Watertown Development Company

Watertown, South Dakota's Watertown Development Company (WDC) was created in 1947 to establish, fund, and direct programs designed to promote and increase the commercial, financial, and economic vitality of the city. Their website markets many of the community's assets, like affordable housing, quality education systems, and a variety of recreational activities. In addition, it spotlights its top industries, as well as those it is most motivated to attract to the region.

Strategy 4: Prioritize Intentional Collaboration with Regional and State Economic Development Organizations

Best practices suggest that when localities win in the business attraction game, it is in part because they have formed strong partnership with statewide and regional economic development partners. As mentioned earlier in this plan, Utah is widely regarded as a very competitive state for economic development. Traditionally, business attraction projects are managed at the state level, and because of this, the project team suggests that city leadership focuses on building a stronger and more intentional relationship with the Governor's Office of Economic Opportunity. City staff should ensure they have full knowledge of the suite of financial tools and incentives offered through the state. In addition, city leadership should understand and activate the tools and resources offered by the Office of Outdoor Recreation and the Office of Tourism. Further, the project team encourages city leadership to explore the utility of the Utah Main Street program, which will be discussed later in this plan.

Action Steps:

- Connect with state leadership on a regular basis
- Convene regular meetings with state delegation to inform them of economic development goals and strategies
- Research, identify, understand, and be prepared to utilize state capital tools and financial incentives (Resources include Go Utah, Mountainland Association of Governments (MAG), Utah Redevelopment Agency (URA), Utah Alliance for Econ Dev, Utah South Economic Partnership (USEP), World Trade Center of Utah, etc.)

The project team encourages city leadership to create forums for city staff to meet with state leadership on a more consistent basis, take full advantage of the resources and technical assistance provided by the Office of Economic Development, and ensure that Orem's business attraction strategy is well-aligned with the office's statewide focus. Further, regular meetings and communication with the local delegation will ensure that elected representatives are aware, can communicate the community's priorities, and make policy, legislative, and budget related decisions that support Orem's economic development agenda.



Focus Area 3:

Entrepreneurship and Innovation

One of Orem's greatest strengths is its highly capable population. Local colleges and universities graduate thousands of young, ambitious professionals every year, many of whom are eager to contribute to the economy in an innovative way. Entrepreneurial ventures greatly benefit the city, and the Orem Economic Development Division should actively support individuals or groups who are interested in hatching a new business within city limits.

There exist many resources available to prospective entrepreneurs in Orem, but the systems for connecting individuals to those resources could be improved. The local government, educational institutions, existing businesses, and other community actors share responsibility for creating a supportive environment for entrepreneurs. In this section, the project team has outlined several strategies for doing so. Orem has a history of incubating many highly successful startups, including LiveView Technologies, Blendtec, Pura, WordPerfect, Omniture, and it is in the city's best interests to ensure up-and-coming innovators feel supported in their efforts to build out the local economy in forward-thinking ways.



Strategy 1: Increase Access to the Full Spectrum of Capital

During various interviews and focus groups, stakeholders expressed concerns about the lack of adequate resources for small businesses. Most notably, numerous participants cited a lack of capital products and financial incentives for small businesses. While the project team believes there are several appropriate capital products in place in Orem, there is room for improvement in several areas. City leadership should conduct a citywide analysis to evaluate current capital offerings and work with appropriate partners to fill any noticeable gaps. City leadership should work with external partners to ensure that capital is available for businesses at all stages of the business lifecycle – through business ideation to succession, and every step in between.

Action Steps:

- Survey businesses during business outreach visits and at Orem Business Alliance meetings to assess their need for capital
- Use survey results to inform strategic next steps
- Work with private lenders and economic development partners to list, outline, and ensure available and accessible capital across the full business lifecycle – from ideation to succession.
- Consider funding sources and financial incentives for property owners to make exterior improvements
- Think creatively how to utilize the Utah Microloan Fund, Utah Microenterprise Loan Fund, Mountainland Association of Governments Small Business Loan Fund, and possibly Orem CDBG funding
- Consider creating Community Reinvestment Areas (CRAs) along State Street to fund exterior improvements of businesses

Several steps will help this process. First, the project team suggests that city leadership survey businesses during business outreach visits on their access and awareness of capital products. Informal surveying during business outreach visits can inform strategic implementation and support decisions to create new funding sources or recapitalize and amend current funding sources. Second, city leadership should consider redeploying interest earned on the city revolving loan funds to create and capitalize small business grant funds. These small grant funds can help small businesses access professional services or make physical improvements to their business exterior and façade. Third, the city should take inventory of available capital products for small businesses at the local and state level and take a more intentional approach to ensuring small businesses are aware of the variety of products available to them. This can be accomplished with a more intentional outreach and marketing approach from the city Economic Development Division. Lastly, the city should consider the continued use of Community Reinvestment Areas (CRAs) along State Street and other strategic corridors to help fund development, infrastructure, and exterior improvements to existing properties.

Startup Financing Cycle

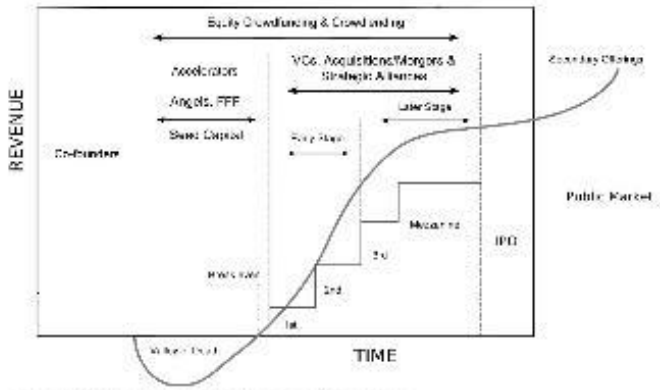


Figure 5: Startup Financing Cycle. Source: Kmuehmel

Strategy 2: Build Places for Entrepreneurs to Flourish

One potential solution to address some of the vacant or underutilized space in Orem is to think differently about how that space can be activated. The project team believes that city leadership can continue to support startup businesses and entrepreneurs by focusing on building out a physical ecosystem that allows them to startup, thrive, and grow. City leadership should work with the private sector, strategic economic development partners, and university leadership to build out coworking spaces, flexible space, and mixed-use space that appropriately accommodates the types of businesses already thriving in Orem, and those they are trying to attract through a business attraction campaign.

Action Steps:

- Double down on efforts to activate, market, and fill Canyon Park Technology Center
- Create a pipeline for incubator and accelerator companies to fill vacant space
- Consider reevaluating zoning policy; enable creative mixed-use for vacant and underutilized properties
- Look for and research opportunities to develop modern coworking space(s) at Canyon Park Technology Center and/or University Place

The project team believes the highest priority should be working with The Muller Company to fully activate and fill Canyon Park Technology Center. City leadership should continue to find ways to activate the space through events, programming, and host potential businesses for site tours. In addition, the city should consider helping the Utah Valley Business Resource Center (BRC) build a stronger partnership with The Muller Company. Companies participating in and leasing space at the BRC are in a natural pipeline to fill space at Canyon Park Technology Center. The goal of the incubation and acceleration program at the BRC should be to hatch those companies into long-term space – Canyon Park Technology Center is the perfect fit.

In addition, city leadership should consider reviewing current zoning policy and make the appropriate changes to allow commercial and industrial property owners to subdivide units to accommodate both light manufacturing, retail, warehousing, and shipping in the same location. Commonly referred to as 'flex space,' a change in zoning policy could facilitate better utilization of properties and the industry segments that can use this space are well-positioned to complement the current industry mix in Orem.

Best Practice:

Scottsdale Fashion Square

In 2019, the former Barneys New York at Scottsdale Fashion Square in Scottsdale, Arizona was repurposed as a coworking space. Partnering with national real estate company Industrious, the mall now features over 33,000 square feet of coworking space for entrepreneurs, small businesses, remote workers, and freelancers. The space embraces the 'live, work, play' ethos common across the country, and offers shared office space, coffee lounges, private offices, and access to a number of amenities.

Strategy 3: Focus on Culture Building

Building an entrepreneurial ecosystem is more than offering capital and physical spaces for business startups to flourish. The city must take intentional steps to build a culture that facilitates, supports, and nourishes risk-takers, innovators, and the next generation of great Orem business owners. City leadership can take several steps to harness the talent in the community and facilitate an ecosystem that produces and sustains high-potential 21st century businesses.

Action Steps:

- Offer programming geared towards innovative and technology enabled companies and startups through the Orem Business Alliance
- Support the BRC in creating pitch competitions and business plan competitions
- Facilitate the creation of peer-to-peer and mentorship networks
- Connect with Utah Manufacturing Extension Partnerships (Utah MEP)
- Network with local multi-cultural chambers to help facilitate specific programming and support services for aspiring and current entrepreneurs from historically underrepresented segments of the population

First, city leadership should continue its partnership with the Utah Valley Business Resource Center (BRC). More specifically, city leaders should support the BRC in creating innovative and exciting business plan and pitch competitions. Additionally, city leaders should integrate the Orem Business Alliance into efforts to support startups and entrepreneurs – offering support, sponsorship, and evaluators in business pitch competitions. Further, partnerships should be expanded to include local multi-cultural chambers to help facilitate specific opportunities and support services for aspiring and current entrepreneurs from historically underrepresented segments of the population.

Second, city leadership should work with regional partners to launch and support peer-to-peer networking groups and opportunities. Creating an ecosystem of people who can share ideas and experiences is the cornerstone of any great entrepreneurial ecosystem. Intentionally facilitating these opportunities is paramount to launching more organic opportunities for entrepreneurs to connect. In addition to peer-to-peer networks, city leadership should work through the Orem Business Alliance to create a network of mentors who are willing and able to support the next generation of business owners. Lastly, technical support should be offered through existing organizations like the Utah Manufacturing Extension Partnership, Utah Valley University, BYU, and private sector service providers.

Best Practice:

Fairfield Iowa Entrepreneurs Association

The Fairfield Entrepreneurs Association is committed to creating a culture of entrepreneurship in Fairfield, Iowa. The website boasts the creation of 5,000 new jobs, $300 million in investment and $2 billion in new equity through the association. A variety of programs are offered, including entrepreneurial coaching, financing programs, and relocation programs. Collectively, all the startup resources create a culture which encourages entrepreneurship.

Strategy 4: Take a Targeted Approach to Incubation and Acceleration

One of the most important economic development assets in Orem is the Utah Valley Business Resource Center. As an original funding partner, the City of Orem has both a financial and strategic incentive to fully support the efforts of the BRC. With that in mind, the project team encourages city leadership and the Economic Development Division to support the BRC through enhanced collaboration, business client referrals, events, programming, and shared resources. Further, it is imperative that the BRC has a key seat at the table should the city decide to move forward with a target industry analysis.

While the project team is encouraged by the efforts of the BRC, and more specifically its efforts to incubate and hatch businesses, there appears to be an opportunity to take a more targeted approach. Like in business attraction, incubator programs cannot support all businesses and industries. Because of this, city leadership, along with university and BRC leadership, should become more involved in the pipeline of incubator businesses the BRC supports. This can be accomplished by ensuring BRC leadership is heavily involved in the target industry analysis. The BRC incubator program should focus on technology-enabled, scalable businesses that support and complement the existing industry base in Orem. Further, the BRC should look to recruit businesses that have the appropriate talent pool to draw from. Building more intentional partnerships with Utah Valley University and BYU is a strategic step to ensure incubator businesses have access to talent as they grow and scale. Lastly, city leadership should be prepared to promote ongoing efforts to build out a citywide fiber network system. The potential Utah Telecommunications Open Infrastructure Agency (UTOPIA) network of fiber optic internet access is an asset that will be attractive to technology-enabled 21st century startups.

Action Steps:

- Continue to support the Utah Valley Business Resource Center through collaboration, business client referrals, events, serving on the BRC Executive Board, advertising BRC programming, etc.
- Ensure leadership at Utah Valley University, BYU, and the Utah Valley Business Resource Center are integral partners in the Target Industry Analysis
- Ensure that business development efforts at the BRC Incubation program are well-aligned with a target industry analysis
- Consider partnering with Canyon Park Technology Center to create an additional business incubator
- Provide information about UTOPIA fiber to high-tech enabled companies

Best Practices:

Des Moines Iowa Global Insurance Accelerator

Des Moines' Global Insurance Accelerator is a business accelerator designed specifically to support entrepreneurship and innovation in the insurance industry. The accelerator's investors and mentors are comprised mostly of insurance professionals, and the services provided are designed to bolster the growth of the industry in the city. Des Moines has identified the insurance industry as an appropriate business expansion target and provides resources for firms or individuals interested in contributing to the effort.

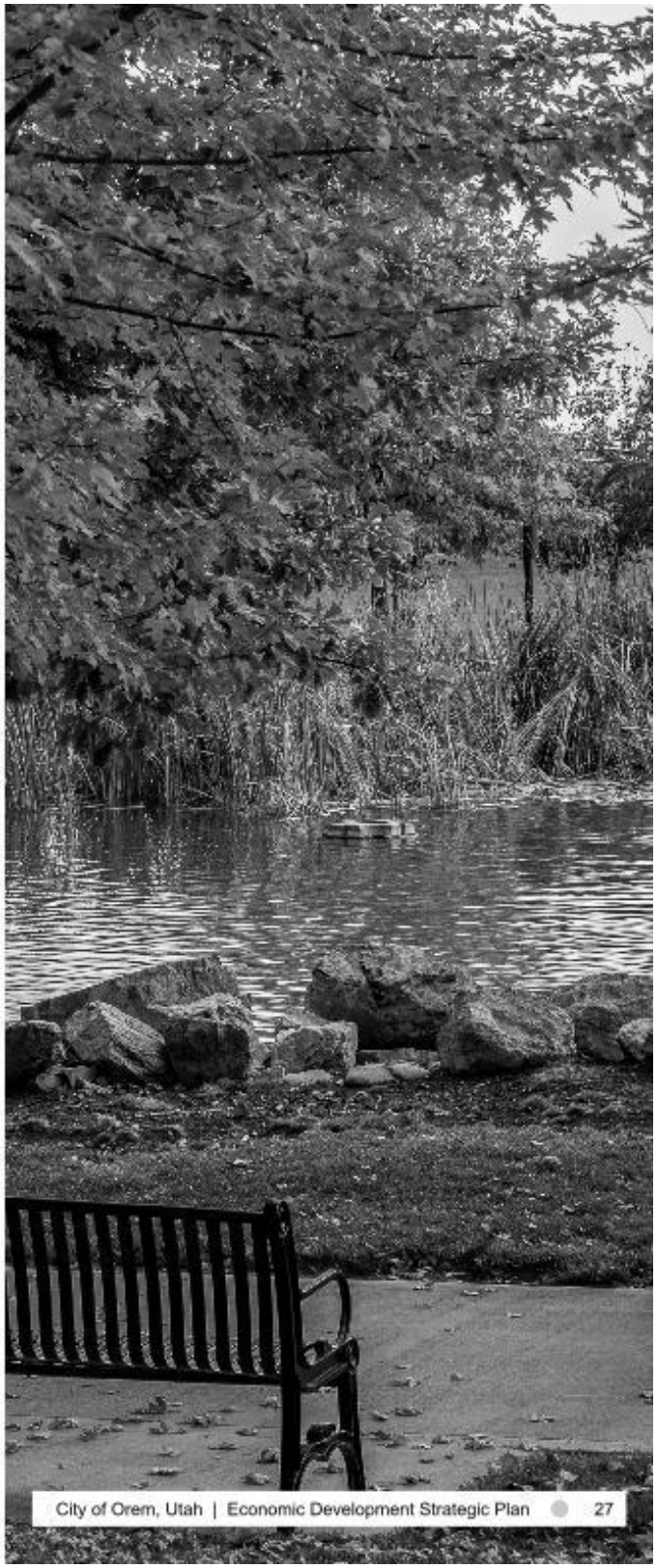
Cape Girardeau Codefi Co-Working Space

Codefi is an entrepreneurial system which partners with private and public groups to train workers and innovators in digital professions. Codefi builds and attracts software-focused companies and creates community spaces which can support the expansion of the digital economy in Missouri. In their coworking space they offer large office space, small working stations, and simple desk space to accommodate workers with a variety of needs.

Focus Area 4: Quality of Life

Ultimately, the local economy can flourish only as much as is allowed by its environment. Improvements to the quality-of-life assets in Orem are crucial for ensuring the economy continues to grow. Many challenges face the city in this regard; limited developable land, high housing costs, and poor pedestrian and transit infrastructure will begin to impact the economy more severely if unaddressed.

The Orem Economic Development Division, in partnership with other local government agencies and community actors, should prioritize the exploration of solutions which address these problems; other economic development strategies might be futile without improvements to the infrastructure, regulatory, and political environment within the city. In this section, strategies are provided for increasing public engagement, stimulating new economic growth, and improving the general quality of life afforded to Orem residents.



Strategy 1: Consider Creating a Forum for Community Discussion, Debate, and Research

Consistently through this process, the project team encountered fragmented and conflicting views on the direction and economic future for Orem. During onsite stakeholder sessions, participants ranked an inability to unify around a singular vision for the future as the number one challenge facing the community. The fact that the city's most recent EDSP was adopted over seven years prior and has not been fully revisited in the time since could be a contributing factor to this lack of a unified approach. Further discussion on the matter with community stakeholders yielded constructive and hopeful insights, but participants were unable to arrive at a consensus on a shared vision.

Action Steps:

- Research and identify ways to engage local and regional Universities, including Utah Valley University, Mountainland Technical College, Weber State University, Southern Utah University, Utah State University, BYU, and University of Utah (Kem C. Gardner Policy Institute) to take the lead in organizing local community forums
- Engage local philanthropic organizations to assess funding
- Research best practice community ambassador and fellowship programs

Based on these factors, the project team encourages city leadership to work with local and regional partners to explore the creation of a non-partisan forum for community discussion, debate, and research. The Utah Valley Chamber of Commerce, the Orem Business Alliance, and the Business Resource Center are all potential partners that can help establish forums for healthy community debate and discussion around Orem's future and can help identify and address any issues that may appear.

The project team recognizes that local universities each have some iteration of this concept and working with established groups would be deemed as an acceptable path forward. Whether creating a new organization or building a stronger partnership with existing organizations and initiatives, city leadership should ensure there is a place where healthy conversations can occur, and ideas can take action. This initiative should be anchored on a foundation of academic study and research, as well as constructive discussion that can crystallize a shared vision for the future of Orem.

Best Practice:

Jefferson Educational Society

The Jefferson Educational Society in Erie, Pennsylvania is a nonprofit organization that promotes civic engagement for societal progress. Through research and discussion about emerging ideas and events, the Jefferson Educational Society aims to facilitate collaboration in a more united community improvement effort. The Society offers courses, seminars, and lectures that can help members understand Erie's past, present, and future opportunities, and provides a platform for members to engage through.

Strategy 2: Review and Re-evaluate Local Zoning and Policies

Many of the concerns and frustrations voiced in the stakeholder engagement sessions revolved around zoning and the regulatory environment in Orem. While it's not uncommon, the project team believes these concerns can be addressed with a balanced approach to reviewing and revising certain policies to facilitate the right kind of growth in Orem. The project team encourages city leadership to allocate resources so that neighborhood plans across Orem can continue to be reviewed and updated. The neighborhood plans that were reviewed by the project team were useful and informative; however, these plans were developed between 2015 and 2020 and some have become quickly outdated due to recent, significant changes in the community and in the country. The COVID-19 pandemic and accelerated growth in the community will continue to shape future change. Continually updating plans may facilitate more substantive feedback from the residents and allow both the Economic Development Division and the Development Services Department to align policies and strategies to meet the needs of residents.

Action Steps:

- Commit to intentional and consistent dialogue with property owners and residents – ensure key city departments are collaborating to address concerns in an appropriate manner
- Continue to support and consider allocating resources to the Neighborhood Improvement Team
- Update neighborhood plans

The project team further encourages city leadership to consider reviewing and reevaluating zoning policies in Orem. While the project team doesn't suggest making drastic changes to zoning policy overnight, the team suggests that city leadership commit to consistent and constructive discussions with residents and property owners. The project team also encourages the Development Services Department, the Economic Development Division, and the Community Services Division to look for ways to enhance collaboration so the city is well-positioned to make strategic changes to zoning and policy when appropriate.

In addition, city leadership should look for ways to facilitate more mixed-use (non-residential) development in targeted and strategic locations. The project team often heard about the desire for more 'flex space'. Flex space, in this instance, refers to the ability to subdivide a unit with retail in the front of the building, and shipping, distribution, or logistics operations in the back half of the building.

Lastly, the city of Orem should continue to refine the culture and approach to code enforcement. The project team heard many concerns about absentee landlords. In the project team's experience, overly combative code enforcement is rarely the answer. Instead, the city should continue to allocate resources to the Neighborhood Improvement Team and ensure that collaboration is occurring across key departments in the city hall.

Strategy 3: Focus on Outdoor Recreation and Tourism

Orem is an outdoorsman's paradise; with easy access to mountains, trails, and other recreational sites, the city is an ideal location for its active, healthy population. Local parks are largely considered to be one of Orem's greatest strengths; green space, playgrounds, and sports complexes attract visitors from beyond city limits. City Center Park hosts a weekly farmers market, and the city owns a 55-acre sports park on the southwest side of town. In addition, Sundance is only 15 minutes from Orem and is an excellent location for hiking, snowboarding, and skiing. Mount Timpanogos can be seen from anywhere in the city and is a beacon to adventurous hikers and mountain bikers.

Action Steps:

- Consider creating a City of Orem Tourism Commission or Advisory Council
- Work with the Utah Valley Visitor's Center, Utah Office of Tourism, and Explore Utah Valley to include and promote Orem as destination
- Research the option of creating a "Recreation District" in the remaining areas available for development from the mouth of Provo Canyon up 800 N all the way to State Street to encourage and facilitate recreation-based development

All these features are marketable to residents and tourists alike. The natural environment is attractive to travelers, and the prevalence of the retail and restaurant industries only adds to its appeal for tourists. An expanded marketing strategy which promotes Orem as a destination could help generate local business and increase tax revenue. The effectiveness of this strategy is contingent upon the successful execution of the first strategy outlined in this section; a unified vision for the city is a requirement for its marketing under a single brand.



Orem should not simply be a suburb of Salt Lake City, or as a commuting track between rural towns and urban hubs; the accessibility of the city should be increased. At present, there is no clearly defined city center. University Place is home to a variety of retail vendors and restaurants, but the mall is relatively self-contained and does not connect well to other parts of the city. The city center is not walkable, and it is difficult for residents to travel around Orem without a vehicle.

To attract tourists more effectively to the area, the city must be developed to accommodate travelers. Many tourists will not have easy access to personal transportation, which could justify creating a tourism transportation campaign to inform tourists about existing public transit options and encourage their use. Additionally, visitors will likely be unfamiliar with many of the experiences Orem has to offer. An intentional effort should be made to provide visitors with resources that enhance their experience within the city.

Ultimately, the expansion of the tourism industry within the city will benefit all aspects of the economy. With increased revenues, the city can make improvements to infrastructure and quality-of-place amenities in the area, which will only attract more tourists and improve the lifestyles of current residents.

Best Practice:

Visit Richmond, Virginia

Richmond, Virginia's natural environment is one of the city's most valuable assets, and the city has successfully created a unified, marketable identity centered around outdoor recreation. The city hosts the country's largest music and sports festival, maintains more than 70 miles of mountain bike trails, and has been voted Outdoor Magazine's best river town. The recreation page on the city's website, titled "Outdoor RVA," spotlights some of its most popular recreational facilities and invites residents and tourists alike to get outside and enjoy the natural environment.



Strategy 4: Allocate Resources for Façade Improvement, Placemaking, and Accessibility

During stakeholder engagement sessions, and throughout the project team's preliminary discovery, the appearance of State Street was a topic of conversation. A major corridor for residents across the region traveling east and west, State Street has historically been the epicenter of the 'Retail Hub of Utah County". However, years of neglect and lack of focus have resulted in a corridor that looks dated and need of reimagination and reinvestment. The project team encourages city leadership to explore ways to revitalize the corridor with a focus on façade improvement, placemaking, and accessibility.

Action Steps:

- Explore Utah Main Street Designation for State Street
- Work with UTA and UDOT to enhance existing multimodal transportation options
- Enhance community gateways
- Work with other departments within the city to develop a plan to invest in public, interactive art exhibits

First, the project team highly encourages city leadership to explore a Main Street designation through the Governor's Office of Economic Opportunity. According to the website, "The Utah Main Street Program helps communities revitalize their economy, appearance, and image of downtown commercial districts. They do this by building a strategy centered around a community's unique heritage and attributes that make it a great place to live and visit. The program provides a framework and resources to support a community's downtown revitalization efforts." With a Main Street designation, city leadership, in partnership with business and residents, can tap into resources to revitalize the corridor, preserve the history and culture of the community, and enhance business facades, placemaking, sense-of-place, and accessibility.

Relatively speaking, the project team does not consider Orem to be a walkable city. However, the community has several assets in place that can improve that perception quickly and dramatically. City leaders should consider forging stronger relationships with the Utah Transit Authority, Utah Department of Transportation, Utah Valley University, and other strategic stakeholders to enhance multi-modal transportation options. Drastic measures are not required, instead, city leaders should focus on greater promotion of existing public transit options, implement more visible way-finding measures, consider community gateways at strategic locations, and promote walkability, bikeshare programs, and suburban trails throughout the community. Additionally, city leadership should coordinate with the Orem Arts Council to develop and implement public art installations to improve the aesthetic and appeal to strategic nodes across the city.

Best Practice:

Frederick Maryland Downtown Partnership

The Downtown Frederick Partnership is a nonprofit organization that is dedicated to improving the quality of life of Frederick, Maryland residents. Some of their objectives include increasing diversity, redeveloping old storefronts, opening restaurants and shops, and expanding access to public transportation. This program also manages the city's Main Street program, which is a program that has been active since 2001. The partnership's revitalization efforts have spurred innovation within the city and helped grow the local economy.


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Implementation Matrix

Business Retention and Expansion

Strategies	Action Items	Timeline	Metrics for Success
Goal 1: Improve the Small Business Culture in Orem			
Make the Orem Business Alliance a Strategic Priority of the Economic Development Division	• Review and reevaluate business outreach goals • Create an asset map of economic development service providers • Review and reevaluate business outreach marketing strategy • Purchase and utilize a CRM system to collect and analyze primary information; capture trends; track business visits, and economic development strategy and goals	Short (1-2 years)	• Clear list of business outreach goals • # of economic development service providers identified • Adoption of CRM system
Engage Elected Officials in Business Outreach and Engagement	• Include city council members in business ribbon cuttings and outreach visits; promote these on social media and through other marketing channels. • Create an economic development bi-annual report for city staff, elected officials, and residents of Orem • Present the economic development bi-annual report to elected officials in a City Council Work Session every six months	Ongoing	• # of business outreach meetings with city council • # of businesses added to business outreach list • # of visits made with city council members or mayor
Lead by Example by Supporting Local Business	• Review city procurement policy with the city's procurement and budget manager; encourage the city to purchase from local vendors where appropriate • Work with the regional PTAC office to assist local businesses become approved Utah government vendors • Help major employers in Orem review and implement buy local procurement initiatives • Reinstate buy local campaigns, initiatives, and events through the Orem Business Alliance	Medium (2-3 years)	• # of local businesses approved as government vendors • # of buy local events or campaigns • # of collaborative initiatives started with local employers
Leverage University Assets to Support Business	• Continue to build strong partnerships with university leadership • Work with university leaders and faculty at Utah Valley University and BYU to facilitate practical education opportunities with local businesses • Connect educational organizations such as the UVU Entrepreneurship Institute, Mountainland Technical College, and the BYU Rollins Center for Entrepreneurship and Technology to support Orem businesses for capstone projects and internship opportunities • Consistently engage with student population through networking events, pitch competitions, lunch and learns, and mentorship meet and greets.	Medium (2-3 years)	• # of collaborative events led by universities and the city, jointly • # of internship opportunities offered • # of interns hired for full-time positions after completion of internship • % of graduate retention rate in Orem • $ committed to collaborative initiatives
Champions & Partners: Orem Economic Development Division, City Council, Local Colleges and Universities, Regional PTAC Office			

Business Attraction

Strategies	Action Items	Timeline	Metrics for Success
Goal 2: Launch a Business Attraction Campaign			
Prioritize Intentional Collaboration with Regional and State Economic Development Organizations	• Connect with state leadership on a regular basis • Convene regular meetings with state delegation to inform them of economic development goals and strategies • Research, identify, understand, and be prepared to utilize state capital tools and financial incentives (Resources include Go Utah, MAG, URA, Utah Alliance for Econ Dev, USEP, World Trade Center of Utah etc.)	Ongoing	• # of annual meetings with state leadership • Creation of a catalog of state capital tools and financial incentives
Take Inventory of Available Commercial, Industrial, and Office Properties	• Prioritize ongoing land and building inventory and availability • Conduct a market and cost analysis with a third-party service provider • Showcase and list available land and space to a targeted audience via City Economic Development website • Share monthly article postings on property in local newspapers, media, and showcase articles on the Economic Development website	Short (1-2 years), then ongoing	• # of properties identified for commercial or industrial development • Creation of structure to market available land • # of participants in real estate forums • # of article postings made in local media
Conduct a Target Industry Analysis	• Review the quantitative data, qualitative data, and retail gap analysis in this report to inform the basis of a target industry analysis • Develop an RFP soliciting professional firms to conduct a target industry analysis • Hire a professional firm with experience conducting a Target Industry Analysis for the purposes of business attraction	Medium (2-3 years)	• Publish of RFP • Identification of clear target industries
Utilize the Target Industry Analysis to Develop an Integrated Economic Development Marketing and Business Attraction Campaign	• Consider allocating appropriate resources to develop and execute a marketing and business attraction campaign • Consider developing an RFP soliciting professional firms to develop and manage an integrated marketing campaign • Focus marketing campaign on industries identified in the target industry analysis to assist in filling office space at University Place and Canyon Park Technology Center • Consider identifying and purchasing lead generation software • Identify and attend trade shows and conferences in identified target industries • Plan and host annual or bi-annual familiarization and/or site selector tours	Long (3-5 years)	• # of resources committed to marketing and business attraction campaign • Publish of integrated marketing campaign RFP • Purchase of lead generation software • # of trade shows and conferences attended by staff • # of site selection tours hosted
Champions & Partners: Orem Economic Development Division, Utah Governor's Office of Economic Opportunity, Mountainland Association of Governments, Utah Redevelopment Agency, Utah Alliance for Economic Development, Utah South Economic Partnership, World Trade Center of Utah			

Entrepreneurship and Innovation

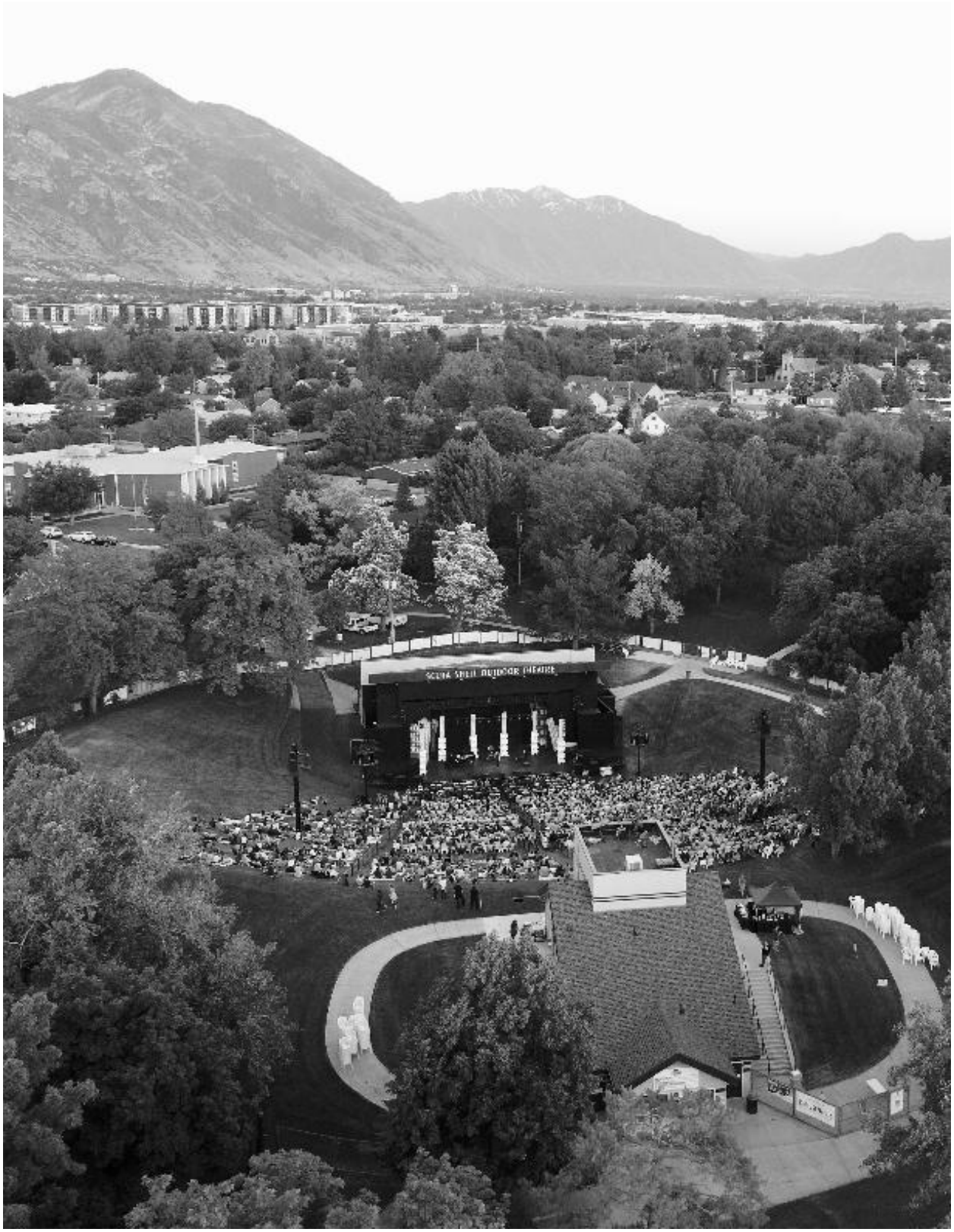
Strategies	Action Items	Timeline	Metrics for Success
Goal 3: Foster an Environment That Allows Risk Takers and Innovators to Start and Grow New Businesses and Industries			
Take a Targeted Approach to Incubation and Acceleration	• Continue to support the Utah Valley Business Resource Center through collaboration, business client referrals, events, advertising BRC programming, etc. • Ensure leadership at Utah Valley University, BYU, and the Utah Valley Business Resource Center are integral partners in the Target Industry Analysis • Ensure that business development efforts at the BRC Incubation program are well-aligned with a target industry analysis • Consider partnering with Canyon Park Technology Center to create an additional business incubator • Advertise UTOPIA fiber to high-tech enabled companies	Ongoing	• # of referrals made to BRC • # of advertising and marketing events held by BRC • # of new businesses incubated • # of businesses graduated from incubation space into long-term space • # of businesses within BRC that fall under targeted industries
Focus on Culture Building	• Use the Orem Business Alliance to offer programming geared towards innovative and technology enabled companies and startups • Support the BRC in creating pitch competitions and business plan competitions • Facilitate the creation of peer-to-peer and mentorship networks • Connect with Utah Manufacturing Extension Partnerships (Utah MEP) • Network with local multi-cultural chambers to help facilitate specific programming and support services for aspiring and current entrepreneurs from historically underrepresented segments of the population	Short (1-2 years)	• # of programs presented to and/or created for startups • # of pitch competitions and business plan competitions hosted by BRC • # of peer-to-peer mentorship networks created • # of partnerships created with MEP and multi-cultural chambers • # of chamber programs facilitated

Entrepreneurship and Innovation

Strategies	Action Items	Timeline	Metrics for Success
Goal 3: Foster an Environment That Allows Risk Takers and Innovators to Start and Grow New Businesses and Industries			
Increase Access to the Full Spectrum of Capital	• Survey businesses during business outreach visits and at Orem Business Alliance meetings to assess their need for capital • Use survey results to inform strategic next steps • Work with private lenders and economic development partners to ensure available and accessible capital across the full business lifecycle – from ideation to succession. • Consider funding sources and financial incentives for property owners to make exterior improvements • Think creatively how to utilize the Utah Microloan Fund, Utah Microenterprise Loan Fund, Mountainland Association of Governments Small Business Loan Fund, and possibly Orem CDBG funding. • Consider creating Community Reinvestment Areas (CRDAs) along State Street to fund exterior improvements of businesses	Medium (3-5 years)	• # of businesses surveyed • # of CDAs created • Catalog of capital products for small businesses
Build Places for Entrepreneurs to Flourish	• Double down on efforts to activate, market, and fill Canyon Park Technology Center • Create a pipeline for incubator and accelerator companies to fill vacant space • Consider reevaluating zoning policy; enable creative mixed-use for vacant and underutilized properties • Look for opportunities to develop modern coworking space(s) at Canyon Park Technology Center and/or University Place	Medium (2-3 years)	• Catalog of available commercial and industrial properties • # of advertisements made for Canyon Park Tech Center • # of meetings with BRC and the Muller Group • # of new tenants in Canyon Park Tech Center • # of new coworking spaces created
Champions & Partners: Orem Economic Development Division, Utah Valley Business Resource Center, Utah Redevelopment Agency, Orem Business Alliance, Local Colleges and Universities, Multi-cultural Chambers, private lenders, RLF loan programs			

Quality of Life

Strategies	Action Items	Timeline	Metrics for Success
Goal 4: Enhance the Quality of Life for Orem Residents			
Focus on Outdoor Recreation and Tourism	• Consider creating a City of Orem Tourism Commission or Advisory Council • Work with the Utah Office of Tourism to promote Orem as destination • Research the option of creating a "Recreation District" in the remaining areas available for development from the mouth of Provo Canyon up 800 N all the way to State Street to encourage and facilitate recreation-based development	Short (1-2 years)	• $ increases in revenues from tourism-related industries • Improved health metrics • # of marketing campaigns planned which incorporate Orem's brand
Consider Creating a Forum for Community Discussion, Debate, and Research	• Research and identify ways to engage local and regional Universities, including Utah Valley University, Mountainland Technical College, Weber State University, Southern Utah University, Utah State University, BYU, and University of Utah (Kem C. Gardner Policy Institute) to participate and organize local community forums • Engage local philanthropic organizations to assess funding • Research best practice community ambassador and fellowship programs	Medium (2-3 years)	• Detailed research of forum • # of members or participants of forum • # of universities or other institutions participating • $ raised to support the forum
Allocate Resources for Façade Improvement, Placemaking, and Accessibility	• Explore Utah Main Street Designation for State Street • Work with UTA and UDOT to enhance existing multimodal transportation options • Enhance community gateways • Work with other departments within the city to develop a plan to invest in public, interactive art exhibits	Medium (2-3 years)	• State Street's designation of Utah Main Street • # of public transportation options enhanced • # of public arts exhibits created • # of storefronts redeveloped
Review and Re-evaluate Local Zoning and Policies	• Commit to intentional and consistent dialogue with property owners and residents – ensure key city departments are collaborating to address concerns in an appropriate manner. • In targeted and strategic locations, consider revising and reducing restrictions on duplexes, fourplexes, and townhomes. • In targeted and strategic locations, consider zoning changes that will better facilitate medium-density development • Look for ways to support and consider allocating resources to the Neighborhood Improvement Team • Update neighborhood plans	Long (3-5 years)	• # of meetings held with a focus on the review of zoning policies • Updated neighborhood plans • Consideration of resources allocated to Neighborhood Improvement Team
Champions & Partners: Orem Economic Development Division, Development Services Department, Community Services Division, Local Colleges & Universities, Utah Office of Tourism, Orem Arts Council, Utah Transit Authority			



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Appendix I: Qualitative Findings & Stakeholder Engagement

Historical Context Review

Introduction

A key component of the project methodology for the Economic Development Strategic Plan, the project team conducted a document review by examining various historical planning documents and studies. The analysis provided the project team with insights into the demographic, social, and economic conditions of the region. In addition, the review and analysis of various plans helped inform the project team of previous and existing economic development related goals, strategies, and action steps. Further, the analysis was conducted to ensure the project team did not replicate or duplicate existing efforts. Thus, this analysis will position the project team to build upon existing efforts and earlier analysis to develop a contemporary study with appropriate goals, strategies, and action steps. The following plans were reviewed:

- Transportation Master Plan
- State Street Master Plan
- Geneva Road Area Plan
- Central Corridor Transit Study
- City Center Market Analysis
- University Place Final Project Plan
- University Place CDA Agreement
- University Place CDA Budget Document
- Orem Annual Report 2020
- Orem EDSP 2019 Update
- Orem EDSP 2014
- Aspen Timpview Neighborhood Plan
- Canyon View, Orchard, and Cascade Neighborhood Plan
- Geneva Heights, Orem Park, and Suncrest Neighborhood Plan
- Northridge, Heatheridge, and Windsor Neighborhood Plan
- Orem North and Sharon Park Neighborhood Plan
- Orem, Sharon, and Hilcrest Neighborhood Plan
- Stonewood-Lakeridge Neighborhood Plan
- Orem General Plan 2018
- MEDD Covid-19 Recovery Plan
- MEDD Covid-19 Appendix

Document Review Findings and Key Themes

Key findings and themes from the document review include:

- A lack of developable land puts Orem at a competitive disadvantage. There are little to no greenfield development opportunities to increase the inventory of in-demand commercial, industrial, and residential development.
- Cities to the north, such as Lehi, and cities to the west like Vineyard are rapidly growing, creating strong regional competition.
- As far back as 2010, Orem has aspired to be one of the most bicycle and pedestrian friendly cities in Utah. However, very little demonstrable progress has been made. In addition, previous transportation plans called for improved multi-modal transportation options.
- Previous economic development brand attributes include a prime location, young and skilled workforce, successful start-up culture, and a low cost of doing business.
- The Geneva Road area is a valued industrial asset with strong transportation infrastructure, a highly skilled workforce, and three residential neighborhoods in proximity. However, there remains some potential contamination concerns, limiting its use for potential residential development.
- The Central Corridor Transit study pointed out the need for more efficient transit serving north to south, and that transit improvement could catalyze economic and redevelopment opportunities.
- Previous plans called for strong urban design objectives on State Street, increased pedestrian access, and traffic-calming measures.
- It was recognized that Orem was able to accomplish many of the goals outlined in the 2014 Economic Development Strategic Plan, and the subsequent plan update in 2019.

Steering Committee Interviews

Introduction

Another component of the qualitative analysis, the project team conducted individual interviews with key city staff members. These interviews allowed the project team to garner contextual insights into previous economic development strategies, the progress of those initiatives, and the success of previous planning efforts. In addition, questions were posed to better understand the aspirations of city leadership, specifically the Economic Development Division. The project team recorded the interviews and took verbatim notes to eliminate the possibility of bias when reviewing, synthesizing, and using the feedback to inform strategy.

Key Findings

Key findings and themes from the individual interviews include:

- Goals, strategies, and action steps from the 2014 Economic Development Strategic plan were informed by strong data. The plan provided a clear blueprint with realistic and obtainable goals.
- City staff members want the new Economic Development Strategic Plan to focus on the four key pillars of traditional economic development: business retention and expansion, business attraction, entrepreneurship and innovation, and quality of life.
- There is a strong desire to learn how stronger and more intentional relationships can be forged with Utah Valley University and Brigham Young University. Interactive SWOT Engagement Sessions

Interactive SWOT Engagement Sessions

Process

On January 27th, 2022, the project team, in partnership with city staff members, hosted a preliminary stakeholder engagement session to solicit feedback on the vision for Orem's future, and community strengths, weaknesses, opportunities and threats. 12 individuals representing the regional economic development, education, healthcare, and business community participated in the session. Participants were polled at the conclusion of the session and responded as follows:

- 95% of participants were encouraged by the direction of the Economic Development Strategic Plan
- 100% volunteered to participate in future stakeholder engagement sessions

Key Findings

Key findings and themes from the SWOT sessions include:

- When asked about the vision for Orem's future, an overwhelming majority of participants cited the need for 'managed growth.' Further, participants recognized the need to respect the history of Orem, but to also embrace future possibilities.
- When asked about the most prominent challenges facing Orem, participants cited the housing challenges facing the city, which are exasperated by the lack of development ready land. Further, some participants suggested that economic development leadership at the city does not clearly communicate the services it can offer to the business community.
- When asked about economic development priorities participants suggested that communication and education about managed growth and smart development was paramount to success. Participants suggested that benchmarking similar cities and researching best practices was a first step to achieving this goal.
- When asked about potential solutions to the challenges facing Orem, participants focused on improved communication from city hall and offering forums for community discussion, debate, and research.
- When asked about barriers to success, participants cited a lack of financial incentives to facilitate redevelopment and renovation, and uncertainty about how to manage population growth and increasing housing costs.

On-Site Focus Groups

Process

The project team visited Orem in February 2022 to conduct four two-hour in-person workshops. The workshops were designed to further identify economic development priorities and solicit suggestions and recommendations to address those priorities. In these highly interactive sessions, participants were asked to rank ten issues facing Orem using a 1 to 10 scale (1 being top priority, 10 being lowest priority). Forty-five community stakeholders participated in the exercise. The results of this prioritization process are presented in Table 3 below:

Challenges	Votes
Housing challenges (quality, availability, and affordability)	29
Difficulty achieving consensus on Orem's vision for the future	20
Startup companies are outgrowing Orem	16
Lack of clearly defined target industry strategy	12
Lack of resources to conduct a business campaign strategy	9
Businesses do not have the resources they need to expand and grow	9
Lack of coordination between the public and private sectors	9
There is no clearly defined city center or sense of place	6
Orem resists being a university town	4
Lack of communication, education, accountability, and transparency about development	3
Widely held perception that there is a lack of locally owned businesses	3
Lack of plan for 1600 N	1
Traffic, parking, crime, and water	1
Lack of follow-through on State Street plan	1

Table 3: Prioritization of Challenges by Stakeholders

Key Findings

Key findings and themes from the focus groups include:

- Participants were focused on the need for more attainable housing options
- Participants believed there were opportunities to strengthen the relationship between the business community and the local universities and education providers
- Participants agreed there was a need for a forum to facilitate public discussion, debate, and research
- Participants agreed that the city Economic Development Division could better promote the resources available to the business community
- Participants were overwhelmingly optimistic about Orem's future, however, they recognized there was a need for more clearly articulate vision

Appendix II: Quantitative Data Analysis

Introduction

The plan's quantitative data analysis has been broken into three sections: population and socioeconomic analysis, housing market analysis, and business and workforce analysis. The data below have been used to guide the stakeholder engagement sessions and are ultimately the foundation of many of the recommendations provided at the beginning of the report.

Population & Socioeconomic Analysis

To understand the City of Orem's economy, it is important first to understand the broader context. Below, data has been provided to offer insight into the City's racial, educational, and financial makeup. In addition, health and age statistics are analyzed. An actionable strategic plan must be tailored to meet the specific needs of the community; the purpose of this overview is to highlight some of the community's defining characteristics.

Population Historical Trends & Projections

The City of Orem has seen substantial population growth in the last two decades. In 2000, the City's population was 84,464; by 2020, the population had increased by over 16%, or 13,665 residents. This growth is expected to continue for years to come, and the City's population is projected to surpass 109,000 by 2026. Population growth at the rate observed in Orem has implications for various aspects of the economy; these implications will be discussed and addressed in subsequent sections of the strategy.

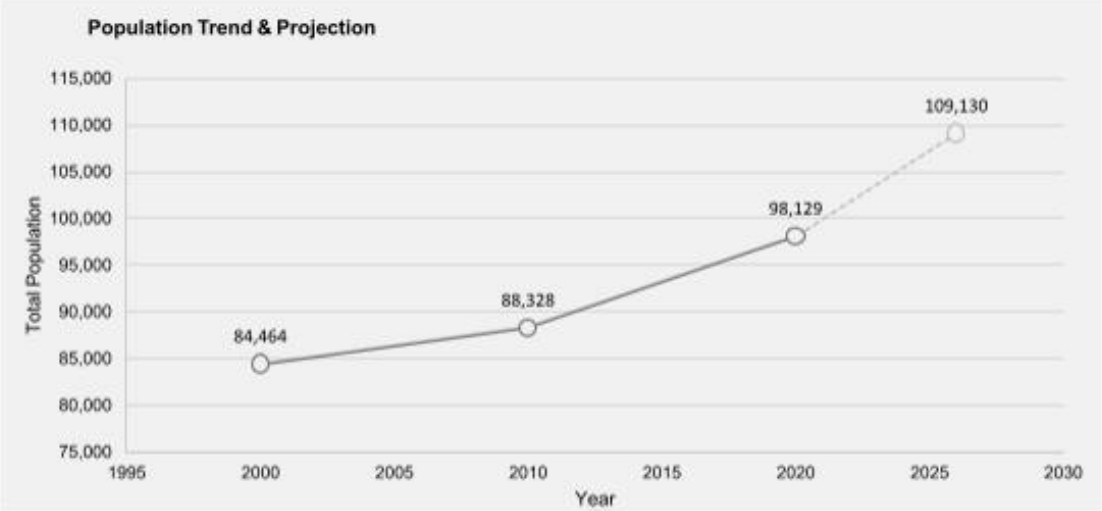


Figure 6: Population Trend & Projection. Source: 2020 U.S. Census and ESRI 2021

Population by Age

As the graph below indicates, Orem's population is young; in 2021, approximately 61% of the population was younger than 35 years. The City's median age in the same year was 28.8, which was exactly 10 years younger than the median for the rest of the United States. The City's unique population characteristics, specifically those which relate to age, will require an economic development strategy that considers the younger population's needs while continuing to provide for residents of all ages. The City's age distribution is predicted to remain relatively constant through 2026.

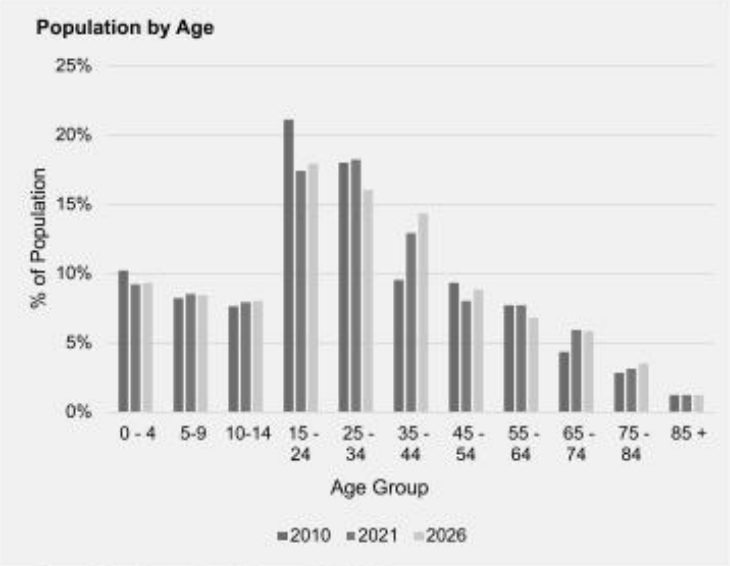


Figure 7: Population by Age. Source: ESRI 2021

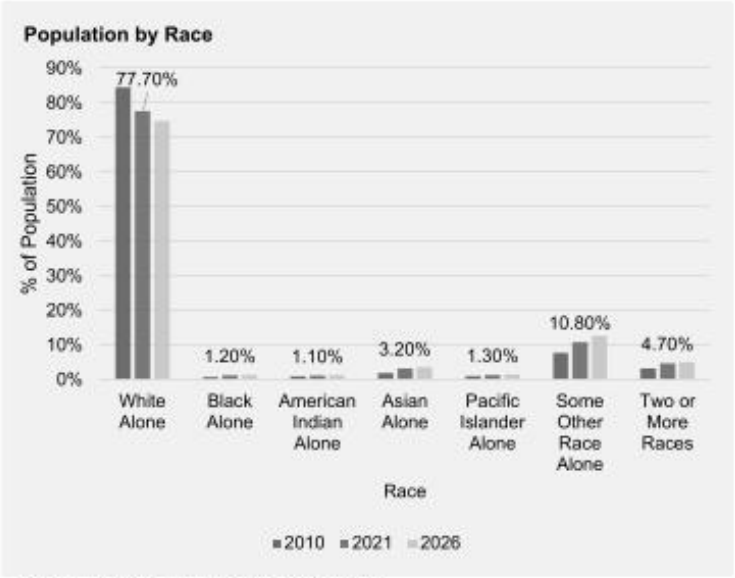


Figure 8: Population by Race. Source: ESRI 2021

Population by Race

The City of Orem's population is predominantly white. However, the City's diversity has increased since 2010, and is expected to continue its increase through 2026, albeit by relatively small margins. By 2026, slightly more than 25% of the population is projected to be comprised of non-white individuals.

Educational Attainment

As is evidenced in the graph below, Orem benefits from a very highly educated population. Approximately 41.7% of the population holds a bachelor's degree or higher, with only about 6% without any high school diploma or equivalent. A population with high educational attainment is well-positioned to attract investment from a variety of industries and can leverage its human capital in building its economy. Moreover, the rest of Utah County and neighboring Salt Lake County also have high educational attainment rates, which make the region more marketable.

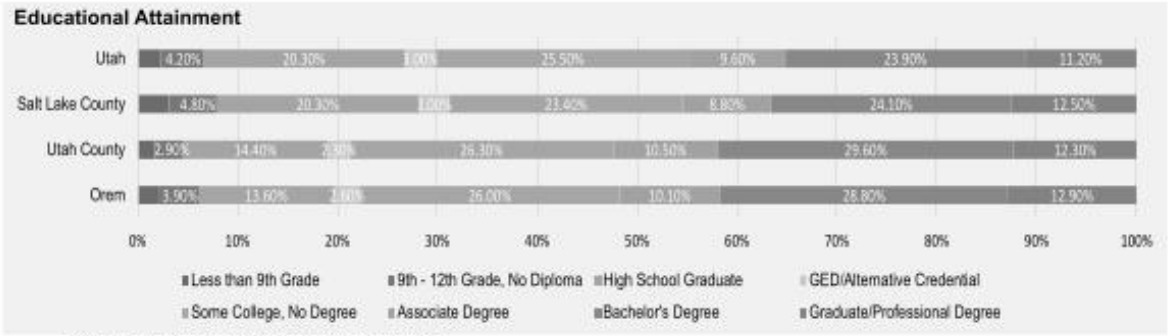


Figure 9: Educational Attainment. Source: Esri, 2021

Income and Earnings

Below, household incomes and earnings in Orem are provided for 2021 and projected to 2026. The median household income in Orem was $68,435 in 2021 and is expected to climb to $78,239 by 2026. The median is slightly greater in Orem than in the rest of the United States. Every income group above $50,000/year is expected to grow in the next five years. Despite an overall upward trend in income and earnings, an economic development strategy can address the needs of residents that fall at both ends of the spectrum.

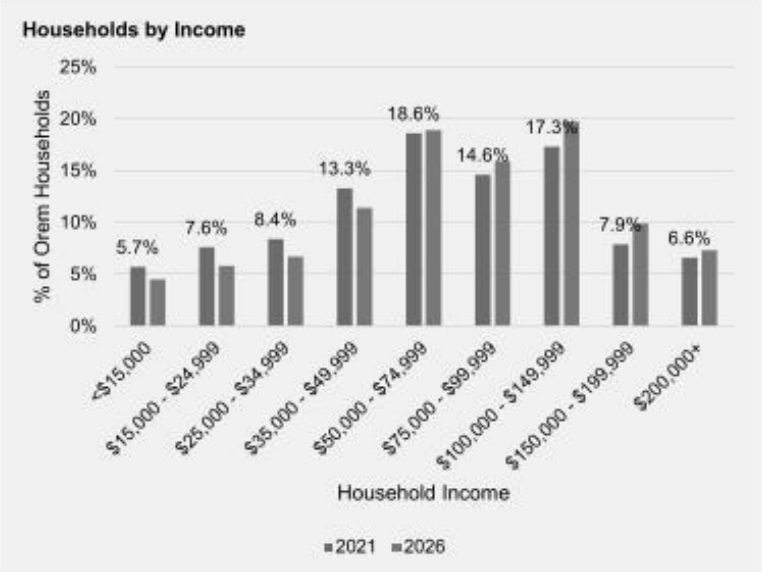


Figure 10: Household Income Estimates & Projections. Source: ESRI 2021

Health and Well-Being

The physical health and general well-being of the population can provide valuable information for an economic development strategy. A community with poor health metrics might require greater access to health services and facilities or could indicate a greater demand for specialized housing. Conversely, a healthy population suggests a strong health infrastructure, as well as the potential for development that tailors to an active community's recreational demand.

Utah County residents have life expectancies that are greater than or equal to the rest of Utah and the United States; the percentage of the population that smokes is 7 percentage points lower than that for the rest of the country. The obesity, heart disease, and stroke rates in Utah County are comparable to the rest of the state, but considerably lower than U.S. rates. The diabetic population is substantially smaller in Utah County than in Utah and the United States. These metrics indicate a healthy, active population, which invites unique opportunities for economic development.

Health Metric	Utah County	Utah	U.S.
Average Male Life Expectancy (2019)	79.42	78.28	76.3
Average Female Life Expectancy (2019)	82.04	82.1	81.3
Obesity Population Percentage (2019)	31.40%	27.20%	42.40%
Smoking Population Percentage (2018)	7.00%	7.90%	14%
Diabetic Population Percentage (2019)	4.90%	8.50%	10.50%
Heart Disease Death Rate per 100,000 (2017-19)	300	286.4	317.4
Stroke Death Rate per 100,000 (2017-19)	71.4	69.5	72.3

Table 4: Orem Health Metrics. Sources: CDC; Utah's Public Health Indicator Based Information System



Housing Market Analysis

Introduction

In this section, an overview of Orem's housing market is provided. Included is an analysis of the age of the existing housing stock, housing tenure, home and rent values, and vacancy rates. In addition, a cost burden analysis has been conducted in order to measure the financial burden of housing on Orem homeowners and renters. Finally, commuting patterns are analyzed, as is the City's pedestrian transportation infrastructure.

Housing by Year Built

Understanding the age of Orem's housing stock can be helpful for estimating the quality of housing available, as well as the rate at which the state of housing can be expected to decline in years to come. For example, an aging housing stock might require of greater investment from homeowners, as maintenance and upkeep costs are likely to be greater. Just under 60 percent of Orem's total housing units were built between 1970 and 2000; less than 11 percent were built after 2010. While most of the City's housing is not seriously outdated, there could be the potential to renovate or redevelop existing homes or properties to more effectively meet the community's needs.

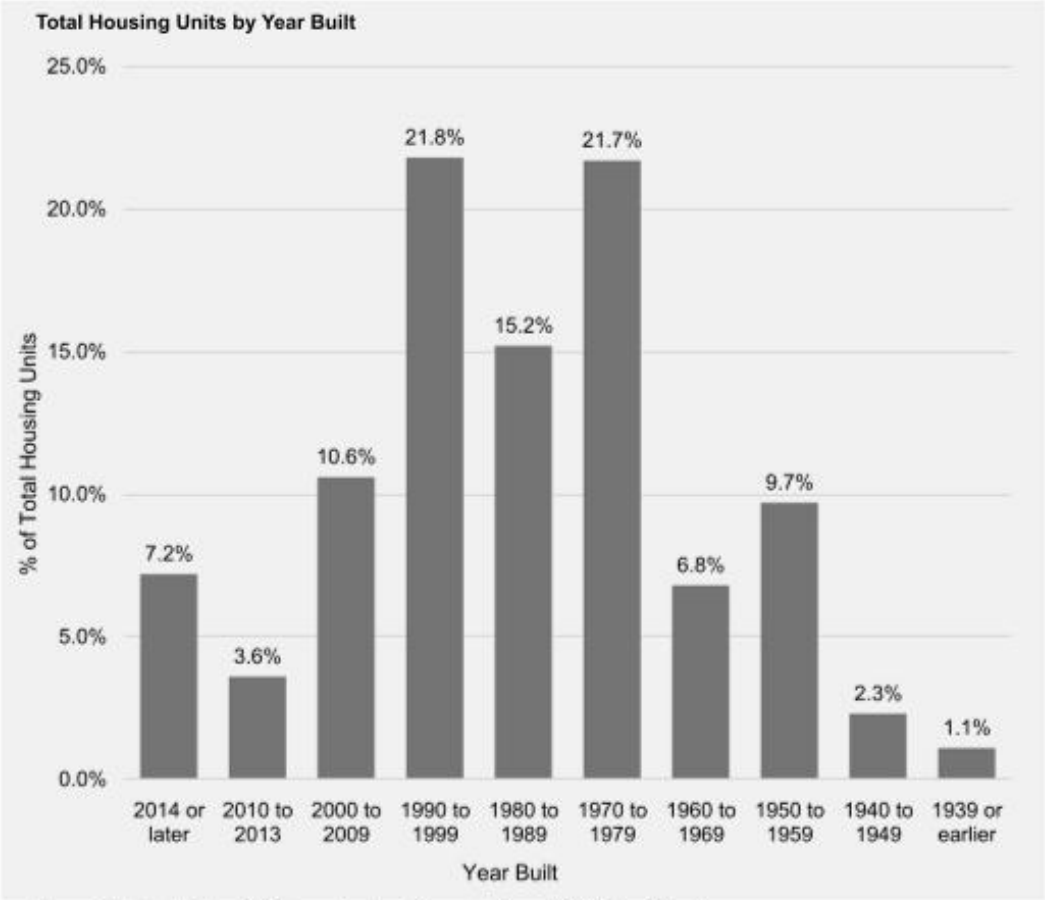


Figure 11: Housing by Year Built. Source: American Community Survey 2020 5-Year Estimates

Occupancy and Vacancy Rates

Vacancy rates in Orem are exceptionally low and have hovered between 3% and 4.5% for the past 20 years. They are expected to remain low through 2026. Low vacancy rates indicate high demand for housing; this high demand is apparent in much of the data and will be addressed in some of the recommendations provided in the report.

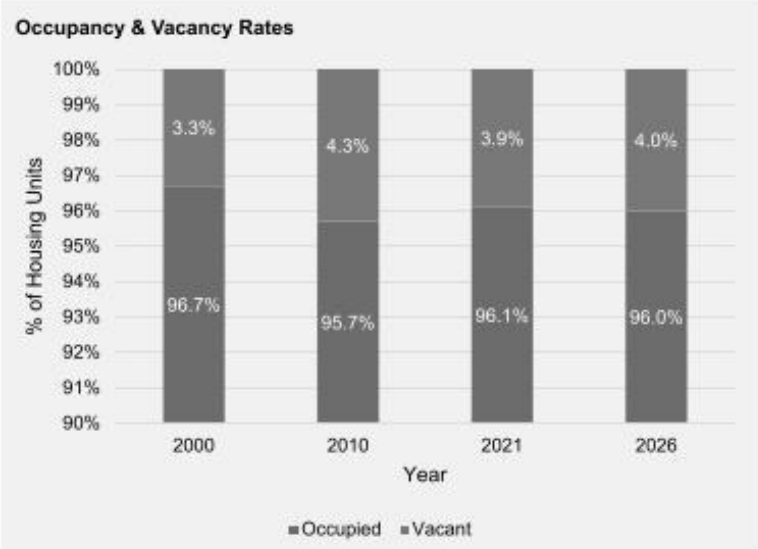


Figure 12: Occupancy & Vacancy Rates. Source: ESRI 2021

Owner vs. Renter Occupancy

The percentage of renter-occupied units in Orem has increased steadily since 2000; renter-occupied units in 2021 comprised a greater percentage of the total housing units by approximately 6.5 percentage points, compared to 2000. The ratio of owner-occupied and renter-occupied housing is expected to remain relatively constant in the next 5 years.

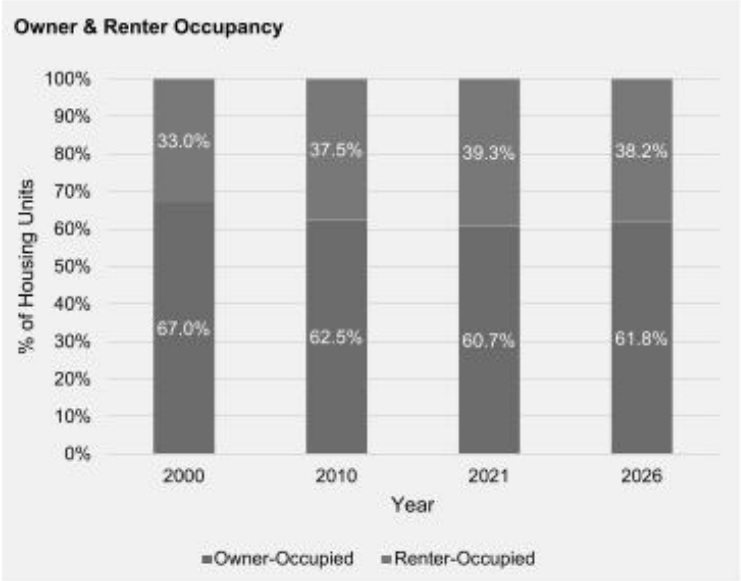


Figure 13: Housing Tenure. Source: ESRI 2021

Owner-Occupied Home Values

The owner-occupied home values are high in Orem. In December 2021, the median housing value as measured by sale price was $467,500. That was more than $200,000 greater than the United States' median home value of $264,021. Between January 2017 and December 2021, the median sale price of a home in Orem increased by $228,500, from $239,000 to $467,500; the median sale price increased by about 25% in 2021 alone. According to a third-party modeling company, the median home value in Orem is supposed to reach $468,000 by 2026; the fact that the city has nearly reached this price in 2021 means that housing costs in the city are far outpacing model projections. Elevated home values are a further indication of high demand for housing, which will be addressed in this report's recommendations.



Figure 14: Owner-Occupied Home Values. Source: Redfin 2021

Renter-Occupied Unit Monthly Rents

Monthly rents, too, are high within the city. Approximately 52% of rental units are priced at more than $1,000 per month, and the average monthly rent falls between $1,000 and $1,250. Less than 8% of rental units cost less than $600 per month. A limited supply of for-rent units likely increases the prices of existing units.



Figure 15: Renter-Occupied Units by Monthly Rent. Source: ESRI 2021

Housing Cost Burden Analysis

HUD defines a household as being moderately cost burdened if between 30% and 50% of their household income is spent on housing. If more than 50% of the household's income is spent on housing, it is considered to be severely cost burdened. Between 2014 and 2019, Orem saw a decrease in the share of owner-occupied households that were moderately or severely cost burdened from 22.68% to 18.47%. This share is lower than the United States' share of cost-burdened households, which was equal to 22.3% in 2019. In 2019, about 7.5% of homeowner households were severely cost burdened.

Renter households are considerably more cost burdened than homeowner households. In 2020, 41.42% of Orem's renter households were cost burdened, which is more than 7 percentage points lower than in 2014. The number of cost-burdened renter households is lower than the United States' percentage, though. In 2019, 17.38% renter households were severely cost burdened.

There are a couple of limitations with this data that are worth noting. First, the cost-burdened percentage of U.S. households is not necessarily a suitable comparison group for Orem; the national housing market behaves much differently than the local housing market, and the demographics of each region are much different. Thus, the overall health of one housing market cannot necessarily be gleaned from a comparison to another dissimilar region. Second, the most recent data available are from 2019; in 2020, the COVID-19 pandemic had a significant impact on the housing market. It is likely that the cost-burdened share of households in Orem will be much greater in 2022 than in 2019, but there are no data yet to show it.

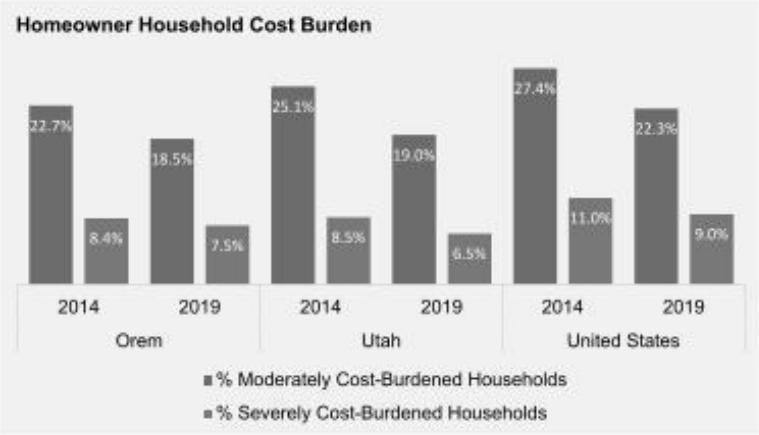


Figure 16: Homeowner Household Cost Burden. Source: American Community Survey

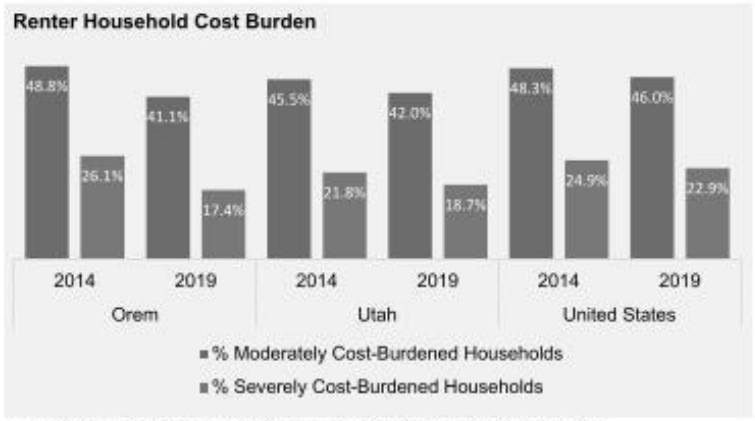


Figure 17: Renter Household Cost Burden. Source: American Community Survey

Housing Cost Burden by Income

Below, the distribution of cost-burdened renter and homeowner households at various income levels is provided for 2019. As one might expect, the most cost-burdened households are those who earn less than $20,000 per year; it is difficult to find housing which requires less than 30% of an occupant's income if that income is less than $20,000. Approximately 83.4% of individuals who fall below that income threshold was cost burdened in 2019. The share of cost-burdened households decreases as the income levels of each category increase. 51.96% of renters and 37.42% of homeowners who earn $75,000 or less are cost burdened. The table below indicates the percentage of Orem households that fall below each income threshold.

Occupant Percentages by Household Income

Household Income	% of Renter Households	% of Homeowner Households
$20,000 or less	10.4%	4.8%
$50,000 or less	51.7%	18.9%
$75,000 or less	74.6%	35.3%

Table 5: Units by HHI Bracket and Occupation Type. Source: ESRI 2021

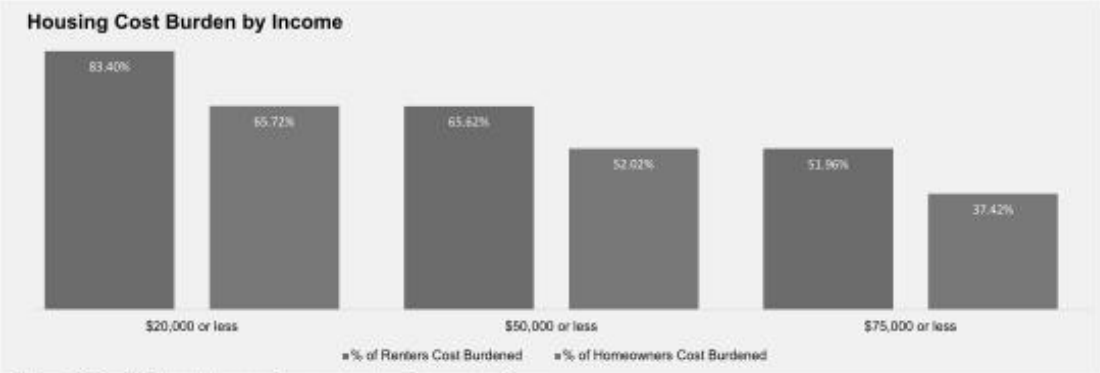


Figure 18: Cost Burden by Income. Source: American Community Survey

Neighborhood Walkability Analysis

A neighborhood walkability analysis can be helpful for gauging the transportation infrastructure within the city. According to WalkScore.com, Orem is a car-dependent city; by its metric of measuring walkability, Orem scores a 43 on a scale of 100. This means that most errands require a car. The transit score for Orem is slightly lower, at 33. There are some transit options available; there are about 10 bus lines and 1 rail line that run through the city. Figure 19 shows the public transit routes within the city.

While Orem's transportation score is lower as it relates to walkability and public transit options, the City scores highly on the biking scale. With a bike score of 58, Orem is considered bike-able and has some biking infrastructure to support cyclists.

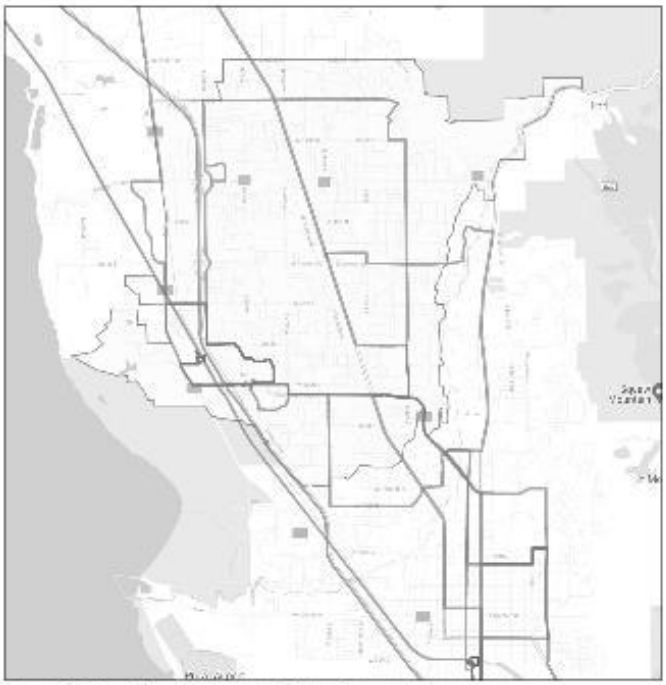


Figure 19: City of Orem Public Transit Routes. Source: Walkscore.com

Commuting and Traffic Patterns

As the following graph illustrates, slightly more than 36,000 resident workers are employed outside of Orem and must commute beyond its limits for work. Conversely, 38,400 workers live outside of the city and travel into it for work. Approximately 10,500 people both live and work within the city. The net number of commuters who travel into the region for work is 2,222. In other words, after accounting for the number of workers who travel out of the city for work, 2,222 workers travel into the city for work daily. This could indicate positive economic productivity within Orem, or plenty of jobs that attract residents of other cities or counties. Conversely, this could also highlight the lack of affordable housing within the city. If Orem's workers are unable to find suitable housing within the city, they must live outside of its limits and commute in for work.

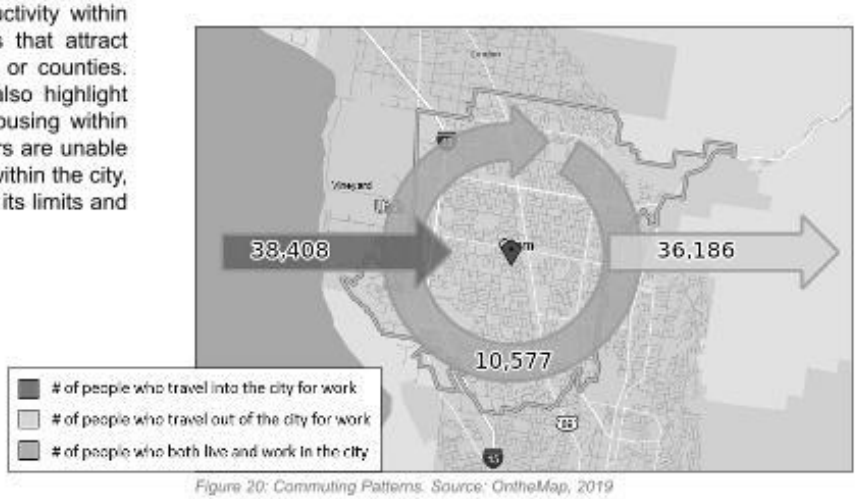


Figure 20: Commuting Patterns. Source: OntheMap, 2019

Business & Industry Analysis

Introduction

In this section, an analysis of Orem's major industries and occupations is provided, as well as an analysis of the City's workforce. In the first section, the highest-employing, fastest-growing, and most highly concentrated industries are highlighted. In the next, the area's top occupations are presented, along with a list of the hard skills most highly demanded by employers. Finally, the most up-to-date labor market information is provided, including unemployment and labor market participation rates.

Largest Industries

Within Orem, the public "Colleges, Universities, and Professional Schools" industry is, by far, the largest. More than 5,300 employees work in this industry, with the overwhelming majority likely finding employment in Utah Valley University (UVU). Quality-of-place industries, like those which include restaurants and shopping centers, also top the chart; collectively, the "Limited-Service Restaurant" and "Warehouse Clubs and Supercenters" industries employ more than 4,600 in Orem.

In the past, retail gap analyses have been used to measure the potential for capturing sales from surrounding areas, as well as reducing sales leakage to those areas. Due to data limitations and the influence of e-commerce on the retail industry, these analyses are less informative as an economic development tool now than they might have been in the past. For a full discussion of the utility of retail gap analyses in 2022, as well as an analysis of the available data, please refer to Appendix IV.

Some technology or web-related industries can also be seen in the Table 6, such as "Custom Computer Programming Services" and "Internet Publishing, Broadcasting, and Web Search Portals" industries, each employing just shy of 1,400 workers. All the top industries in Orem have seen growth in the past 10 years.

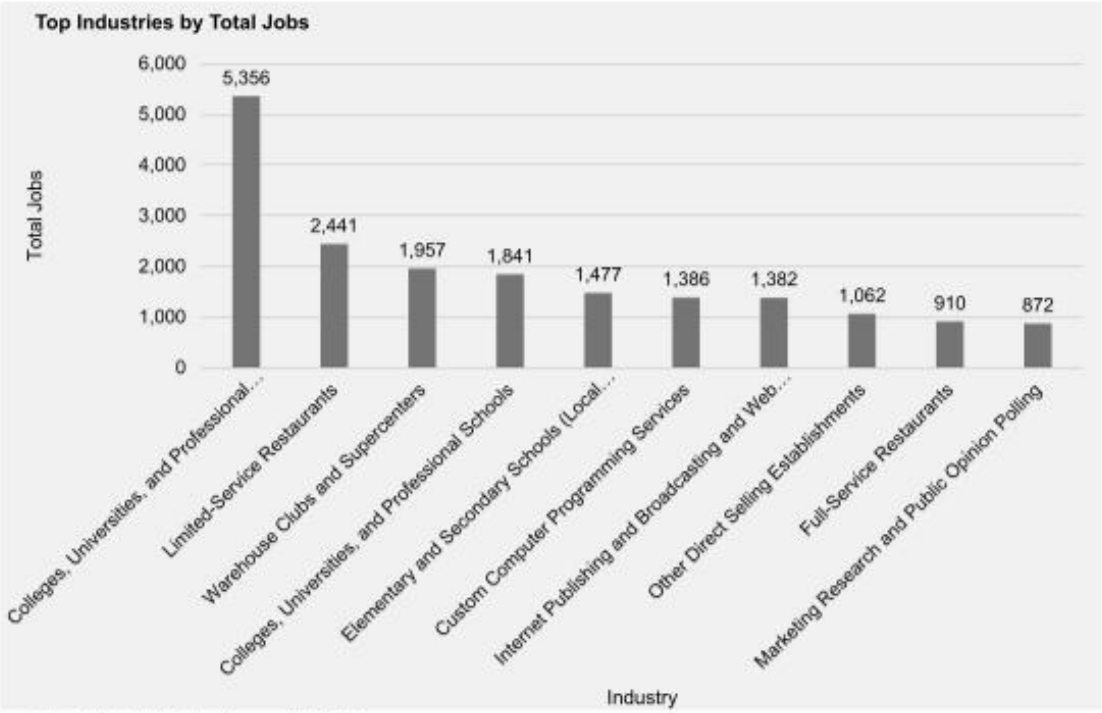


Figure 21: Top Industries. Source: EMSI 2021

Top Growing Industries

The "Colleges, Universities, and Professional Schools" industry saw limited growth since 2016, adding only 63 jobs. As Figure 21 demonstrates, this industry still employs more than any other industry in Orem, indicating its role as an anchor industry within the city. "Warehouse Clubs and Supercenters" saw the largest percent increase adding 526 jobs over the five-year span. With 270 new jobs, Direct Selling continues to be a large and growing industry in the area, following the national growth trends.

Custom Computer Programming Services also saw substantial growth since 2016, adding 320 jobs. This is also a top employer, and its growth implies potential for additional investment. Restaurants, shopping centers, and other direct selling establishments have seen considerable growth, as have some building contractors. Additionally, the "Marketing Research and Public Polling Opinion" industry also added nearly 600 jobs in the last 10 years.

NAICS	Industry	2021 Jobs	2016-2021 Change
902612	Colleges, Universities, and Professional Schools (State Government)	5,356	1.18%
722513	Limited-Service Restaurants	2,441	16.64%
452311	Warehouse Clubs and Supercenters	1,957	26.88%
611310	Colleges, Universities, and Professional Schools	1,841	13.43%
903611	Elementary and Secondary Schools (Local Government)	1,477	4.90%
541511	Custom Computer Programming Services	1,386	23.07%
519130	Internet Publishing and Broadcasting and Web Search Portals	1,382	-1.17%
454390	Other Direct Selling Establishments	1,062	25.44%
722511	Full-Service Restaurants	910	1.46%
541910	Marketing Research and Public Opinion Polling	872	17.48%

Table 6: Top NAICS Industry by 2021 Job Count. Source: EMSI 2021

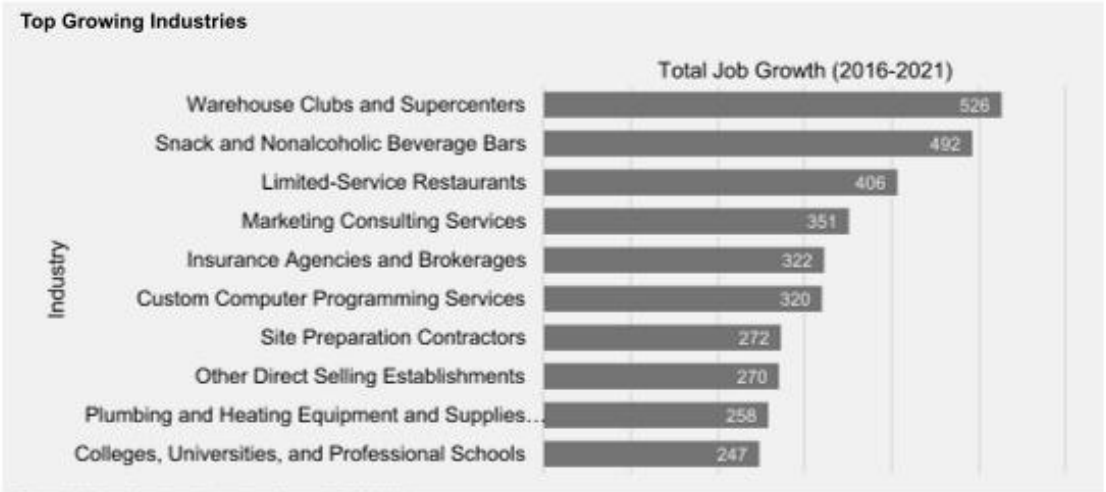


Figure 22: Top Growing Industries. Source: EMSI 2021

Most Highly Concentrated Industries

Location quotient (LQ) is a metric used to compare the concentration of industries within the region to the national average. Any LQ greater than 1 indicates that the industry is more highly concentrated in Orem than in similar regions. For the purposes of this metric, the following industry information was collected using a broader definition of industry groups (3-digit vs. 6-digit) than the tables relating to job count and growth in the previous sections. LQ scores are more easily skewed by the more detailed industry data.

Industries with high location quotients are often, but not always, significant exporting industries. Their retention and growth within the city are important because they're useful for attracting money into the city from buyers outside of its borders.

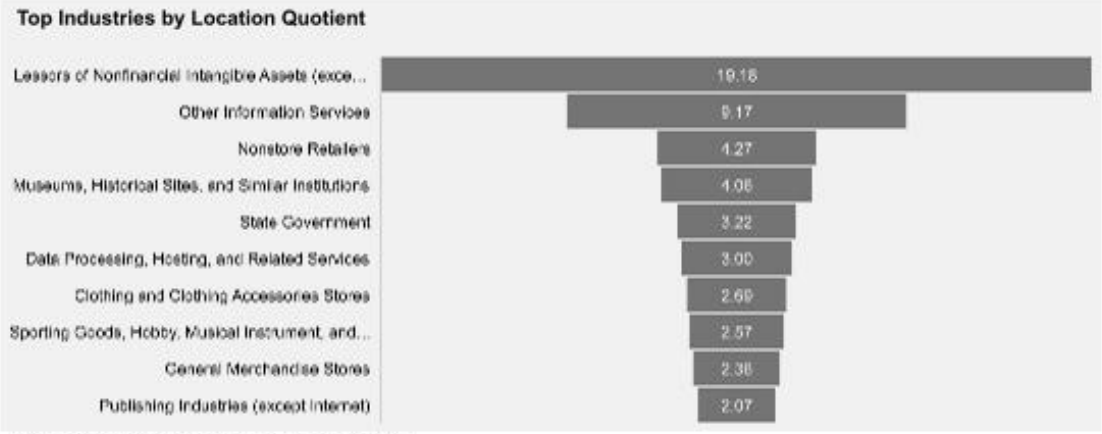


Figure 23: Industry Concentration. Source: EMSI 2021

For Orem, the "Lessors of Nonfinancial Intagible Assets (except Copyrighted Works)" industry is the most highly concentrated industry in the city. This industry has an LQ of 19.18, which means that this industry is over 19 times more concentrated in Orem than the national average, adjusted to scale. However, this industry is also quite small, employing only 97 workers in 2021. "Other Information Services" (9.17) and "Nonstore Retailers" (4.27), incldluing the Direct Sellers mentioned in the previous section, round out the top three 3-digit industry codes as most highly concentrated industries within Orem.

NAICS	Industry	Location Quotient	2021 Total Jobs
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	19.18	97
519	Other Information Services	9.17	1,563
454	Nonstore Retailers	4.27	1,177
712	Museums, Historical Sites, and Similar Institutions	4.06	184
902	State Government	3.22	5,694
518	Data Processing, Hosting, and Related Services	3.00	408
448	Clothing and Clothing Accessories Stores	2.69	864
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	2.57	496
452	General Merchandise Stores	2.36	2,203
511	Publishing Industries (except Internet)	2.07	558

Table 7: Top NAICS Industry by Location Quotient. Source: EMSI 2021

Top Industry GRP

Gross Regional Product, or GRP, measures the final market value of all goods and services produced in the region of study. GRP is the sum of total industry earnings, taxes on production & imports, and profits, minus subsidies. The industries presented in Figure 24 have the highest GRPs in the the three Orem ZIP codes of 84057, 84058, 84097. This geographical selection was made based on the most applicable available data for the City of Orem and should represent a more accurate picture of the city than would data relating to the Provo-Orem Metropolitan Statistical Area (MSA).

In 2021, the "Internet Publishing and Broadcasting and Web Search Portal" industry produced approximately $637 million in value. The "Lessors of Nonfinancial Intagible Assets" and "Custom Computer Programming Services" industries produced $409 million and $288 million, respectively.



Figure 24: Top Industries by GRP. Source: EMSI 2021

Top Industry Earnings

The total industry earnings for a region include wages, salaries, supplements, and proprietor income. The "Customer Computer Programming Services" industry earned the most in 2021, approximately $275 million. The "Colleges, Universities, and Professional Schools (State Government)" and "Marketing Research and Public Opinion Polling" industries earned $258 million and $248 million, respectively. Many of the top earning industries are also top employers within the city.

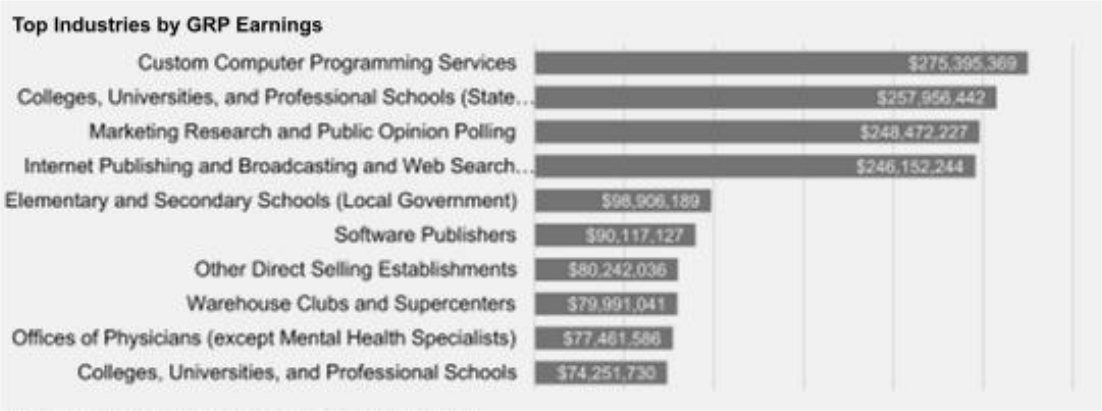


Figure 25: Top Industries by GRP Earnings. Source: EMSI 2021

Workforce Characteristics

Largest Occupations

The top occupation in Orem by total jobs is "Retail Salesperson" followed by "Postsecondary Teachers." The next several occupations listed in Figure 26 connect to the retail or restaurant industries; "Software Developers and Software Quality Assurance Analysts and Testers" is the only other highly skilled occupation in the top ten. Because most of the top occupations in Orem are relatively low skill, their earnings are low; 7 of the top 10 occupations in the chart below earn less than $35,000 per year. The yellow line graph provides the median annual earnings of each of the top ten occupations. The fact that much of Orem's working population is employed in low-paying occupations can be seen to affect other aspects of the economy.

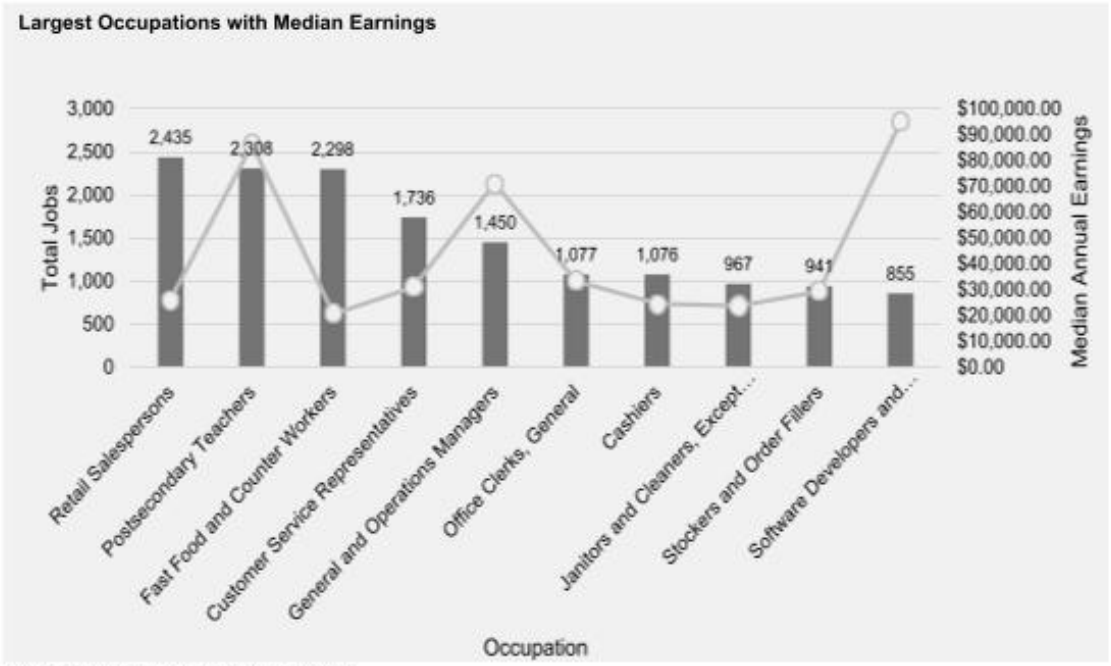
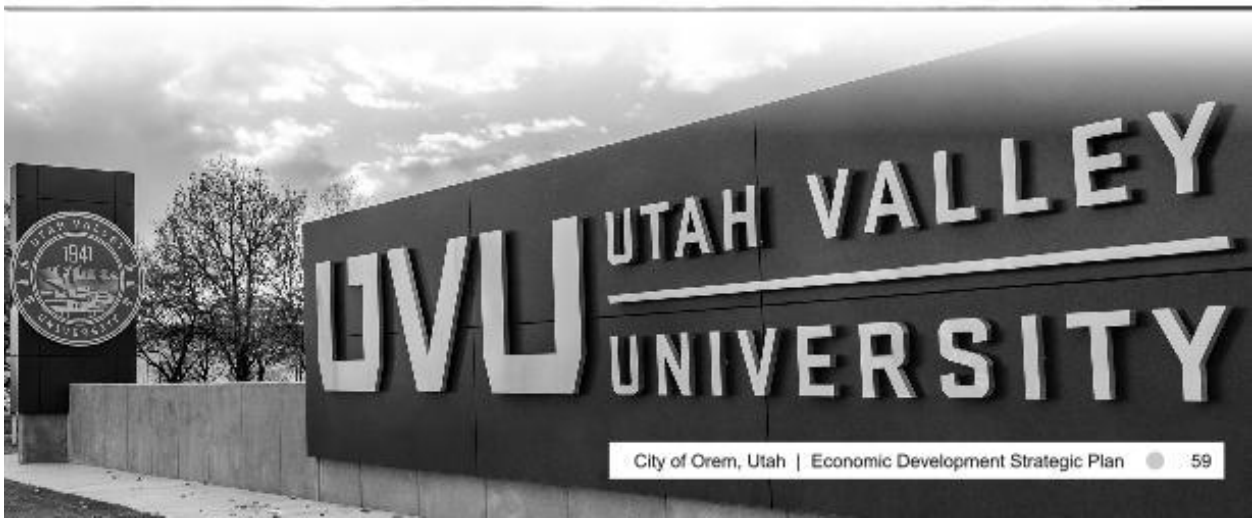


Figure 26: Top Occupations. Source: EMSI 2021



Top Growing Occupations

As with industry trends, occupation growth trends can be helpful in identifying opportunities for economic development. The occupations presented in the Figure 27 are those which saw the most growth between 2016 and 2021. Many of the fastest growing occupations connect to the retail industry. The occupations with the most jobs added during the five-year span were managers and project managers. Some other high-skilled occupations top the charts, as well, including software developers, and market research analysts. Overall, the growth represented in Figure 27 is a relatively healthy mix of low and middle-skill and low- and middle-wage occupations. However, as has been noted in other parts of this report, these are not typically the kinds of jobs and earnings that would allow a person to comfortably live within the City of Orem itself.

SOC	Occupation	2021 Jobs	2016 - 2021 % Change	Median Annual Earnings
41-2031	Retail Salespersons	2,435	9%	$25,777.94
25-1099	Postsecondary Teachers	2,308	-1%	$85,921.32
35-3023	Fast Food and Counter Workers	2,298	9%	$20,625.70
43-4051	Customer Service Representatives	1,736	22%	$31,088.57
11-1021	General and Operations Managers	1,450	46%	$70,760.54
43-9061	Office Clerks, General	1,077	12%	$33,303.80
41-2011	Cashiers	1,076	15%	$24,199.28
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	967	13%	$23,512.92
53-7065	Stockers and Order Fillers	941	49%	$29,289.79
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	855	23%	$94,988.43

Table 8: Top Occupations in 2021. Source: EMSI 2021

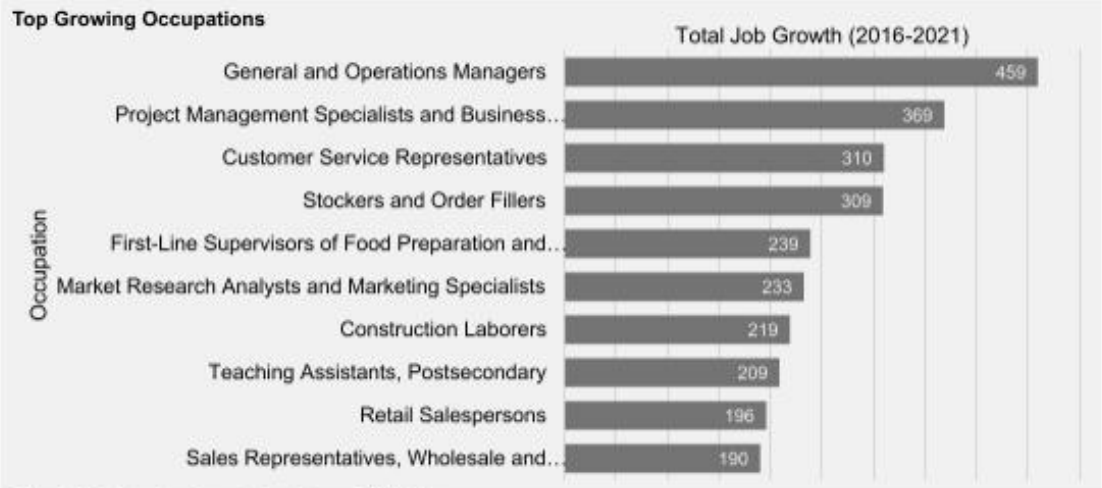


Figure 27: Top Growing Occupations. Source: EMSI 2021

Most In-Demand Occupations

To track the most recent occupational trends, the number of unique job postings for each occupation are counted. The most in-demand occupations are those for which the most jobs were posted between January 2019 and April 2022. The "Retail Salespersons" was the most in demand, with just over 2,250 unique postings. Retail occupations comprised three of the top five most in-demand jobs, which is a testament to the prowess of retail in the area, but also represents national trends through the pandemic-influenced years of 2021 and 2022. Similarly, "Registered Nurses" being among the most in-demand positions tracks with national trends over these years.

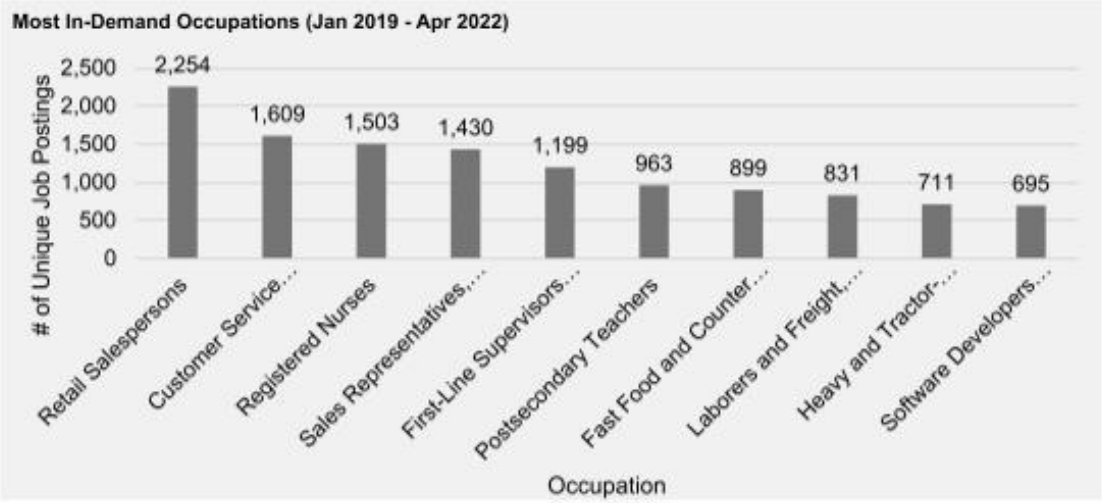


Figure 28: Most In-Demand Occupations. Source: EMSI 2021

In-Demand Skills

The top hard skills in Figure 29 are those which are most frequently mentioned in job postings in Orem. In understanding the demand for hard skills, strategies can be implemented to prepare the workforce to meet employers' needs. Merchandising, selling techniques, and nursing skills are all popular skills, which align with the top industries and occupations presented in previous charts.

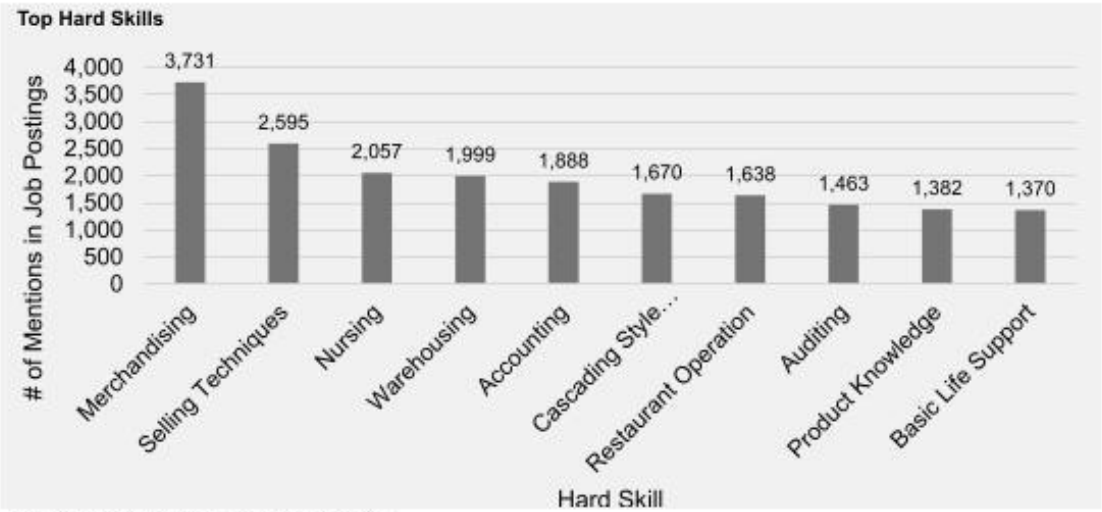


Figure 29: Top Hard Skills. Source: EMSI 2021

Labor Force & Employment Analysis

Labor Force Participation

In 2019, 52,502 of Orem's population above the age of 16 was employed; that equates to about 71.8% of the 16+ population. The unemployment rate averaged in Utah County was 1.5%, lower than the national average for 2021 (5.4%) by 3.9 percentage points. The unemployment rate in the Provo-Orem MSA was the same, at 1.5%.



Figure 30: Labor Force Overview. Source: ACS 2015-19 Estimate; Utah Department of Workforce Services

Unemployment by Race

In the graph below, 2020 unemployment rates are given for each racial group in Orem. 3.9% of the White population in the labor force was unemployed in 2020. The "Black or African American" and "American Indian and Alaska Native" groups saw the highest unemployment rates, reaching 7.4% and 8.4%, respectively. The data below indicate employment inequities; the fact that the unemployment rates of some racial groups are 3-4 percentage points higher than others implies that employment opportunities are not equally accessible.

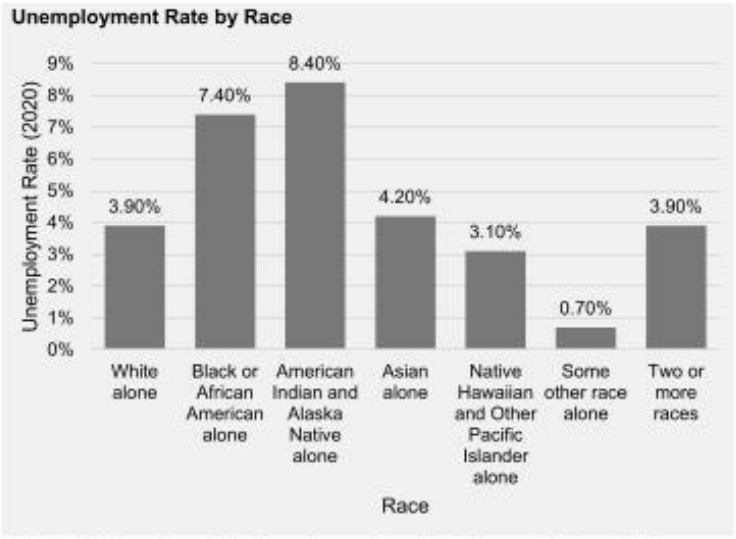


Figure 31: Unemployment by Race. Source: American Community Survey, 2020

Unemployment Rate Trends

The unemployment rate in the Provo-Orem UT metropolitan statistical area (MSA) spiked between March and April of 2020, increasing from 2.5% to 7.8% in one month. Unemployment gradually fell throughout 2020 and 2021, and finally reached pre-pandemic levels at 2.2% in March of 2021. By January 2022, the unemployment rate had dropped to 1.6%, which is nearly 1 percentage point lower than it was at the start of the pandemic in March of 2020.

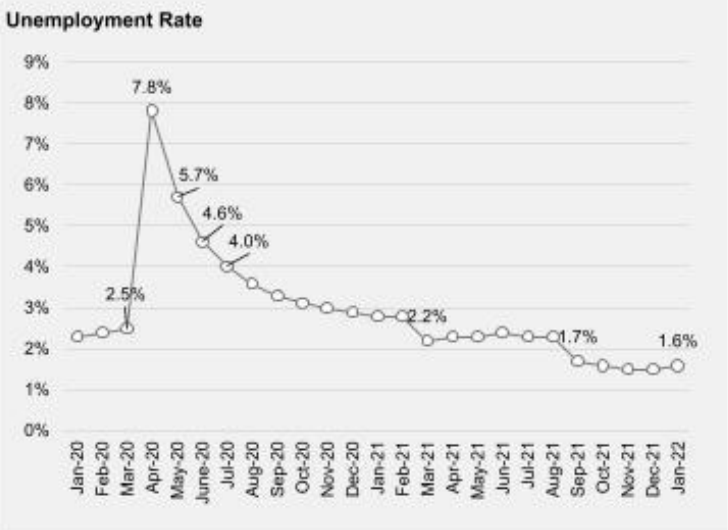
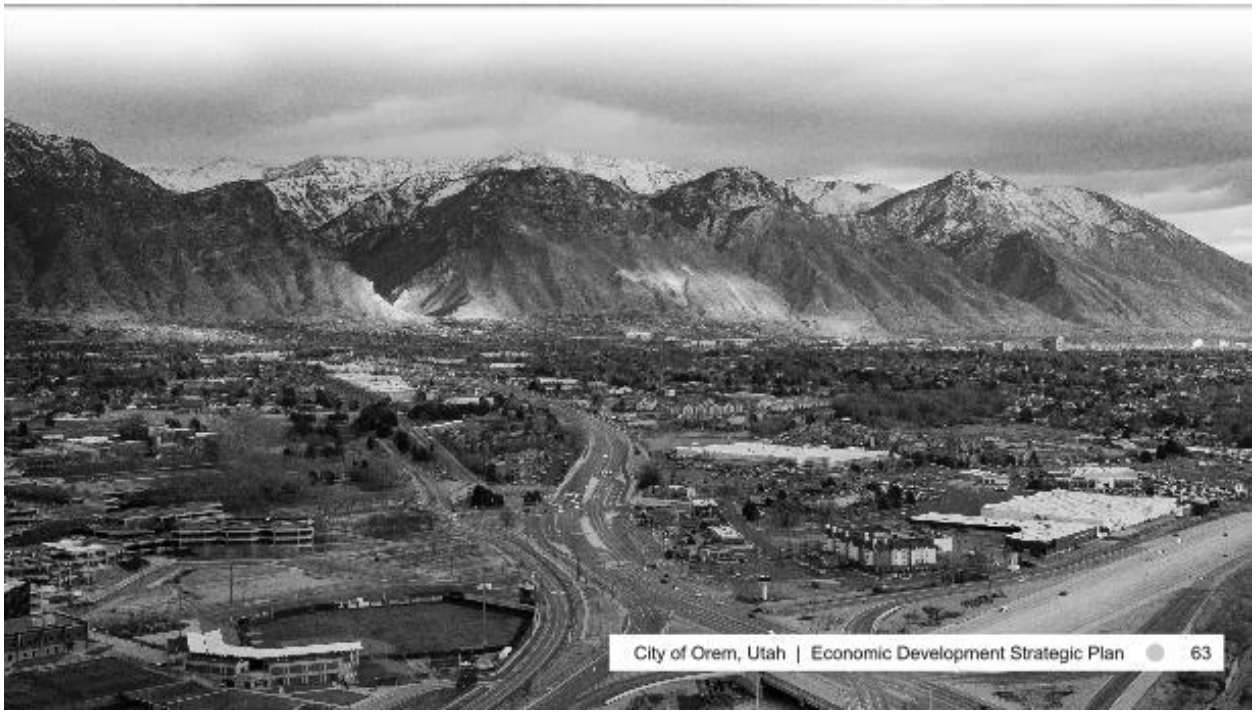


Figure 32: Provo-Orem UT MSA Unemployment Rate by Month, Source: Bureau of Labor Statistics, 2022

Remote Worker Trends

One impact of the COVID-19 pandemic was the transition of many occupations to a work-from-home model. While some workers have returned to the office, many businesses have made the decision to allow their employees to work permanently from a remote location. In the graph below, the total number of job postings for all occupations has been provided for 2019 and 2021. In 2019, there were 859 job postings for remote positions in the Provo-Orem MSA; in 2021, that number had increased to 5,384. This increase of more than 600% in remote worker job postings demonstrates one of the tremendous impacts of the COVID-19 pandemic on the workplace.



Tapestry Segmentation

Esri's Tapestry Market Segmentation characterizes and measures an area's population based on income, age, and general lifestyles. The tapestry segmentation for Orem can be helpful for understanding the population's demand, financial ability, and housing preferences, all of which inform an economic development strategy.

In Table 9, the top ten tapestries in Orem are ranked by the percent of households comprised by each tapestry. Annual growth, owner and renter preferences, household size and income, and financial ability are estimated, as well. Full tapestry profiles and descriptions can be found for all the tapestries below at this website.[9]

Tapestries	Percentage of Households	Annual Population Growth	% Home-owner	% Renter	Median Age	Average Household Size	Median Household Income	Maximum Affordable House Price	Maximum Monthly Affordable Rent
Bright Young Professionals (8C)	25.9%	1.20%	57.20%	42.80%	33	2.41	$54,000.00	$162,000	$1,125.00
Young and Restless (11B)	10.6%	1.30%	86.90%	13.10%	29.8	2.04	$40,500.00	$121,500	$843.75
In Style (5B)	7.0%	0.80%	68%	32%	42	2.35	$73,000.00	$219,000	$1,520.83
Savvy Suburbanites (1D)	6.7%	0.80%	90.60%	9.40%	45.1	2.85	$108,700.00	$326,100	$2,264.58
Comfortable Empty Nesters (5A)	6.2%	0.50%	86.90%	13.10%	48	2.52	$75,000.00	$225,000	$1,562.50
Up and Coming Families (7A)	6.1%	2.80%	73.90%	26.10%	31.4	3.12	$72,000.00	$216,000	$1,500.00
Workday Drive (4A)	5.5%	1.40%	84.90%	15.10%	37	2.97	$90,500.00	$271,500	$1,885.42
College Towns (14B)	5.1%	1.10%	24.60%	75.40%	24.5	2.14	$32,200.00	$96,600	$670.83
Parks and Rec (5C)	4.7%	0.40%	69.70%	30.30%	40.9	2.51	$60,000.00	$180,000	$1,250.00
Urban Edge Families (7C)	4.7%	1%	63.70%	36.30%	32.5	32.5	$50,900.00	$152,700	$1,060.42

Table 9: Tapestry Segmentation for the City of Orem. Source: ESRI 2021.

9 https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm

Appendix III: SWOT Analysis



Strengths

Highly Educated Population

One of the City of Orem's strengths lies in its highly educated residents. With 41.7% of the resident adult population having obtained a bachelor's degree or higher, Orem residents make up a highly educated workforce that can serve as industry leaders and innovators. This compares positively to Utah's statewide average of 35.1%.

The high educational attainment of Orem is in part due to the strong presence of nearby institutions of higher education. Utah Valley University (UVU) has a student body population of over 40,000 students, and it offers 208 degree208-degree options, 91 of which are bachelor's degrees and 11 of which are master's degrees. With tuition that is 42% lower than the nation's average and 15% lower than the state of Utah's average, UVU provides an affordable higher education option for Utah residents.[10] Located just south of Orem, the proximity of Brigham Young University offers residents another high-quality education option. BYU has a student population of over 30,000 students and it offers 185 undergraduate majors, 64 master's programs, and 26 doctoral programs.[11]

Members of Orem's highly educated population have contributed to the city's strong startup culture. Business incubators, such as the Utah Valley Business Resource Center, provide support and resources for entrepreneurs to plan, strategize, and launch innovative ideas that contribute to the business and economic sectors both locally and nationally. Examples of successful startups that have either originated or grown in Orem include Word Perfect, BlendTec, Clear Task Solutions, Ready2Teach, and Warren.[12]

Quality of Life

There are many quality-of-life advantages that make Orem an attractive location for those seeking a healthy and active lifestyle. The health of residents is high with the local population outperforming the state and country by many health metrics. With several key medical facilities, such as Wasatch Medical Center, Orem Community Hospital, and Timpanogos Regional Hospital, and family practices throughout the city, there are a variety of providers to meet the medical and health needs of residents.

People travel and move to Utah because of its natural beauty and outdoor assets, and one of Orem's key defining features is its outdoor recreation opportunities. Utah Lake, Cascade Mountain, Mt. Timpanogos, and state parks surround the Orem metropolitan area and offer easy access to hiking, fishing, and other outdoor activities. Within the city, an extensive public park system provides families with space to recreate, children with areas to compete in sports, and community members with areas to gather.

In addition to natural assets, indoor assets contribute to the city's quality of life. The Orem Family Fitness Center has workout equipment, lap and leisure pools, a multi-purpose gym, group fitness classes, and sport offerings.[13] Private gyms also give residents indoor space for fitness and activity. For those who enjoy education activities, Orem Public Library contains hardcopy and digital books; online resources for student academic enrichment; and community events geared toward specific age groups, such as adults, teens, tweens, young children, and toddlers.

Finally, residents overall feel safe within Orem. The city is in the 52nd percentile for safety, which means its crime rate is on par with the national average.[14]

10 https://www.uvu.edu/whyuvu/
11 https://www.byu.edu/facts-figures
12 https://www.uvu.edu/uvbrc/incubator_companies/index.html
13 https://www.orem.us/orem-rec-center---orem-utah.html
14 https://crimegrade.org/safest-places-in-orem-

Strategic Location and Infrastructure Assets

Orem's geographic location makes it the epicenter of Utah Valley. With close access to outdoor recreation, surrounding cities in the Valley, and Salt Lake City, residents can easily access different opportunities the area offers. Orem residents also have access to I-15, which connects them to the surrounding areas.

In addition to I-15, Orem contains other important infrastructure assets. Two rail freight lines that run through the city transport goods throughout the state. Orem Central Station is an intermodal center that is a hub for train and bus travel, which residents can use to travel throughout Orem and the parts of Utah. Utah Valley Express is a bus line that makes 15 stops and runs from Orem Central Station to University Place to BYU's campus to Provo Central Station.[15] FrontRunner is a commuter train that makes 15 stops and runs from Provo Central Station to Orem Central Station to Salt Lake and ends at Ogden Station.[16] Finally, Orem is known as a high-speed fiber UTOPIA with high quality broadband.

Orem Tech Center is 788,562 square-foot facility offering retail and warehouse space to businesses.[17] With easy access to 1-15 via Geneva Road and up to 30-foot ceilings, it is a prime space to meet business and distributors' needs.[18] Located near this facility is the 368-acre Geneva Road Industrial Corridor. This area currently houses a variety of manufacturers and companies, and it offers space for future expansion including the addition of low-rise industrial facilities, mid-rise manufacturers, and mid-rise residential buildings.[19]

Retail Assets

Retail in Orem is an asset and comprises a significant market share of retail sales within Utah Valley. One key driver of retail sales is University Place, which offers retail shopping, dining, recreation, office space, and housing. Within University Place and throughout the city are nationally recognized brands, including Costco, Macy's, Lululemon, and Trader Joe's.

Strong and Experienced Economic Development Leadership

Utah is a competitive state for business, as companies across industries have chosen to start, relocate, or expand their business in the state. This is the case for Orem and the surrounding areas, as many businesses and companies are headquartered in these areas. The Utah Valley area has strong regional leadership through the Mountainland Economic Development District and advances senior services, transportation, and economic development.

Orem has successfully implemented previous economic development strategic plans. Many of the goals from past strategic plans have been successfully implemented, and the city is poised to accomplish additional goals to enhance its business sector, housing offerings, and other amenities.

The Orem Business Alliance has been instrumental in helping expand and enhance the business sector. Through its work, the Alliance advocates for small business, provides networking opportunities, and connects businesses to resources.[20]

15 https://www.rideuta.com/Rider-Tools/Schedules-and-Maps/630X-Utah-Valley-Express
16 https://www.rideuta.com/Rider-Tools/Schedules-and-Maps/750-FrontRunner
17 https://listingsprod.blob.core.windows.net/ourlistings-usa/fb66b6e5-2518-413d-b584-5be33d57d3ec/32a07a3a-4fc7-44be-9454-984e1b2f217a
18 https://listingsprod.blob.core.windows.net/ourlistings-usa/fb66b6e5-2518-413d-b584-5be33d57d3ec/32a07a3a-4fc7-44be-9454-984e1b2f217a
19 https://orem.org/wp-content/uploads/2018/08/072018_Draft_GRAP_Alternatives.pdf
20 https://econ.orem.org/oba/

Weaknesses

Housing Costs

While the strengths of Orem outlined above attract individuals to the area, the rising cost of housing has become a challenge for many, particularly for young professionals and families hoping to purchase a home. According to the real estate website Redfin's market analytics, the median sale price of a home in Orem in February of 2022 was approximately $494,500, representing an increase of 39.6% since February of 2021.[21] While the upward trend in sale price is not unique to Orem, the year-over-year (YoY) increase is substantially larger than the 28.8% growth throughout the state as a whole and the 15.9% increase nationally over the same period.

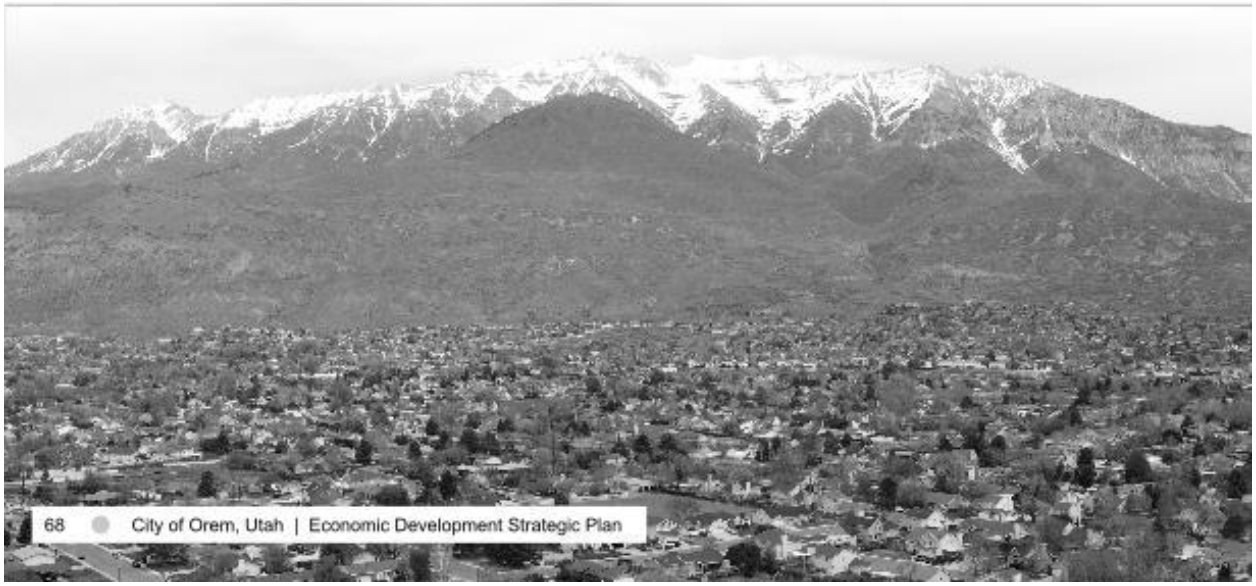
These high prices make it challenging for both young professionals and families to commit to moving to the city, and those that do are likely to face financial strain. But it is not just people moving to Orem who are likely to feel the impact of rapidly rising housing costs. Currently, 41.42% of renter-occupied households in the city are housing cost burdened, meaning they are spending more than 30% of their household income on housing costs. This number has been steadily increasing over recent years. The impact is increasingly also felt by owner-occupied households, as well.

Compounding the problem of Orem's rising housing costs are below-state-average household incomes (HHI). As of 2020, the median HHI in the city was an estimated $65,622 (mean of $87,734), which was considerably lower than the statewide median of $74,197 and only slightly above the national median of $64,994. An estimated 36% of Orem households earn an annual income of less than $50,000, including 55% of renter-occupied households.

Housing Supply

Orem's rising housing costs are heavily influenced by a growing demand for housing without a significant change in supply. Orem has a lack of developable land to build more attainable single-family homes. Only 8% of Orem's land is undeveloped, and of that, only 3% of that is zoned for residential properties. With Orem surrounded by mountains, Utah Lake, and neighboring cities, expansion of homes is extremely limited. Many have proposed high and medium density housing as a potential solution that allows for upward expansion of more attainable housing. However, others are opposed to this concept if proposed over large swaths of land area without a targeted strategic approach. High-density housing projects are frequently met with resistance by the overall community, and because Orem does not have many vacant or available high-density housing options, this exacerbates the affordability of housing challenges in the city.

21 https://www.redfin.com/city/14855/UT/Orem/housing-market



Lack of Clearly Defined Downtown

Unlike other cities throughout the state and nation that have a distinct downtown, given the layout of Orem, the lack of a clearly defined downtown is an obstacle. State Street, which most closely resembles downtown road, has a rundown appearance compared to the quaintness and attractiveness of downtowns in other Utah cities and towns. State Street also serves as a main transportation channel for commuters and residents. As a seven-lane highway, there is a lack of walkability along State Street, and as a result, instead of walking to and from restaurants and retail establishments, residents and commuters spend their time driving past the city's assets at high speeds.

The high concentration of traffic on State Street also creates another issue: traffic congestion. During peak travel times, State Street easily becomes congested with residents and commuters travelling in and out of the city. Because of the lack of walkability of the area, the high volume of traffic, and the vehicle congestion, individuals spend little of their time accessing Orem's retail and restaurant assets. Moreover, perhaps because of the highly trafficked State Street, among many there is the perception that there is a lack of locally owned small businesses throughout the city.

Disunity Around Long-Term Vision

Due to the the expiration of the previous EDSP, Orem has not recently achieved consensus around a long-term vision as it relates to economic development. The number one challenge identified by stakeholders during on-site visits was the disunity around a long-term vision for Orem's economic future. For instance, there is no clearly defined business attraction strategy. It is not clear what businesses Orem desires to attract and what approach or methods the city plans to use to attract those businesses. While Utah Valley University is a key asset to the city, its role in the local and regional economic development ecosystem is not clearly defined. Moreover, although the Utah Valley Business Resource Center is indeed an asset to local businesses and startups, it lacks a detailed and defined strategy to attract, retain, and sustain businesses. A clearly defined, unified vision in these areas would focus Orem's efforts and outreach, which will lead to greater success with business retention and attraction.

The underutilization of commercial and retail space may in part be due to the lack of a clear business strategy. From Canyon Park Technology Center to storefronts along State Street, there are a multitude of vacant office and retail spaces. Additionally, there is a lack of class-A office space for companies to use and expand their business. As a result, many startup companies that initially took root in Orem have moved out of the city to adjacent areas that better meet their office space needs. Some developers have looked to brownfield and contaminated industrial sites as areas to expand office and business space. However, there has been a reluctance to use EPA funds for proper clean-up of these areas. There is also stigma associated with brownfield sites, and many residents are reluctant to live or work in these areas.

Opportunities

Enhanced Business Support

An opportunity exists for Orem to enhance the support it provides to businesses. With a clearly defined focus and plan, Orem has the potential to attract and retain businesses. Additionally, it can help existing businesses expand within the area. There is also opportunity to have stronger alignment with Utah Valley University regarding business support. While still in the development phases, the Orem Business Alliance is a key collaborator for fostering business partnerships and networking.

While the Utah Valley Business Resource Center is an asset to the community, there are additional ways to leverage those assets and create new opportunities. By enhancing the resources within the center, the BRC can provide support to business, particularly startups. What will be paramount is a clear strategy to attract and retain businesses and identified target industries in which the BRC would like to invest. There is also opportunity for the BRC to expand its impact by building a strategic partnership with Canyon Park Technology Center. Additionally, there is an opportunity to make better use of the Smart Cities and Fabrication Lab. New technology could be tested and/or utilized in connection with City Hall.

There are many capital assets and supportive services that Orem can leverage to bring more resources to the city. The Revolving Loan Fund Program through the Economic Development Administration supports small business growth and new employment opportunities.[22] Strategically investing in business incubation and acceleration would create and retain businesses within the area. Many grant opportunities exist for minority-owned businesses that local Orem business owners could take advantage of to sustain and grow their business.[23] There are several funds allocated for capital improvements that the city could use to improve buildings and aesthetics. Finally, succession planning is necessary to sustain businesses over an extended period.

Quality of Place Improvements

There are many quality of place improvements that, if implemented effectively, could drastically enhance the attractiveness of Orem. Given the rundown appearance of State Street, the traffic congestion, and other weaknesses outlined above, there are many approaches Orem could take to improve these aspects. Streetscaping efforts, such as landscaping and sidewalk improvements, could make the area more desirable for foot traffic and recreation and encourage residents and visitors to patronize the local retail and restaurants. Traffic calming measures, such as the addition of a median down the middle of State Street, could reduce the fast-paced, vehicular activity. Gateways would improve the overall aesthetic of the area and be a marker of Orem as a distinct community. Establishing design standards will also create the feel of Orem as a distinct, unique community with its own amenities and attractions. Finally, façade improvement to store fronts would make the area more visually appealing and would highlight the uniqueness of the locally owned businesses.

Transit-oriented development and specifically multi-modal strategies are an opportunity for Orem to leverage the healthy and active lifestyle of its residents. Bike share programs are one example. Since 2010, nationally Americans have taken over 343 million trips using bike shares.[24] This increasingly popular transportation option provides residents and commuters with an affordable and easy-to-use mode of transportation at any time of day. To make bicycling a safe and viable option, bike lanes would need to be added to State Street and other roads. Properly implemented, a bike share program would encourage less automobile traffic throughout the city. Enhancement of and additions of paths for both biking and walking would complement the outdoor assets of the community and provide additional recreation options. Finally, public transportation campaigns are an opportunity to inform the public of existing public transit options and encourage their use.

With the Infrastructure Investment and Jobs Act that was recently passed and that addresses certain aspects of transportation, funding may be for the traffic and multi-modal ideas outlined above.[25] Finally, with the construction of the Orem Utah Temple of the Church of Jesus Christ of Latter-day Saints that is likely to draw many, there is an opportunity to expand housing near this area.

22 https://www.eda.gov/rlf/
23 https://www.governmentgrants.us/minority-grants/
24 https://nacto.org/program/bike-share-initiative/
25 https://www.congress.gov/bill/117th-congress/house-bill/3684

Embracing a Mid-21st Century Economy

Orem is well-positioned to take advantage of opportunities of a mid-21st century economy. University Place is a prime location to expand mixed-use development, specifically at the intersection of University and State streets. To attract a younger population to the area that will contribute to the local economy and workforce, many of these individuals are likely to be drawn to mixed-use development that meets their various living, shopping, and recreation needs.

These individuals are also likely to be attracted to experiential retail, recreation, and tourism. There are many approaches Orem can take to offer its residents and visitors unique experiences that set the city apart from others. With a clearly identified business attraction plan, Orem can determine the target attraction industry it would like to market. To increase the aesthetics of the area, public art, such as murals and sculptures, is an attraction for residents and visitors. As mentioned above, gateways can identify the entrance to the City of Orem and indicate to travelers that they are entering a unique, distinct community.

Given that Orem must be thoughtful about how it uses its existing spaces, flex spaces are an opportunity for the city to use limited space to serve multiple purposes. Flex spaces would consist of retail in the front of a building and wholesale and warehouses in the back of the space. By structuring the space in this way, the more visually appealing retail assets would be prominently displayed to the highly trafficked areas while the less visually appealing assets would be more discreet on less-travelled roads.

Although many of the technology companies that took root in Orem now reside in neighboring cities, with close proximity and relationships to technology corporations and start-ups another opportunity arises: offering retail-related technology. To provide key technology to both residents and local and surrounding employers, Orem could become a hub for retail technology. Types of retail to offer include software applications, logistics technology, and inventory management technology.



Threats

Defaulting to the Status-Quo

Demographic and economic trends in Orem appear to be heading in the direction of significant issues in both the short- and long-term. Rising housing costs are likely to put increasing pressure on Orem's workers to relocate or seek better-paying alternatives. Reliance on a robust retail sector is threatened by the rapid growth of e-commerce. Attempts to attract tech companies to diversify the city's industry mix is running up against nearby competitor regions that offer affordable rent, appealing and walkable "15-minute cities," defined senses of place, and developed transportation and accessibility options.

While it is difficult to draw sharp distinctions between each of these inter-related factors and trends, the largest direct threat to the City of Orem comes from potential inaction if these trends are not addressed. Prior to the development of this plan, there was no clearly defined or official short- or long-term vision for the future. Many stakeholders seem willing and able to point out potential problems or shortcomings of the city, but a collaborative approach to meeting these challenges directly is necessary to allow Orem to maximize its many strengths and build a positive future that the community can be proud of and meets the needs of its citizens.

With each month and year that measures are not taken to address the threats detailed below, these trends will become more solidified and the ramifications increasingly serious. Whether desired or not, the population in the City of Orem seems destinied to show continued growth. Without action, the cost of housing will continue to rise. Without diversification and innovation, the retail sector will continue to be threatened by advancing technologies and shopping trends, which will, in turn threaten the city's sales tax-dependent budget. Local businesses and the local economy rely on leadership to address these issues head on. Otherwise, Orem is liekly to go the way of many other cities that failed to rise to their challenges and meet them with a unified vision and set of goals.

Housing Cost's Effect on Workers and Businesses

Orem is a commuter city. In fact, around 80% of Orem residents commute outside of the city for their jobs. Conversely, around 80% of Orem's workers live outside of the city and commute in. Conversation with local workers suggest that many travel up to and beyond an hour in each direction. In the short-term this may be sustainable, with Vineyard and other surrounding cities building high-density housing mixed-use development, there may be more affordable housing close enough to Orem to maintain its lower-wage retail workforce. However, the trend of rising housing costs presents a significant threat to businesses looking to keep their employees.

In other areas around the country, trends like those seen in Orem have led to a range of negative results. High housing costs can often lead to the departure of young families or a barrier to those looking to move to the area. The families that can locate to the area are taking on excessive or burdensome debt. Either situation may not bode well for the retail sector, whether through the loss of Orem's current businesses or the inability to attract new ones.

Orem's robust retail sector is dependent on the availability of workers willing to work for low-to-moderate wage jobs. Without available housing, it is not a certainty that these companies can keep enough employees to sustain themselves. Small businesses, which often operate with much smaller operating margins, are likely to struggle to find workers or be forced into paying higher wages. In many cases, this pressure causes small businesses to close their doors. The current low unemployment rates in the region add further pressure on local businesses to pay higher wages or risk losing key staff.

Tech companies looking to relocate from more expensive areas are attracted to locations with affordable housing for their employees, too. Orem has a lot to offer tech companies that are looking to relocate from more expensive regions of the country. Access to both outdoor recreation and high-speed internet are among a number of appealing factors in making those decisions. However, these companies are often looking to relocate specifically because of high housing costs for their workers. If Orem cannot offer affordable housing, it is likely to become difficult to attract a diverse mix of businesses and industries to the city.

Heavy Reliance on Sales Tax Revenue

Known as the "Retail Hub of Utah County," the City of Orem is heavily invested in maintaining its position as the retail center of a prosperous county. As important as it is to keep the retail sector as strong as possible, attempts to diversify the industry mix in the city will help protect the local economy from the threats and fluctuations currently facing the retail industry.

Despite a policy change in 2019 that allows the City to collect taxes on out-of-state sales (including online sales), there is reason to believe that many brick-and-mortar retail stores face a difficult future. Recent trends in retail are moving quickly toward warehousing and distribution and away from in-person shopping. Evidence of this change is already quite visible throughout Orem. There are currently vacant storefronts up and down the State Street corridor. Small businesses in the retail space are likely to continue to face a difficult road ahead with the continued growth of e-commerce platforms.

Instances of new brick-and-mortar retail investment around the county are centered around walkable spaces, cafes, and restaurants. These "15-minute cities" are being constructed around access and the creation of a defined "sense of place." Although Orem is somewhat land-locked with little-to-no developable land, innovative thinking and planning is likely required to grow or even save the retail that has defined Orem for years. This means that significant investment and a singular vision would be needed to create a more modern retail and living environment that would help attract a broader and more diverse industry mix.

Sales tax revenue is considerably more volatile than property tax revenue and has proven to be increasingly volatile in recent years due to the trends and consolidation of e-commerce. Orem's 2014 EDSP noted the effect this volatility had on the city's budget during the 2008 recession. In 2007, 39 percent of the city's general fund revenues came from sales taxes. By 2010, that number had decreased to 29 percent despite the property tax revenues remaining consistent throughout the recession. Orem's 2022 budget will mark the first time since 2007 that Orem's sales tax will comprise more than 40 percent of the general fund revenues.

Fiscal Year	Sales Taxes	% of Total Revenues	Property Taxes	% of Total Revenues
FY15	**$18,839,327**	**32.78%**	$7,305,594	12.71%
FY16	**$19,471,579**	**36.17%**	$6,424,109	11.93%
FY17	**$20,722,179**	**36.79%**	$6,416,808	11.39%
FY18	**$22,198,446**	**37.34%**	$6,597,887	11.10%
FY19	**$22,736,417**	**37.16%**	$6,657,969	10.88%
FY20	**$23,737,723**	**38.77%**	$6,895,505	11.26%
FY21	**$28,004,565**	**39.90%**	$7,060,159	10.00%
FY22 (Estimate)	**$30,805,022**	**45.53%**	$7,278,289	10.76%

Table 10: Sales and Property Taxes as Percent of General Fund Revenues. Source: City of Orem Budget

Appendix IV: Review of the Retail Gap Analysis

Introduction

In 2021, the City of Orem contracted with Thomas P. Miller & Associates, an Indianapolis-based economic and workforce development consulting form to assist in the production of their Economic Development Strategic Plan (EDSP). One component of the agreed upon scope was to provide the City of Orem a retail gap analysis, an update to a major section of the city's 2014 EDSP. As TPMA consultants and data analysts sought to collect and compile the appropriate data to provide this analysis, however, they encountered two significant barriers in their ability to provide such an update.

First, due to changes in Utah state policy in the years between the most recent version of the retail gap analysis and the current effort, TPMA's consultants were not able to retrieve the relevant sales data from the Utah State Tax Commission. Second, multiple attempts to calculate or retrieve a consumer demand estimate resulted in wildly conflicting data sets.

A retail gap analysis, which is explained in greater detail in the report below, uses these two figures to compare the relative supply and demand in each retail sector. The inability of TPMA consultants to collect or calculate reliable numbers for either side of this equation ultimately led to the realization that the retail gap analysis that appeared in the 2014 EDSP, and which was updated again with 2018 numbers, could not be updated, or replicated in any meaningful way.

This report then serves as a detailed account of the inability to provide this update. It includes:

- an explanation of the typical uses of a retail gap analysis;
- how these analyses are commonly calculated, including samples of data from 2014, 2018, and 2020;
- why those calculations could not be made in this case; and
- an investigation of the uses and limitations of retail leakage and capture analyses for the purposes of strategic planning at the local government level in the current retail climate.

At the conclusion of this report, the data provided by Zion Public Finance Bank in the 2014 EDSP, the 2018 data update are provided in their entirety. Additionally, the 2020 estimates provided by a third-party data analysis company are provided. The consultants at TPMA feel it is important to include these analyses to the reader of this report. However, they do not endorse the data, or the calculations used in them.

Sales Leakage and Capture Rates

The City of Orem, Utah has long been recognized as the "retail hub" of Utah County, drawing shoppers who reside throughout the county into Orem to shop at the city's variety of retail establishments. Beyond the anecdotal, this distinction has been further evidenced by retail sales leakage and capture rate data that demonstrate that Orem retailers are serving a customer base that stretches beyond the city limits and into the surrounding communities. The city's 2014 Economic Development Strategic Plan and 2019 update, both prepared by Zion Public Finance, Inc., include these retail leakage and capture rates analyses, providing insight into which industries are "capturing" the most sales from surrounding communities and which are "leaking" sales and customers to competitors in other parts of the county.

Sales leakage and capture rates are calculated by comparing the dollar amount of recorded sales over a set period (e.g., one year) at a set location (e.g., within a city's boundaries) to an estimate of the dollar amount of purchases expected from consumers who reside in that location over the same length of time. For the purposes of these calculations, the recorded number of sales are often referred to as the "supply" and the expected number of purchases are referred to as "demand."

For example, if local furniture stores combine to have higher sales numbers than their local consumer base is expected to have spent at furniture stores, that industry has "captured" sales from the furniture stores in neighboring communities. As a result, the furniture stores in those surrounding communities are likely to show lower sales than expected and might be said to have "leaked" sales to competitors in a neighboring location.

These calculations are often used to evaluate opportunities for investment. If, for example, the grocery store industry in City A is shown to be "leaking" sales to City B, this analysis might indicate that building a new grocery store in City A is a worthwhile investment – that the current demand in City A is not being met. They have also occasionally been used to inform strategic planning at the local government level, especially in places heavily dependent on the tax revenue generated from retail sales. Such is the case with the City of Orem, for which sales and leakage data comprise a major component of past iterations of the Economic Development Strategic Plan (EDSP).

Previous Retail Gap Analyses

The 2014 EDSP and 2019 Update

In preparing the City of Orem's 2014 EDSP, Zion Public Finance Bank prepared sales leakage and capture data from taxable sales information provided by the Utah State Tax Commission. Zion also provided a 2019 update to these figures. A sample of these numbers are presented in Table 11.[26]

	2009 Leakage	2009 Capture Rate	2013 Leakage	2013 Capture Rate	2018 Leakage[27]	2018 Capture Rate[27]
Motor Vehicle and Parts Dealers (NAICS code 441)	$26,421,297	*162.44%*	$105,724,362	*165.24%*	$115,351,879	*152.92%*
Furniture and Home Furnishing Stores (NAICS code 442)	$44,780,511	*295.60%*	$46,365,720	*289.01%*	$68,392,227	*299.88%*

Table 11: Zion Public Finance, Inc. Leakage & Capture Rates

26 The full reports are provided in Supplement A at the end of this report.
27 May contain data from out-of-state online sales.

To begin to understand the data provided in Table 11, it is important to understand how these figures are presented, as this presentation is somewhat atypical. The dollar amounts in the leakage columns represent the difference between the supply (sales) and the demand (estimated purchases from Orem residents). In Table 11, this amount of leakage is presented as a positive number. However, the corresponding capture rate are greater than 100%, demonstrating that the supply is larger than the demand. Typically, the resulting leakage amount would be presented as a negative number, showing that Orem retailers were not leaking sales to surrounding areas but were instead "capturing" them from the surrounding areas. It is not entirely clear why the writers of this report chose to present the numbers in this way, but in Table 11 and in the full tables presented in Supplement A, a positive number in the leakage column actually represents "negative leakage" and demonstrates that Orem retailers are generating ("capturing") sales from non-Orem consumers.

As Table 11 demonstrates, 2013 and 2018 calculations show two retail sectors with very high capture rates for the City of Orem, suggesting that many shoppers travelled into Orem for their vehicle and furniture purchases. In total, these reports show the City of Orem with positive capture rates (over 100%) in 13 out of 19 retail sectors measured, demonstrating that Orem was, in fact, the retail hub of Utah County.

However, while the leakage and capture rates provided seem to show evidence of Orem's retail prowess in these sectors, the raw data used to calculate these figures are not provided in the reports nor was the methodology used to determine demand given in detail. Zion Public Finance was provided taxable sales numbers from the Utah State Tax Commission, broken down by geographic location and retail sector. These numbers effectively provide the supply component in calculating leakage, but they do not account for the demand component. To determine the demand component, some estimate must be used as no actual sales figures can measure demand.

This demand figure is not an easy estimate to determine. Models for determining the demand estimate vary widely in their complexity, and a flawed methodology can have a significant impact on the resulting leakage and capture calculations. This is especially the case when calculating these figures for a large area such as a city, as opposed to a smaller area such as a ZIP code or city block.[28]

The 2014 and 2019 reports give very little indication as to how this demand estimate was calculated, although there is some reason to believe that the method used was on the simpler end of the spectrum.[29] As this report will demonstrate in a later section, different attempts to calculate the same demand can produce wildly different results. Whether the methods used by Zion Public Finance produced an accurate measurement of retail demand or not, it is important to note that there is no standard approach to determining this number.

Updating the Retail Gap Analysis with 2020 Data

Utah State Tax Commission Data

In August 2021, the City of Orem and TPMA requested 2020 sales data from the Utah State Tax Commission with the purpose of performing a retail gap analysis to update the 2018 leakage and capture rates. However, two significant changes in the intervening years impacted the TPMA's ability to provide this update.

The first change was to the Utah State Tax Commission policy, which restricted the type of sales data that could be made publicly available. As a result, TPMA was unable to obtain the same level of detail as the sales data that were made available for Zion Public Finance in 2014 and 2019. TPMA could only access sales data that had not been disaggregated by zip code as previous years' data had been. Rather, TPMA was only able to obtain aggregate gross taxable sales and purchase data for the city of Orem as a whole, separated only by retail sector.

28 Retail gap/sales leakage analyses are more commonly used in site selection decisions about whether and where to open a new retail establishment. They are less commonly used in the development of economic development strategy.
29 A footnote in the 2019 Update asserts, "Estimated consumer purchases are based on average annual consumer purchases in the State of Utah."

Table 12 contains the Utah State Tax Commission's 2020 Gross Aggregate Taxable Sales and Purchases figures for the same two industries represented in Table 11. The number in the second column represents the total dollar amount of sales and purchases made by Orem companies within each industry that was subject to sales or use taxes. TPMA was unable to obtain data relating only to taxable sales, which would ideally be the information used to calculate leakage and capture rates. Although it is assumed to be a small percentage, the portion of the provided dollar amount that comprises taxable purchases is unknown.

Retail Sector	2020 Gross Aggregate Taxable Sales and Purchases
Motor Vehicle and Parts Dealers (NAICS code 441)	$354,416,317
Furniture and Home Furnishing Stores (NAICS code 442)	$94,801,699

Table 12: Utah Tax Commission 2020 Gross Aggregate Sales & Purchase Figures

Beyond the aforementioned policy updates regarding publicly available data, another important change took place between the time when Zion Public Finance obtained the 2018 sales numbers and when TPMA made their data request. Beginning in 2019, Utahns who made purchases from out-of-state retailers were required to pay sales tax on these purchases.[30] Prior to this, online sales were listed separately by the Utah State Tax Commission and were not included in their aggregate taxable sales data. However, after the 2019 rule change, these data were collected and presented together. This requirement not only had a large impact on the taxes collected by the state, but presumably affected the "aggregated gross taxable sales and purchases" data that were made available, making a comparison between the 2020 and 2018 figures effectively meaningless. This shift points to a larger issue involving out-of-state sales: the increasing effect of e-commerce on the retail market, and the calculation of leakage and capture rates, to which this report will return in the concluding section.

In summary, the data provided to TPMA differed from the data made available to Zion Public Finance in two important ways: in geographic specificity and in the inclusion of out-of-state/online purchases.

Supplementing the Missing 2020 Sales Data with Other Reports and Proprietary Models

Despite these changes, the taxable sales and purchases data provided to TPMA by the Utah State Tax Commission are sufficient to serve as the "supply" component in a standard retail gap analysis, albeit a less informative one than was prepared for the 2014 and 2018 reports. To complete the sales leakage calculations, an estimated "demand" component is needed.

As was mentioned above, there are a number of ways to calculate this demand estimate that range from the simple to the complex. For a simple metric, one might take the average annual consumer purchases for the entire state and scale them down for the population count of the City of Orem. This seems to be the method chosen by Zion Public Finance. This method will produce a demand estimate, but one that problematically assumes a homogeneous population across the State of Utah, treating all consumers the same regardless of age, location, income, etc.

Another option would be to look at more complex calculations such as those performed by third-party data analytics companies. These third-party consumer demand estimates are developed using proprietary algorithms and modeling. For example, the input-output model used by Economic Modeling Specialists International (EMSI) provides sales and demand estimates for a variety of geographic regions. This model utilizes information from a wide variety of sources including data sets from the Bureau of Economic Analysis (BEA), Census LODES data, and the American Community Survey, among others.[31] Table 13 represents a sample of EMSI's estimates for retail sales and demand for the City of Orem in 2020.

30 https://www.ksl.com/article/46459266/how-laws-in-2019-include-online-sales-tax-for-out-of-state-purchases
31 For more information on the data sources used in EMSI's Input Output Model, see their glossary entries and articles on the topic here: https://kb.emsidata.com/faq/what-is-input-output-modeling/

3-Digit NAICS Code	Industry	2020 Total Demand	2020 Total Sales	Capture/(Leakage)	2020 Aggregate Sales and Demand
441	Motor Vehicle and Parts Dealers	$94,518,297	$141,025,205	$46,506,908	$235,543,502
442	Furniture and Home Furnishings Stores	$15,055,563	$30,382,161	$15,326,598	$45,437,724

Table 13: EMSI Leakage/Capture Input-Output Model

EMSI's model produces a leakage dollar amount that can be used to calculate a capture rate. Together, these numbers would amount to a 2020 update to the previous retail gap analyses.[32] However, comparing the output of EMSI's models to the "actual" data provided by the Utah State Tax Commission uncovers a potential issue with relying solely on this third-party model.

EMSI's estimated sales for Orem retailers do not come close to matching the 2020 data provided by the state. To highlight the differences between EMSI's sales estimates and those provided by the state, Table 4 compares the two for the Motor Vehicle and Parts Dealers (NAICS 441) and Furniture and Home Furnishing Stores (NAICS 442) industries.

3-Digit NAICS Code	Industry	EMSI 2020 Sales Estimate	Utah State Tax Commission 2020 Aggregate Sales & Purchases
441	Motor Vehicle and Parts Dealers	$141,025,205	$354,416,317
442	Furniture and Home Furnishings Stores	$30,382,161	$94,801,699

Table 14: Comparison of EMSI estimates and Utah State Tax Commission data

The difference between the "actual" sales numbers and the third-party estimate raises concern about the usefulness of the EMSI model. The model is attempting to estimate the dollar amount of sales in these retail sectors, but the estimate produced is roughly 2.5 to 3 times lower than actual sales figures. This, of course, calls into question the accuracy of both the EMSI sales estimates and the demand estimates. In a situation where the sales figures differ so greatly from the raw data provided by the state, comparing the demand estimates to the actual taxable sales numbers would not produce a useful or accurate set of leakage data.

For further comparison and analysis, TPMA also pulled a sale leakage report from Environmental Systems Research Institute (ESRI), another third-party data analytics company.[33] ESRI uses similar data sources to EMSI but creates their own proprietary models. In 2017, though, the data analytics team at ESRI moved to discontinue their production of the retail gap analysis reports. Explaining this decision, ESRI analysts point to "the changing face of retail." In a 2018 release, they elaborate:

> When the Retail MarketPlace database was first developed in 2003, the methodology supported a retail industry that was dominated by a brick-and-mortar business model. Within recent years, and specifically in today's marketplace, larger chunks of retail activity have swung to e-commerce activity. As a result, the larger portion of sales activity taking place online has impacted the traditional models to estimate supply and demand. [34]

The decision to discontinue a popular report is further evidence of the complicated nature of a modern-day retail gap analysis: the necessary data are hard to acquire and when limited data are available, accurate models are nearly impossible to create. For reference, ESRI's final retail gap analysis for the City of Orem, produced in 2017, is provided in Supplement B at the conclusion of this report.

32 The full report from EMSI can be found in Appendix B at the conclusion of this report.
33 https://www.esri.com/en-us/home
34 Retirement of Esri Retail MarketPlace Data, Report, & Maps. ESRI, 2018

After considering the limitations of available data, as well as the ever-changing retail environment from which the data are derived, there is good reason to evaluate the overall utility of retail gap analyses as tools for economic development in 2022.

Examining the Retail Gap Analysis in 2022

Given the information presented above, it is clear why the comparison of third-party demand models to the Utah State Tax Commission taxable sales data would likely result in an inaccurate, and thus misleading, city-wide retail gap analysis. For this issue, there are two possible solutions: 1) only use EMSI models to determine leakage and capture, or 2) create a new model to compare to the raw taxable sales data. The model referenced in the first solution is provided, along with several other data reports, in Supplement B at the conclusion of this report. However, given the discrepancy between the raw sales data and the third-party estimates, there is good reason to doubt the accuracy or usefulness of the analysis.

The second solution, to create a new model to arrive at a more accurate demand estimate, presents a new set of problems. Chief among them is the difficulty in producing an accurate, useful estimation model (the issues with the methodology adopted by Zion Public Finance in determining this figure are mentioned above). Given the data- and model-related obstacles enumerated to this point, it is worth pausing here to briefly investigate the most common uses of retail gap analyses and retail leakage and capture data in general.

Historically, the most common use for a retail gap analysis is to help inform investment decisions and evaluate potential geographical areas for growth or expansion. For example, if a retail business is deciding whether to open a new store in a new area, a leakage and capture analysis of their retail sector might be a useful tool. If an area appears to have a higher demand in a certain sector than the local stores can meet, the retailer might feel more secure in opening a new store there. These reports are often conducted to assist both the retailer and the lending financial institution in determining whether a positive return on investment is likely. Retail gap analyses, then, are often considered in tandem with a variety of other metrics, to help make these investment decisions on a "micro" level.

Although less common, retail gap analyses can also have uses for more "macro" strategic planning. If, for example, a leakage and capture analysis show a higher demand for clothing stores than is being met by current sales, a city might seek to attract an additional retailer or two in this sector. For example, the 2018 update prepared by Zion Public Finance states that:

> There are areas of leakage in the Accommodation and Gasoline Station sales which indicate that the City has an opportunity to expand its ability to capture more of these sales. Increased capture rates in these areas have the potential to benefit the city through complementing large employers currently in the city and by potentially attracting new employers.

As Orem has historically placed significant emphasis on its retail sector, this kind of analysis and interpretation of the data may give crucial insight as to which sectors are currently "capturing" sales (meaning there may not be much room for additional growth) and which sectors are "leaking" sales (meaning there may be potential to grow this industry).

In general, though, retail gap analyses and leakage and capture data are less informative on a "macro" strategic planning process than they are on a "micro" investment decision-making level. One reason for this is that they typically provide information about a single point in time – one that is heavily influenced by a variety of factors.[35] For example, the years of 2020 and 2021 have been significantly impacted by the COVID-19 pandemic. While many industries and sectors have been dramatically affected by this once-in-a-century event, the retail sector appears likely to have reshaped entirely. Following trends that have long been noted, the move away from brick-and-mortar stores to e-commerce has been accelerated in the past few years. Moreover, disruption and

35 While it is true that regular updates to these figures can point to trends and give a deeper understanding than a single year's report could offer, this data point is only one in a large number of factors. It is not advised that large-scale decisions are influenced by this analysis alone. One potential result could be an overreliance on tax revenue from brick-and-mortar retail, which can put cities in a precarious position given the rapidly evolving and tumultuous retail market.

innovation driven by Amazon and other online retailers has shifted the retail landscape in ways that will never be fully undone, regardless of how long COVID-19 pandemic lasts.

The consultants at Zion Public Finance note this shift in their 2018 update, asserting that "The City is strong in almost every retail category which indicates that there may be few opportunities for retail growth, especially given trends in the retail industry for less brick-and-mortar development." The 2014 EDSP, by contrast, only mentions online sales once, clarifying that online sales are not a part of their analysis as they were listed separately by the Utah State Tax Commission.

Although online sales are no longer separated from traditional retail sales, their growing share of sales in the retail sector creates further issues for the evaluating of leakage and capture rates. A vast majority of online sales are out-of-state sales; this is especially the case with national retail giants like Walmart or Amazon. If, for example, all sales on a platform like Amazon appeared in leakage calculations for the appropriate sector, one might interpret that leakage as an opportunity for more brick-and-mortar retail in the online purchaser's community. This analysis, however, is likely to lead to poor decision-making, considering the recent increase in online sales. Even retail sectors once thought to be safe from the encroachment of online retailers are increasingly feeling the squeeze. Car dealerships, for example, operate in an industry that has seen significant growth in the space of e-commerce. The fact that consumers are purchasing cars online does not necessarily mean that Orem needs more car dealerships – it might actually mean the opposite. These market shifts must be evaluated in conducting and using a traditional retail gap analysis.

To summarize, the state of Orem's retail environment as presented by a retail gap analysis must be considered within its broader context; an understanding of available data, national economic trends (like those toward e-commerce), and the limitations of models and estimates is required for the retail gap analysis' use as an economic development tool. The figures and models provided in this report, as well as those provided in the supplements included below and referenced throughout, might be helpful for broadly informing an understanding of retail trends. Their limitations, however, are perhaps more informative and illuminate the need for other economic development tools that use available data more appropriately to inform decisions.

Supplement A: Full Zion Public Finance, Inc. Reports (2013 & 2018)

Zion Public Finance, Inc 2013 Leakage & Capture Rate Report

Category	2013 Leakage	2013 Capture Rate
General Merchandise Stores	$123,428,141	165.16%
Motor Vehicle and Parts Dealers	$105,724,362	165.24%
Clothing and Clothing Accessories Stores	$69,146,835	234.44%
Furniture and Home Furnishings Stores	$46,365,720	289.01%
Miscellaneous Store Retailers	$34,632,928	170.15%
Sporting Goods, Hobby, Book, and Music Stores	$34,487,643	210.33%
Electronics and Appliance Stores	$29,058,628	211.20%
Food and Beverage Stores	$23,709,935	119.55%
Food Services and Drinking Places	$22,618,204	119.27%
Building Material and Garden Equipment and Supplies Dealers	$12,573,804	117.66%
Repair and Maintenance	$9,204,849	128.39%
Health and Personal Care Stores	$1,982,276	114.01%
Nonstore Retailers	$477,230	102.87%
Museums, Historical Sites, and Similar Institutions	($821,440)	6.34%
Amusement, Gambling, and Recreation Industries	($2,734,797)	77.98%
Performing Arts, Spectator Sports, and Related Industries	($3,522,080)	2.03%
Personal and Laundry Services	($4,171,128)	58.20%
Gasoline Stations	($6,706,634)	77.77%
Accommodation	($29,813,411)	28.62%
Total	**$465,641,067**	**146.28%**

Zion Public Finance, Inc 2018 Leakage & Capture Rate Report

Category	2018 Leakage	2018 Capture Rate
General Merchandise Stores	$157,102,778	173.32%
Motor Vehicle and Parts Dealers	$115,351,879	152.92%
Clothing and Clothing Accessories Stores	$68,392,227	299.88%
Furniture and Home Furnishings Stores	$65,205,939	210.47%
Miscellaneous Store Retailers	$39,169,049	124.61%
Sporting Goods, Hobby, Book, and Music Stores	$37,728,479	214.81%
Electronics and Appliance Stores	$36,557,967	124.44%
Food and Beverage Stores	$36,307,822	131.08%
Food Services and Drinking Places	$31,815,993	191.95%
Building Material and Garden Equipment and Supplies Dealers	$29,399,552	156.31%
Repair and Maintenance	$8,701,912	121.42%
Health and Personal Care Stores	$6,283,323	138.00%
Nonstore Retailers	$2,144,208	104.26%
Museums, Historical Sites, and Similar Institutions	($1,798,873)	4.61%
Amusement, Gambling, and Recreation Industries	($3,419,212)	67.24%
Performing Arts, Spectator Sports, and Related Industries	($4,708,159)	1.24%
Personal and Laundry Services	($8,503,162)	60.81%
Gasoline Stations	($13,548,791)	65.79%
Accommodation	($44,129,766)	28.97%
Total	**$558,053,167**	**142.32%**

Supplement B: Third-Party Leakage/Capture Reports

EMSI 2021 Total Sales, Total Demand, and Leakage/Capture Analysis

NAICS	Description	2021 Total Sales	2021 Total Demand	2021 Capture/(Leakage)	2021 Capture Rate
441	**Motor Vehicle and Parts Dealers**	**$154,359,906**	**$107,786,949**	**$46,572,957**	**143.21%**
4411	Automobile Dealers	$104,869,195	$80,673,942	$24,195,253	129.99%
4412	Other Motor Vehicle Dealers	$22,977,220	$8,158,258	$14,818,962	281.64%
4413	Automotive Parts, Accessories, and Tire Stores	$26,513,490	$18,954,749	$7,558,741	139.88%
442	**Furniture and Home Furnishings Stores**	**$34,600,848**	**$17,571,378**	**$17,029,471**	**196.92%**
4421	Furniture Stores	$16,376,472	$9,680,205	$6,696,267	169.17%
4422	Home Furnishings Stores	$18,224,376	$7,891,173	$10,333,204	230.95%
443	**Electronics and Appliance Stores**	**$21,265,034**	**$20,179,930**	**$1,085,104**	**105.38%**
444	**Building Material and Garden Equipment and Supplies Dealers**	**$97,107,822**	**$78,952,273**	**$18,155,549**	**123.00%**
4441	Building Material and Supplies Dealers	$81,504,497	$69,754,166	$11,750,331	116.85%
4442	Lawn and Garden Equipment and Supplies Stores	$15,603,325	$9,198,107	$6,405,218	169.64%
445	**Food and Beverage Stores**	**$56,435,947**	**$75,069,708**	($18,633,761)	**75.18%**
4451	Grocery Stores	$48,002,559	$65,235,198	($17,232,639)	73.58%
4452	Specialty Food Stores	$7,671,305	$5,745,071	$1,926,233	133.53%
4453	Beer, Wine, and Liquor Stores	$762,082	$4,089,438	($3,327,356)	18.64%
446	**Health and Personal Care Stores**	**$50,419,157**	**$31,877,070**	**$18,542,086**	**158.17%**
447	**Gasoline Stations**	**$29,239,626**	**$35,835,161**	($6,595,536)	**81.59%**
448	**Clothing and Clothing Accessories Stores**	**$94,510,948**	**$39,321,564**	**$55,189,384**	**240.35%**
4481	Clothing Stores	$69,173,793	$26,390,875	$42,782,918	262.11%
4482	Shoe Stores	$10,782,317	$5,600,299	$5,182,018	192.53%
4483	Jewelry, Luggage, and Leather Goods Stores	$14,554,837	$7,330,389	$7,224,448	198.55%
451	**Sporting Goods, Hobby, Musical Instrument, and Book Stores**	**$38,929,075**	**$12,570,034**	**$26,359,041**	**309.70%**
4511	Sporting Goods, Hobby, and Musical Instrument Stores	$34,906,959	$11,326,287	$23,580,672	308.19%
4512	Book Stores and News Dealers	$4,022,117	$1,243,747	$2,778,369	323.39%
452	**General Merchandise Stores**	**$221,212,617**	**$76,885,193**	**$144,327,424**	**287.72%**
4522	Department Stores	$8,528,935	$21,134,091	($12,605,156)	40.36%
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	$212,683,682	$55,751,102	$156,932,580	381.49%
453	**Miscellaneous Store Retailers**	**$97,789,003**	**$31,063,548**	**$66,725,454**	**314.80%**
4531	Florists	$706,521	$1,821,314	($1,114,793)	38.79%
4532	Office Supplies, Stationery, and Gift Stores	$16,421,156	$6,052,997	$10,368,159	271.29%
4533	Used Merchandise Stores	$43,913,389	$5,237,748	$38,675,640	838.40%
4539	Other Miscellaneous Store Retailers	$36,747,937	$17,951,489	$18,796,448	204.71%
454	**Nonstore Retailers**	**$371,962,378**	**$95,353,335**	**$276,609,043**	**390.09%**
4541	Electronic Shopping and Mail-Order Houses	$31,603,425	$67,814,363	($36,210,939)	46.60%
4542	Vending Machine Operators	$0	$2,117,665	($2,117,665)	0.00%
4543	Direct Selling Establishments	$340,358,953	$25,421,307	$314,937,646	1338.87%

ESRI 2017 Retail Gap Analysis

NAICS	2017 Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
441	Motor Vehicle & Parts Dealers	$194,627,189	$495,727,494	$(301,100,305.00)
4411	Automobile Dealers	$160,986,503	$387,625,167	$(226,638,664.00)
4412	Other Motor Vehicle Dealers	$17,514,509	$39,526,463	$(22,011,954.00)
4413	Auto Parts, Accessories & Tire Stores	$16,126,177	$68,575,864	$(52,449,687.00)
442	Furniture & Home Furnishings Stores	$28,581,484	$92,560,436	$(63,978,952.00)
4421	Furniture Stores	$18,675,957	$67,036,234	$(48,360,277.00)
4422	Home Furnishings Stores	$9,905,527	$25,524,202	$(15,618,675.00)
443	Electronics & Appliance Stores	$32,486,257	$140,058,322	$(107,572,065.00)
444	Bldg Materials, Garden Equip. & Supply Stores	$57,507,755	$119,547,458	$(62,039,703.00)
4441	Bldg Material & Supplies Dealers	$53,509,117	$114,557,822	$(61,048,705.00)
4442	Lawn & Garden Equip & Supply Stores	$3,998,638	$4,989,636	$(990,998.00)
445	Food & Beverage Stores	$153,452,383	$125,420,936	$28,031,447.00
4451	Grocery Stores	$137,284,429	$114,023,018	$23,261,411.00
4452	Specialty Food Stores	$10,221,169	$10,779,612	$(558,443.00)
4453	Beer, Wine & Liquor Stores	$5,946,785	$618,306	$5,328,479.00
446,4461	Health & Personal Care Stores	$41,624,400	$99,188,956	$(57,564,556.00)
447,4471	Gasoline Stations	$101,309,300	$106,254,057	$(4,944,757.00)
448	Clothing & Clothing Accessories Stores	$45,585,044	$155,131,107	$(109,546,063.00)
4481	Clothing Stores	$31,777,560	$124,951,485	$(93,173,925.00)
4482	Shoe Stores	$5,129,958	$19,442,046	$(14,312,088.00)
4483	Jewelry, Luggage & Leather Goods Stores	$8,677,526	$10,737,576	$(2,060,050.00)
451	Sporting Goods, Hobby, Book & Music Stores	$38,609,952	$93,140,565	$(54,530,613.00)
4511	Sporting Goods/Hobby/Musical Instr Stores	$34,183,911	$81,002,219	$(46,818,308.00)
4512	Book, Periodical & Music Stores	$4,426,041	$12,138,346	$(7,712,305.00)
452	General Merchandise Stores	$171,763,491	$401,988,158	$(230,224,667.00)
4521	Department Stores Excluding Leased Depts.	$101,404,516	$240,734,331	$(139,329,815.00)
4529	Other General Merchandise Stores	$70,358,975	$161,253,827	$(90,894,852.00)
453	Miscellaneous Store Retailers	$37,864,965	$52,437,601	$(14,572,636.00)
4531	Florists	$1,389,554	$1,050,247	$339,307.00
4532	Office Supplies, Stationery & Gift Stores	$8,059,475	$16,479,116	$(8,419,641.00)
4533	Used Merchandise Stores	$4,717,004	$6,527,507	$(1,810,503.00)
4539	Other Miscellaneous Store Retailers	$23,698,932	$28,380,731	$(4,681,799.00)
454	Nonstore Retailers	$16,200,440	$24,303,387	$(8,102,947.00)
4541	Electronic Shopping & Mail-Order Houses	$14,476,451	$21,433,451	$(6,957,000.00)
4542	Vending Machine Operators	$387,525	$0	$387,525.00
4543	Direct Selling Establishments	$1,336,464	$2,869,936	$(1,533,472.00)
722	Food Services & Drinking Places	$101,148,080	$126,001,563	$(24,853,483.00)
7223	Special Food Services	$1,866,567	$1,575,987	$290,580.00
7224	Drinking Places - Alcoholic Beverages	$3,099,948	$275,353	$2,824,595.00
7225	Restaurants/Other Eating Places	$96,181,565	$124,150,223	$(27,968,658.00)
	Total	**$1,866,101,523**	**$3,718,018,745**	**$(1,851,917,222.00)**

Supplement C: City of Orem Taxable Sales Data

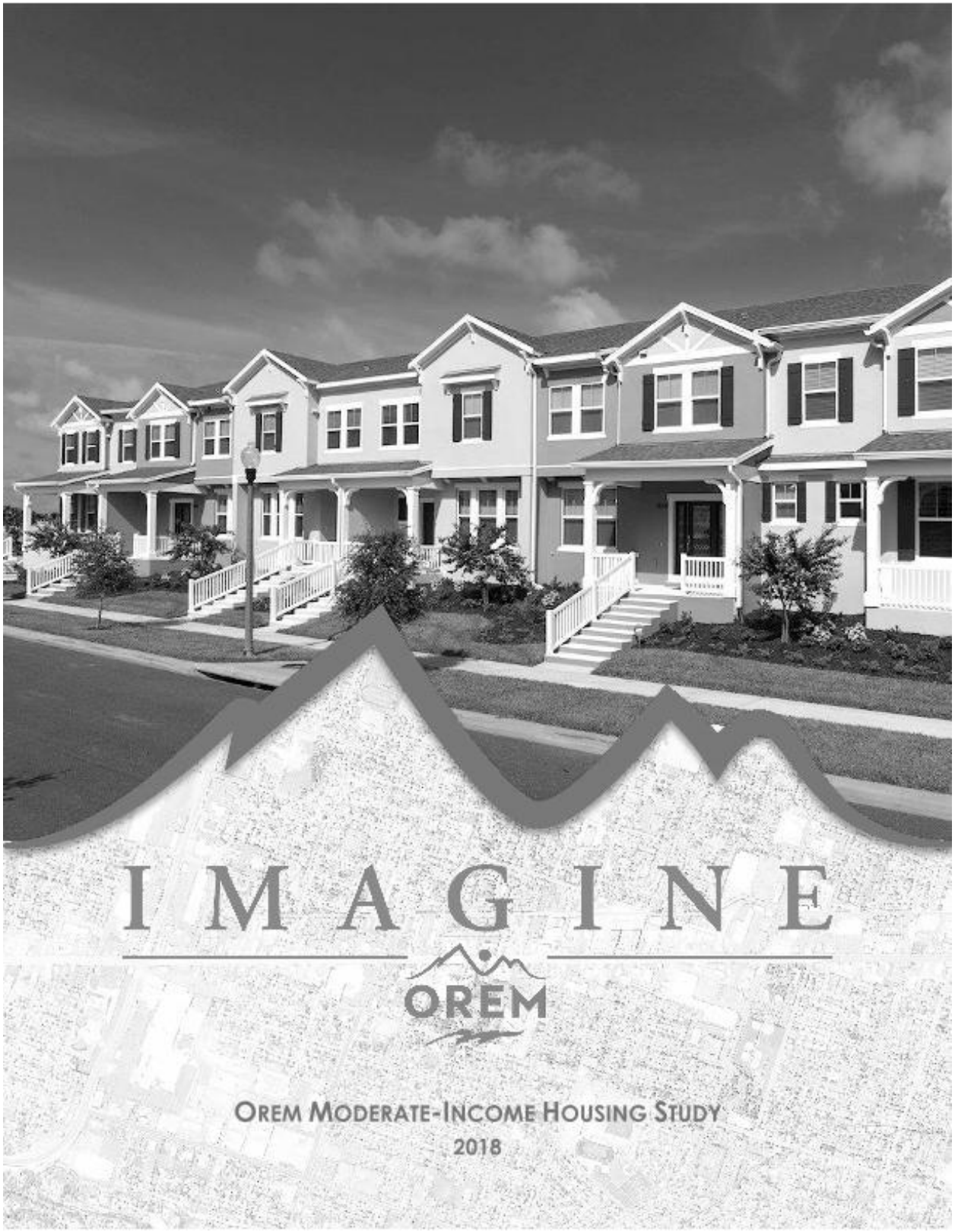
2020 Gross Aggregate Taxable Sales and Purchases Data Provided by the Utah State Tax Commission

Industry Description	2020 Gross Aggregate Taxable Sales and Purchases
MOTOR VEHICLE AND PARTS DEALERS	
New Car Dealers	$201,824,190.00
Used Car Dealers	$107,658,744.00
Other Motor Vehicle Dealers	$12,523,023.00
Automotive Parts, Accessories, and Tire Stores	$32,410,360.00
Total	**$354,416,317.00**
FURNITURE AND HOME FURNISHINGS STORES	
Furniture Stores	$78,219,954.00
Home Furnishing Stores	$16,581,745.00
Total	**$94,801,699.00**
ELECTRONICS AND APPLIANCE STORES	
Electronics and Appliance Stores	$50,905,997.00
Total	**$50,905,997.00**
BUILDING MATERIAL AND GARDEN EQUIPMENT AND SUPPLIES DEALERS	
Building Material and Supplies Dealers	$172,809,939.00
Lawn and Garden Equipment and Supplies Stores	$18,873,870.00
Total	**$191,683,809.00**
FOOD AND BEVERAGE STORES	
Grocery Stores	$205,483,565.00
Specialty Food Stores	$11,870,054.00
Beer, Wine, and Liquor Stores (Fewer than 10)	$6,500,000.00
Total	**$223,853,619.00**
HEALTH AND PERSONAL CARE STORES	
Cosmetics, Beauty Supplies, and Perfume Stores	$14,278,010.00
Optical Goods Stores	$5,023,979.00
Other Health and Personal Care Stores	$6,243,002.00
Pharmacies & Drug Stores	$240,787.00
Total	**$25,785,778.00**

Industry Description	2020 Gross Aggregate Taxable Sales and Purchases
GASOLINE STATIONS	
Gasoline Stations	$28,359,562.00
Other Gasoline Stations (Fewer than 10)	$500,000.00
Total	**$28,859,562.00**
CLOTHING AND CLOTHING ACCESSORIES STORES	
Clothing Stores	$89,257,934.00
Shoe Stores	$7,962,841.00
Jewelry, Luggage, and Leather Goods Stores	$8,119,567.00
Total	**$105,340,342.00**
SPORTING GOODS, HOBBY, BOOK, AND MUSIC STORES	
Book Stores and New Dealers	$9,335,855.00
Hobby, Toy, and Game Stores	$5,405,639.00
Musical Instruments and Supplies Stores	$11,656,605.00
Sewing, Needlework, and Piece Goods Stores	$4,680,116.00
Sporting Goods Stores	$61,041,310.00
Total	**$92,119,525.00**
GENERAL MERCHANDISE STORES	
Department Stores (Fewer than 10)	$150,000.00
General Merchandise Stores, Including Warehouse Clubs and Supercenters	$474,537.00
Total	**$624,537.00**
MISC. STORE RETAILERS	
Florists	$473,506.00
Office Supplies, Stationery, and Gift Stores	$11,236,644.00
Other Miscellaneous Store Retailers	$60,635,701.00
Used Merchandise Stores	$3,416,026.00
Total	**$75,761,877.00**
NONSTORE RETAILERS	
Electronic Shopping and Mail-Order Houses	$157,663,019.00
Vending Machine Operators	$303,059.00
Direct Selling Establishments	$7,801,449.00
Total	**$165,767,527.00**

Industry Description	2020 Gross Aggregate Taxable Sales and Purchases
PERFORMING ARTS, SPECTATOR SPORTS, AND RELATED INDUSTRIES	
Performing Arts Companies (Fewer than 10)	$1,000.00
Spectator Sports (Fewer than 10)	$20,000.00
Promoters of Performing Arts, Sports, and Similar Events (Fewer than 10)	$3,000.00
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures (Fewer than 10)	$1,000.00
Independent Artists, Writers, and Performers	$84,509.00
Total	**$109,509.00**
MUSEUMS, HISTORICAL SITES, AND SIMILAR INSTITUTIONS	
Museums, Historical Sites, and Similar Institutions (Fewer than 10)	$45,000.00
Total	**$45,000.00**
AMUSEMENT, GAMBLING, AND RECREATION INDUSTRIES	
Amusement, Gambling, and Recreation Industries	$15,039,695.00
Total	**$15,039,695.00**
ACCOMMODATION	
Bed-and-Breakfast Inns and All Other Traveler Accommodation	$4,018,364.00
Hotels and Motels	$7,632,540.00
Total	**$11,650,904.00**
FOOD SERVICES AND DRINKING PLACES	
Full-Service Restaurants	$11,549,649.00
Limited-Service Restaurants	$7,808,904.00
Special Food Services	$21,150,232.00
Cafeterias, Grill Buffets, Buffets, Snack and Nonalcoholic Beverage Bars	$2,755,855.00
Drinking Places (Alcoholic Beverages) (Fewer than 10)	$350,000.00
Total	**$43,614,640.00**
REPAIR AND MAINTENANCE	
Automotive Repair and Maintenance	$45,605,599.00
Electronic and Precision Equipment Repair and Maintenance	$1,376,492.00
Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	$163,233.00
Personal and Household Goods Repair and Maintenance	$2,183,746.00
Total	**$49,329,070.00**
PERSONAL AND LAUNDRY SERVICES	
Personal and Laundry Services	$7,676,869.00
Religious, Grantmaking, Civic, Professional, and Similar Organizations	$371,027.00
Total	**$8,047,896.00**
GRAND TOTAL	**$1,537,757,303.00**


OREM
FAMILY CITY USA


IMAGINE
OREM
OREM MODERATE-INCOME HOUSING STUDY
2018

OREM MODERATE-INCOME HOUSING STUDY

SEPTEMBER 2018

Prepared for:

The City of Orem

56 North State Street

Orem, Utah

Prepared by:

Orem City Planning Division

J. Kirby Snideman, AICP - Long Range City Planner

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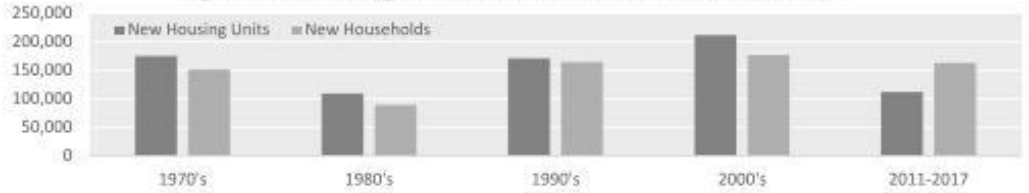
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EXECUTIVE SUMMARY

The purpose of this study is to understand the current challenges in the housing market and examine the options available to provide a reasonable opportunity for a variety of housing, including moderate income housing. Strategies that will encourage affordable housing in Orem are recommended, and it is intended that this study will be the basis for ongoing discussions by the City Council to develop a moderate-income housing plan and ensure that Orem remains a City where everyone is welcome.

Until recently, the Utah housing market provided more new housing units than new households--in other words, the supply of housing kept up with the demand. Since 2011 this has not been the case. The reasons for this are varied, but chief among them are land constraints, restrictive zoning ordinances, and rising construction costs. While these are national trends, Utah has been disproportionately impacted due to our larger than average families and our high rate of population growth.

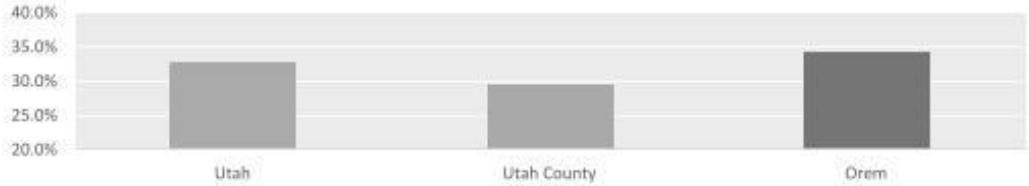
Figure 1: New Housing Units vs. New Households in Utah, 1970 to 2017



Source: U.S. Census Bureau and Ivory-Boyer Construction Database

Compared to the Utah County and State average, households in Orem that make roughly 80% of the household area median income are more likely to find housing that does not exceed 30% of their income (the general measure of affordability). This is due in large part to Orem's long history of zoning for a range of housing types, many of which offer lower housing costs. Housing options in Orem include smaller single-family homes on smaller lots, as well as accessory apartments, duplexes, triplexes, quadplexes, and larger multifamily housing.

Figure 2: % Households Earning $49,999 or Less & Able to Find Housing for Less than 30% of their Income



Source: U.S. Dept. of Housing & Urban Development (2018). Comprehensive Housing Affordability Strategy, 2011-2015

Despite this, affordability is still an issue in Orem. To allow for strategic growth and help increase the supply of housing, the Orem City Council has adopted the City Center District mixed-use zone and is considering additional Districts along State Street. As well, Orem will be exploring other strategies to increase the supply of affordable housing in the City, as outlined in this study. Ultimately, Orem recognizes that this a regional issue, and the City is committed to being part a regional response.

STUDY OVERVIEW & HIGHLIGHTS

Introduction

The term affordable housing is used to describe housing, rental or owner-occupied, that is affordable no matter what one's income is. Generally, housing costs at or below 30% of one's income is deemed be affordable. Conversely, housing that costs greater than 30% is deemed un-affordable. Orem, like most communities in Utah, has a lack of affordability housing, particularly for those making below the City's median income.

While some see any growth as negative, most current residents recognize that growth has been an overall positive part of Orem's history. Feedback from recent public outreach indicates that the majority of residents are supportive of additional growth as long as it is well planned and strategically located.

As Orem continues to grow, part of the strategy going forward should address the challenge of affordability. While rising housing costs is a regional challenge, the City of Orem can take steps to address the issue locally. Currently, the City has zoned for multiple types of housing, including student housing, multifamily housing, senior housing, and mixed-use housing. The purpose of this study is to understand the current challenges in the housing market and examine the options available to provide a reasonable opportunity for a variety of housing, including moderate income housing.

Demographic Trends

The general perception in Orem is that the City is growing rapidly. In reality, Orem has experienced moderate growth at a rate much slower than Utah County for the last few decades, since most of Orem's growth came several decades previous. Currently, there is little remaining undeveloped land in Orem, whereas other parts of Utah County--particularly the northern part--have large tracts of undeveloped land that are currently experiencing significant new growth.

The other demographic and economic trends are relatively positive with local unemployment remaining lower than national levels for some time. It is anticipated that employment gains will continue as the local and State economy are expected to remain strong. This, combined with Utah's big families and continual growth, means that housing costs will likely continue to rise.

Housing Market Trends – For-Sale Homes

Overall, the market for for-sale units in Orem and Utah County has increased significantly in the last decade since the recession. In 2010, 65% of all homes sold in Orem and 55% of all homes sold in Utah County were sold at a price under $200,000. As of the summer of 2018, only 14% of homes sold in Orem and 8% of homes sold in Utah County were under $200,000.

Housing Market Trends –Rentals

There are currently 12,641 multifamily units in Orem. The majority of these are rentals. Based on the survey completed by the City, the average occupancy rate for multifamily rentals in the City is estimated to be at 97%. Demand for rental housing in Orem is very high. The average rental rate for all types of listed rental units in Orem is estimated at $1,142, which represents a 7.9% increase from the previous year.

New Construction Trends

Orem added 1,747 single family units and 4,906 multifamily units from 2000 to 2018. This accounts for 8.8% of the units assumed to have been added by Utah County. In Orem, some have made the claim that the City is taking too much growth from the rest of the County. This data demonstrates otherwise. While Orem represents 16.3% of the County's population (100,181 of 613,211 in 2018), it has only added 8.8% of the new housing stock since the year 2000 (when Orem made up 22.9% of the County's population).

Measuring Affordability in Orem

Compared to the County average, households in Orem making $49,999 or less (roughly 80% of the household area median income) are more likely to find housing that does not exceed 30% of their income. In Orem, 34.4% of households who earn less than $49,999 income can find affordable housing, compared to 33.0% for the State and 29.7% for Utah County.

While Orem has more affordable housing than many cities in Utah County, there is a still a need for additional moderate-income housing units. According to the data, 19.8% of Orem households earn $34,999 or less (roughly 50% of the household median income) and have housing costs greater than 30%. This represents roughly 5,284 households and an estimated 18,500 Orem residents.

Recommendations

Based on the data contained in this report as well as discussions with housing advocates, realtors, developers, community members, and other stakeholders, the following strategies have been recommended for further study:

- Explore Public/Private Partnerships for Affordable Housing
- Fast Track Affordable Housing Projects
- Study Lot Size and Housing Unit Size Minimums
- Educate Residents on Housing Affordability Issues
- Explore a Community Land Trust
- Rediscover the Missing Middle
- Re-Invest in Orem's Older Neighborhoods

INTRODUCTION

The Purpose of this Study

The purpose of this study is to understand the current challenges in the housing market and examine the options available to provide a reasonable opportunity for a variety of housing, including moderate income housing. Strategies that will encourage affordable housing in Orem are recommended, and it is intended that this study will be the basis for ongoing discussions by the City Council to develop a moderate-income housing plan and ensure that Orem remains a City where everyone is welcome. In addition, this study will be a general resource for the latest information related to population growth and housing needs for the City of Orem.

What is Affordable Housing?

The term affordable housing is used to describe housing, rental or owner-occupied, that is affordable no matter what one's income is. Generally, housing costs at or below 30% of one's income is deemed be affordable. Moderate income housing is defined by Utah Code Section 10-9a-103(21) as "housing occupied or reserved for occupancy by households with a gross household income equal to or less than 80% of the median income of the county in which the city is located." The following table displays the households in Orem based on their HAMFI – HUD Area Median Family Income.

Table 1: Orem Households Income Distribution Overview

Orem Income Distribution Overview	Owner	Renter	Total
Total Households	15,870	10,280	26,150
Household Income <= 30% HAMFI	885	2,210	3,095
Household Income >30% to <=50% HAMFI	1,270	2,075	3,345
Household Income >50% to <=80% HAMFI	2,495	2,560	5,055
Household Income >80% to <=100% HAMFI	1,825	1,130	2,955
Household Income >100% HAMFI	9,395	2,305	11,700

Source: U.S. Dept. of Housing & Urban Development. (2018). Comprehensive Housing Affordability Strategy, 2011-2015

The HAMFI is calculated according to percentages of median incomes by family size and location based on the census's American Community Survey. The limits fall into three categories: low (80 percent of the median income), very low (50 percent), and extremely low (30 percent of the median income or the federal poverty line, whichever is greater). In Orem 5,055 households are considered low income, 3,345 are considered very low income, and 3,095 households are considered extremely low income.

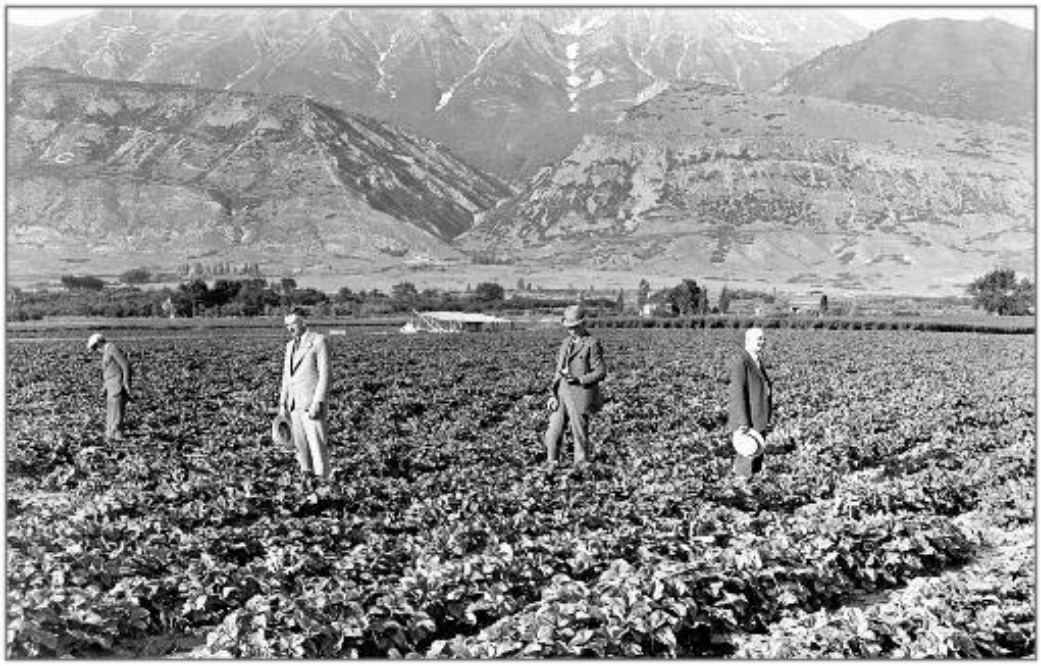
The City of Orem

Orem is the fifth largest city in Utah, with an estimated 2018 population of 100,171. Orem is located at the heart of Utah County and the Provo-Orem Metropolitan Area (consisting of both Utah and Juab Counties), one of the fastest growing metro areas in the Nation. Although the area is experiencing considerable growth, particularly in the northern end of the County, Orem's growth is rather moderate. Over the last decade and a half, Orem has grown at roughly a 1% annual average growth rate, compared to over 3% for Utah County.

Orem's Early History

The City of Orem was organized in 1919 and named after Walter C. Orem, President of the Salt Lake and Utah Railroad. Prior to its incorporation, Orem was known as the "Provo Bench," and its fertile orchards and farmlands added to Provo's early reputation as the "Garden City of Utah." Farms, orchards, and open fields dominated the landscape, consisting of large-acre homesteads and a few small businesses supported by local trade. To facilitate the movement of people and agricultural products, train tracks were laid down through what is now Orem Boulevard, connecting Utah Valley with Salt Lake Valley, and by extension, the rest of the country.

Figure 3: Historic View of the Stratton Orchard and Strawberry Fields in the 1920's



1940's to the 1970's

The completion of Geneva Steel in the mid 1940's marked a turning point for the City. Orem began to see significant growth fueled by the proximity of new jobs and industry. Contrary to popular perception, Orem did not develop as an exclusive "bedroom community" for a certain class of people or a narrow set of uses. The City's first zoning ordinance was adopted in 1946, creating zones within the City for multiple and varied uses with a range of densities.

With new jobs came an increase in home building activity. Fields and farms were sold into mostly small homes on small lots for working class residents. Multifamily homes were also built during this time, with duplexes, quadplexes, and medium density complexes mixed throughout the community, offering more affordable options.

Figure 4: Historic View of Geneva Steel in the 1940's



1970's to the 2000's

As the population in the larger region increased, Orem became the commercial center of Utah County. Having one long commercial corridor rather than a downtown gave Orem an advantage in attracting auto-oriented retail businesses. As well, it provided a relatively large area of commercially zoned land for businesses to spread out. The University mall opened for business in 1973, further solidifying Orem as a retail hub. Major institutional uses such as schools and hospitals also located in the City, taking advantage of Orem's central location within the County.

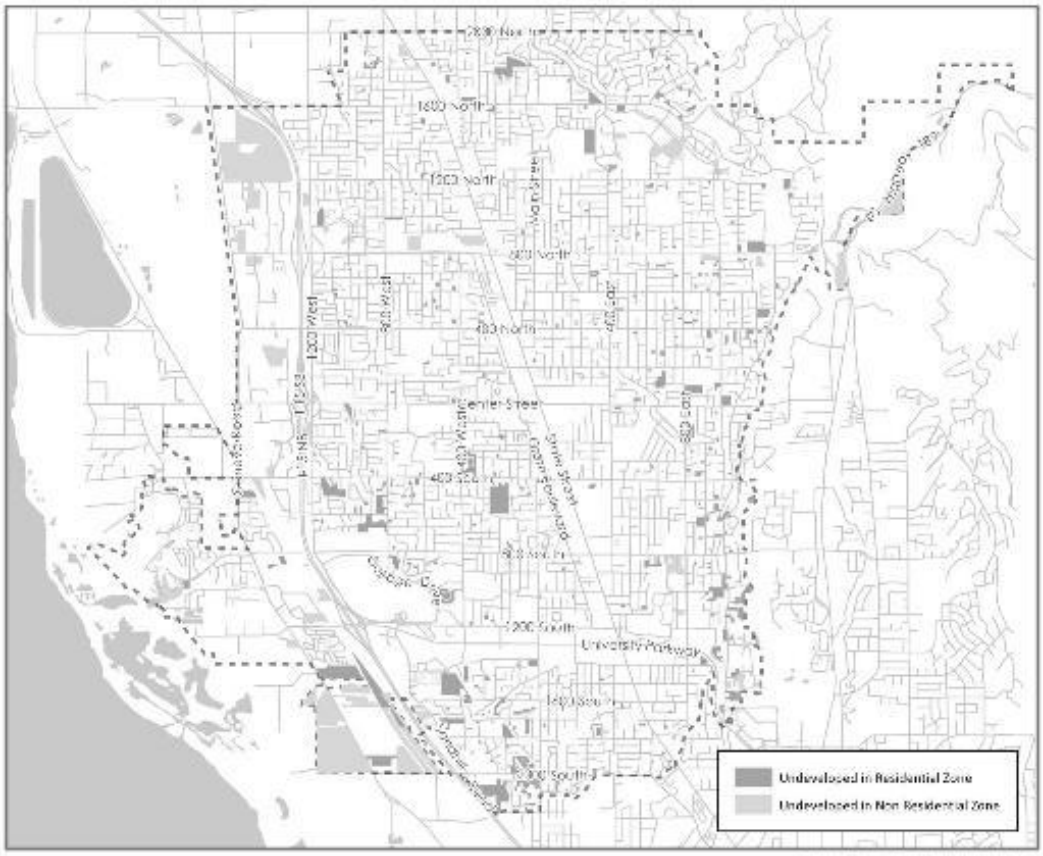
The economic growth experienced during this period was an engine for additional housing construction. However, new single-family homes built during this time tended to be larger, on larger lots, and in larger subdivisions. As a result, much of Orem's agricultural land was sold and developed into low density residential during this period. Unlike older neighborhoods that contained a wider mix of uses and types of housing, these newer subdivisions tended to be more homogeneous and strictly single family detached. As a consequence, the demand and supply for multifamily housing was concentrated in larger, higher density complexes.

2000's to The Future

There is very little undeveloped land remaining in Orem. As of 2018, undeveloped land is estimated at 889 acres and accounts for less than 8% of the total land area in Orem. Of that amount, an estimated 378 acres, or 3% of the Orem total, is currently zoned residential. It is expected that most or all of this remaining residential land will develop as low density residential. Under average occupancy rates, this would only allow for roughly 5,000 new

residents. In contrast, over the next 40 years, Utah County is expected to add roughly one million new residents. The majority of this growth is expected to come from the natural increase of Utah residents.

Figure 5: Undeveloped Land in Orem



Source: Orem City Planning Division

With the supply of housing constrained in the City and also in the County, Orem's property values have continued to increase year over year. Currently the median home price in Orem is estimated at just under $250K and the median list price of homes for sale at roughly $330K.

Due to the decreasing availability of undeveloped land, and in response to demand for more affordable housing options, developers and homebuilders have showed increasing interest in recent years for higher density developments. Like the new single-family subdivisions of the 1970's, the higher density developments of today have some concerned, despite making up less than 5% of the housing units in Orem.

While some see any growth as negative, most current residents recognize that growth has been an overall positive part of Orem's history. Feedback from recent public outreach indicates that the majority of residents are supportive of additional growth as long as it is well planned and strategically located.

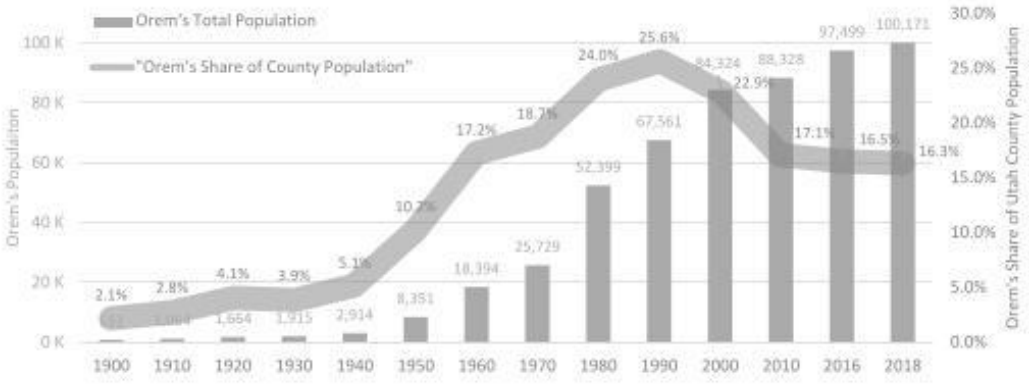
Commercial Activity and State Street

Over the latter half of the 20th century, Orem became the commercial center of Utah County. This happened for two primary reasons: the State Street retail corridor and population growth.

Orem's first zoning ordinance was adopted on April 10th, 1946. Previous to the adoption, there was a discussion about creating a central business zone for a future Orem downtown. Due to competing commercial interests at multiple locations along the State Highway (State Street), it was decided that instead of creating a central business zone, the entire State Highway corridor in Orem would be zoned C-2 (general) commercial. Having one long commercial corridor rather than a downtown gave Orem an advantage in attracting auto-oriented retail businesses. As well, it provided a relatively large area of commercially zoned land for businesses to develop.

As explained previously, with the construction of the Geneva Steel plant, Orem began a transformation from an agricultural community to an employment center. Other industries, business, and institutions also located in Orem to take advantage of the existing labor pool and to benefit from the central location within Utah County.

Figure 6: Orem Population as a Share of Utah County from 1900 to 2018



Source: US Census / American Community Survey, Orem City Planning Division

In 1950, Orem had 8,351 residents and represented roughly one tenth of the population in Utah County. By 2000, Orem had grown to 84,324 residents and made up nearly one quarter of the County's population. With such a large share of the County's population, many businesses located in Orem to serve the local population and also to attract patrons from surrounding Cities.

Although the City has continued to grow, since 1990, Orem's share of the County's population has decreased. Most cities in the County are now large enough to have their own local retail, and a few have become regional retail hubs that compete directly with Orem. This, combined with the trends of increased online sales and

experiential shopping (where shoppers prefer to spend more money in places that are engaging, pedestrian friendly, and have amenities) has led to a decline in some parts along State Street.

Residential Zoning in Orem

The City has multiple zoning classifications which can be used for residential development ranging in minimum lots size and allowable density. They are R5 (5,000 sq. ft. residential); R6 (6,000 sq. ft. residential); R6.5 (6,500 sq. ft. residential); R7.5 (7,500 sq. ft. residential); R8 (8,000 sq. ft. residential); R12 (12,000 sq. ft. residential); R20 (20,000 sq. ft. residential); OS1 (1 acre residential); OS5 (5 acre residential); PRD (Planned Residential Development); PD (Planned Development); and mixed-use Districts.

These zones were created to meet the wide range of housing needs of the residents of the City. Each of the zones is intended to provide well designed residential development with compatible uses as outlined in the zoning ordinance. Residential uses that may be permitted in each zone include single-family dwellings, accessory apartments, condominiums, townhomes, and multifamily developments.

Student Housing Developments

One of the growing housing needs in Orem is for students. Utah Valley University is continuing to grow, and a larger share of students are desiring to live near campus as opposed to commuting from further away. Designated areas in proximity to Utah Valley University have been established for student housing. These designated areas will reduce car trips, make student life more affordable, and discourage demand for family housing in residential neighborhoods to be converted into student housing (and adversely impact housing affordability). The accommodation for student housing development has been made in Orem utilizing planned development zones and the Student Housing Overlay zone. The zones allow for increased occupancy and greater density, which has encouraged affordability for the student population.

Multifamily Developments

Multifamily development is considered the development of any units which are attached. This includes small unit developments such duplexes, triplexes, and quadplexes as well as townhomes, condominiums, and larger multifamily complexes with 20 or more units in each building. Orem has a long history with multifamily development, having approved denser, more affordable units in the past to support blue collar workers associated with Geneva Steel and other nearby industry. Because of this, and because of continued willingness to zone for and allow for denser developments, Orem has a greater share of multifamily housing than the average for both Utah County and the State of Utah.

Accessory Apartments

Unlike some cities (such as nearby Provo) that only allow accessory apartments in a relatively small area of the city, Orem allows accessory apartments in nearly all residential areas in every part of the City. To qualify, accessory apartments need to be in single family homes that are owner-occupied, and meet certain size limits and parking availability, among other requirements. Because they tend to be smaller in size and less expensive to construct or retrofit, accessory apartments allow for more affordable housing options for residents at different life stages, such as singles, young couples, and particularly seniors —who benefit greatly from sharing

the cost of a home and having a close neighbor. The City currently has an estimated 600 legal accessory apartments.

Senior Overlay Zone

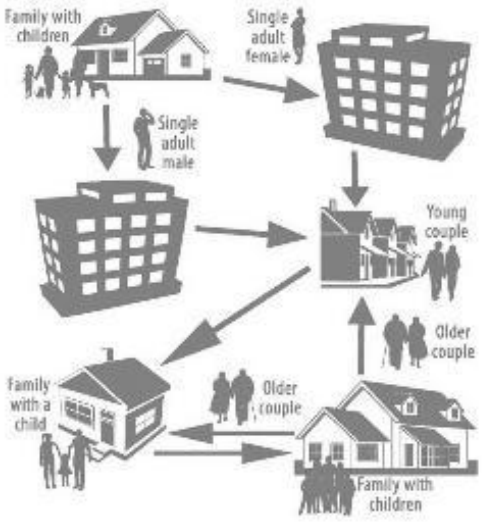
In 2012 the City approved an overlay zone to assists income restricted seniors. The Affordable Senior Housing (ASH) overlay allows up to four units to be constructed on a single parcel. The tenancy of each unit is restricted to those over age 60 and at or less than 80% of the median income of the Orem/Provo MSA. Through this new ordinance, the City has added new affordable senior housing units, some of which are owned and operated by the Utah County Housing Authority.

The State Street Mixed-Use Districts

The State Street Corridor Master Plan, which involved thousands of Orem residents through meetings and outreach, proposed five mixed-use districts along State Street where future high-density development could be concentrated. Creating the Districts will allow for new investment and redevelopment along State Street while also allowing for strategically located high density development. This will allow the City to continue to grow and help alleviate the demand for new housing in Orem. Another benefit is that single family neighborhoods will be preserved by discouraging high density development in those areas of the City.

Housing for All Life Stages

Orem has adopted the slogan of Family City, USA. When some envision a family, they think of a father and mother with children. But today's families come in many shapes and sizes, and as individuals and couples age, their definition of family may change.



Orem seeks to be a city that is friendly for families at all of life's stages. To accomplish this, a variety of housing options need to be supplied. When a young individual leaves home to study at Utah Valley University, they need to find student housing. If that individual decides to get married, they will seek an affordable place for a young couple. If that couple decides to have children, a larger home will be sought. When those children leave, that couple may wish to downsize. And if a partner dies, a widow or widower may prefer to live in a senior community or assisted living facility where they can find support.

Orem is greatly benefited by the contribution of its long-term residents. These are the residents that often donate countless hours and make meaningful contributions to their communities. To ensure these residents can stay long-term, it is important that the City make plans to allow for a variety of housing for all life stages.

DEMOGRAPHIC TRENDS

Understanding the demographic trends for the area is an important element in assessing the market demand for new housing. Past, present and future demographic figures were collected and estimated by utilizing data from the following sources: US Census, American Community Survey, Nielsen/Claritas 2018 Estimates – PCensus for ArcView (hereafter referred to as "PCensus"), Bureau of Labor Statistics, and data collected by the Orem Planning Division.

Population and Households

The table below provides population and household counts for 1990, 2000, 2010, as well as estimates for 2018, covering Orem, Utah County, Utah State, and the United States. The first four columns with data provide the population and household counts and estimates. The last three columns provide a relative comparison for how much each geography has grown—looking at the annual average growth rate (AAGR).

Table 2: Population and Households, 1990 to 2018

Population	1990 Census	2000 Census	2010 Census	2018 Estimate	AAGR '90-'00	AAGR '00-'10	AAGR '10-'18
Orem	67,821	84,324	88,328	100,181	2.2%	0.5%	1.6%
Utah County	263,590	368,536	516,564	613,211	3.4%	3.4%	2.2%
Utah State	1,722,850	2,233,169	2,763,885	3,127,752	2.6%	2.2%	1.6%
United States	248,709,873	281,421,906	308,745,538	326,533,070	1.2%	0.9%	0.7%
Households	**1990 Census**	**2000 Census**	**2010 Census**	**2018 Estimate**	**AAGR '90-'00**	**AAGR '00-'10**	**AAGR '10-'18**
Orem	17,660	23,382	25,822	28,605	2.8%	1.00%	1.29%
Utah County	70,168	99,937	140,602	168,210	3.6%	3.47%	2.27%
Utah State	537,273	701,281	877,692	999,462	2.7%	2.27%	1.64%
United States	91,947,410	105,480,101	116,716,292	123,942,960	1.4%	1.02%	0.75%

AAGR = Annual Average Growth Rate ((FV/PV)^(1/n)) – 1)

Source: US Census, ACS, Nielsen/Claritas 2018 Estimates – PCensus for ArcView (hereafter referred to as PCensus), Orem Planning Division

As can be seen, Orem has grown at a rate slower than Utah County for the last few decades. This is due to the fact that most of Orem's growth came several decades previous. Currently, there is little remaining undeveloped land in Orem, whereas other parts of Utah County--particularly the northern part--have large tracts of undeveloped land that are currently experiencing significant new growth.

It is interesting to note that households in Orem and Utah County have generally grown at a rate faster than the population. Gaining more households than population occurs when there is an overall decrease in the number of persons per household—which is the trend in most places across the country. Couples are having fewer children than in previous decades, and there are more single person households.

Population and Age

The following table contains a breakdown of the 2000 and 2018 populations for Orem and Utah County by age range. Total population, median age, and the percentage change from 2000 to 2018 are also presented. The

accompanying chart displays the 2018 percentages for age ranges and includes data for the State of Utah and the United States, as well. Orem and Utah County had a similar age profile in 2000.

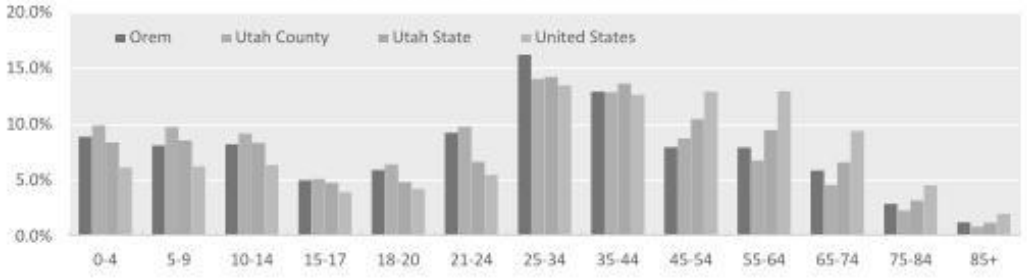
In 2018, Orem showed an increase in the share of residents aged 25 to 34 while the County saw a decrease. This can likely be explained by growth in Utah Valley University and an increase in the young single professionals who have congregated in the more urban areas of the County. Another interesting trend is the increase in the median age for both the City and the County. This is a trend that is occurring in many areas of the country as Americans are living longer and more often aging in place rather than relocating to retirement communities. Compared to the County, Orem saw a greater increase in the share of residents in all age ranges 55+.

Table 3: Population by Age, 2000 to 2018

Population By Age	Orem			Utah County		
	2000	2018	Change	2000	2018	Change
Total Population	84,324	100,181	18.8%	368,536	613,211	66.4%
Age 0 to 4	10.6%	8.9%	-1.7%	11.0%	9.9%	0.0%
Age 5 to 9	9.2%	8.1%	-1.1%	9.2%	9.7%	-0.5%
Age 10 to 14	9.3%	8.2%	-1.2%	8.5%	9.1%	-0.3%
Age 15 to 17	6.3%	5.0%	-1.3%	5.4%	5.1%	-1.0%
Age 18 to 20	6.9%	5.9%	-1.0%	8.6%	6.4%	-1.0%
Age 21 to 24	10.6%	9.2%	-1.4%	12.4%	9.8%	0.1%
Age 25 to 34	14.8%	16.2%	1.4%	15.2%	14.0%	1.0%
Age 35 to 44	11.0%	12.9%	1.9%	10.6%	12.8%	-1.9%
Age 45 to 54	9.2%	7.9%	-1.3%	8.0%	8.7%	-0.9%
Age 55 to 64	5.3%	7.9%	2.6%	4.8%	6.7%	3.2%
Age 65 to 74	3.6%	5.8%	2.2%	3.4%	4.6%	2.1%
Age 75 to 84	2.4%	2.9%	0.5%	2.2%	2.3%	-0.7%
Age 85 and over	0.9%	1.2%	0.3%	0.8%	0.8%	-0.1%
Median Age	24.0	28.0	16.7%	23.4	25.0	6.9%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

Figure 7: Percent of Population by Age, 2018



Source: US Census, American Community Survey, PCensus, Orem Planning Division

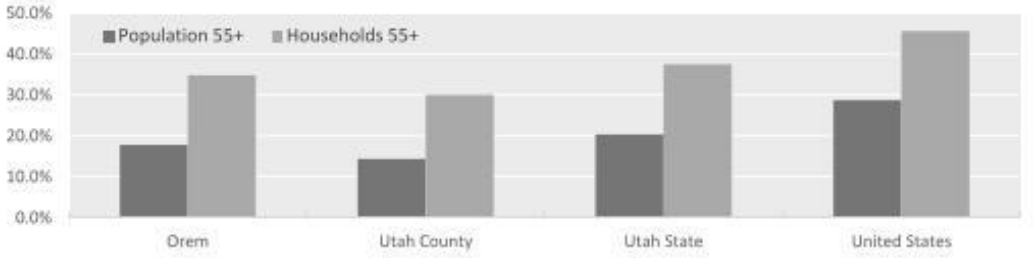
The following table provides the number and share of households where the householder is age 55 years or older. In Orem, householders 55+ make up over a third of all households. The chart below the table shows that despite being over a third of all householders in Orem, 55+ residents make up less than 20% of the total population. This is due to the fact that most 55+ households are made up of one or two members, while many younger households usually have more (due to children living at home).

Table 4: Households where the Householder is Age 55 Years and Older, 2018

	Orem	Utah County	Utah State	United States
Total households	28,605	168,210	999,462	123,942,960
Householder Age 55+	9,969	50,581	375,598	56,592,356
Percent of Total	34.9%	30.1%	37.6%	45.7%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

Figure 8: Population and Householders Age 55 and Older, 2018



Source: US Census, American Community Survey, PCensus

Educational Attainment and School Enrollment

The following table provides information regarding educational attainment in Orem. The total number and share of residents age 25 and older by educational attainment is displayed for both 2000 and 2018. Noteworthy observations include the following:

- Educational attainment has generally increased from 2000 to 2018.
- The number of individuals with a bachelor's degree increased by 3,949 and the number with a graduate or professional degree increased by 3,295. These typically represent residents with higher incomes. This also demonstrates that much of the new growth in Orem is from young educated professionals.

Table 5: Educational Attainment in Orem, 2000 to 2018

Educational Attainment	2000		2018 Estimate		% Change '00 - '18
	Number	% Share	Number	% Share	
Population 25 Years and Older	39,795	100.0%	54,879	100.0%	37.9%
Less than 9th Grade	994	2.5%	1,849	3.4%	86.1%
Some High School, No Diploma	2,408	6.1%	3,293	6.0%	36.7%
High School Graduate (or GED)	6,154	15.5%	8,852	16.1%	43.8%

Educational Attainment	2000		2018 Estimate		% Change '00 - '18
	Number	% Share	Number	% Share	
Some College, No Degree	12,322	31.0%	14,966	27.3%	21.5%
Associate Degree	3,989	10.0%	5,806	10.6%	45.6%
Bachelor's Degree	9,645	24.2%	13,594	24.8%	40.9%
Graduate or Professional Degree	2,868	11.9%	6,163	11.2%	114.9%
High School Graduate or Higher	34,978	87.9%	49,380	90.0%	41.2%
Bachelor's Degree or Higher	12,513	31.4%	19,756	36.0%	57.9%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

The following table provides enrollment figures for all Orem public schools elementary through high school, all of which are within the Alpine School District. The bottom of the table contains rows that add up the schools based on elementary, junior high, and high schools.

Overall, Orem has seen a 16% decline in public K-12 enrollment from 2000 to 2018. Some of the individual schools have seen enrollment decline by much more. The elementary schools highlighted in red have experienced the largest declines in enrollment. These are schools located in the older neighborhoods of Orem, where many of the homes have been converted into rental units.

This has happened in large part due to increase in demand for rental housing in Orem and the lack of supply. While Orem is building some multifamily and rental housing, the supply has not kept up with the demand. In addition, some Orem residents have actively opposed rental housing developments in an effort to stop Orem from changing. Ironically, not building enough rental housing has actually had a more profound impact on Orem, particularly in the older neighborhoods where the price investors can pay to turn homes into rentals has outstripped the buying power of potential home-owners.

Table 6: School District Enrollment in Orem Public Schools

Schools	Enrollment			
	2000	2017	Change	% Change
Mountain View HS	1,562	1,278	-284	-22%
Orem HS	1,510	1,214	-296	-24%
Timpanogos HS	1,631	1,506	-125	-8%
Canyon View JH	1,247	1,162	-85	-7%
Lakeridge JH	1,279	1,235	-44	-4%
Oak Canyon JH	1,432	1,416	-16	-1%
Orem JH	1,095	915	-180	-20%
Aspen ES	639	469	-170	-36%
Bonneville ES	906	570	-336	-59%
Cascade ES	698	739	41	6%
Cherry Hill ES	740	766	26	3%
Foothill ES	607	673	66	10%

Schools	Enrollment			
	2000	2017	Change	% Change
Geneva ES	578	373	-205	-55%
Hillcrest ES	488	353	-135	-38%
Northridge ES	891	737	-154	-21%
Orchard ES	787	743	-44	-6%
Orem ES	823	587	-236	-40%
Scera Park ES	447	444	-3	-1%
Sharon ES	461	401	-60	-15%
Suncrest ES	588	394	-194	-49%
Westmore ES	468	369	-99	-27%
Windsor ES	642	510	-132	-26%
Total HS Enrollment	4,703	3,998	-705	-18%
Total JH Enrollment	5,053	4,728	-325	-7%
Total ES Enrollment	9,763	8,128	-1635	-20%
Total Enrollment	19,519	16,854	-2665	-16%

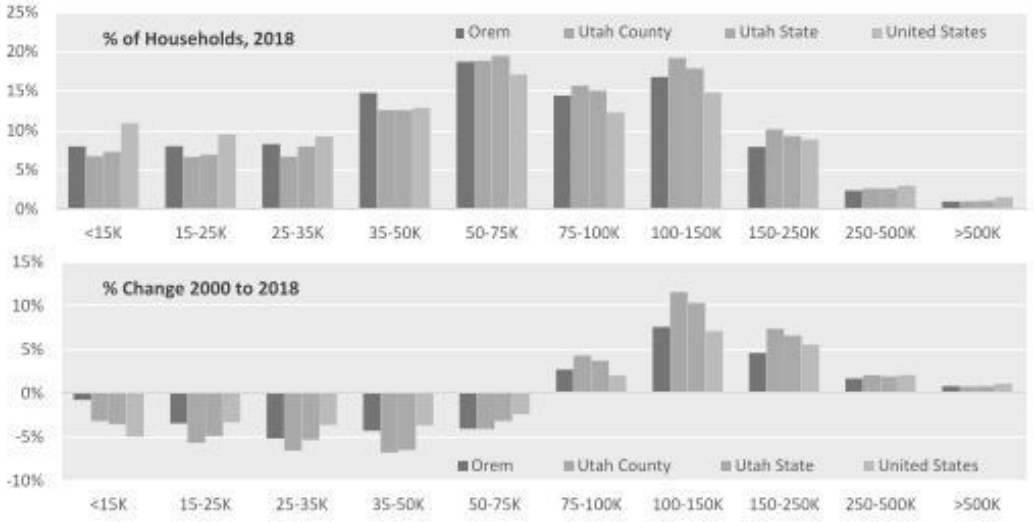
Source: Alpine School District

Note: HS = High School, JH = Junior High, ES = Elementary School

Income Trends

The following charts and table reveal the household income trends for Orem, Utah County, and Utah State—with a comparison to the United States in the chart.

Figure 9: Household Income Trends, 2000 to 2018



Source: US Census, American Community Survey, PCensus, Orem Planning Division

Table 7: Household Income Trends, 2000 to 2018

Location	Orem			Utah County			Utah State		
Year	2000	2018	% Change	2000	2018	% Change	2000	2018	% Change
Total Households	23,382	28,605	22.3%	99,937	168,210	68.3%	701,281	999,462	42.5%
Less than $15,000	8.7%	8.0%	-0.8%	9.9%	6.7%	-3.2%	10.8%	7.3%	-3.6%
$15,000 to $24,999	11.4%	8.0%	-3.5%	12.3%	6.6%	-5.7%	11.9%	6.9%	-4.9%
$25,000 to $34,999	13.4%	8.3%	-5.2%	13.3%	6.7%	-6.6%	13.3%	7.9%	-5.3%
$35,000 to $49,999	19.0%	14.7%	-4.3%	19.3%	12.6%	-6.8%	19.0%	12.6%	-6.5%
$50,000 to $74,999	22.8%	18.7%	-4.1%	22.9%	18.8%	-4.1%	22.6%	19.4%	-3.2%
$75,000 to $99,999	11.7%	14.4%	2.7%	11.4%	15.7%	4.3%	11.4%	15.1%	3.7%
$100,000 to $149,999	9.2%	16.8%	7.6%	7.6%	19.2%	11.6%	7.5%	17.8%	10.3%
$150,000 to $249,999	3.3%	7.9%	4.6%	2.7%	10.1%	7.4%	2.7%	9.3%	6.6%
$250,000 to $499,999	0.7%	2.4%	1.7%	0.6%	2.6%	2.1%	0.7%	2.6%	1.9%
$500,000 or more	0.2%	1.0%	0.8%	0.2%	1.0%	0.8%	0.3%	1.1%	0.8%
Median HH Income	$48,112	$64,822	34.7%	$46,345	$73,097	57.7%	$46,109	$69,694	51.2%
Inflation Adjusted Median	$70,648	$64,822	-8.2%	$68,053	$73,097	7.4%	$67,707	$69,694	2.9%

Source: US Census, American Community Survey, PCensus, Orem City Planning Division

* Note: Inflation adjustment is based on Bureau of Labor Statistics CPI Inflation Calculator ($100 in 2000 = $146.84 in 2018)

Noteworthy observations include the following:

- Although incomes have risen nominally in Orem, when adjusted for inflation the median household income estimate has actually decreased. This trend is not uncommon. Many areas of the country have not seen significant, inflation adjusted income growth in recent years.
- In Orem, 52.6% of all households make below $50,000, which is below the area median income for Utah County. The growing student population associated with UVU and BYU does play a part in the number of households who make below the area median income.

Housing Trends

The following tables and figures present information regarding the housing characteristics and trends in the area. The majority of this information is derived from the US Census and the American Community Survey, and in some cases is self-reported data. While this can generate minor anomalies, the information presented in this section still provides a valuable overview of the housing situation in the area.

Housing Type Trends

The following table contains an estimate of the number and type of housing units in Orem, Utah County, and Utah State for 2000 and 2018. Notable observations include the following:

- Total housing units in Orem increased by 25% from 2000 to 2018. While this is positive, it is significantly less than the number of units added in Utah County and Utah State, where the total grew by 69% and 44% respectively.

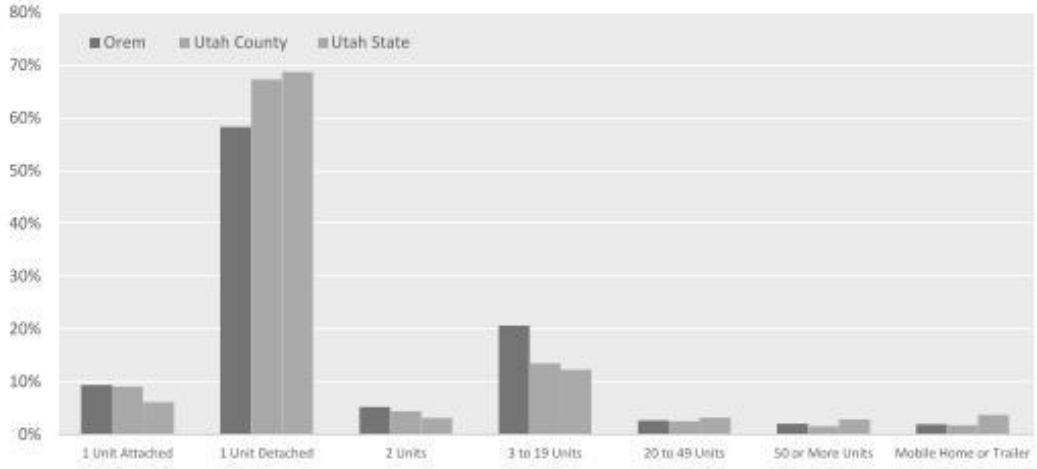
- The main driver for new housing is primarily job growth. As employment data presented later in the report will show, all three geographies have seen positive job growth over the last several years.
- Single family detached units make up the vast majority of all housing types in all geographies, accounting for 58%-69% of the housing stock.
- Duplexes and smaller unit multifamily housing (3-19 Units) make up a greater share of all housing types in Orem than compared to the County and the State; 26% in Orem compared to 18% in the County and 15% in the State.

Table 8: Housing Type Trends, 2000 to 2018

Location	Orem			Utah County			Utah State		
Year	2000	2018	Change	2000	2018	Change	2000	2018	Change
Total Housing Units	24,166	30,279	25.3%	104,315	176,268	69.0%	768,594	1,103,846	43.6%
1 Unit Attached	1,968	2,834	866	6,471	15,952	9481	37,902	67,685	29,783
1 Unit Detached	14,911	17,638	2,727	68,002	118,571	50569	520,101	757,853	237,752
2 Units	1,250	1,587	337	5,879	7,687	1808	29,243	34,721	5,478
3 to 19 Units	4,505	6,241	1,736	15,370	23,751	8381	95,032	135,517	40,485
20 to 49 Units	463	787	324	3,255	4,387	1132	22,720	35,019	12,299
50 or More Units	393	606	213	2,388	2,756	368	22,128	31,307	9,179
Mobile Home or Trailer	666	587	-79	2,900	3,029	129	39,267	40,860	1,593
Boat, RV, Van, etc.	8	0	-8	50	135	85	2,201	884	-1317

Source: US Census, American Community Survey, PCensus, Orem Planning Division

Figure 10: Housing Type as a Share of the Total in Orem, Utah County, and Utah State, 2018



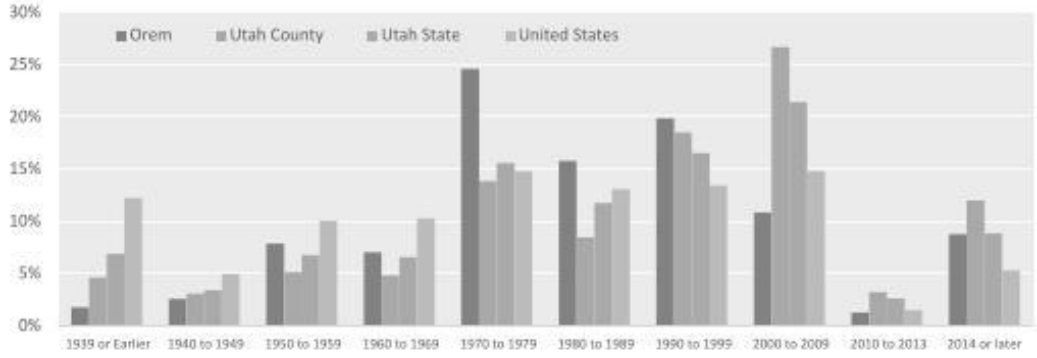
Source: US Census, American Community Survey, PCensus, Orem Planning Division

Age of Existing Housing

The following chart and table display estimates for the age of the existing housing stock in the area, with a comparison to the United States for reference. This information is based on self-reported data gathered by the Census. Notable observations include the following:

- The housing stock in Orem is significantly older than the County and the State with a large share of the housing stock having been constructed in the 1970's when Orem experienced significant growth.
- Residents who are surveyed often have a tendency to underestimate the age of their dwelling, particularly if they are renters. Therefore, the numbers presented should be viewed with caution (especially when comparing the number of units added since 2000 with other estimates in this study).

Figure 11: Age of Existing Housing Stock, 2000 to 2018



Source: US Census, American Community Survey, PCensus, Orem Planning Division

Table 9: Age of Existing Housing Stock, 2000 to 2018

2018 Estimate	Orem		Utah County		Utah State		United States	
Total Housing Units	30,279		176,268		1,103,846		10,891,364	
Built 2014 or later	2,643	8.7%	21,062	12.0%	97,187	8.8%	7,361,466	5.3%
Built 2010 to 2013	375	1.2%	5,585	3.2%	28,337	2.6%	2,008,798	1.4%
Built 2000 to 2009	3,267	10.8%	46,990	26.7%	236,014	21.4%	20,639,146	14.8%
Built 1990 to 1999	6,004	19.8%	32,550	18.5%	182,057	16.5%	18,749,543	13.4%
Built 1980 to 1989	4,772	15.8%	14,880	8.4%	129,360	11.7%	18,212,928	13.0%
Built 1970 to 1979	7,437	24.6%	24,331	13.8%	171,653	15.6%	20,643,858	14.8%
Built 1960 to 1969	2,123	7.0%	8,464	4.8%	72,103	6.5%	14,317,203	10.2%
Built 1950 to 1959	2,371	7.8%	9,001	5.1%	74,237	6.7%	13,981,348	10.0%
Built 1940 to 1949	766	2.5%	5,340	3.0%	37,123	3.4%	6,864,669	4.9%
Built 1939 or Earlier	521	1.7%	8,065	4.6%	75,775	6.9%	17,059,857	12.2%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

Housing Occupancy Trends

The following table provides estimates for housing occupancy in the area. Overall, rates have remained relatively unchanged. The most notable difference is a slight rise in the share of renter occupied units in Orem, as well as a slight rise in the vacancy rates for all geographies. Despite this increase, Orem and Utah County both have an occupancy rate below 6%. This is extremely low given that vacancy rates consider all types of vacant housing (including temporarily unoccupied housing, uninhabitable homes, second homes, etc.). Having vacancy rates this low has an upward pressure on housing prices, particularly on rental prices. This has been this case in Utah in general, where median rental rates have increased hundreds of dollars over the last decade.

Table 10: Housing Occupancy Trends, 2000 to 2018

Location	Orem			Utah County			Utah State		
Year	2000	2018	Change	2000	2018	Change	2000	2018	Change
Total Housing Units	24,166	30,279	25.3%	104,315	176,268	69.0%	768,594	1,103,846	43.6%
Occupied Housing Units	96.8%	94.5%	-2.3%	95.8%	95.4%	-0.4%	91.2%	90.5%	-0.7%
Owner Occupied	64.9%	58.8%	-6.1%	64.0%	66.2%	2.2%	65.3%	63.9%	-1.3%
Renter Occupied	31.9%	35.6%	3.8%	31.8%	29.2%	-2.5%	26.0%	26.6%	0.6%
Vacant Housing Units	3.2%	5.5%	2.3%	4.2%	4.6%	0.4%	8.8%	9.5%	0.7%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

Owner Occupied Housing Value Trends

The following table and figure display owner occupied housing units grouped into self-reported value ranges for Orem, Utah State, and the United States. This data applies to all homes in each geography, not just homes that are sold (as will be displayed in the next section). Notable observations include the following:

- Homes in all geographies have seen inflation adjusted prices increase significantly. This data corroborates the market data that is presented later in this report.
- Orem has a smaller share of homes in the prices ranges below $150,000 when compared to the State of Utah, but a larger share of homes in the $150,000 to $300,000 price range.
- In Orem, homes valued over $200,000 made up roughly 20% of owner-occupied homes in 2000. By 2018, homes valued over $200,000 increased to 73.7% (with homes valued over $300,000 making up 34.5%). This represents a significant increase in the value of homes outside the range of affordability for households at or below the median income in Orem.

Table 11: Housing Value Trends, 2000 to 2018

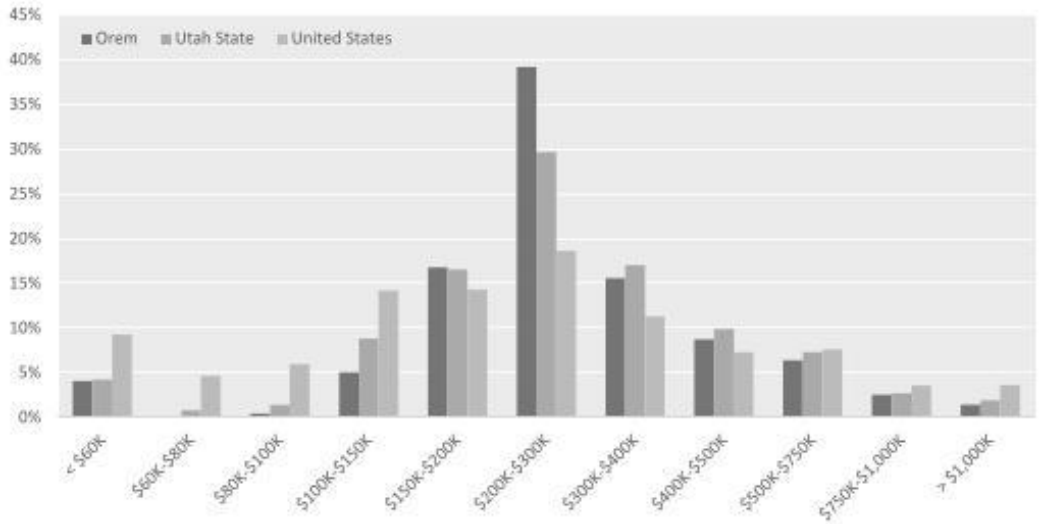
Location	Orem			Utah State			United States		
Year	2000	2018	Change	2000	2018	Change	2000	2018	Change
Owner-Occupied Housing	23,382	28,605	22.3%	99,937	168,210	68.3%	918,174	1,022,814	11.4%
Less than $60K	3.5%	4.1%	0.5%	6.2%	4.2%	-2.0%	19.7%	9.2%	-10.5%
$60K to $80K	1.2%	0.1%	-1.0%	4.4%	0.8%	-3.7%	11.6%	4.6%	-7.0%

Location	Orem			Utah State			United States		
Year	2000	2018	Change	2000	2018	Change	2000	2018	Change
$80K to $100K	5.4%	0.4%	-5.0%	10.1%	1.4%	-8.8%	13.2%	5.9%	-7.3%
$100K to $150K	39.2%	5.0%	-34.2%	34.7%	8.8%	-25.9%	21.8%	14.1%	-7.6%
$150K to $200K	30.9%	16.7%	-14.1%	22.3%	16.5%	-5.8%	13.4%	14.3%	0.8%
$200K to $300K	13.1%	39.2%	26.0%	14.3%	29.7%	15.3%	11.2%	18.6%	7.4%
$300K to $400K	3.8%	15.5%	11.8%	4.2%	17.0%	12.8%	4.2%	11.3%	7.1%
$400K to $500K	1.0%	8.7%	7.7%	1.7%	9.9%	8.2%	2.0%	7.3%	5.3%
$500K to $750K	1.1%	6.4%	5.3%	1.3%	7.3%	6.0%	1.7%	7.6%	5.9%
$750K to $1,000K	0.3%	2.5%	2.2%	0.4%	2.7%	2.3%	0.6%	3.5%	2.9%
$1,000K or more	0.4%	1.4%	1.0%	0.4%	1.9%	1.5%	0.6%	3.6%	3.0%
Median Value	$151,069	$258,658	71.2%	$142,187	$258,692	81.9%	$112,467	$200,102	77.9%
Inflation Adjusted*	$221,831	$258,658	16.6%	$208,788	$258,692	23.9%	$165,147	$200,102	21.2%

Source: US Census, American Community Survey, PCensus, Orem Planning Division

* Note: Inflation adjustment is based on Bureau of Labor Statistics CPI Inflation Calculator ($100 in 2000 = $146.84 in 2018)

Figure 12: Owner Occupied Housing Values, 2018



Source: US Census, American Community Survey, PCensus, Orem Planning Division

Employment Trends

In most locations, local employment is a key indicator used in determining the demand for housing in a community, as well as a principal driver of population and household growth. The information in this section provides general and detailed employment statistics for Orem.

Unemployment Rates

The table below displays unemployment rates for Orem, Utah County, Utah, and the United States from 2000 to June 2018. According to the BLS, the "unemployed" are defined as all persons who had no employment during the reference period, were available for work, except for temporary illness, and had made specific efforts to find employment.

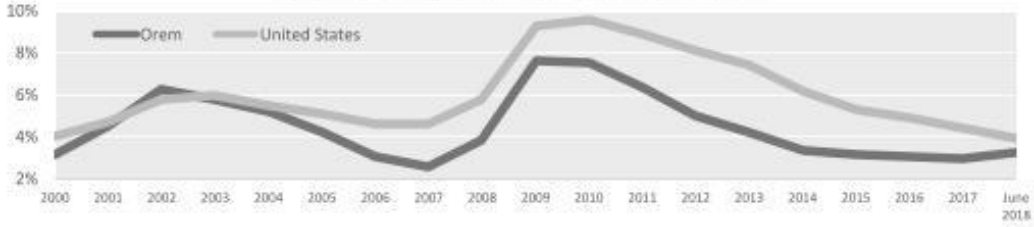
Table 12: Unemployment Rates, 2010 to June 2018

Time Period	Orem	Utah County	Utah	United States
2000	3.2%	2.9%	3.3%	4.0%
2001	4.5%	4.1%	4.4%	4.7%
2002	6.3%	5.8%	5.8%	5.8%
2003	5.8%	5.3%	5.6%	6.0%
2004	5.2%	4.8%	5.0%	5.5%
2005	4.2%	3.9%	4.1%	5.1%
2006	3.1%	2.9%	3.0%	4.6%
2007	2.6%	2.4%	2.6%	4.6%
2008	3.8%	3.5%	3.6%	5.8%
2009	7.6%	7.0%	7.3%	9.3%
2010	7.5%	7.4%	7.8%	9.6%
2011	6.4%	6.3%	6.7%	8.9%
2012	5.0%	5.0%	5.4%	8.1%
2013	4.2%	4.2%	4.6%	7.4%
2014	3.4%	3.5%	3.8%	6.2%
2015	3.2%	3.3%	3.6%	5.3%
2016	3.1%	3.1%	3.4%	4.9%
2017	3.0%	2.9%	3.2%	4.4%
June 2018	3.3%	3.4%	3.5%	3.9%

Source: US Bureau of Labor Statistics, LAUS; Numbers are not seasonally adjusted

The overall unemployment rate for Orem has remained lower than the Nation and the State for some time, roughly similar to the rate observed for Utah County. This speaks to the economic health of the area and has had an impact on wages of certain industries in the local economy. This has played a part in the affordability issue as the gap between pay has widened and created a competitive environment for the more desirable housing options in Orem and Utah County.

Figure 13: Unemployment Rates, 2010 to June 2018



Source: US Bureau of Labor Statistics, LAUS; County numbers are not seasonally adjusted

Employment and Labor Force

The table below presents estimated annual employment and labor force numbers for Orem. Prior to 2010 Orem did experience a decline in employment due to the recession. However, since 2010, every year has seen a significant increase in the number of individuals employed. From 2010 to 2018, Orem has added over 12,000 jobs and nearly 11,000 to the workforce.

Figure 14: Orem Employment and Labor Force, 2010 to 2018

Year	Employed	Labor Force
2010	38,460	41,565
2011	38,798	41,429
2012	40,376	42,481
2013	41,906	43,724
2014	42,704	44,203
2015	44,877	46,378
2016	47,323	48,835
2017	49,519	51,035
2018	50,743	52,474
Change 2010 to 2018	12,283	10,909

Source: US Bureau of Labor Statistics, LAUS; County numbers are not seasonally adjusted

Wage and Employment Trends by Private Industries Tracked

The following table and figure take a closer look at the employed residents in Orem, with data on each tracked NAICS coded private industry sector—comparing annual averages from 2005 with 2015 (the most recent industry specific data available). These numbers exclude public employees.

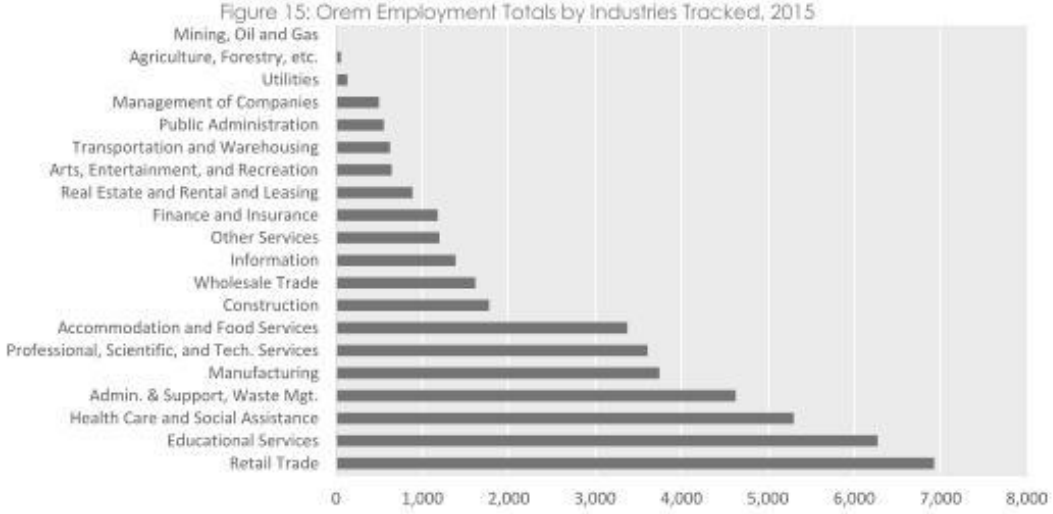
Table 13: Orem Employment Trends by Industries Tracked, 2005 to 2015

NAICS Industry (Private)	Employment		
	2005	2015	% Change
Agriculture, Forestry, Fishing and Hunting	42	55	31.0%
Mining, Quarrying, and Oil and Gas Extraction	7	2	-71.4%

NAICS Industry (Private)	Employment		
	2005	2015	% Change
Utilities	78	133	70.5%
Construction	2,423	1,772	-26.9%
Manufacturing	3,937	3,745	-4.9%
Wholesale Trade	1,021	1,613	58.0%
Retail Trade	7,136	6,928	-2.9%
Transportation and Warehousing	632	625	-1.1%
Information	1,968	1,385	-29.6%
Finance and Insurance	1,172	1,177	0.4%
Real Estate and Rental and Leasing	538	886	64.7%
Professional, Scientific, and Technical Services	3,462	3,609	4.2%
Management of Companies and Enterprises	92	497	440.2%
Admin. & Support, Waste Mgt. and Remediation	4,373	4,629	5.9%
Educational Services	4,225	6,273	48.5%
Health Care and Social Assistance	3,572	5,300	48.4%
Arts, Entertainment, and Recreation	604	644	6.6%
Accommodation and Food Services	3,038	3,374	11.1%
Other Services (excluding Public Administration)	845	1,199	41.9%
Public Administration	526	555	5.5%
TOTAL / AVERAGE	39,691	44,401	11.9%

Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Figure 15: Orem Employment Totals by Industries Tracked, 2015



Source: US Bureau of Labor Statistics

The industries which saw the largest numerical gains in Orem from 2005 to 2015 were educational services and health care, both of which saw around 2,000 jobs added. Also noteworthy is the number of jobs in manufacturing, which is the fifth largest industry in Orem. This is related in large part to the industrial uses located along the Geneva Road corridor, which have played an important role in Orem's economy for most of its history.

Local Employers

The following table displays the major employers in Orem. These businesses represent jobs in many industries, including public services, manufacturing, retail, healthcare, and others. Combined, these employers account for nearly half of all employees in Orem.

Table 14: Major Employers in Orem, 2018

Company	Employees	Company	Employees	Company	Employees
Utah Valley University	4000-5999	Employee Benefits Leasing	100-249	City of Orem	100-249
Nexeo Staffing, Llc	2000-2999	Express Services Inc	100-249	Orem Community Hospital	100-249
Timpanogos Regional Medical	500-999	First Colony Mortgage	100-249	Orem High School	100-249
Us Synthetic Corporation	500-999	Fishbowl Inventory	100-249	Orem Public Safety Dept	100-249
Bluehost.Com	250-499	Geneva Rock Products	100-249	Orem Public Works	100-249
Costco Wholesale Corp	250-499	Golden Landscaping & Lawn	100-249	Orem Recreation Center	100-249
Mity-Lite, Inc.	250-499	Harmons	100-249	Orem Rehabilitation Nursing	100-249
Securitymetrics, Inc.	250-499	Home Care Specialists	100-249	R C Willey Home Furnishings	100-249
Target	250-499	Infotrax Systems, L.C.	100-249	Rsi-Residential Services Inc	100-249
United Parcel Service	250-499	Intermountain Temp Svc	100-249	Silverback Network, Inc.	100-249
Wal Mart	250-499	Jive Communications	100-249	Smiths Food And Drug Ctrs	100-249
Wayfair Llc	250-499	Jive Communications, Inc.	100-249	Solcius Llc	100-249
Alder	100-249	Ken Garff Motors	100-249	Spherion Pacific Enterprises	100-249
Alliance Medical Admin.	100-249	Kenny Seng Construction	100-249	Squire And Co	100-249
American Crafts, L.C.	100-249	Kids On The Move Inc	100-249	Strategic Staffing	100-249
Ancestry.Com	100-249	Klas Enterprises, L.L.C	100-249	Studies Weekly	100-249
Any Hour	100-249	Legato Systems Inc	100-249	Telos Residential Treatment	100-249
Blendtec	100-249	Maceys Inc	100-249	Texas Roadhouse	100-249
Boostability	100-249	Matc Orem Campus	100-249	Timpanogos High	100-249
Brent Brown Toyota	100-249	Mobile Productivity, Llc	100-249	Trimed, Llc	100-249
Cirque Lodge, Inc.	100-249	Mountainland Supply Co	100-249	Uhs Of Timpanogos Inc	100-249
Clear Satellite	100-249	Moxtek, Inc.	100-249	Unicity Network	100-249
Clyde Companies Inc	100-249	Mt View High	100-249	Utah Transit Authority	100-249
Edge Construction Llc	100-249	North Eastern Services	100-249	Winco Foods	100-249
Elwood Staffing	100-249	Northstar Alarm Services	100-249	**Total Estimated**	**~ 23,000**

Source: Utah Department of Workforce Services, Orem Planning Division

HOUSING MARKET TRENDS – FOR-SALE HOMES

This section examines the latest market trends related to for-sale homes, which includes single-family detached units as well as attached units such as twin homes, townhomes, condos, and other multifamily units. Overall, the market for for-sale units in Orem and Utah County has increased significantly in the last decade since the recession. The following table and charts illustrate just how unaffordable home ownership has become. In 2010, 65% of all homes sold in Orem and 55% of all homes sold in Utah County were sold at a price under $200,000. As of the summer of 2018, Only 14% of homes sold in Orem and 8% of homes sold in Utah County were under $200,000.

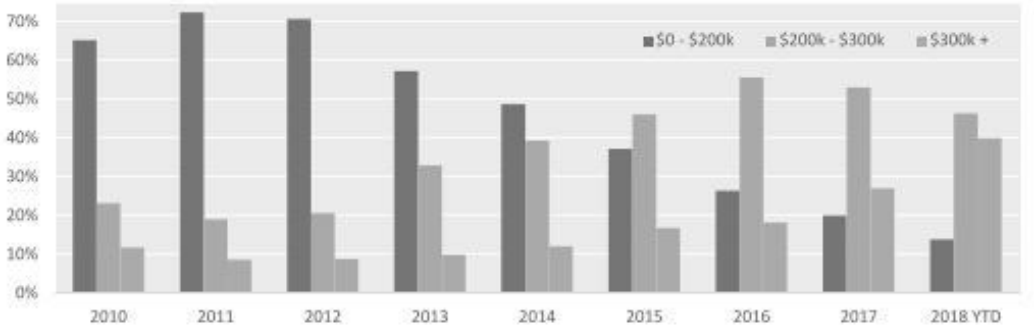
As a broad generalization, most households can afford to purchase a home that is 2.5 to 3 times their household income. With the median household income in Orem estimated at $64,822, a median household could afford a home in the $160,000 to $200,000 price range. While many more homes were within this price range a decade ago, in 2018 very few homes are in this price range. The homes that are in this range regularly require additional needed investment for repairs such as new roofs or corrected plumbing.

Table 15: Total Housing Units Sold by Price Range, 2010 to 2018 YTD

Year	$0 - $200k		$200k - $300k		$300k +		Total	
	#	%	#	%	#	%	#	%
Orem								
2010	417	65%	148	23%	75	12%	640	100%
2011	532	72%	140	19%	63	9%	735	100%
2012	494	71%	144	21%	61	9%	699	100%
2013	412	57%	237	33%	71	10%	720	100%
2014	426	49%	344	39%	105	12%	875	100%
2015	381	37%	472	46%	172	17%	1025	100%
2016	244	26%	515	56%	168	18%	927	100%
2017	189	20%	501	53%	255	27%	945	100%
2018 YTD	78	14%	261	46%	225	40%	564	100%
Utah County								
2010	2689	55%	1444	29%	778	16%	4911	100%
2011	3322	61%	1440	26%	725	13%	5487	100%
2012	3418	57%	1735	29%	845	14%	5998	100%
2013	3041	45%	2363	35%	1299	19%	6703	100%
2014	2773	39%	2802	39%	1619	23%	7194	100%
2015	2711	32%	3419	40%	2365	28%	8495	100%
2016	2041	23%	3784	43%	3016	34%	8841	100%
2017	1542	17%	4011	44%	3653	40%	9206	100%
2018 YTD	471	8%	2210	39%	2948	52%	5629	100%

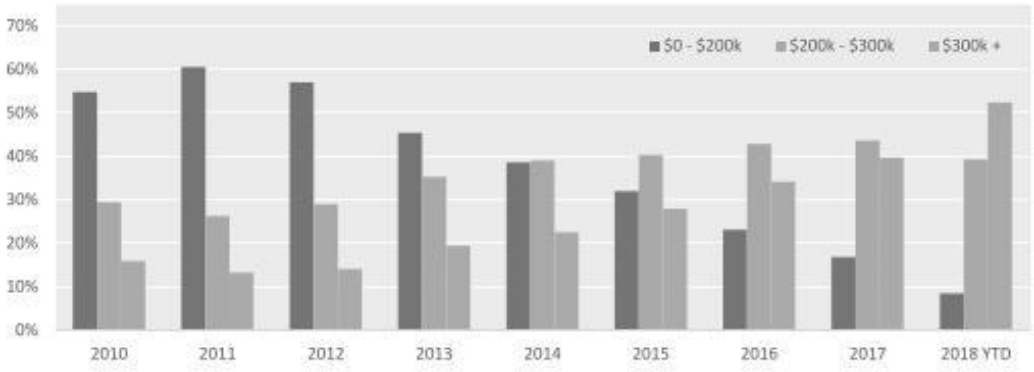
Source: Multiple Listing Service, Orem Planning Division, 2018 YTD includes data to July 31st

Figure 16: Orem Total Housing Units Sold by Price Range, 2010 to 2018 YTD



Multiple Listing Service, Orem Planning Division, 2018 YTD includes data to July 31st

Figure 17: Utah County Total Housing Units Sold by Price Range, 2010 to 2018 YTD



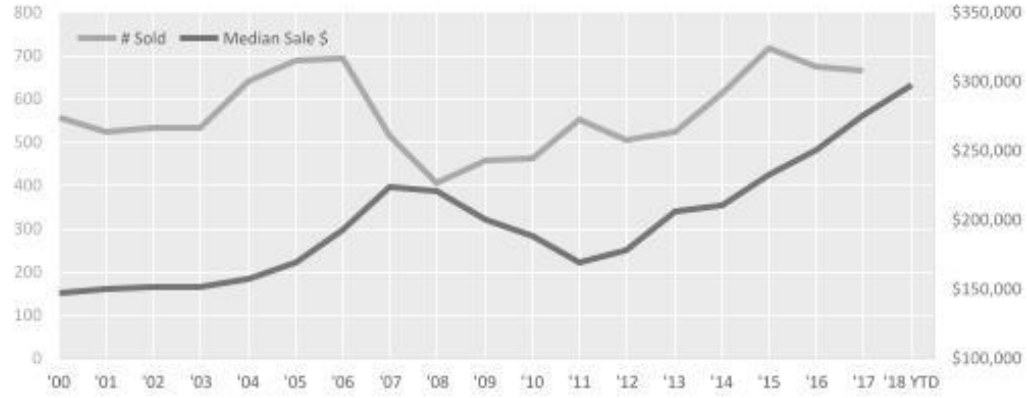
Multiple Listing Service, Orem Planning Division, 2018 YTD includes data to July 31st

The previous charts visually illustrate the significant change in affordability that has taken place in the for-sale housing market in the last decade. The blue bar represents the percentage of for-sale housing units that are sold for under $200,000. The green bar represents units sold ranging from $200,000 to $300,000. The red bar represents units sold over $300,00k. In both Orem (top chart) and Utah Count (bottom chart), the blue bar has decreased steadily since 2011.

Sales Trends - Single Family Homes

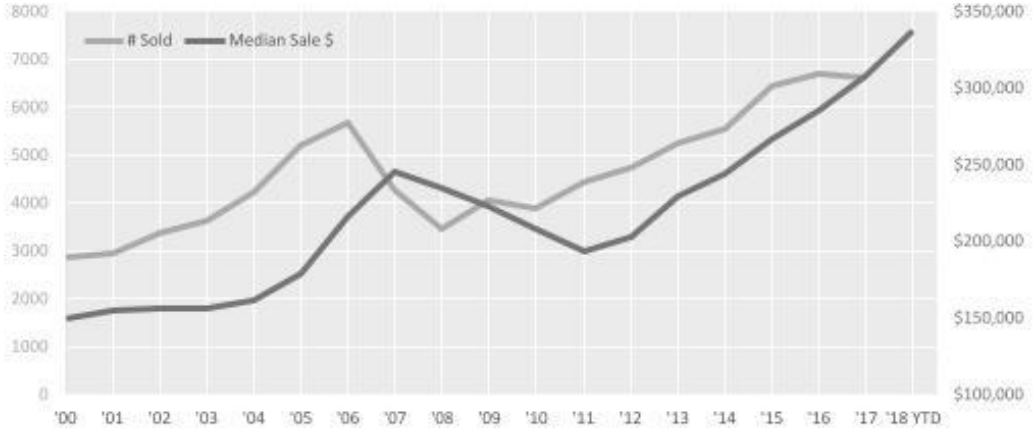
The following charts depict volume and median sale price trends for single family homes from 2000 to 2018 YTD in Orem (top chart) and Utah County (bottom chart). Volume in Orem has fluctuated but generally not increased from historic levels. In contrast, the volume of sales in Utah County has increased several thousand from 2000 to 2017. In both Orem and Utah County, the median sale price for single family homes has increased rapidly since 2011.

Figure 18: Orem Single Family Sales Volume and Median Price, 2000 to 2018 YTD



Source: Multiple Listing Service, Orem Planning Division

Figure 19: Utah County Single Family Sales Volume and Median Price, 2000 to 2018 YTD

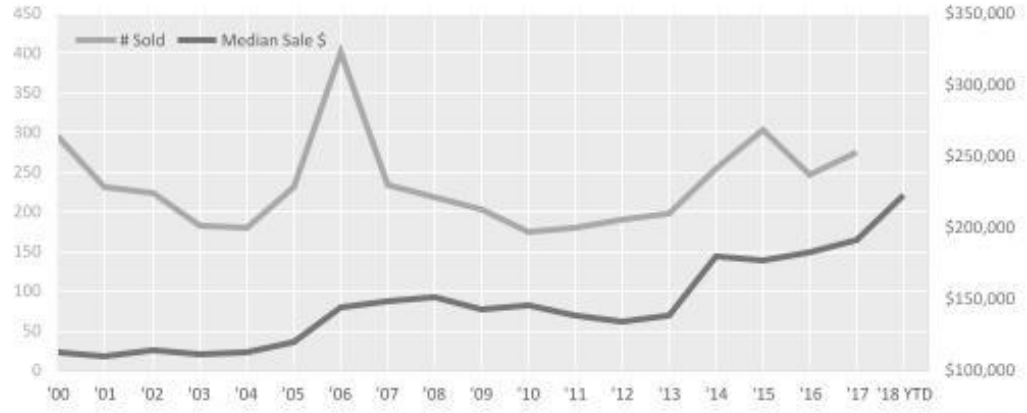


Source: Multiple Listing Service, Orem Planning Division

Sales Trends - Condos, Townhomes, Other

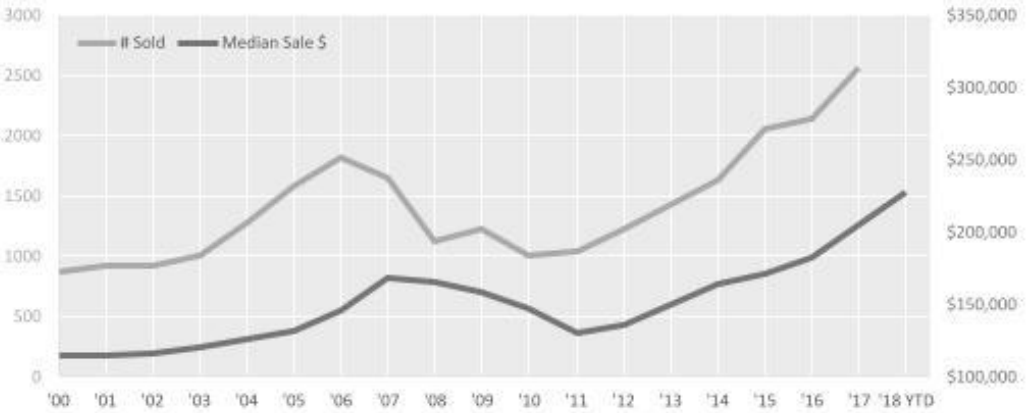
The following charts depict volume and median sale price trends for condos, townhomes, and other multifamily homes from 2000 to 2018 YTD in Orem (top chart) and Utah County (bottom chart). Volume in Orem has fluctuated but generally not increased from historic levels. In contrast, the volume of sales in Utah County has increased over 1,500 from 2000 to 2017. In both Orem and Utah County, the median sale price for single family homes has increased rapidly since 2011.

Figure 20: Orem Condo, Townhome, Other Sales Volume and Median Price, 2000 to 2018 YTD



Source: Multiple Listing Service, Orem Planning Division

Figure 21: Utah County Condo, Townhome, Other Sales Volume and Median Price, 2000 to 2018 YTD



Source: Multiple Listing Service, Orem Planning Division

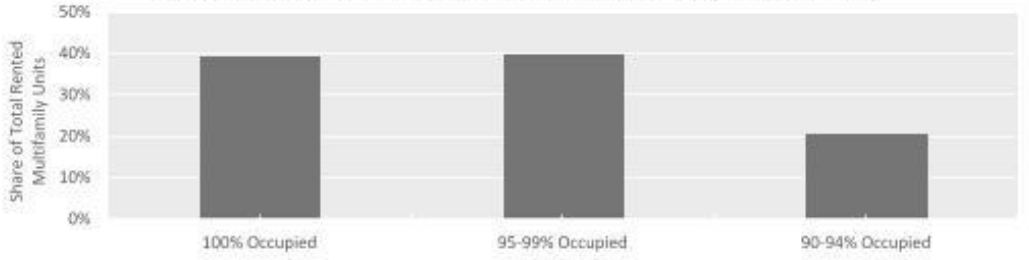
HOUSING MARKET TRENDS – RENTALS

According to the Census related housing type estimates presented earlier in this report, there are currently 12,641 multifamily units in Orem. The majority of these are rentals. Through an extensive survey conducted by the City, 122 multifamily complexes were identified in Orem accounting for 9,761 rental units.

Multifamily Occupancy

Based on the survey completed by the City, the average occupancy rate for multifamily rentals in the City is estimated to be at 97%. As illustrated in the chart below, roughly 40% of the complexes surveyed reported 100% occupancy, 40% reported an occupancy rate between 95-99%, and 20% reported an occupancy rate between 90-94%. In the multifamily rental industry, occupancy at 95% is effectively full, given that some tenants are always moving in and out. That Orem is above 95% on average demonstrates just how much rental demand pressure currently exists and why rents are increasing so rapidly.

Figure 22: Share of Total Rented Units Based on Occupancy of the Complex



Source: Sample based on 9,761 units reporting data in Spring 2018, Orem Planning Division

In addition to data in the table, the following insight was obtained through interviews with property managers:

- Several of the complexes have a waiting list that is dozens of people long. When vacancies occur, they call individuals from this list. Vacancies are usually filled immediately for most complexes. This suggests that not all renters are satisfied with their current rental and are waiting for a vacancy at a more preferred location.
- Several property owners and managers have reported increasing rents as a response to the recent rise in demand. Rental increases in the amount of $50-$100 over the last year were not uncommon.
- Even though many of the complexes were full or close to full, they continued to advertise their properties for lease. It was explained that it is easier to leave the signs and ads up, rather than taking them down and then replacing them back up as soon as a vacancy opens up. In addition, complexes desire to have a waiting list where they can screen tenants and be more selective for tenants who will be long term and low maintenance.

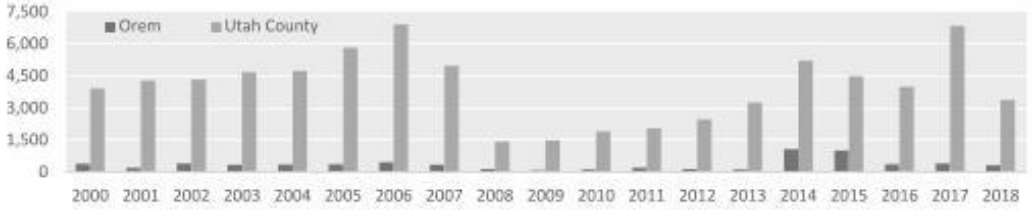
Rental Rates

The average rental rate for all types of listed rental units in Orem is estimated at $1,142, which represents a 7.9% increase from the previous year. Overall, the market has an average rate per square foot of $1.17 and an average size of 978 square feet per unit.

NEW CONSTRUCTION TRENDS

The following chart and table provide an accounting for the number of building permits issued in Orem and Utah County from 2000 to 2018. Assuming that these permits resulted in constructed units, Orem added 1,747 single family units and 4,906 multifamily units from 2000 to 2018. This accounts for 8.8% of the units assumed to have been added by Utah County. In Orem, some have made the claim that the City is taking too much growth from the rest of the County. This data demonstrates otherwise. While Orem represents 16.3% of the County's population in 2018 (100,181 of 613,211), it has only added 8.8% of the new housing stock since the year 2000 (when Orem made up 22.9% of the County's population).

Figure 23: Single Family and Multifamily Permits Issued, 2000 to 2018 YTD



Source: Utah Bureau of Economic and Business Research, Orem Planning Division

Table 16: Single Family and Multifamily Permits Issued, 2000 to 2018 YTD

Location	Orem			Utah County			Orem Share of County
Year	SF	MF	Total	SF	MF	Total	
2000	142	238	380	3,139	759	3,898	9.7%
2001	101	91	192	3,287	985	4,272	4.5%
2002	85	310	395	3,213	1,113	4,326	9.1%
2003	119	218	337	3,375	1,302	4,677	7.2%
2004	170	178	348	3,404	1,324	4,728	7.4%
2005	171	191	362	4,319	1,500	5,819	6.2%
2006	156	302	458	5,329	1,573	6,902	6.6%
2007	101	232	333	3,506	1,465	4,971	6.7%
2008	28	98	126	871	544	1,415	8.9%
2009	44	26	70	1,129	357	1,486	4.7%
2010	60	47	107	1,315	578	1,893	5.7%
2011	46	145	191	1,255	795	2,050	9.3%
2012	54	75	129	1,704	760	2,464	5.2%
2013	71	34	105	2,181	1,066	3,247	3.2%
2014	94	962	1,056	1,976	3,232	5,208	20.3%
2015	105	893	998	2,500	1,976	4,476	22.3%
2016	73	284	357	2,708	1,278	3,986	9.0%
2017	75	324	399	3,506	3,327	6,833	5.8%
2018	52	258	310	2,001	1,369	3,370	9.2%
Total	1,747	4,906	6,653	50,718	25,303	76,021	8.8%

Source: Utah Bureau of Economic and Business Research, Orem Planning Division

Construction Underway, Planned, or In Application

There are currently over 2000 units underway, planned, or in application in Orem. These include the following:

Table 17: Residential Units, Construction Underway, Planned, or In Application in Orem

Under Construction	Units	Beds	Type	Address
Under Construction				
Aston Court Building C	120		Market Rate Apartments	700 East 950 South
Sun Canyon Villas Building 3	24		Market Rate Apartments	439 South State Street
The Villas at Sleepy Ridge	74		For Sale Townhomes	700 South 1840 West
Flying Horse	134		Condos	1800 South Sandhill Road
Midtown 360 Phase 3 & 4	248		Market Rate Apartments	360 South State Street
Lexington Towns	142		For Sale Townhomes	1430 South Sandhill Road
Subtotal	742			
Approved				
Hunter Town Homes	10		For Sale Townhomes	900 East 1400 South
Lakeview Fields	271		Townhomes (unsure if rentals)	2000 South Geneva Road
Subtotal	281			
Application in Process				
The Hub	269	1,060	Student Housing	1420 West 800 South
Lanihuli	4		Senior Housing	430 West 600 North
Concord Heights	4		Townhomes	280 West 170 North
Palos Verde Student Housing	453	1,578	Student Housing	1030 South 400 West
Westmore Senior Housing	4		Senior Housing	1054 South Main Street
University Downs	316		Student Housing	1240 West University Parkway
The Aston North - Phase 1	114		Market Rate Apartments	700 East 900 South
Parkside at University Place	70			
Subtotal	1,234	2,638		
Total	2,257	2,638		

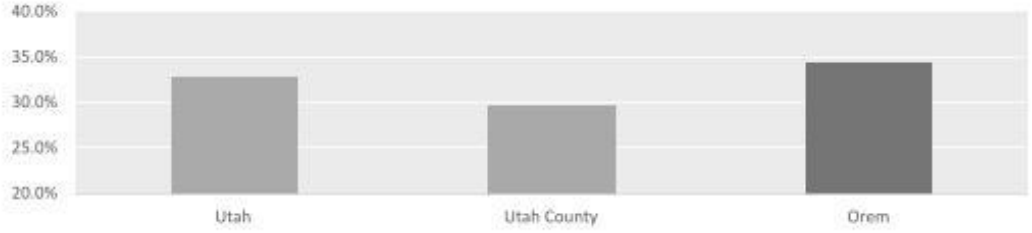
Source: Orem City Planning Division

MEASURING AFFORDABILITY IN OREM

The following chart and tables provide a breakdown of owner occupied and renter occupied housing costs according to household income levels in Orem, Utah County, and Utah. Compared to the County average, households in Orem making $49,999 or less (roughly 80% of the household area median income) are more likely to find housing that does not exceed 30% of their income. In Orem, 34.4% of households who earn less than $49,999 income can find affordable housing, compared to 33.0% for the State and 29.7% for Utah County.

This is due, in large part, to Orem's long history of zoning for a range of housing types, many of which offer lower housing costs. Housing options in the City include smaller single-family homes on smaller lots, as well as duplexes, triplexes, and quadplexes, and larger multifamily housing. Because of this, the availability of affordable housing in Orem is generally higher when compared to much of Utah County, and slightly higher when compared to the State.

Figure 24: Share of Households Earning $49,999 or Less Able to Find Housing for Less than 30% of their Income



Source: U.S. Dept. of Housing & Urban Development (2018). Comprehensive Housing Affordability Strategy, 2011-2015

Table 18: Owner Occupied Housing Costs in Utah, Utah County, and Orem

	Utah		Utah County		Orem	
	Estimate	Share	Estimate	Share	Estimate	Share
Total:	918,367	100%	151,342	100%	26,620	100%
Owner-occupied housing units:	638,767	69.6%	101,740	67.2%	15,973	60.0%
Earn Less than $20,000:	38,947	4.2%	4,971	3.3%	1,078	4.0%
Housing Costs < 20%	4,336	0.5%	520	0.3%	99	0.4%
Housing Costs 20% - 29%	6,046	0.7%	726	0.5%	202	0.8%
Housing Costs ≥ 30%	28,565	3.1%	3,725	2.5%	777	2.9%
Earn $20,000 to $34,999:	61,222	6.7%	8,101	5.4%	1,631	6.1%
Housing Costs < 20%	21,336	2.3%	2,569	1.7%	556	2.1%
Housing Costs 20% - 29%	9,662	1.1%	1,278	0.8%	287	1.1%
Housing Costs ≥ 30%	30,224	3.3%	4,254	2.8%	788	3.0%
Earn $35,000 to $49,999:	75,439	8.2%	11,021	7.3%	1,828	6.9%
Housing Costs < 20%	27,661	3.0%	3,540	2.3%	703	2.6%
Housing Costs 20% - 29%	16,018	1.7%	2,077	1.4%	364	1.4%
Housing Costs ≥ 30%	31,760	3.5%	5,404	3.6%	761	2.9%

Source: U.S. Dept. of Housing & Urban Development (2018). Comprehensive Housing Affordability Strategy, 2011-2015

Table 19: Renter Occupied Housing Costs in Utah, Utah County, and Orem

	Utah		Utah County		Orem	
	Estimate	Share	Estimate	Share	Estimate	Share
Total:	918,367	100%	151,342	100%	26,620	100%
Renter-occupied housing units:	279,600	30.4%	49,602	32.8%	10,647	40.0%
Earn Less than $20,000:	57,887	6.3%	10,377	6.9%	2,085	7.8%
Housing Costs < 20%	1,341	0.1%	156	0.1%	27	0.1%
Housing Costs 20% - 29%	4,608	0.5%	591	0.4%	68	0.3%
Housing Costs ≥ 30%	51,938	5.7%	9,630	6.4%	1,990	7.5%
Earn $20,000 to $34,999:	58,028	6.3%	10,369	6.9%	2,060	7.7%
Housing Costs < 20%	2,851	0.3%	706	0.5%	20	0.1%
Housing Costs 20% - 29%	10,716	1.2%	1,657	1.1%	406	1.5%
Housing Costs ≥ 30%	44,461	4.8%	8,006	5.3%	1,634	6.1%
Earn $35,000 to $49,999:	46,498	5.1%	8,865	5.9%	2,153	8.1%
Housing Costs < 20%	7,838	0.9%	1,785	1.2%	327	1.2%
Housing Costs 20% - 29%	21,672	2.4%	3,848	2.5%	1,232	4.6%
Housing Costs ≥ 30%	16,988	1.8%	3,232	2.1%	594	2.2%

Source: U.S. Dept. of Housing & Urban Development (2018). Comprehensive Housing Affordability Strategy, 2011-2015

While Orem has more affordable housing than many cities in Utah County, there is a still a need for additional moderate-income housing units. According to the data, 19.8% of Orem households earn $34,999 or less (roughly 50% of the household median income) and have housing costs greater than 30%. This represents roughly 5,284 households and an estimated 18,500 Orem residents.

Figure 25: Breakdown of Orem Households Earning $34,999 or Less



Source: U.S. Dept. of Housing & Urban Development (2018). Comprehensive Housing Affordability Strategy, 2011-2015

Based on an income of $34,999, affordable housing would be housing where the monthly housing costs do not exceed $875 (30% of income). Most households in Orem that make under $34,999 and do not have affordable housing are renter households, accounting for 3,624 households. Currently, the median gross rent in Orem as estimated by the Census is $903. This is up 17% from 2010, when the median monthly gross rent was estimated at $771. Rents are expected to continue to rise as the demand for housing, particularly rental housing, outstrips the supply. As mentioned previously, this has been corroborated with multiple property managers who have confirmed rising rents and see this trend continuing.

RECOMMENDATIONS

This section contains the conclusions and recommendations that will guide the City in the development of a more robust Moderate-Income Housing Plan in the years to come. These conclusions and recommendations were formulated by consulting the data contained in this report as well as discussions with housing advocates, realtors, developers, community members, and other stakeholders.

Explore Public/Private Partnerships for Affordable Housing

Collaboration is a key component of mitigating the housing crisis, as such the need for ongoing community leadership and guidance is critical to arriving at locally-relevant solutions. In 2019, an Orem Housing Summit will be convened, providing an opportunity for housing industry leaders, Orem staff, and the general public to come together, learn more about the conditions of housing in Orem and Utah County, and evaluate possible solutions to the challenges faced.

Fast Track Affordable Housing Projects

Orem City has a process in place whereby development can be fast tracked. A fee is paid which covers the cost of building and zoning officials spending supplementary time reviewing the development. In addition, the development project is moved to the front of the list, expediting the permitting process. The option can be explored for affordable housing projects that make application for development in Orem to be fast tracked automatically, without additional expense.

Study Lot Size and Housing Unit Size Minimums

Many governments have minimum size requirements for primary structures in residential zones, often imposed to maintain the consistency in neighborhoods (both in size of buildings and people who choose to live there). It may be beneficial for Orem to study whether these size requirements for both lots and housing units can be relaxed if certain conditions are met. The intent would be to allow creative developers and homebuilders to apply creative solutions to housing affordability that otherwise may not be permitted under current zoning requirements.

Educate Residents on Housing Affordability Issues

It is recommended that Orem continue to connect underserved populations, including seniors, veterans, disabled persons, and those with low to moderate incomes with housing and assistance providers, homebuyer programs, mortgage and rental assistance programs or other resources. There are multiple organizations active in Utah County who would benefit from the City's continued sponsorship and participation. One such organization is NeighborWorks Mountain Country Home Solutions. NeighborWorks offers counseling services such as home buyer education, foreclosure counseling, reverse mortgage counseling, and general finance and budget counseling.

In addition to educating underserved residents regarding the opportunities that are available, it would be beneficial for the City to partner with housing advocacy groups to educate residents who are not underserved. There are many misconceptions about population growth in Orem, the cost of housing, and the impacts of new

development. Housing advocacy groups would be a willing and helpful partner to take the data to all Orem residents to help them understand the challenges and opportunities that currently exist related to housing and growth. Neighborhood meetings would be an appropriate venue for this outreach. As residents participate in creating a neighborhood plan, the City could invite housing advocates from various organizations to participate.

Explore a Community Land Trust

To preserve the ability to develop affordable housing in the future, the City could create a Community Land Trust and work with its institutional partners to purchase land and entrust it for future development. This would ensure that as property values continue to rise, there will still be land available to build new affordable housing as the City grows. This mechanism preserves affordability into the future.

There are examples of successful land trusts in Utah that would provide opportunities for Orem to learn and explore this option. The Moab Area Community Land Trust is one such organization. Other cities in Utah County, such as Provo, are also exploring land trusts. Partnering with other cities in a regional land trust might also be an advantageous option to explore.

Rediscover Missing Middle Housing

Missing middle housing consists of multi-unit residential building types such as duplexes, triplexes, and fourplexes that are generally not bigger than a large house. When designed and built to look like a single family home, they can be better integrated into single family neighborhoods. This will allow for more diverse housing options that allow a neighborhood to have a mix of residents at different life stages--young professionals, new couples, big families, seniors, owners and renters alike. Although missing middle housing types are more common in Orem's older neighborhoods, they have become much less common in new residential development (hence the "missing").



Orem's creation of the Affordable Senior Housing (ASH) Overlay zone allowed for the first time in many years small, multi-unit developments to be built on smaller infill lots in Orem. These projects have been popular, and the majority have been designed and built in a way that adds value to the existing neighborhoods, while providing affordable options for low income seniors.

It is recommended that the City build on the success of the ASH Overlay zone and explore other zoning changes that would allow for small, multi-unit developments. Perhaps an affordable housing overlay for rent restricted duplexes and quadplexes. As with the ASH Overlay zone, it is important that design standards be required to

ensure that these developments fit in with the existing neighborhoods and that their affordability is maintained in perpetuity. A strategy such as this for affordable housing will ensure that it is incorporated within many parts of Orem, rather than having large low-income housing projects that concentrate poverty and lead to many of the issues that existing residents fear.

Re-Invest in Orem's Older Neighborhoods

While the supply of affordable housing in Orem is a challenge, one of the major reasons Orem is in a better position than many cities in Utah County is because of the its supply of older housing stock. These homes are generally more affordable because they are older, but also because they smaller, on smaller lots, and have a more modest design. This benefits the City by providing a greater variety of housing to meet the needs of residents with a range of incomes and in various life stages.

The demand for rental housing that has not been met in Utah County--due to a lack of new multifamily development--has not gone away. It has been absorbed primarily by older neighborhoods where owner-occupied home have been converted into rentals. This has been confirmed in Orem's older neighborhoods by the data presented previously. While multifamily complexes typically have management, security, background checks, landscaping crews, and a maintenance crews, a neighborhood with many rentals lacks these advantages and can experience general decline.

As these older homes continue to age and experience unique challenges related to a higher rental occupancy rate, it is important that the City recognize the value of these older neighborhoods and continue to invest in these areas. There are a variety of strategies that can be used to bring value to these neighborhoods. They include:

- Adopt a Block: Adopt-a-block programs are created to help reduce litter in targeted areas within a neighborhood while building resident connections. These programs require an ongoing commitment to keep a targeted area litter-free. The goals of the program are to address neighborhood aesthetics and build neighborhood capacity. Adopt-a-blocks are often one of the first steps towards community organizing.
- Increased code enforcement: Code enforcement is the act of enforcing a variety of applicable codes, ordinances, rules, and regulations related to zoning, land use, nuisance housing, building codes, health and safety, blight, waste, etc. When homes are blighted or poorly maintained, it can create a vicious cycle that makes surrounding homeowners less likely to maintain their properties, spreading blight and harming the entire community. Code enforcement can be used to proactively prevent decline or address existing maintenance issues. Currently, Orem has taken steps to appoint an administrative law judge that would make enforcement of code violations easier. While doing so, the City is also reviewing its policies and procedures related to code enforcement. As of 2018, code enforcement is handled primarily by three sworn officers in the Neighborhood Preservation Unit of the City's police department. Increased code enforcement will likely require additional officers or support staff.
- Complete Streets: Complete streets are planned and designed with all users in mind, as opposed to only moving automobiles. By treating all street users equally, the vitality of the street and local businesses are often improved, among other environmental, health, and social benefits. Increased investment in bike lanes, buffered bike lanes, sidewalk installations (where missing), and sidewalk repairs (where needed) in Orem's

older neighborhoods will spur further investment by property owners and business owners in these areas. In addition, increasing the quality of various transportation options reduces the dependency on auto ownership, which can be a considerable expense to lower income households.

- Encourage home ownership: Home owners are not "better" than renters. Whether an Orem resident rents or owns, they should be valued equally. However, it is important to recognize that home owners often have a greater incentive to invest in their homes, neighborhoods, and local communities. Home owners also stay longer at a place of residence forming longer relationships with the surrounding community. Recognizing this, it is in the interest of the City to encourage home ownership, particularly in neighborhoods with challenges. To encourage home ownership, Orem could partner with other organizations that currently offer incentives to first time homebuyers or returning residents or initiate a new Orem-based program (other cities with programs include Salt Lake City, Provo, Ogden, and West Valley). These incentives could target public employees, such as teachers or public safety, or open to a broader group of low- and moderate-income Orem households who would otherwise not be able to purchase a home. This and other measures which encourage home ownership in Orem's older neighborhoods should be explored.

Consolidated Plan 2025-2029 Needs Survey English Responses

Q1 - How did you hear about this survey?

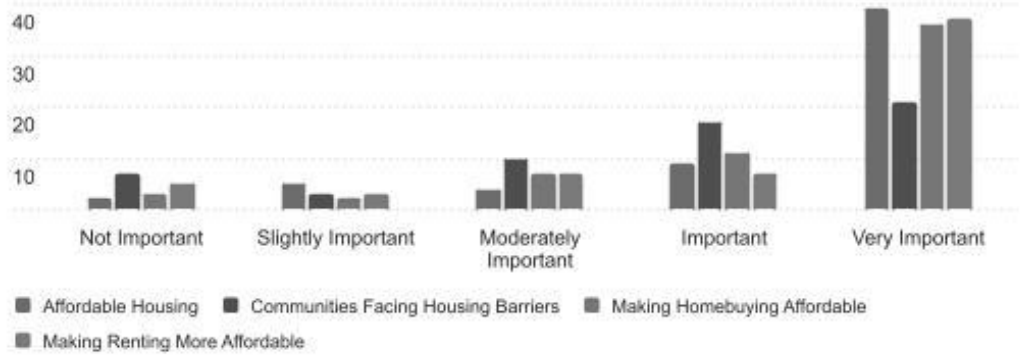
57 Responses

How did you hear about this survey?
Orem city instagram
Facebook
Social
Facebook
Facebook
Facebook
TabithasWay
Email from Mag
Shayne Roy
My story matters
Facebook
Through My Story Matters
Fb
Local CoC
Facebook
City Facebook page
Melissa McNalley
CoC
The Refuge
Facebook

Facebook
Orem Site
Facebook
Orem facebook
Social media - Facebook
Orem FB Page
Instagram The Refuge Utah
Facebook, What's Happening In Orem group
Facebook
Signal Thread
Facebook
City FB page
Alpine School District
Facebook
Orem City Facebook page
Facebook
Friend
Facebook
Facebook
Facebook
CDBG funding holders
Orem City Facebook page
Facebook
Facebook post
Facebook

Email
Facebook
Orem City Facebook page
My city FB page
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Work
Work

Q2 - HOUSING How important are the following to you?



Q2 - HOUSING How important are the following to you?

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Affordable Housing	1.00	5.00	4.32	1.13	1.27	59	255.00
Communities Facing Housing Barriers	1.00	5.00	3.72	1.32	1.75	58	216.00
Making Homebuying Affordable	1.00	5.00	4.27	1.12	1.25	59	252.00
Making Renting More Affordable	1.00	5.00	4.15	1.30	1.69	59	245.00

Q3 - Which Utah County Communities do you feel have the most barriers to housing?

50 Responses

Which Utah County Communities do you feel have the most barriers to housing?
Highland, Alpine, Cedar Hills,
Lehi, Saratoga Springs
I don't know
Orem, no more land to build on and somehow the other side of the lake is cheaper.
All these apartments in people's houses ruin the neighborhoods but you cant afford anything but a cheap basement apartment
Orem and Provo
Utah has become an expensive place to live.
Truthfully? Most of them. The further south you go the better it gets. But its tough all over.
lower middle class
Alpine, Highland, Mapleton, Cedar Hills,
I fell all areas have need to improve
Orem, Spanish Fork, Eagle mountain and Saratoga springs
Orem, American Fork

Pretty much all of them. North county is too expensive and South county is about right, but too far away from most employment (depending). It's frustrating to pay so much for rent and have it not go towards a payment on a home. Housing dollars are precious and I want mine to go to something that increases in value and that I can turn around a leave for my family in the future.
Hispanic families
18-29 year olds, homeless, low socioeconomic status
Maybe draper?
Pet owners
Alpine Elkridge
Orem and Provo
Any community that is built out and doesn't have room to grow
Immigrants and the poor
Orem, they are landlocked
Victims of abuse or those speaking another language
Orem
Orem
First time home buyers
Orem
Provo & Orem
Not sure
All
Anyone making less than $200,000 a year.
Orem, Highland, Lehi
Not Sure, but probably quite a few
Orem
Orem
Orem, provo

Low income and undocumented families
It's the corporate greed which cause problems.
Lindon
First time home buyers, minorities, low-income
Young adults
None
Orem
Minorities, immigrants, young people
Orem
Orem
Hispanic, younger families and first time home buyers
Vineyard, West Provo
Most of them

Q4 - Which Communities in Utah County have the most affordable housing?

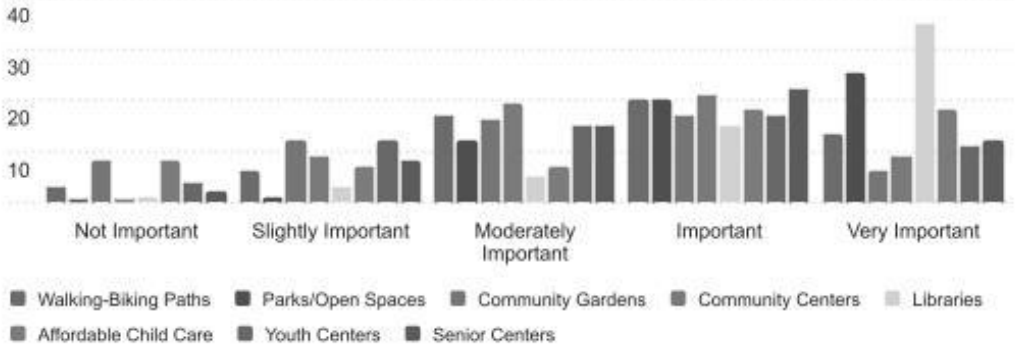
53 Responses

Which Communities in Utah County have the most affordable housing?
I don't know
Provo
None
I don't know
Santiquin. Mostly far south
?
Eagle Mountain, Santaquin
Utah has become an expensive place to live.

Provo? Santaquin?
utah county
Provo & Orem
I have not looked for a while due to the high costs that I last looked.
None
Provo
Provo, Orem and Springville. The housing is older and therefore less expensive.
Families with help from well-established parents
Rural
I think orem or provo
Santaquin
Springville
Out west and down south where there is room for growth
What is considered affordable? Who is this arbiter of affordability?
Santaquin, Eagle Mountain
Unknown. Maybe students.
None
None of it is affordable, even renting
Eagle mountain, Santaquin
Saratoga Springs and Eagle Mountain
Not sure
None
People making $300,000 a year or more.
Not sure, Maybe some old areas old Provo.
None, but Saratoga Springs seems to be slightly cheaper

Spanish fork
Provo
None
Low income, people who have been on the waitlist for over a year
South of Payson and West of Eagle Mountain
West
None
Santaquin
I don't know
None
All
Eagle Mountain
Older and wealthy
None
Payson & eagle mountain
Lehi, Provo, Santaquin, Spanish Fork
Payson
None
Saratoga Springs
Provo

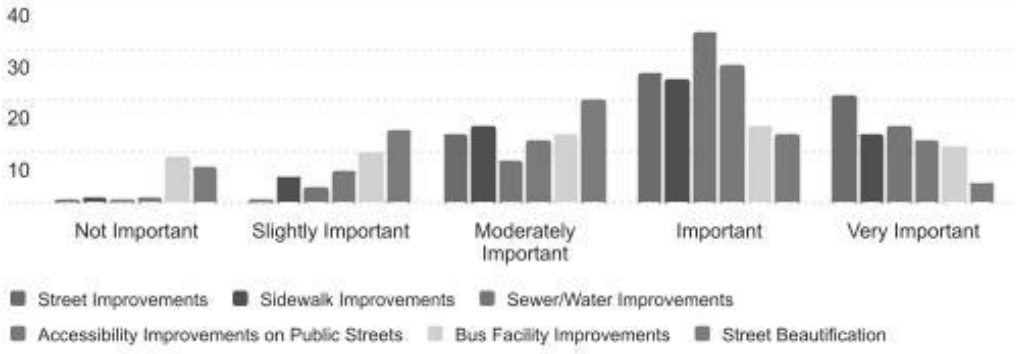
Q5 - COMMUNITY SERVICES How important are the following to you?



Q5 - COMMUNITY SERVICES How important are the following to you?

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Walking-Biking Paths	1.00	5.00	3.58	1.09	1.19	59	211.00
Parks/Open Spaces	2.00	5.00	4.19	0.82	0.67	58	243.00
Community Gardens	1.00	5.00	3.02	1.20	1.44	59	178.00
Community Centers	2.00	5.00	3.52	0.93	0.87	58	204.00
Libraries	1.00	5.00	4.36	0.95	0.91	59	257.00
Affordable Child Care	1.00	5.00	3.53	1.39	1.94	58	205.00
Youth Centers	1.00	5.00	3.32	1.19	1.40	59	196.00
Senior Centers	1.00	5.00	3.58	1.06	1.13	59	211.00

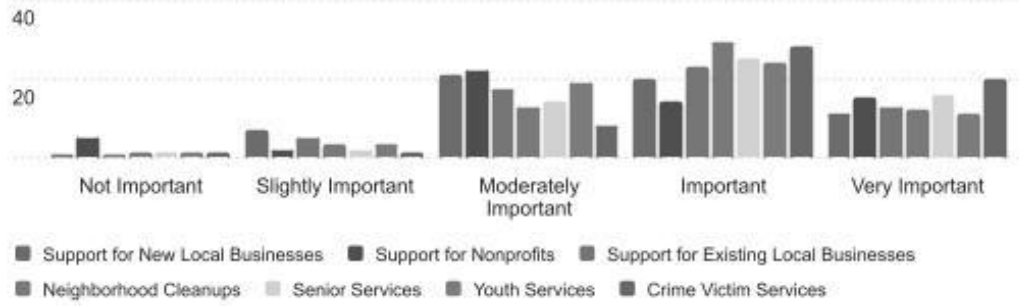
Q6 - STREETS AND UTILITIES How important are the following to you?



Q6 - STREETS AND UTILITIES How important are the following to you?

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Street Improvements	3.00	5.00	4.14	0.75	0.56	59	244.00
Sidewalk Improvements	1.00	5.00	3.74	0.96	0.92	58	217.00
Sewer/Water Improvements	2.00	5.00	4.02	0.77	0.59	59	237.00
Accessibility Improvements on Public Streets	1.00	5.00	3.74	0.96	0.92	58	217.00
Bus Facility Improvements	1.00	5.00	3.16	1.34	1.79	58	183.00
Street Beautification	1.00	5.00	2.88	1.10	1.21	58	167.00

Q7 - BUSINESS AND COMMUNITY SUPPORT How important are the following to you?



Q7 - BUSINESS AND COMMUNITY SUPPORT How important are the following to you?

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Support for New Local Businesses	2.00	5.00	3.59	0.92	0.85	59	212.00
Support for Nonprofits	1.00	5.00	3.55	1.16	1.35	58	206.00
Support for Existing Local Businesses	2.00	5.00	3.76	0.90	0.80	58	218.00
Neighborhood Cleanups	1.00	5.00	3.83	0.87	0.76	58	222.00
Senior Services	1.00	5.00	3.91	0.90	0.80	58	227.00
Youth Services	1.00	5.00	3.71	0.89	0.79	58	215.00
Crime Victim Services	1.00	5.00	4.12	0.83	0.69	58	239.00

Q8 - Other Critical Needs/Services that you are aware of not mentioned:

22 Responses

Other Critical Needs/Services that you are aware of not mentioned:
Neighborhood quality, preserving family friendly neigjborhoods
Better bus service meaning more routes connecting more places at an affordable price
Raise wages
Gang prevention mental health services for kids is 6 month wait list which will lead to deaths goat heads on all side walks makes it harder for kids to bike around.
Community commercial kitchens that have the equipment to preserve food for storage would be beneficial to those who support the community gardens as well as to steward and maintain local fruit producing trees who's produce otherwise goes to waste.
Owner-occupied housing opportunities
N/A
Accessibility for disabled and deeply affordable housing for those on fixed income.
N/a
Smaller Government
Disabilities services
affordable water and power
None
Water. Not overextending our culinary water supply by bringing in too many new residents.
Police and first responders
Seperared Bike Lanes, not gutters. TRAX on State St. And University
Support for those on disability
Fixing pot holes and road damage quickly, adding better paint for more visibility in rain
Costs for fixed income. Don't raise taxes for elderly on a fixed income
Food, unhoused
Bike and pedestrian safety

13

Safe bike paths!

Q9 - In which Community in Utah County do you live?

59 Responses

In which Community in Utah County do you live?
Orem
Orem
Orem
Orem
Orem but when we rented it's 3x what it was in the slums with no improvements. Could not live there now and many friends who were renting have moved out of state due to rising costs after forced to live in trailers.
Orem
Orem
Orem
Orem
Orem
orem
Orem
Orem Community
Orem
Orem
Orem, Windsor South
Orem
Orem
Orem, UT
Orem
Orem
Orem

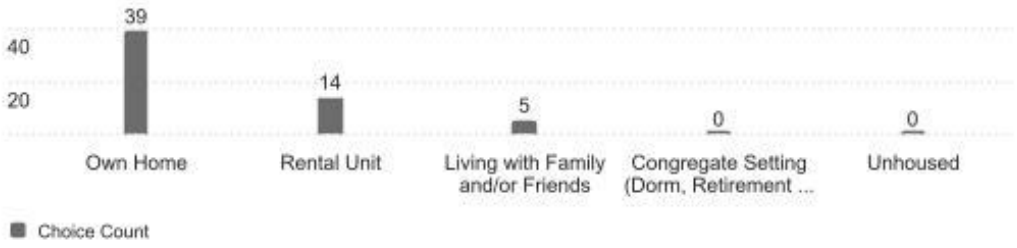
15

Orem
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Provo/Orem
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Orem

16

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Orem

Q10 - What is your current housing status?



Q11 - Are you able to find safe, decent and affordable housing in your community?



Consolidated Plan 2025-2029 Needs Survey Spanish Responses

Q1 - ¿Cómo se enteró de esta encuesta?

¿Cómo se enteró de esta encuesta?

Food bank

Q2 - Vivienda ¿Qué tan importantes son para usted los siguientes aspectos?



Q2 - Vivienda ¿Qué tan importantes son para usted los siguientes aspectos?

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Vivienda asequible	4.00	4.00	4.00	0.00	0.00	1	4.00
Comunidades que enfrentan dificultades con la vivienda	5.00	5.00	5.00	0.00	0.00	1	5.00
Hacer que la compra de una vivienda sea asequible	5.00	5.00	5.00	0.00	0.00	1	5.00
Hacer que el alquiler sea más asequible	5.00	5.00	5.00	0.00	0.00	1	5.00

Q3 - ¿Qué comunidades del condado de Utah cree que tienen más dificultades en cuanto a la vivienda?

No data found - your filters may be too exclusive!

Q4 - ¿Qué comunidades en el condado de Utah tienen las viviendas más económicas?

No data found - your filters may be too exclusive!

Q5 - Servicios comunitarios ¿Qué tan importantes son para usted los siguientes a...



Q5 - Servicios comunitarios ¿Qué tan importantes son para usted los siguientes a...

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Senderos para caminar y andar en bicicleta	3.00	3.00	3.00	0.00	0.00	1	3.00
Parques / Espacios abiertos	4.00	4.00	4.00	0.00	0.00	1	4.00
Jardines comunitarios	4.00	4.00	4.00	0.00	0.00	1	4.00
Centros comunitarios	4.00	4.00	4.00	0.00	0.00	1	4.00
Bibliotecas	4.00	4.00	4.00	0.00	0.00	1	4.00
Cuidado infantil asequible	5.00	5.00	5.00	0.00	0.00	1	5.00

Centros para jóvenes	5.00	5.00	5.00	0.00	0.00	1	5.00
Centros para personas mayores	5.00	5.00	5.00	0.00	0.00	1	5.00

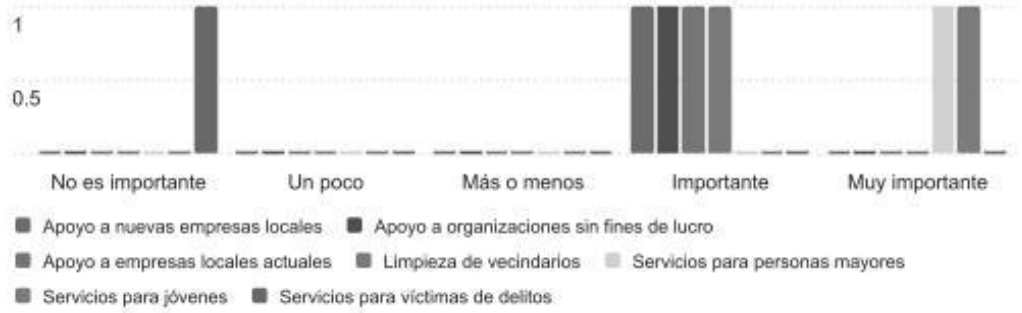
Q6 - Calles y servicios públicos ¿Qué tan importantes son para usted los siguien...



Q6 - Calles y servicios públicos ¿Qué tan importantes son para usted los siguien...

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Mejoras en la calles	4.00	4.00	4.00	0.00	0.00	1	4.00
Mejoras en las aceras	4.00	4.00	4.00	0.00	0.00	1	4.00
Mejoras en el agua y el alcantarillado	4.00	4.00	4.00	0.00	0.00	1	4.00
Mejoras de acceso en las vías públicas	4.00	4.00	4.00	0.00	0.00	1	4.00
Mejoras en las instalaciones de autobuses	4.00	4.00	4.00	0.00	0.00	1	4.00
Embellecimiento de calles	4.00	4.00	4.00	0.00	0.00	1	4.00

Q7 - Apoyo a empresas y a la comunidad ¿Qué tan importantes son para usted los s...



Q7 - Apoyo a empresas y a la comunidad ¿Qué tan importantes son para usted los s...

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Apoyo a nuevas empresas locales	4.00	4.00	4.00	0.00	0.00	1	4.00
Apoyo a organizaciones sin fines de lucro	4.00	4.00	4.00	0.00	0.00	1	4.00
Apoyo a empresas locales actuales	4.00	4.00	4.00	0.00	0.00	1	4.00
Limpieza de vecindarios	4.00	4.00	4.00	0.00	0.00	1	4.00
Servicios para personas mayores	5.00	5.00	5.00	0.00	0.00	1	5.00
Servicios para jóvenes	5.00	5.00	5.00	0.00	0.00	1	5.00
Servicios para víctimas de delitos	1.00	1.00	1.00	0.00	0.00	1	1.00

Q8 - Otras necesidades o servicios cruciales que usted conoce y que no se mencionan:

Otras necesidades o servicios cruciales que usted conoce y que no se mencionan:

Ayuda para buscar trabajo

Q9 - ¿En qué comunidad del condado de Utah vive?

¿En qué comunidad del condado de Utah vive?

Orem

Q10 - ¿Cuál es su situación actual de vivienda?



Q11 - ¿Puede encontrar vivienda segura, digna y asequible en su comunidad?



Please find the official minutes for the CDBG Hearing held December 10, 2024 at the following link, posted by Orem City: (titled PUBLIC HEARING - Community Development Block Grant (CDBG) Consolidation)

12 December 2024 - Google Drive

Daily Herald

AFFIDAVIT OF PUBLICATION

See Proof on Next Page

State of Florida, County of Orange, ss:

Daily Herald
1200 Provo Towne Centre Blvd #1058
(801) 373-5050

ACCOUNT #	DESCRIPTION	TIMES	PROOF	TOTAL CHARGES
	yyiZnD8Vzp11sdJD7SGE	1	00	130.09

Edmar Corachia, being first duly sworn, deposes and says: That (s)he is a duly authorized signatory of Column Software, PBC, duly authorized agent of the Daily Herald, which is, and was at the times of publication, hereinafter mentioned, a newspaper printed and published in Provo, Utah County State of Utah and that the annexed advertisement was published in said paper on:
May. 17, 2025

That said newspaper was regularly issued and circulated on those dates. Same was also published online at utahlegals.com, according to Section 45-1-101 -Utah Code Annotated, beginning on the first date of publication, for at least 30 days thereafter and a minimum of 30 days prior to the date of scheduled.

Edmar Corachia

(signed)_____

VERIFICATION

State of Florida
County of Orange

Subscribed in my presence and sworn to before me on this: 05/19/2025

Notary Public
Notarized remotely online using communication technology via Proof.

Orem Announces Public Hearing and Public Comment Period for feedback on the five-year 2025-2029 Draft Consolidated Plan and the PY25 Annual Action Plan

Mountainland Association of Governments will hold a public hearing to consider feedback on the **Orem CDBG 5-Year Consolidated and Annual Action Plan**, which outlines community needs, potential community funding priorities, and program structure and governance. The estimated amount of CDBG funds for the program year will be discussed, along with the range of projects eligible.

The hearing will be held at Mountainland Association of Governments at 586 E 800 N in Orem on Thursday, May 29, 2025 at 5pm. Suggestions will be solicited verbally, electronically, and in writing from all interested parties during the public comment period from May 17 - June 16, 2025.

Virtual Attendance: Join with this Video call link: https://meet.google.com/kzo-hxxi-fcw

To comment or for further information, contact Taylor Draney at tdraney@magutah.gov or 801-647-7584.

The public hearing facility is fully accessible to persons with disabilities. Individuals needing special accommodations (including auxiliary aids/services or translation) during the hearing should notify Taylor Draney at least five days prior to the hearing. A language interpreter can be provided upon request.

Orem Anuncia la Audiencia Pública y el Período de Comentarios Públicos para las recomendaciones sobre el Plan Consolidado Borrador 2025-2029 y el Plan de Acción Anual PY25

Mountainland Association of Governments llevará a cabo una audiencia pública para considerar la retroalimentación sobre el Plan de Acción Anual y Consolidado Borrador CDBG de Orem que resume las necesidades de la comunidad, posibles prioridades de financiación comunitaria y la estructura del programa y la gestión. El monto estimado de los fondos CDBG para este año del programa se examinará junto con la gama de proyectos elegibles.

La audiencia se llevará a cabo en las oficinas de Mountainland Association of Governments, 586 E 800 N en Orem el Jueves 29 de Mayo de 2025 a las 5:00 p.m. Sugerencias serán solicitadas verbalmente, electrónicamente y por escrito de todas las partes interesadas durante el período de comentarios públicos del 17 de Mayo de 2025 – 16 de junio de 2025.

Para comentar u obtener información adicional, póngase en contacto con Taylor Draney 801-647-7584 o tdraney@magutah.gov.

Presencia Virtual: Unirse a este enlace de videollamada: https://meet.google.com/kzo-hxxi-fcw

La instalación de audiencia pública es totalmente accesible para personas con discapacidad. Las personas que necesiten adaptaciones especiales (servicios o traducción auxiliares) durante la audiencia deberán notificar a Taylor Draney al menos cinco días antes de la audiencia. Un número de teléfono Utah Relay o un intérprete de lenguaje pueden ser disponibles bajo petición.

May 29, 2025

Orem Consolidated Plan Public Hearing

Attachments Orem Consolidated Plan Public Hearing

Meeting records Recording

Summary

Taylor Draney presented the overview of Oram city's consolidated plan for the next five years and the FY25 annual action plan during a public hearing. The approved projects in the annual action plan include funding for MAG and ORM staff administration, a section 108 loan repayment, code enforcement, critical home repair, LMI Parks playground equipment replacement, and the Fuller Center for Housing. Public service funding allocations were detailed for the police department's victim and homeless services, neighborhood revitalization, Rocky Mountain University services, Utah Tax Help Services, and Big Brothers Big Sisters. Taylor Draney closed the hearing due to no other attendees or public comments.

Details

- **Consolidated Plan and FY25 Annual Action Plan Overview** Taylor Draney opened the public hearing for the Oram city consolidated plan and the FY25 annual action plan, explaining that the consolidated plan covers community needs and funding priorities for the next five years. Taylor Draney noted the hearing was taking place at the MAG building in Oram and commenced at 5:02 p.m.
- **Approved Projects in the Annual Action Plan** Taylor Draney detailed the projects approved by the council within the annual action plan for the upcoming year. These included $90,000 for MAG administration, $23,98.40 for ORM staff administration, and $101,369 for the final installment of a section 108 loan

repayment. Funding was also allocated for code enforcement ($161,500), critical home repair ($57,000), LMI Parks playground equipment replacement ($279,6747), and the Fuller Center for Housing for Single Family Rehab ($17,000).

- **Public Service Funding Allocations** Taylor Draney outlined the public service funding, which included $30,000 for police department victim services, $1,896.90 for police department homeless services, and $1,827.70 for neighborhood revitalization. Additional funding was allocated to Rocky Mountain University for services ($7,696.70), Utah Tax Help Services ($34,230), and Big Brothers Big Sisters ($9,780).
- **Hearing Closure** Taylor Draney stated that with no other individuals present and no comments received, they would close the hearing at 5:04 p.m.

Consultation Form

Date of Consultation: October 28 and 30, 2024

Agency/Group/Organization Types:

	Housing		Services- Victims		Neighborhood Organization
	PHA		Services- Broadband Internet Service Providers		Regional Organization
	Services- Housing		Services- Narrowing the Digital Divide		Planning organization
	Services- Children		Health Agency		Business Leaders
	Services- Elderly Persons		Child Welfare Agency		Civic Leaders
	Services- Persons with Disabilities		Agency- Managing Flood Prone Areas		Community Development Financial Institution
	Services- Persons with HIV/AIDS		Agency- Management of Public Land or Water Resources		Foundation
	Services- Victims of Domestic Violence		Agency- Emergency Management		Grantee Department
	Services- Homeless		Publicly funded institution / System of Care*		Major Employer
	Services- Health		Other government-Federal		Private Sector Banking/Financing
	Services- Education		Other government- State		Other:
	Services- Employment		Other government-County		
	Services- Fair Housing	X	Other government- Local		

*Organizations which may discharge persons into homelessness, such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions.

Areas addressed by Consultation:

X	Housing Needs Assessment		Homelessness Needs-Unaccompanied Youth	X	Economic Development
X	Public Housing Needs	X	Homelessness Strategy		Lead-based Paint Strategy
X	Homeless Needs-Chronically homeless	X	Non-Homeless Special Needs	X	Anti-Poverty-Strategy
X	Homeless Needs- Families with Children		HOPWA Strategy	X	Other: Public Safety, Water and Sewer Lines, Infrastructure and Utilities, Critical Home Repair Program, Victim

					Services, Abused Children and Domestic Violence Resources, Parks
	Homelessness Needs-Veterans	X	Market Analysis		

The Agency/Group/Organizations were consulted via a paper questionnaire during a community meeting on the application process for CDBG funds.

Respondents noted the following needs of the community:

Public safety, water and sewer line replacement and/or repair, walkable streets for residents including sidewalks and ADA access, neighborhood revitalization and critical home repair, economic development potential and job availability while aligning with housing needs and scarcity, public housing, homeless assistance, affordable and clean drinking water, park creation and amenity repair, affordable commercial rental properties for small business retailers and lack of development of more properties, roads, sidewalks,

Respondents also noted obstacles to these needs including: enough funding to meet the needs, competition for grant funding, jobs that enable individuals and families to afford adequate housing, increasing State modern income housing requirements, and overcoming hurdles and qualifying for and being able to distribute CDBG funds for economic development.

Additional responses emphasized that housing needs are dire, the aging population is struggling to afford care and repair of homes, senior services are needed as well as improving accessibility in the community, small business and entrepreneurship assistance, and aging infrastructure creating a large need while simultaneously adding new growth to the old systems.

Date of Consultation: October 28 and 30, 2024

Agency/Group/Organization Types:

X	Housing	X	Services- Victims	X	Neighborhood Organization
	PHA		Services- Broadband Internet Service Providers	X	Regional Organization
X	Services- Housing		Services- Narrowing the Digital Divide		Planning organization
X	Services- Children		Health Agency		Business Leaders
X	Services- Elderly Persons		Child Welfare Agency	X	Civic Leaders

X	Services- Persons with Disabilities		Agency- Managing Flood Prone Areas		Community Development Financial Institution
	Services- Persons with HIV/AIDS		Agency- Management of Public Land or Water Resources		Foundation
X	Services- Victims of Domestic Violence		Agency- Emergency Management		Grantee Department
X	Services- Homeless	X	Publicly funded institution / System of Care*		Major Employer
X	Services- Health		Other government-Federal		Private Sector Banking/Financing
X	Services- Education		Other government- State	X	Other: Senior services, Legal Services, Food Services
X	Services- Employment		Other government-County		
	Services- Fair Housing	X	Other government- Local		

*Organizations which may discharge persons into homelessness, such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions.

Areas addressed by Consultation:

X	Housing Needs Assessment	X	Homelessness Needs-Unaccompanied Youth	X	Economic Development
X	Public Housing Needs	X	Homelessness Strategy		Lead-based Paint Strategy
X	Homeless Needs-Chronically homeless	X	Non-Homeless Special Needs	X	Anti-Poverty-Strategy
X	Homeless Needs- Families with Children		HOPWA Strategy	X	Other: Healthcare Services, Senior Services, Economic Development Resources in Spanish, Child Abuse Victims, Therapy Services, Domestic Violence and Sexual Assalt Victim Services, Mental Healthcare, Food Insecurity and Hunger, Developmentally Disabled, Youth Services and Childcare
	Homelessness Needs-Veterans	X	Market Analysis		

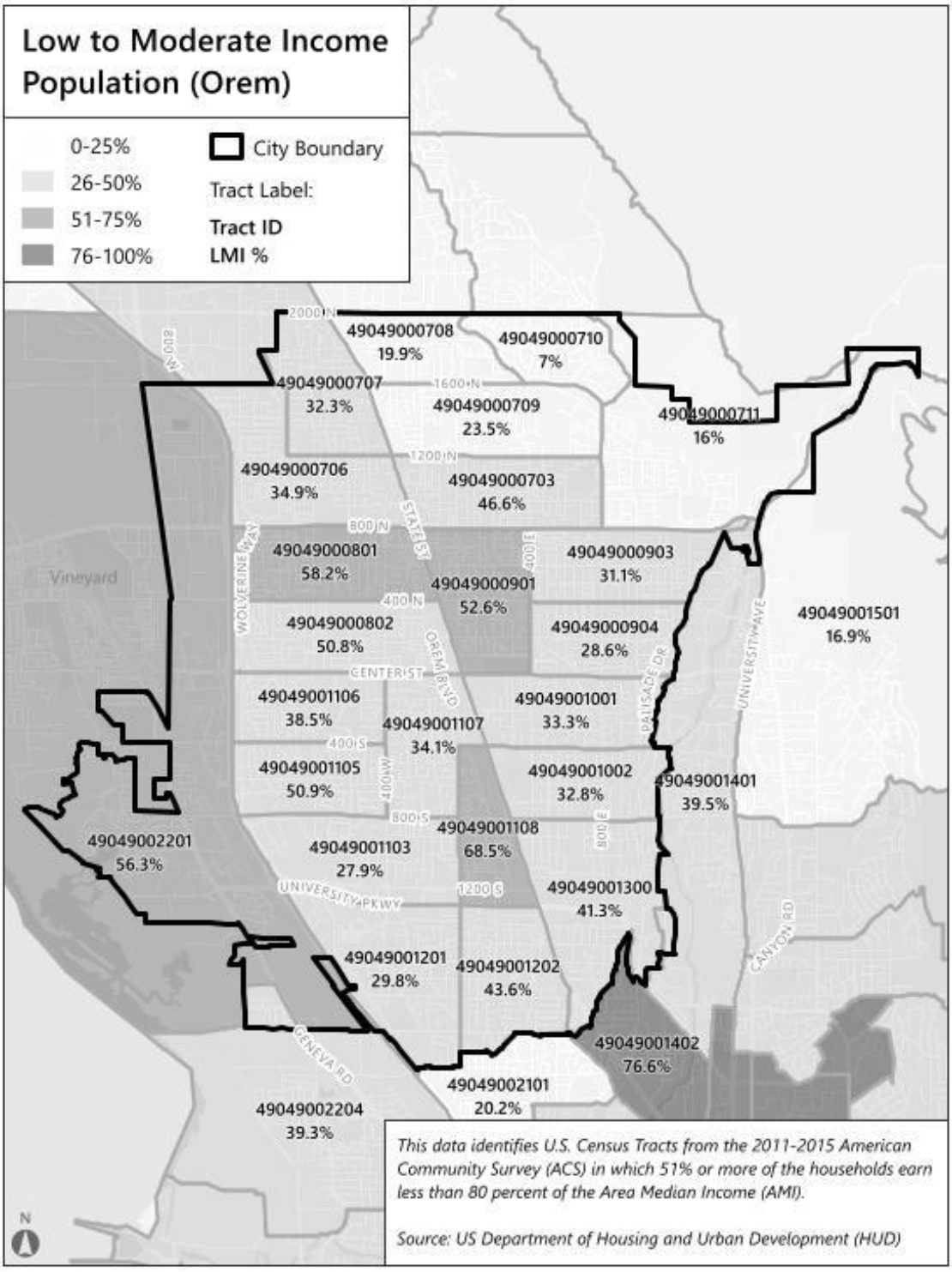
The Agency/Group/Organizations were consulted via a paper questionnaire during a community meeting on the application process for CDBG funds.

Respondents noted the following needs of the community:

Homeless needs for families and children, homeless shelters, non-homeless special needs and additional facilities to assist with this work, safe and affordable housing, preventing and assisting homelessness, affordable healthcare for low-moderate incomes, senior services, addressing poverty, help for adults with disabilities and the facilities for that work, safe and affordable facility availability that accepts families, single family rehab, economic development, financial and tax education for the underserved, services and ongoing therapy for child abuse victims and their family members, group and individual therapy and supplies to support that work, domestic violence shelter increase, rental assistance for survivors of abuse to prevent homelessness and general rental assistance, battered spouses, affordable treatment for mental illness, public housing, anti-poverty strategy, youth services and childcare, food assistance, food waste and getting access of food to people in need.

Respondents also noted obstacles to these needs including: functional partnerships to create solutions for homelessness, services being limited due to funding or capacity, lack of man-power to assist with needs, lack of building capacity to shelter abused, and most importantly the gap between need and funding is growing.

Additional responses emphasized that a sliding scale for all healthcare types would be beneficial, addressing an increasing homeless population is important, that most facilities are often to capacity and have to turn people away, temporary homelessness can often turn to chronic homelessness due to trauma and mental capabilities and having resources to assist those things can help and to create more children justice centers.



OMB Control No: 2506-0117 (exp. 09/30/2021)

Home Area Profile Analysis

Workers: *Living in Orem city, UT*
Showing: *Residential locations*

Total Primary Jobs

	2022	
	Count	Share
Total Primary Jobs	42,660	100.0%

Jobs by Worker Age

	2022	
	Count	Share
Age 29 or younger	15,844	37.1%
Age 30 to 54	19,430	45.5%
Age 55 or older	7,386	17.3%

Jobs by Earnings

	2022	
	Count	Share
$1,250 per month or less	8,177	19.2%
$1,251 to $3,333 per month	13,169	30.9%
More than $3,333 per month	21,314	50.0%

Jobs by NAICS Industry Sector

	2022	
	Count	Share
Agriculture, Forestry, Fishing and Hunting	99	0.2%
Mining, Quarrying, and Oil and Gas Extraction	102	0.2%
Utilities	100	0.2%
Construction	3,821	9.0%

Page: 1
Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by NAICS Industry Sector

2022

	Count	Share
Manufacturing	3,577	8.4%
Wholesale Trade	1,453	3.4%
Retail Trade	4,944	11.6%
Transportation and Warehousing	1,301	3.0%
Information	2,031	4.8%
Finance and Insurance	1,798	4.2%
Real Estate and Rental and Leasing	675	1.6%
Professional, Scientific, and Technical Services	3,913	9.2%
Management of Companies and Enterprises	512	1.2%
Administration & Support, Waste Management and Remediation	2,873	6.7%
Educational Services	4,294	10.1%
Health Care and Social Assistance	5,133	12.0%
Arts, Entertainment, and Recreation	765	1.8%
Accommodation and Food Services	3,272	7.7%
Other Services (excluding Public Administration)	999	2.3%
Public Administration	998	2.3%

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by Worker Race

	2022	
	Count	Share
White Alone	38,842	91.1%
Black or African American Alone	807	1.9%
American Indian or Alaska Native Alone	451	1.1%
Asian Alone	1,034	2.4%
Native Hawaiian or Other Pacific Islander Alone	475	1.1%
Two or More Race Groups	1,051	2.5%

Jobs by Worker Ethnicity

	2022	
	Count	Share
Not Hispanic or Latino	35,825	84.0%
Hispanic or Latino	6,835	16.0%

Jobs by Worker Educational Attainment

	2022	
	Count	Share
Less than high school	3,599	8.4%
High school or equivalent, no college	6,598	15.5%
Some college or Associate degree	8,574	20.1%
Bachelor's degree or advanced degree	8,045	18.9%
Educational attainment not available (workers aged 29 or younger)	15,844	37.1%

Page: 3

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by Worker Sex

	2022	
	Count	Share
Male	23,539	55.2%
Female	19,121	44.8%

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Report Settings	
Analysis Type	Area Profile
Selection area as	Home
Year(s)	2022
Job Type	Primary Jobs
Labor Market Segment	All Workers
Selection Area	Orem city, UT from Places (Cities, CDPs, etc.)
Selected Census Blocks	998
Analysis Generation Date	04/10/2025 16:54 - OnTheMap 6.25.1
Code Revision	d7e653d6dda5dbfeaebf0121d6547c7bdf6e3686
LODES Data Vintage	20241022_1605

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2022).
Notes:

1. Race, Ethnicity, Educational Attainment, and Sex statistics are beta release results and are not available before 2009.
2. Educational Attainment is only produced for workers aged 30 and over.
3. Firm Age and Firm Size statistics are beta release results for All Private jobs and are not available before 2011.

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Work Area Profile Analysis

Workers: *Employed in Orem city, UT*
Showing: *Employment locations*

Total Primary Jobs

	2022	
	Count	Share
Total Primary Jobs	45,726	100.0%

Jobs by Worker Age

	2022	
	Count	Share
Age 29 or younger	16,662	36.4%
Age 30 to 54	21,483	47.0%
Age 55 or older	7,581	16.6%

Jobs by Earnings

	2022	
	Count	Share
$1,250 per month or less	9,709	21.2%
$1,251 to $3,333 per month	14,089	30.8%
More than $3,333 per month	21,928	48.0%

Jobs by NAICS Industry Sector

	2022	
	Count	Share
Agriculture, Forestry, Fishing and Hunting	44	0.1%
Mining, Quarrying, and Oil and Gas Extraction	1	0.0%
Utilities	179	0.4%
Construction	3,731	8.2%

Page: 1
Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by NAICS Industry Sector

2022

	Count	Share
Manufacturing	3,605	7.9%
Wholesale Trade	1,794	3.9%
Retail Trade	6,703	14.7%
Transportation and Warehousing	744	1.6%
Information	2,049	4.5%
Finance and Insurance	1,303	2.8%
Real Estate and Rental and Leasing	891	1.9%
Professional, Scientific, and Technical Services	3,459	7.6%
Management of Companies and Enterprises	547	1.2%
Administration & Support, Waste Management and Remediation	3,282	7.2%
Educational Services	5,297	11.6%
Health Care and Social Assistance	5,980	13.1%
Arts, Entertainment, and Recreation	689	1.5%
Accommodation and Food Services	3,530	7.7%
Other Services (excluding Public Administration)	1,210	2.6%
Public Administration	688	1.5%

Page: 2

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by Worker Race

	2022	
	Count	Share
White Alone	42,136	92.1%
Black or African American Alone	766	1.7%
American Indian or Alaska Native Alone	415	0.9%
Asian Alone	1,027	2.2%
Native Hawaiian or Other Pacific Islander Alone	364	0.8%
Two or More Race Groups	1,018	2.2%

Jobs by Worker Ethnicity

	2022	
	Count	Share
Not Hispanic or Latino	39,744	86.9%
Hispanic or Latino	5,982	13.1%

Jobs by Worker Educational Attainment

	2022	
	Count	Share
Less than high school	3,712	8.1%
High school or equivalent, no college	7,304	16.0%
Some college or Associate degree	9,397	20.6%
Bachelor's degree or advanced degree	8,651	18.9%
Educational attainment not available (workers aged 29 or younger)	16,662	36.4%

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Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Jobs by Worker Sex

	2022	
	Count	Share
Male	24,548	53.7%
Female	21,178	46.3%

Page: 4
Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Report Settings	
Analysis Type	Area Profile
Selection area as	Work
Year(s)	2022
Job Type	Primary Jobs
Labor Market Segment	All Workers
Selection Area	Orem city, UT from Places (Cities, CDPs, etc.)
Selected Census Blocks	998
Analysis Generation Date	04/10/2025 16:53 - OnTheMap 6.25.1
Code Revision	d7e653d6dda5dbfeaebf0121d6547c7bdf6e3686
LODES Data Vintage	20241022_1605

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2022).
Notes:

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2. Educational Attainment is only produced for workers aged 30 and over.
3. Firm Age and Firm Size statistics are beta release results for All Private jobs and are not available before 2011.

Source: U.S. Census Bureau, OnTheMap Application, https://onthemap.ces.census.gov

Age Group	Population	e Particip	abor Forc	ployment	nemployed
16–19	8274	53.1%	4393.5	9.9%	435
20–24	14840	83.3%	12361.7	5.3%	655.2
25–29	10457	80.0%	8365.6	0.9%	75.3
30–34	6123	83.8%	5131.1	0.4%	20.5
35–44	8523	82.1%	6997.4	7.0%	489.8
45–54	9451	87.2%	8241.3	1.4%	115.4
55–59	3435	75.4%	2590	2.5%	64.7
60–64	3977	61.4%	2441.9	5.5%	134.3
16–24 Tot	23114		16755.2	6.51%	1090.2
25–64 Tot	41966		33767.3	2.67%	900

<10 mins	19.5%	8345
10-14 mins	19.3%	8260
15-19 mins	22.3%	9544
20-24 mins	12.7%	5435
25-29 mins	5.0%	2140
30-34 mins	4.8%	2054
35-44 mins	5.0%	2140
45-59 mins	4.5%	1926
60+ mins	6.8%	2910
Totals:	99.90%	42,796

0-30 Total:	33723
30-49 Total:	6120
60+ Total:	2910

Grantee SF-424's and Certification(s)

Appendix - Alternate/Local Data Sources

1	**Data Source Name** Community Needs Survey 2020-2021
	List the name of the organization or individual who originated the data set. City of Orem, City of Provo, Mountainland Association of Governments
	Provide a brief summary of the data set. The data set was residents living in Utah County. Specific sets include public service providers and those receiving services from the providers.
	What was the purpose for developing this data set? The purpose of this survey was to seek understanding of how the general community, service providers, and clients receiving services would like CDBG and HOME funds are spent in our community.
	Provide the year (and optionally month, or month and day) for when the data was collected. January/February 2020
	Briefly describe the methodology for the data collection. The survey was created in Survey Monkey and offered as a link on city social media channels and through city newsletter in English and Spanish. Paper surveys in both languages were given to service providers to give their clients to complete.
	Describe the total population from which the sample was taken. The total population of Utah County is 636,235. Orem has approximately 97,521 residents.

	Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed. Approximately 57% of those who completed the survey were residents of Orem. There were a total of 593 surveys collected with 337 Orem participants.
2	**Data Source Name** Discussion with Public Service Providers
	List the name of the organization or individual who originated the data set. City of Orem, City of Provo, and Mountainland Association of Governments
	Provide a brief summary of the data set. Local service providers who have received federal funding in the past or plan to seek funding in the future.
	What was the purpose for developing this data set? To better understand the needs in the community and help entitlements to set priorities for federal funding.
	Provide the year (and optionally month, or month and day) for when the data was collected. January 2020
	Briefly describe the methodology for the data collection. Held a facilitated meeting and captured responses from meeting.
	Describe the total population from which the sample was taken. A diverse group of representatives from local public service organization.

	Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed. We had 18 representatives from various and diverse public services organizations attend.
3	**Data Source Name** Priority Setting Activity with Orem City Council
	List the name of the organization or individual who originated the data set. City of Orem Community Services Staff
	Provide a brief summary of the data set. Priority setting activity
	What was the purpose for developing this data set? To better understand the needs in the community and help entitlements to set priorities for federal funding.
	Provide the year (and optionally month, or month and day) for when the data was collected. February 2020
	Briefly describe the methodology for the data collection. Priority setting activity. The Mayor and Council Members were given monopoly money and were presented with various priority options in different areas. The members had to "spend" their limited amount of money on things they thought should be a priority to federal spending.
	Describe the total population from which the sample was taken. Mayor and five Council members. One Council Member was out of town.

	Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed. Six community leaders from diverse backgrounds and from different geographic areas within the City of Orem participated.
4	**Data Source Name** LEHD Origin-Destination Employment Statistics
	List the name of the organization or individual who originated the data set. This data is provided by the US Census.
	Provide a brief summary of the data set. LODES (Longitudinal Employer-Household Dynamics Origin-Destination Employment Statistics) data provides detailed information on the number of jobs by place of work and place of residence, along with various worker and firm characteristics. It's a rich dataset for understanding employment patterns and workforce dynamics at a granular level.
	What was the purpose for developing this data set? This data's purpose is to analyze labor market patterns and commuting behavior.
	How comprehensive is the coverage of this administrative data? Is data collection concentrated in one geographic area or among a certain population? The data is measured on a fine-grained level, as specific as by census block. The numbers I used came from the entire city of Orem, with no other limitations.

	What time period (provide the year, and optionally month, or month and day) is covered by this data set? This data is provided annually. In MA-45, I only included the most recent data available, which was from 2022.
	What is the status of the data set (complete, in progress, or planned)? This data set is complete.
5	**Data Source Name** US Census
	List the name of the organization or individual who originated the data set. US Census Bureau
	Provide a brief summary of the data set. I used several different tables from the US Census. These specific tables are referenced throughout the plan as their numbers are included.
	What was the purpose for developing this data set? The census was developed to provide detailed data on the population.
	Provide the year (and optionally month, or month and day) for when the data was collected. I always used the most recent data available. The most recent year of data available for each table used differed. I always reference the year the data in question was gathered throughout the plan.
	Briefly describe the methodology for the data collection.
	Describe the total population from which the sample was taken. Orem City.

	Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed. Demographics considered differ for each dataset used throughout the plan. This is referenced in each section of the plan that census data is used.