

SCOTTSDALE CITY COUNCIL  
WORK STUDY SESSION MINUTES  
TUESDAY, APRIL 29, 2014



CITY HALL KIVA  
3939 N. DRINKWATER BOULEVARD  
SCOTTSDALE, AZ 85251

**CALL TO ORDER**

Mayor W.J. "Jim" Lane called to order a Work Study Session of the Scottsdale City Council at 3:07 P.M. on Tuesday, April 29, 2014, in the City Hall Kiva.

**ROLL CALL**

Present: Mayor W.J. "Jim" Lane  
Vice Mayor Virginia L. Korte  
Councilmembers Suzanne Klapp, Robert W. Littlefield, Linda Milhaven,  
Guy Phillips and Dennis E. Robbins

Also Present: City Manager Fritz Behring (arrived at 3:17 P.M.)  
City Attorney Bruce Washburn  
City Treasurer Jeff Nichols  
City Auditor Sharron Walker  
City Clerk Carolyn Jagger

**PUBLIC COMMENT – None**

- Economic Development Strategic Plan Framework Update**  
**Request:** Presentation, discussion, and possible direction to staff regarding the Economic Development Strategic Plan framework findings and recommendations.  
**Presenter(s):** Danielle Casey, Economic Development Director; Ioanna Morfessis, Ph.D., President, IO.INC  
**Staff Contact(s):** Danielle Casey, Economic Development Director, 480-312-7601, [dcasey@scottsdaleaz.gov](mailto:dcasey@scottsdaleaz.gov)

Economic Development Director Danielle Casey and Ioanna Morfessis, Ph.D., President of IO.INC, gave a PowerPoint presentation (attached) summarizing the Economic Development Strategic Plan Framework.

**NOTE:** MINUTES OF CITY COUNCIL MEETINGS AND WORK STUDY SESSIONS ARE PREPARED IN ACCORDANCE WITH THE PROVISIONS OF ARIZONA REVISED STATUTES. THESE MINUTES ARE INTENDED TO BE AN ACCURATE REFLECTION OF ACTION TAKEN AND DIRECTION GIVEN BY THE CITY COUNCIL AND ARE NOT VERBATIM TRANSCRIPTS. DIGITAL RECORDINGS AND CLOSED CAPTION TRANSCRIPTS OF SCOTTSDALE CITY COUNCIL MEETINGS ARE AVAILABLE ONLINE AND ARE ON FILE IN THE CITY CLERK'S OFFICE.

In response to interest expressed in strengthening the Plan as it relates to the City's relationship with the Scottsdale Unified School District, Dr. Morfessis committed to placing more emphasis on the Scottsdale Unified School District within the Plan.

Ms. Casey clarified that the action items listed in year one of the Plan are to be started, but are not expected to be completed within the first year.

**ADJOURNMENT**

With no further business to discuss, the Work Study Session adjourned at 5:06 P.M.

**SUBMITTED BY:**



**Carolyn Jagger  
City Clerk**

**Officially approved by the City Council on**

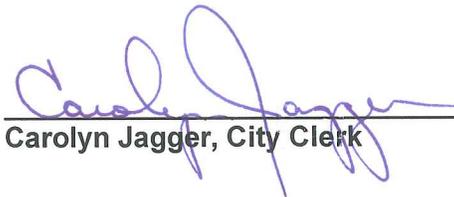
June 3, 2014

### CERTIFICATE

I hereby certify that the foregoing Minutes are a true and correct copy of the Minutes of the Work Study Session of the City Council of Scottsdale, Arizona held on the 29<sup>th</sup> day of April 2014.

I further certify that the meeting was duly called and held, and that a quorum was present.

**DATED** this 3<sup>rd</sup> day of June 2014.



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Carolyn Jagger, City Clerk

# Item 1



City of Scottsdale, AZ  
**ONE SCOTTSDALE:**  
*ELEVATING EXCELLENCE, PROMOTING PROSPERITY*

Prepared by:



April 2014

## SCOTTSDALE, AZ

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:**  
**ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

### Presentation Overview

- Introduction: Scottsdale in the Global Arena
- Scottsdale City Council's Strategic Goals
- Defining Economic Development for the City of Scottsdale
- The Methodology
- Targeted Sectors for the City of Scottsdale
- Snapshot of Scottsdale's Economy
- Economic Development Strategic Framework for Scottsdale
- Economic Development Progress Index: Metrics and Indicators
- Next Steps for Scottsdale's Economic Development Department

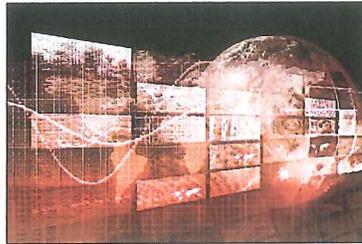
## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Introduction: Scottsdale in the Global Arena**

Today, America's communities are confronted with a dramatically altered worldscape of opportunities and challenges. Communities and their leaders need to think beyond where they have been and aggressively adapt and pursue new approaches to assure better economic outcomes for their residents, businesses and communities.



## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Introduction: Scottsdale in the Global Arena**

Communities need to think **and** act globally **and** locally if they wish to create the kind of environment that business and talent expect and demand in today's world, and to capitalize on the best and most advanced employment and earnings opportunities in the short and long term.

Scottsdale has one of the most desirable community images nationally and internationally, and unlike many Arizona and American cities, the City is in the enviable position of being able to drive its destiny.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Introduction: Scottsdale in the Global Arena**

Scottsdale's highly desirable living, recreating and working environment is a result of the City's legacy of stewardship of its natural, majestic beauty and physical environment, and from the relentless pursuit of creating one of the most sought-after residential, commerce and tourism communities in the U.S. and world.

Virtually every community - whether domestic or international - should aspire to what Scottsdale offers to its residents, businesses and visitors. And the fact is that the competition for what Scottsdale presently has, and what the City aspires to retain and attract, is ferociously intensive and global.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Introduction: Scottsdale in the Global Arena**

It is within this contextual framework of global, national, regional and local dynamics that this economic development strategy has been developed. It's goal?

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**To elevate, enhance and ensure Scottsdale's sustained desirability as a place in which to live, learn, do business, work, recreate and visit.**

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**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Introduction: Scottsdale City Council's Strategic Goals**



W.J. "Jim" Lane  
Mayor



Virginia Korte  
Vice Mayor



Suzanne Klapp  
Councilmember



Robert Littlefield  
Councilmember



Linda Milhaven  
Councilmember



Guy Phillips  
Councilmember



Dennis Robbins  
Councilmember

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Introduction: Scottsdale City Council's Strategic Goals**

Scottsdale City Council's Organizational Strategic Plan, formally approved in December 2013, provides the foundational underlayment for the economic development strategic framework.

Strategic goals of the Council's strategic plan:

- Value Scottsdale's Unique Lifestyle and Character
- Support Economic Vitality
- Enhance Neighborhoods
- Preserve Meaningful Open Space
- Seek Sustainability
- Advance Transportation

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Defining Economic Development for the City of Scottsdale**

While there are few certainties in the realm of economic development, one certainty does exist: every community's aspirations and needs are unique.

No single definition of economic development can encompass or define all facets of economic development for all communities. One size does not fit all.

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Defining Economic Development for the City of Scottsdale**

In Scottsdale, economic development immediately connotes its abundant tangible and intangible attributes - those hallmarks of success and distinction that distinguish the community from all others:

- Distinctive and unsurpassed quality of life
- Majestic natural environment
- Highly educated and engaged citizenry
- Aesthetically pleasing and sensible built environment
- Quality of residential communities and housing stock
- Richness of amenities for residents, businesses and visitors: shopping, resorts, dining, major events, arts and culture, parks and open spaces, recreation, etc.

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

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**Defining Economic Development for the City of Scottsdale**

The most universal goal of economic development is improving the economic well being of a community through efforts that entail job creation, job retention, tax base enhancements and quality of life.

For Scottsdale, it is very important that the Scottsdale City Council agrees to and adopts a definition of economic development that integrates its policies and goals, and those distinctive attributes that contribute to Scottsdale’s distinguished quality of life and reputation.

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Defining Economic Development for the City of Scottsdale**

Recommended definition for economic development in Scottsdale:

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Through its economic development investments and programs, the City of Scottsdale retains, grows and attracts targeted sources of wealth generation to enhance the community’s tax base and quality of life, preserve the natural environment and foster prosperity for all citizens.

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## **SCOTTSDALE, AZ**

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **The Methodology**

A comprehensive approach was utilized in the development of Scottsdale's economic development strategy. Among the major aspects of the team's research and work:

1. Comprehensive review of existing studies and plans, local, regional, state and national.
2. Comprehensive SWOT process engaging 300 Scottsdale stakeholders.
3. Confidential interviews with major Scottsdale employers.
4. Data-driven research and analysis on best-fit sectors for Scottsdale's economic development.

## **SCOTTSDALE, AZ**

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

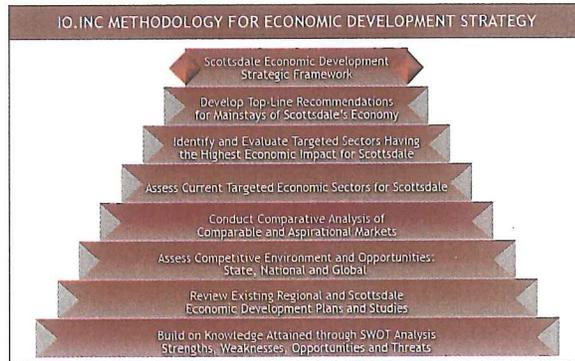
##### **The Methodology**

5. Comprehensive global, national and state research on the selected targeted sectors.
6. Comparative analysis of Scottsdale and five comparable but aspirational cities.
7. Strategic framework to guide the City of Scottsdale in its decision-making about economic development.
8. Recommended indicators and metrics to assess Scottsdale's economic development competitiveness and the performance of its economic development department.
9. Comprehensive review, discussion and input from IO.INC's BrainTrust, comprised of CEOs and industry experts.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
 ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**The Methodology**



**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
 ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**The Methodology**

**The SWOT Process: Engaging Scottsdale Stakeholders**  
 IO.INC engaged 300 Scottsdale public, private and civic leaders; knowledgeable executives and professionals from the Industry sectors that drive the city's economy; government officials at the federal and state levels; state, regional and local economic development leaders, and C-suite executives to provide input into the SWOT process and to review the recommended strategy and action agenda.



**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**The Methodology**

**The SWOT Process: Engaging Scottsdale Stakeholders**

The SWOT process entailed both one-on-one personal interviews as well as five roundtable/focus groups representing key sectors of Scottsdale's economic base:

- Interviews with 230 individuals
- Roundtables with major employers, entrepreneurs, quality of life organizations
- Roundtable with members of the Mayor's Scottsdale Youth Council

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**The Methodology & SWOT Analysis**

CITY OF SCOTTSDALE :: STRENGTHS

**SCOTTSDALE AIRPORT/AIRPARK**  
**DOWNTOWN REPUTATION &**  
**DISTRICT NAME RECOGNITION**  
**TOP EXECUTIVES & FIRMS**  
**QUALITY OF LIFE**  
**PUBLIC STAFF AND SERVICES EVENTS**  
**EDUCATED & AFFLUENT PEOPLE**  
**DESTINATION TOURISM**

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:**  
**ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

The Methodology & SWOT Analysis

CITY OF SCOTTSDALE :: WEAKNESSES

DIVISIVENESS IN GOVERNMENT  
LACK OF SITES BUILT-OUT  
LACK OF ECONOMIC DIVIDED  
DEVELOPMENT MARKETING CITY  
LACK OF YOUNG TALENT  
**LACK OF VISION**  
PUBLIC/CITIZEN VITRIOL  
LACK OF LAND ARROGANCE

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:**  
**ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

The Methodology & SWOT Analysis

CITY OF SCOTTSDALE :: OPPORTUNITIES

GROW HIGH INCREASE  
VALUE SECTORS CIVILITY  
EMPLOYMENT CENTERS  
**QUALITY JOBS**  
MCDOWELL ROAD YOUNG TALENT  
ECONOMIC DEVELOPMENT  
CURE CORRIDOR HOUSING  
EXPANDED TRANSPORTATION  
AND TRANSIT DOWNTOWN

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

The Methodology & SWOT Analysis

CITY OF SCOTTSDALE :: THREATS

**ANTI-GROWTH ATTITUDES**  
**UNWILLINGNESS TO "ENCLAVE"**  
**INVEST IN FUTURE MENTALITY**  
**LACK OF TRANSPORTATION**  
**INCREASED FAILED BOND**  
**COMPETITION ELECTIONS**  
**FAILED SCHOOL OVERRIDES**  
**HIGH COST NORTH VS. SOUTH, OLD VS.**  
**HOUSING NEW, RICH VS. LESS AFFLUENT**  
**ATTRACTING/ PERCEPTION**  
**RETAINING TALENT**  
**LIMITED CAPITAL FOR STARTUPS**

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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The Methodology

**Targeted Sector Identification and Analysis**

Based on a comprehensive review of Scottsdale's General Plan (2001), as well as Character Area Plans, regional, state, national and global studies and data, our team approached the targeted sector analysis with an overarching goal in mind:

=====  
**To identify existing and emerging target sector opportunities that strengthen and enhance Scottsdale's quality of life, current economic base, and natural and physical/built environments.**  
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**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**The Methodology**

**Targeted Sector Identification and Analysis**

Our goal was to identify those economic sectors that can capitalize on the distinctive business location attributes and strengths of the City of Scottsdale.

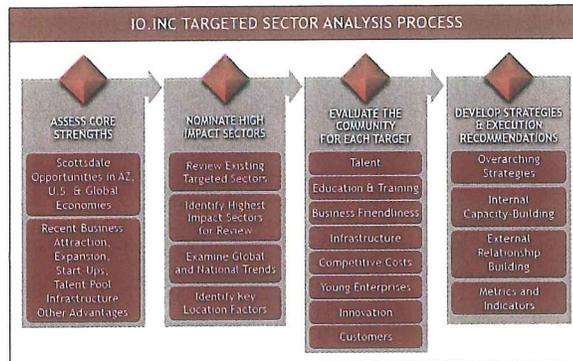
The sectors identified have a higher propensity to avail themselves of Scottsdale’s relative competitive strengths and are less likely to be influenced by the City’s and Greater Phoenix region’s relative competitive disadvantages.

Each sector individually and combined will yield the highest impact to realize Scottsdale’s vision for economic vitality.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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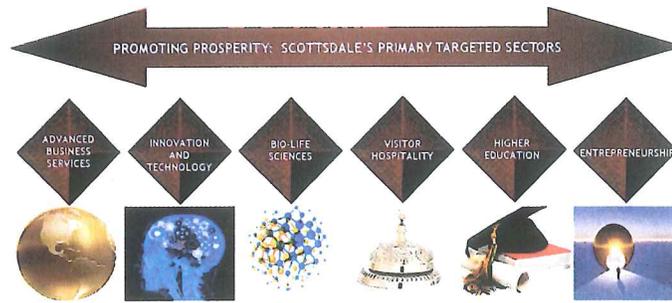
**The Methodology: Targeted Sector Identification and Analysis**



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*Economic Development Strategic Framework*

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**Targeted Sectors for the City of Scottsdale**



IQ.IBC Prepared for the City of Scottsdale April, 2016.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
 ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy**

**Demographic Factors: Income**

Scottsdale's key demographic factors reflect the quality and affluence of a community that enjoys a high standard of living and high educational attainment.

Median Household Income	\$76,124
Average Household Income	\$98,048
Average Disposable Income	\$81,704
Median Home Value	\$261,652

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy**

**Demographic Factors: Educational Attainment**

Some college, no degree	21.8 percent
Associate's degree	6.8 percent
Bachelor's degree	31.8 percent
Graduate or professional degree	20.8 percent

81.2 percent of Scottsdale's residents have some type of postsecondary degree

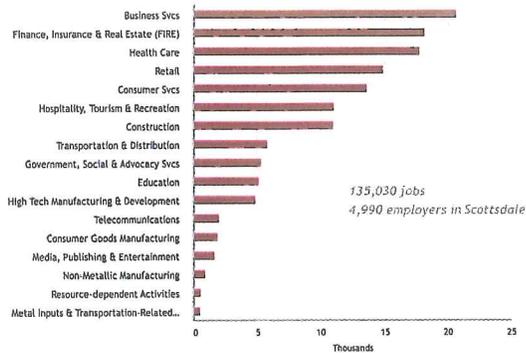


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*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy**

**JOB IN SCOTTSDALE BY ECONOMIC SECTOR**  
 (EMPLOYERS WITH 5+ EMPLOYEES)



## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

###### **Retail**

Perhaps no other place in the State of Arizona and Southwest U.S. enjoys the reputation and panache of Scottsdale's world-class retail offerings. Major retail centers in Scottsdale include:

- Scottsdale Fashion Square
- Scottsdale Quarter
- Downtown Scottsdale (Old Town)
- The Promenade
- The Shops at Gainey Village



## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

###### **Scottsdale's Primary Targeted Sectors: Advanced Business Services**

Advanced Business Services (ABS) encompass regional, divisional and corporate headquarters operations; shared service centers; back-office operations; customer-contact centers and other strategic business functions that are value-and-cost-driven and dependent upon IT. These functions, which are core competencies to a domestic or global enterprise, typically require highly trained and experienced executive, professional, scientific or technical skills.

## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Advanced Business Services**

This sector was selected for analysis and identification of future potential for the City of Scottsdale because of its concentration within the City of Scottsdale and its projected employment growth in the U.S. and world economies. Major subsectors include:

- Corporate, Regional, Divisional Headquarters
- Financial Services
- Insurance
- Shared Services

## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Advanced Business Services**

##### **Corporate, Regional, Divisional Headquarters**

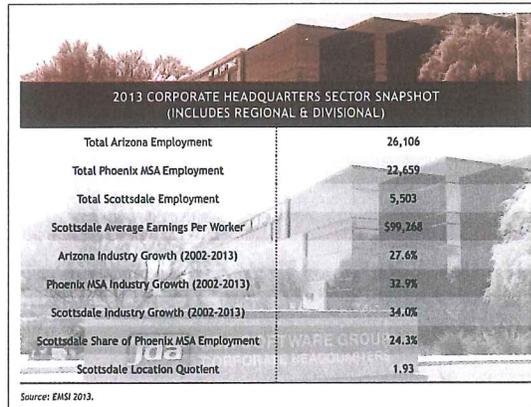
In the Corporate Headquarters Sector, Arizona has an LQ of 0.69, Phoenix MSA has an LQ of 0.84, and Scottsdale has an LQ of 1.93, indicating that Scottsdale's employment in headquarters operations is nearly three times more concentrated than that of Arizona, more than twice the concentration in Greater Phoenix, and nearly twice that of the U.S.

In Scottsdale, the average earnings per worker in this sector were \$99,268, slightly above Greater Phoenix's and well above Arizona's average earnings per worker. Employment growth in this sector was 34 percent between 2002 and 2013, and total Scottsdale employment is 5,503, representing 24.6 percent of the region's headquarters jobs.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

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**Snapshot of Scottsdale's Economy: Headquarters Operations**



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*Economic Development Strategic Framework*

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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Advanced Business Services**

**Financial Services**

For the Financial Services Sector, Arizona has an LQ of 1.99, the Phoenix MSA has an LQ of 2.63, and Scottsdale has an LQ of 1.55, indicating that Scottsdale has a lower concentration of employment in the sector compared to the region and state, and one-and-a-half times the concentration of the U.S.

In Scottsdale, the average earnings per worker in the Financial Services Sector were \$91,928 well above the region's and state's workers in this sector. Employment growth in this sector was 62 percent between 2002 and 2013, and total Scottsdale employment is 2,030, representing 6.2 percent of the region's financial services jobs.

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*Economic Development Strategic Framework*

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**Snapshot of Scottsdale's Economy: Financial Services**

2013 FINANCIAL SERVICES SECTOR SNAPSHOT	
Total Arizona Employment	34,786
Total Phoenix MSA Employment	32,800
Total Scottsdale Employment	2,030
Scottsdale Average Earnings Per Worker	\$91,928
Arizona Industry Growth (2002-2013)	47.2%
Phoenix MSA Industry Growth (2002-2013)	33.0%
Scottsdale Industry Growth (2002-2013)	62.0%
Scottsdale Share of Phoenix MSA Employment	6.2%
Scottsdale Location Quotient	1.55

Source: EMSI 2013.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Advanced Business Services**

**Insurance Services**

For the Insurance Services Sector, Arizona has an LQ of 1.05, the Phoenix MSA has an LQ of 1.24, and Scottsdale has an LQ of 2.14, indicating that the concentration of jobs in this sector is more than two times that of the U.S. and State, and nearly twice that of Greater Phoenix.

In Scottsdale, the average earnings per worker in the Insurance Services Sector were \$79,521, slightly below that of the region and above earnings for these jobs in the state as a whole. Employment growth in this sector was 20.7 percent between 2002 and 2013, and total Scottsdale employment is 3,797, representing 18.2 percent of the region's insurance services jobs.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy: Insurance**

2013 INSURANCE SECTOR SNAPSHOT	
Total Arizona Employment	24,742
Total Phoenix MSA Employment	20,923
Total Scottsdale Employment	3,797
Scottsdale Average Earnings Per Worker	\$79,521
Arizona Industry Growth (2002-2013)	20.1%
Phoenix MSA Industry Growth (2002-2013)	15.4%
Scottsdale Industry Growth (2002-2013)	20.7%
Scottsdale Share of Phoenix MSA Employment	18.2%
Scottsdale Location Quotient	2.14

Source: EHSI 2013.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Advanced Business Services**

**Shared Services**

For the Shared Services Sector, Arizona has an LQ of 1.21, the Phoenix MSA has an LQ of 1.38, and Scottsdale has an LQ of 1.71. Scottsdale far outpaces the state, region and U.S. in regards to employment concentration in these industries.

In Scottsdale, the average earnings per worker in the Shared Services Sector were \$63,425, well above earnings for these jobs in the region and state. Employment growth in this sector was 12.1 percent between 2002 and 2013, and total Scottsdale employment is 18,753, representing 13.1 percent of the region's shared services jobs.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy: Shared Services**



2013 SHARED SERVICES SECTOR SNAPSHOT	
Total Arizona Employment	175,662
Total Phoenix MSA Employment	143,119
Total Scottsdale Employment	18,753
Scottsdale Average Earnings Per Worker	\$63,425
Arizona Industry Growth (2002-2013)	9.7%
Phoenix MSA Industry Growth (2002-2013)	6.2%
Scottsdale Industry Growth (2002-2013)	12.1%
Scottsdale Share of Phoenix MSA Employment	13.1%
Scottsdale Location Quotient	1.71

Sources: EMSI 2013.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Technology and Innovation**

**Information, Communications and Technology Sector (ICT)**

For the Information, Communications and Technology Sector, Arizona has an LQ of 1.06, the Phoenix MSA has an LQ of 1.09, and Scottsdale has an LQ of 1.98 indicating that Scottsdale has a concentration of nearly twice that of the nation, state and region.

In Scottsdale, the average earnings per worker in the Shared Services Sector were \$93,576, significantly above earnings for these jobs in the region and state. Employment growth in this sector was 56.7 percent between 2002 and 2013, and total Scottsdale employment is 10,358, representing 19 percent of the region's ICT jobs.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

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**Snapshot of Scottsdale's Economy: ICT**



2013 INFORMATION, COMMUNICATIONS AND TECHNOLOGY SECTOR SNAPSHOT	
Total Arizona Employment	74,169
Total Phoenix MSA Employment	54,635
Total Scottsdale Employment	10,358
Scottsdale Average Earnings Per Worker	\$93,576
Arizona Industry Growth (2002-2013)	23.5%
Phoenix MSA Industry Growth (2002-2013)	17.3%
Scottsdale Industry Growth (2002-2013)	56.7%
Scottsdale Share of Phoenix MSA Employment	19.0%
Scottsdale Location Quotient	1.96

Source: EANSI 2013.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
 ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Technology and Innovation**

**Entrepreneurship and Emerging Enterprises**

Across the world, entrepreneurship has been recognized as a fundamental underpinning of economic growth and prosperity. According to the McKinsey Global Institute, the 21st century will be the "century of the entrepreneur".

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Technology and Innovation**

**Entrepreneurship and Emerging Enterprises**

The convergence of globalization, technology and hyperconnectivity is providing an unprecedented environment for entrepreneurs across the world to create new enterprises and contribute to innovation, growth and employment.

Entrepreneurs are recognized as important drivers of economic and social advancement, and new and young enterprises are seen as vitally important sources of innovation, job creation and productivity growth.

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*Economic Development Strategic Framework*

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**Entrepreneurship and Emerging Enterprises**

In 2012, Arizona ranked 32nd among the 50 states for startup rates, or 0.33 percent (330 of every 100,000 Arizonans between the ages of 18 to 64 created a business. Arizona's average exceeds the U.S. average of 0.32 percent.

The Phoenix MSA ranked 13th among the nation's 15 top metros for entrepreneurship activity. In 2012, Greater Phoenix's startup rate was on par with the State of Arizona: 0.32 percent, or 320 of every 100,000 persons residing in Maricopa County started a new business.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

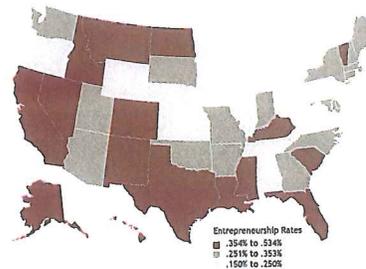
**ONE SCOTTSDALE:  
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Snapshot of Scottsdale's Economy

Scottsdale's Primary Targeted Sectors: Technology and Innovation

Entrepreneurship and Emerging Enterprises

ENTREPRENEURIAL ACTIVITY BY STATE (2012)



Source: Kauffman Foundation, March 2013

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**ONE SCOTTSDALE:  
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Snapshot of Scottsdale's Economy

Scottsdale's Primary Targeted Sectors: Bio-Life Sciences

Across the globe and across all disciplines of science and sectors of the economy, the convergence of technologies to address and solve problems in human health is accelerating. Today, the realm of bio-life sciences integrates science from information technologies, telecommunications, biotechnology, robotics, optics, sensors, materials science, physics, chemistry and nanotechnology.



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**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Bio-Life Sciences**

**Biomedical/Biotechnical Sector**

The Biomedical/Biotechnical sector includes hospitals, ambulatory surgical centers, free standing emergency centers, outpatient care centers, dialysis and imaging centers, and residential nursing facilities. For the purposes of this study, the sector also includes biotech manufacturing fields including basic chemical manufacturing; pharmaceutical and medicine manufacturing; navigational, measuring, electromedical, and control instrument manufacturing; medical equipment and supplies manufacturing; scientific research and development services.

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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Bio-Life Sciences**

**Biomedical/Biotechnical Sector**

In the Biomedical/Biotechnical Sector, Arizona has an LQ of 0.95, the Phoenix MSA has an LQ of 0.90, and Scottsdale has an LQ of 1.18 indicating that Scottsdale has a higher concentration of these types of facilities than the U.S., state and region.

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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Bio-Life Sciences**

**Biomedical/Biotechnical Sector**

For the Biomedical/Biotechnical Sector, Arizona has an LQ of 0.95, the Phoenix MSA has an LQ of 0.90, and Scottsdale has an LQ of 1.18 indicating that Scottsdale has a higher concentration of jobs in this sector than that of the nation, state and region.

In Scottsdale, the average earnings per worker in the Biomedical/Biotechnical Sector were \$60,143, slightly above earnings for these jobs in the region and state. Employment growth in this sector was 76 percent between 2002 and 2013, and total Scottsdale employment is 21,604, representing 13.8 percent of the region's biomedical/biotechnical jobs.

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**Snapshot of Scottsdale's Economy: Bio-Life Sciences**



2013 BIOMEDICAL/BIOTECHNICAL SECTOR SNAPSHOT	
Total Arizona Employment	230,226
Total Phoenix MSA Employment	156,240
Total Scottsdale Employment	21,604
Scottsdale Average Earnings Per Worker	\$60,143
Arizona Industry Growth (2002-2013)	60.1%
Phoenix MSA Industry Growth (2002-2013)	67.1%
Scottsdale Industry Growth (2002-2013)	76.0%
Scottsdale Share of Phoenix MSA Employment	13.8%
Scottsdale Location Quotient	1.18

Source: EMSI 2013.

## **SCOTTSDALE, AZ**

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Bio-Life Sciences**

##### **Biotechnology Sector**

Biotechnology harnesses the application of science and technology to living organisms to develop knowledge, technologies and products that improve human lives and the health of our planet. According to the Biotechnology Industry Organization (BIO), the world's preeminent organization for the biotech community, biotechnology has made enormous advances in helping to heal, feed and fuel the world.

## **SCOTTSDALE, AZ**

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##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Bio-Life Sciences**

##### **Biotechnology Sector**

In the Biotechnology Sector, Arizona has an LQ of 0.76, the Phoenix MSA has an LQ of 0.72, and Scottsdale has an LQ of 1.57, indicating that Scottsdale has nearly twice the concentration of industries in this sector compared to the state and region, and one-and-a-half times that of the U.S.

In Scottsdale, the average earnings per worker in the Biotechnology Sector were \$112,069, well above earnings for these jobs in the region and state. Employment growth in this sector was 17.4 percent between 2002 and 2013, and total Scottsdale employment is 3,847, representing 22.8 percent of the region's biotechnology jobs.

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**Snapshot of Scottsdale's Economy: Biotechnology**



2013 BIOTECHNOLOGY SECTOR SNAPSHOT	
Total Arizona Employment	24,719
Total Phoenix MSA Employment	16,891
Total Scottsdale Employment	3,847
Scottsdale Average Earnings Per Worker	\$112,069
Arizona Industry Growth (2002-2013)	35.7%
Phoenix MSA Industry Growth (2002-2013)	31.1%
Scottsdale Industry Growth (2002-2013)	17.4%
Scottsdale Share of Phoenix MSA Employment	22.8%
Scottsdale Location Quotient	1.57

Source: EMSI 2013.

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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Visitor Hospitality**

In the Visitor/Hospitality Sector, Arizona has an LQ of 1.09, the Phoenix MSA has an LQ of 1.08, and Scottsdale has an LQ of 1.58, indicating that Scottsdale has a higher concentration of industries in this sector compared to the nation, state and region.

In Scottsdale, the average earnings per worker in the Visitor/Hospitality Sector were \$33,189, significantly above earnings for these jobs in the region and state. Employment growth in this sector was 13.8 percent between 2002 and 2013, and total Scottsdale employment is 19,572, representing 11.9 percent of the region's visitor/hospitality jobs.

**SCOTTSDALE, AZ**  
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 ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Snapshot of Scottsdale's Economy: Visitor Hospitality**

2013 VISITOR HOSPITALITY SECTOR SNAPSHOT	
Total Arizona Employment	164,735
Total Phoenix MSA Employment	114,720
Total Scottsdale Employment	19,572
Scottsdale Average Earnings Per Worker	\$27,920
Arizona Industry Growth (2002-2013)	13.9%
Phoenix MSA Industry Growth (2002-2013)	15.8%
Scottsdale Industry Growth (2002-2013)	13.8%
Scottsdale Share of Phoenix MSA Employment	11.9%
Scottsdale Location Quotient	1.58

Source: EMSI 2013.

**SCOTTSDALE, AZ**  
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**Snapshot of Scottsdale's Economy**

**Scottsdale's Primary Targeted Sectors: Higher Education**

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**"The best employers the world over will be looking for the most competent, most creative and most innovative people on the face of the earth and will be willing to pay them top dollar for their services. This will be true not just for top professionals and managers, but up and down the length and breadth of the workforce."**

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## **SCOTTSDALE, AZ**

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Higher Education**

Global demand for more college educated workers will continue to increase dramatically because of the rapid rise in skill requirements for existing jobs and those yet to emerge. Cultivating, developing, retaining and recruiting talent has become one of America's most important economic development imperatives.

## **SCOTTSDALE, AZ**

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

##### **Snapshot of Scottsdale's Economy**

##### **Scottsdale's Primary Targeted Sectors: Higher Education**

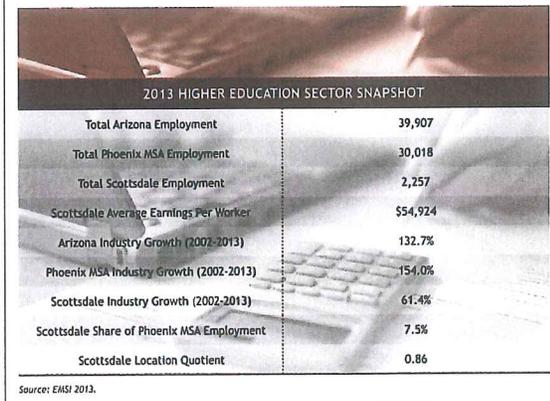
In the Higher Education Sector, Arizona has an LQ of 1.02, the Phoenix MSA has an LQ of 1.20, and Scottsdale has an LQ of 0.86, indicating that Scottsdale has a lower concentration of institutions in this sector compared to the nation, state and region.

In Scottsdale, the average earnings per worker in the Higher Education Sector were \$54,924, on par with earnings for these jobs in the region and state. Employment growth in this sector was 61.4 percent between 2002 and 2013, and total Scottsdale employment is 2,257, representing 7.5 percent of the region's higher education jobs.

**SCOTTSDALE, AZ**  
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**ONE SCOTTSDALE:  
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**Snapshot of Scottsdale's Economy: Higher Education**



2013 HIGHER EDUCATION SECTOR SNAPSHOT	
Total Arizona Employment	39,907
Total Phoenix MSA Employment	30,018
Total Scottsdale Employment	2,257
Scottsdale Average Earnings Per Worker	\$54,924
Arizona Industry Growth (2002-2013)	132.7%
Phoenix MSA Industry Growth (2002-2013)	154.0%
Scottsdale Industry Growth (2002-2013)	61.4%
Scottsdale Share of Phoenix MSA Employment	7.5%
Scottsdale Location Quotient	0.86

Source: ENSI 2013.

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Economic Development Strategic Framework for Scottsdale**

**Guiding Principles for Scottsdale's Economic Development Strategy**

- Exemplifies the City of Scottsdale's collaborative ethos and practice
- Builds on Scottsdale's abundance of existing assets and advantages.
- Identifies economic and entrepreneurial development opportunities.
- Commits to a multi-year, long-term horizon
- Aligns the entire City - internally and externally
- Leverages economic development through visitor/hospitality and quality of life
- Assures accountability with clearly articulated goals, indicators and metrics
- Focuses on strengthening Scottsdale's economic sustainability

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Economic Development Strategic Framework for Scottsdale**

**Building Blocks for Success**

To ensure an effective economic development strategy for the City of Scottsdale that will yield desirable results over time:

- Grounded in guiding principles
- Aligned with Scottsdale City Council vision and priorities
- Strong and sustained leadership from Mayor, Council, City Manager
- Complete integration and alignment throughout the entire City Government
- Active engagement and collaboration with employers, founders, entrepreneurs, educators
- Clear communications with Scottsdale's citizenry
- Annual tracking of progress for both the City Government and Economic Development Department

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
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**Economic Development Strategic Framework for Scottsdale**

**Goal for Scottsdale's Economic Development Strategy**

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To elevate, enhance and ensure Scottsdale's sustained desirability as a place in which to live, learn, do business, work, recreate and visit.

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**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Economic Development Strategic Framework for Scottsdale**

**Action Plan for Scottsdale's Economic Development Strategy**

SCOTTSDALE'S ECONOMIC DEVELOPMENT FRAMEWORK ACTION AGENDA					
ACTION	YR 1	YR 2	YR 3	YR 4	YR 5
1. Galvanize and champion a united city: One Scottsdale.					
2. Retain and grow existing economic drivers and employers.					
3. Ensure that Scottsdale's present and future employers will be able to cultivate, retain and attract the talent that they need.					
4. Strengthen foundations for firms and jobs of the future by identifying infrastructure, quality of life and postsecondary improvements that could position Scottsdale more advantageously for business and talent retention and recruitment.					
5. Invest in and strengthen present and future employment and business centers.					

**SCOTTSDALE, AZ**  
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**ONE SCOTTSDALE:  
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**Economic Development Strategic Framework for Scottsdale**

**Action Plan for Scottsdale's Economic Development Strategy**

SCOTTSDALE'S ECONOMIC DEVELOPMENT FRAMEWORK ACTION AGENDA					
ACTION	YR 1	YR 2	YR 3	YR 4	YR 5
6. Elevate Scottsdale's engagement in the national and international economic development arena.					
7. Build a Scottsdale business location brand on par with Scottsdale's tourism brand.					
8. Grow and attract quality firms and jobs - domestic and global - in targeted sectors.					
9. Adopt indicators and metrics to assess both the City Government's and economic development department's progress.					

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

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**Economic Development Progress Index: Metrics and Indicators**

Economic development is not a science, but it is a well-established profession and practice in the U.S. Many communities have developed indicators that are measurements of the well-being of their citizens and economic base.

Scottsdale is a sophisticated community, with public and citizen leadership that is well-schooled, intelligent and committed to accountability. Economic development is but one of many activities of the City Government, yet it captures - and deservedly so - a very high level of attention.

**SCOTTSDALE, AZ**

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**Economic Development Progress Index: Metrics and Indicators**

As suggested in the recommended Strategic Framework, Scottsdale's economic development endeavors are not the sole responsibility of the City's Economic Development Department. The Scottsdale City Council's Organizational Strategic Plan goals all directly impact the community's economic development.

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**Economic Development Progress Index: Metrics and Indicators**

Every City department has a role in realizing these goals, and the entire City Government needs to take stock of how it impacts and achieves Scottsdale's economic development strategic framework and action agenda.

Every function and department needs to understand its role in Scottsdale's economic development, and be engaged not only in the implementation of the strategy, but also in the tracking of performance.

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**Economic Development Progress Index: Metrics and Indicators**

**City of Scottsdale Government Indicators/Metrics**

- Business Climate
- Quality of Life
- Workforce
- Education and Educational Attainment
- Entrepreneurship and Young Emerging Enterprises

**SCOTTSDALE, AZ**

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**Economic Development Progress Index: Metrics and Indicators**

**City of Scottsdale Economic Development Indicators/Metrics**

- Employment Generating
- Redevelopment / Revitalization
- Capacity Development and Improvement
- Strategy Implementation

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

**ONE SCOTTSDALE:  
ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

**Next Steps for Scottsdale's Economic Development Department**

- Rebuilding Scottsdale's Economic Development Department
- Restoring trust and confidence in its work and performance
- Reconnecting with the employer community
- Reinvesting to bring the agency on par with a market of Scottsdale's size and stature

**SCOTTSDALE, AZ**  
*Economic Development Strategic Framework*

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**Next Steps for Scottsdale's Economic Development Department**

**Scottsdale Economic Development Department's Vision**

The Scottsdale Economic Development Department ranks among the nation's leading, best-of-class organizations and is recognized for its significant contributions to Scottsdale's quality of life, economic prosperity and global brand through its:

- High performing, certified professionals
- Innovative, focused and solutions-driven approaches to support business and economic growth
- Collaborative, proactive engagement of local, regional and state partners in Scottsdale's economic development

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**Next Steps for Scottsdale's Economic Development Department**

**Collaboration with Partners**

Every successful economic development department or organization has a well-developed network of mutually beneficial partnerships. No single organization can effectively capitalize on the broad range of opportunities and or address the many challenges that characterize economic development.

For Scottsdale, it is vitally important to continue to strengthen existing partnerships as well as expand relationships, collaboration and cooperation with new partners to realize the City's ambitious economic development goals.

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**Next Steps for Scottsdale's Economic Development Department**

**Collaboration with Partners**

- Scottsdale Area Chamber of Commerce
- Scottsdale Convention and Visitors Bureau
- SkySong
- Salt River Pima Indian Community
- Greater Phoenix Economic Council
- Arizona Commerce Authority
- Other Partners

**SCOTTSDALE, AZ**

*Economic Development Strategic Framework*

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**Five Years Hence ...**

**Scottsdale's Public and Civic Environment**

- Scottsdale's City Government, businesses and citizens are working together harmoniously, overcoming differences for the greater good
- Scottsdale's City Government and citizens are regarded as the most civil, respectful people in the U.S.
- Bond elections and school overrides have been approved by Scottsdale's voters, supported by its elected leaders
- Scottsdale City Government management and staff receive the highest rating for customer service from businesses
- Scottsdale is lauded for its regional leadership and collaboration

## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*

#### **ONE SCOTTSDALE: ELEVATING EXCELLENCE, PROMOTING PROSPERITY**

Five Years Hence ...

#### **Scottsdale's Business and Economic Development Environment**

- Scottsdale's business brand is well-known and sought after by Global 1000, Russell 2000 and Inc. 5000 firms
- Tourism and economic development officials have created a new "state-of-the-art" in leveraging and collaborating
- Scottsdale's key employment centers - existing and new - are the most sought-after business locations for startups, young firms and established corporations - domestic and global
- Scottsdale's employers are working closely with the City and existing and new educational institutions to cultivate, develop and retain the talent they need
- Scottsdale's Economic Development Department is operating at its vision and beyond
- Scottsdale's indicators/metrics set the new "gold standard" for accountability and reporting

## SCOTTSDALE, AZ

### *Economic Development Strategic Framework*



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**"The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low, and achieving our mark".**

*~ Michelangelo*

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