

PFLUGERVILLE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Chapter 1: Community Assessment

November 2016

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ABOUT THIS STRATEGY

This Comprehensive Economic Development Strategy provides Pflugerville with a unified vision and strategic approach to achieving a robust, resilient economy over the next three years and beyond. The Strategy is designed to provide the Pflugerville Community Development Corporation (PCDC), City of Pflugerville (City), and other business, education, nonprofit, and public sector leaders with a cohesive action plan that ensures everyone is working in-step toward a shared vision and goals.

Once complete, the Comprehensive Economic Development Strategy will include three chapters:

Chapter 1, Community Assessment

This first chapter of the Strategy provides an in-depth trend analysis of Pflugerville's competitive position relative to the Austin metro, Texas, US, and six benchmark cities in comparative national metros. It also includes a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Evaluation, combining the findings of the trend analysis with input received from the Strategy's Steering Committee and more than 50 local, regional and state stakeholders. A strategic vision, goals and recommendations begin to emerge from the findings of the SWOT.

Chapter 2, Target Industry Analysis

The Strategy's second chapter includes the consulting team's recommended target industries and niche sectors. Target industries and niches are those audiences that will be the focus of Pflugerville's economic development initiative, in terms of marketing, product development, and workforce development. The process of target industry selection blends a cluster and location quotient analysis with a review of data trends, SWOT evaluation, and on-the-ground examination of Pflugerville's assets.

Continued...



ABOUT THIS STRATEGY

Chapter 3, Strategic Action Plan

The Strategy's final chapter will recommend a three-year program of work that will advance Pflugerville's economy. It will set the community on-course for achieving its economic development vision and goals. The Strategic Action Plan will begin with profiles of national best practices from communities facing similar opportunities and target industries. The Action Plan will cover topics related to marketing, infrastructure, workforce development, public policy, quality of place, and other factors that affect Pflugerville's competitiveness. Each recommendation in the Action Plan will be accompanied by implementation tactics – timing, roles and responsibilities, and performance metrics. *(Note: This Chapter will be developed following completion of Chapters 1 and 2.)*

Special Focus, Workforce and Educational Institution Analysis

Access to talent is the top driver of business expansion and relocation decisions today. Understanding the dynamics of Austin region's workforce development and educational infrastructure will give Pflugerville a better informed advantage. As a supplement to the Comprehensive Economic Development Strategy, the consulting team offers a deeper dive into the talent-related assets available in Pflugerville's larger regional market.



STEERING COMMITTEE

Avalanche and PCDC would like to thank the strategic planning Steering Committee for helping inform and guide the development of this strategic plan. This diverse group of Pflugerville stakeholders ensured that strategic plan reflects the perspective and desires of the entire community.

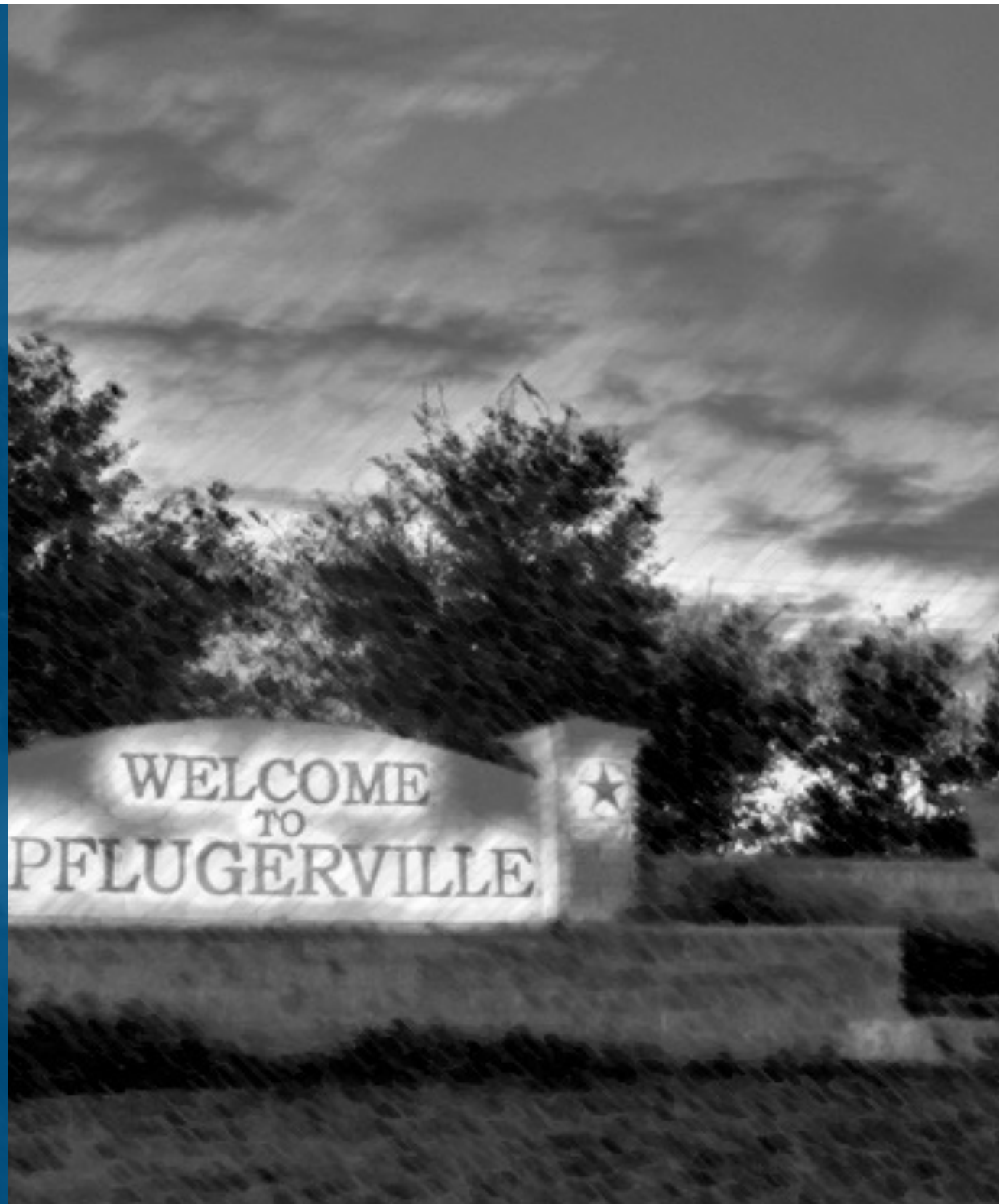
Pflugerville Comprehensive Economic Development Strategy **Steering Committee Members**

Amanda Maegden
Barth Timmermann
Boris Milensky
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Brigid Shea
Carlton Inniss
Charles Harvey
Chris Davenport
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COMMUNITY ASSESSMENT



INTRODUCTION

This first chapter of the Pflugerville Comprehensive Economic Development Strategy tells the story of Pflugerville today. It provides current data on economic and demographic trends in Pflugerville and the greater Austin region. It qualifies this information with perspectives gained through conversations with the residents, businesses, and leadership of the City of Pflugerville.

The analysis in this chapter will help develop a vision for Pflugerville's future and identify the goals and recommendations that will move the community forward through this strategic plan.

Data throughout this chapter is benchmarked to provide context on the city's competitive position relative to peer communities. An assessment using reliable, current data ensures that the consulting team, Pflugerville Community Development Corporation, City, and other community stakeholders are making decisions based on a foundation of shared, accurate data.

The data examined in this report cover a range of topics. The specific metrics examined on each page are from trusted sources and provide the most reliable, comparable measures of Pflugerville's competitive position. Metrics examined include employment composition and growth, export growth, federal research funding per capita, educational attainment, housing affordability, and more.

Many of these metrics were gathered from primary public sources, including the US Bureau of Labor Statistics, US Census, US Bureau of Economic Analysis, and National Science Foundation. Other data were collected from respected private sources such as the Brookings Institute and Economic Modeling Specialists International (ESMI).

Using common national metrics and sources assures the accuracy of data and that inform decisions in the strategic planning process. These are also the metrics and sources utilized by businesses, individuals, and site selectors when examining a city. They allow us to make accurate comparisons between Pflugerville and benchmark communities to examine the local competitive position.



INTRODUCTION

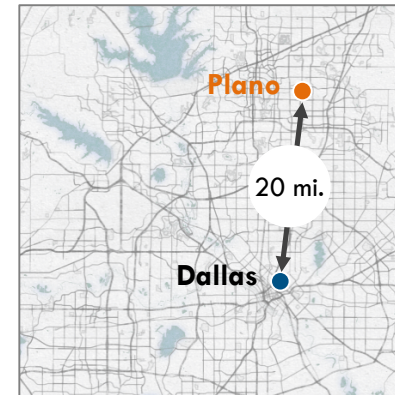
Many of the pages in the *Community Assessment* present data on six pairs of benchmark communities. The benchmark communities were carefully selected in consultation with PCDC. The consulting team first identified metropolitan areas that are considered **peer and competitor communities** of the Austin metro. These metros were Charlotte, NC; Dallas, TX; Denver, CO; Houston, TX; Nashville, TN; and Portland, OR.

Next, Avalanche Consulting identified **six cities** with similar economic, demographic, and geographic similarities to Pflugerville located within each metropolitan area. The six selected benchmark communities were Broomfield, CO; Hendersonville, TN; Indian Trail, NC; Plano, TX; Sugarland, TX; and Tigard, OR.

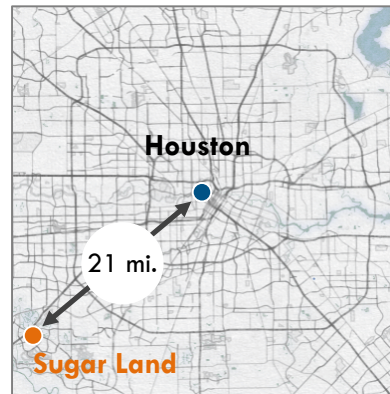
Indian Trail, NC



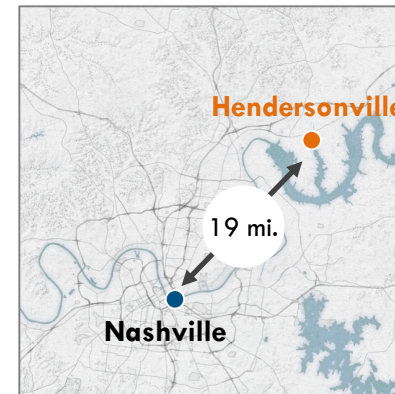
Plano, TX



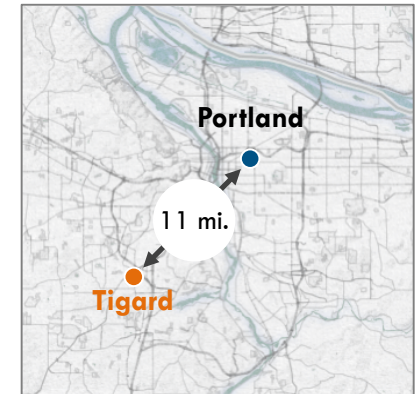
Broomfield, CO



Sugar Land, TX



Hendersonville, TN



Tigard, OR



HIGHLIGHTS

Some of the key themes and takeaways revealed in Chapter 1 include:

- Pflugerville has seen rapid job growth in recent years, but the city is gaining new residents faster than it is creating jobs – maintaining the appearance of a bedroom community despite numerous business opportunities.
- Pflugerville's economy is deeply integrated with the Austin metropolitan region – 90% of working Pflugerville residents are employed outside the city, and 85% of local jobs are filled by non-residents. The majority of out commuters (64%) travel to Austin or Round Rock each day.
- The largest job clusters in Pflugerville remain concentrated in retail, restaurants, and construction, but the city has seen recent growth in the strong primary job clusters of manufacturing, professional services, and logistics.
- Pflugerville has a high concentration of small businesses and self-employed individuals, and the number of both is growing more rapidly than all benchmark communities.
- The population of Pflugerville is highly educated and creative – with a significantly higher share of patent inventors per job than seen in the Austin metro or any benchmark community.
- Pflugerville is one of the youngest and most diverse communities among benchmark cities and metropolitan areas and growing more culturally diverse every year.
- Pflugerville has lower poverty and higher median household incomes than the Austin metro, Texas, and the US – reflecting the strong economy, highly-skilled population, and attractiveness of the city for hardworking families.
- Homes for sale are more affordable to Pflugerville residents than most benchmark communities, but limited rental housing options have driven up prices and made renting highly unaffordable for many residents.
- Although office and industrial real estate are relatively affordably priced in Pflugerville compared to the Austin metro and benchmark communities, there is very little developed product currently available.



ECONOMIC TRENDS



Employment Growth

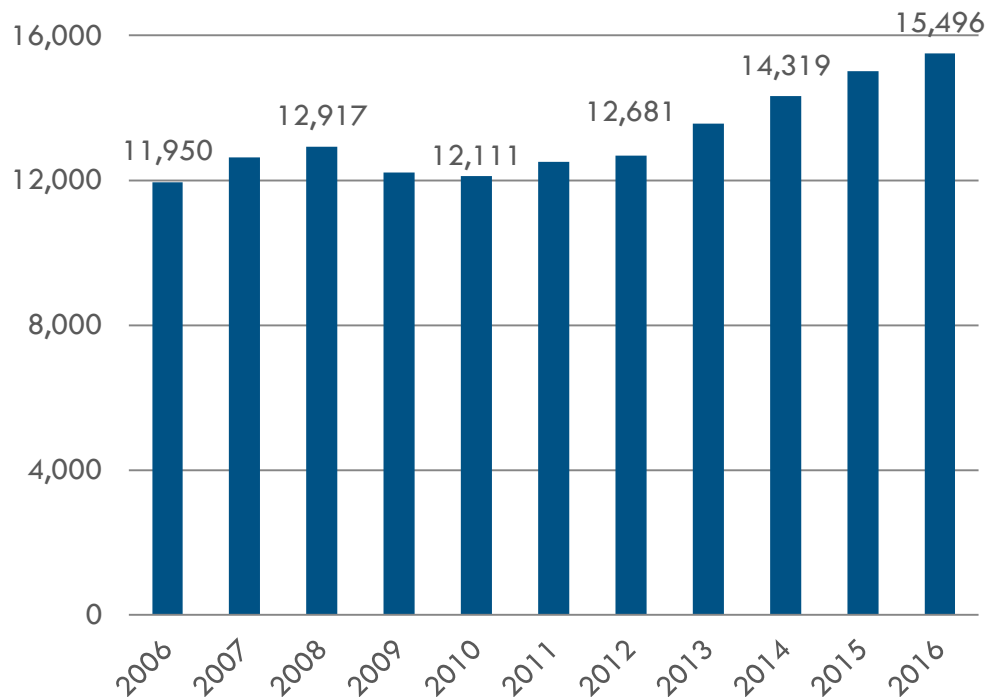
Job growth in Pflugerville outpaced the Austin Metro and State of Texas over the past five years.

The total number of jobs in the city grew by 3,000 from 2011 to 2016, an increase of nearly 25%. This was slightly higher than 22% job growth in the Austin Metro over the same period. Local job growth rates were nearly double the state average (14%) and more than double the US average (10%).

WHY IS THIS IMPORTANT?

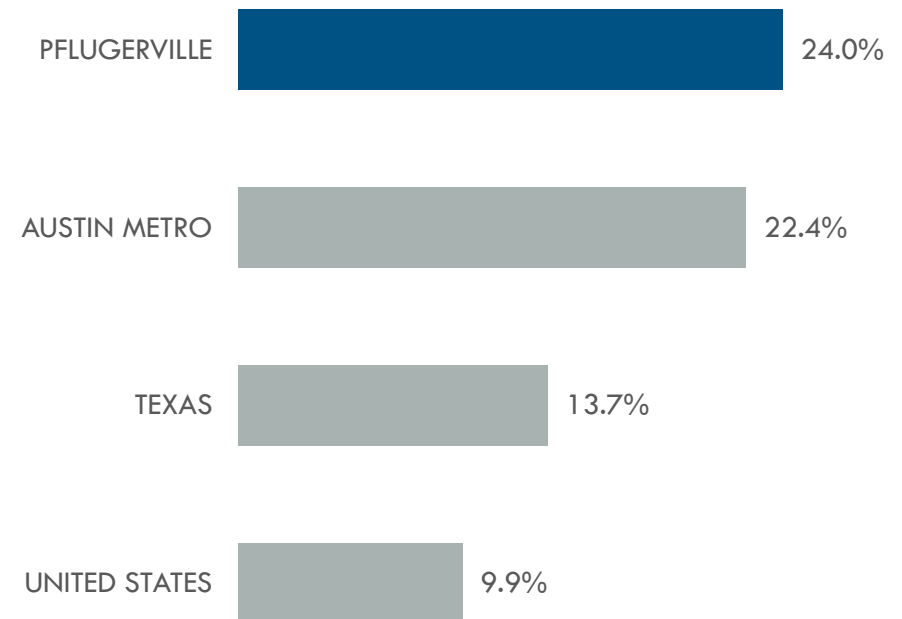
Employment growth is a primary indicator of a community's overall economic health. Strong job creation relative to benchmark communities can indicate a more competitive business climate and the presence of supportive resources.

PFLUGERVILLE TOTAL EMPLOYMENT
2006 – 2016



SOURCE: AVALANCHE CONSULTING / EMSI

EMPLOYMENT GROWTH
2011 – 2016



SOURCE: AVALANCHE CONSULTING / EMSI



Unemployment

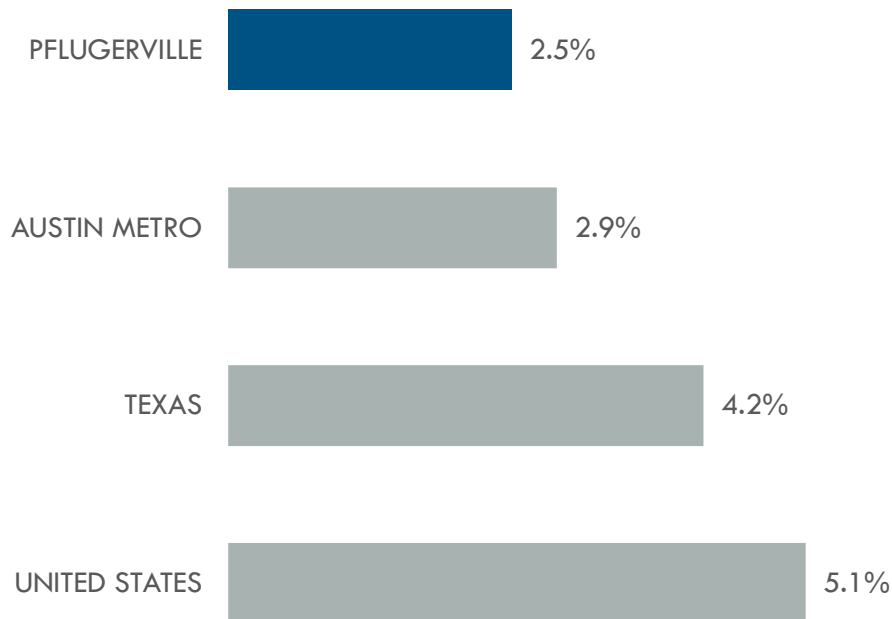
Over the past decade, Pflugerville's unemployment rate remained consistently below the US average. Even at the height of the recession, when unemployment reached double-digits in the US, Pflugerville's unemployment rate never exceeded 7%.

At only 2.5%, today Pflugerville's unemployment rate is less than the Austin metro, Texas, and US averages. This could indicate an increasingly tight labor market, but Pflugerville and the region benefits from rapid population growth which somewhat eases concerns.

WHY IS THIS IMPORTANT?

Low unemployment means that the residents of a community are finding opportunities to work but also can reveal potential workforce shortages in conjunction with other factors. Higher unemployment may also indicate that a larger portion of residents are actively seeking jobs.

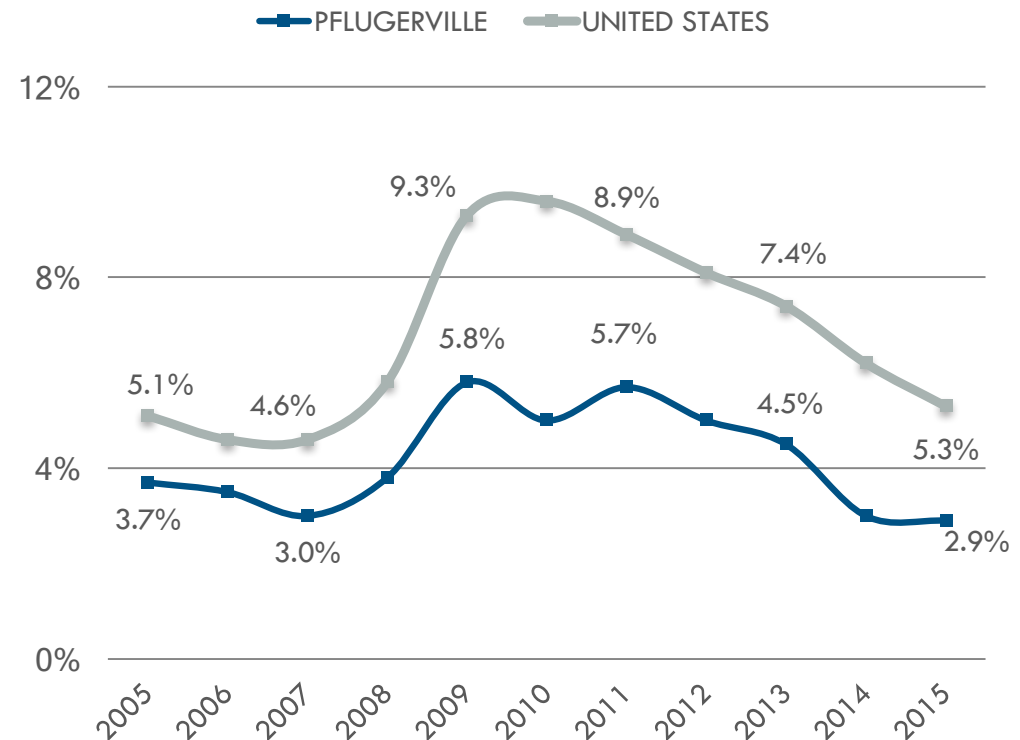
UNEMPLOYMENT RATE
May 2016



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS



UNEMPLOYMENT RATE
2005 – 2015



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS

Benchmark Employment

Over the past five years, Pflugerville ranked 5th for job growth out of the seven benchmarked communities. Although four benchmark communities saw higher job growth, it is important to note that Pflugerville's job growth of 24% was higher than all the larger metropolitan areas benchmarked – including Austin.

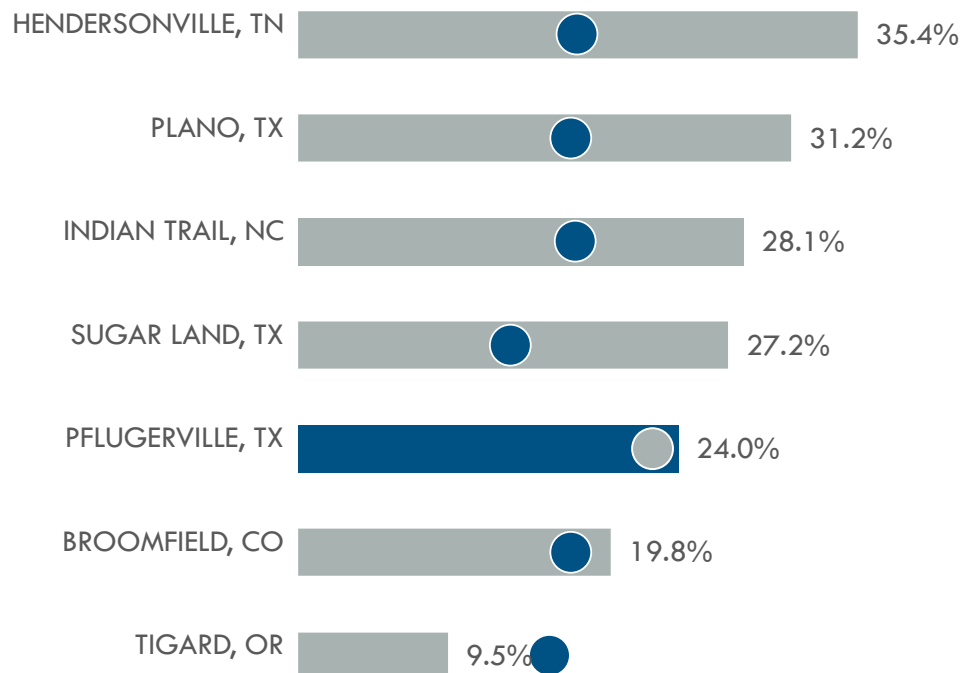
Pflugerville has the lowest unemployment rate of all benchmarked communities and metros. The Austin metro's unemployment rate, at 2.9%, is also lower than all benchmarks.

WHY IS THIS IMPORTANT?

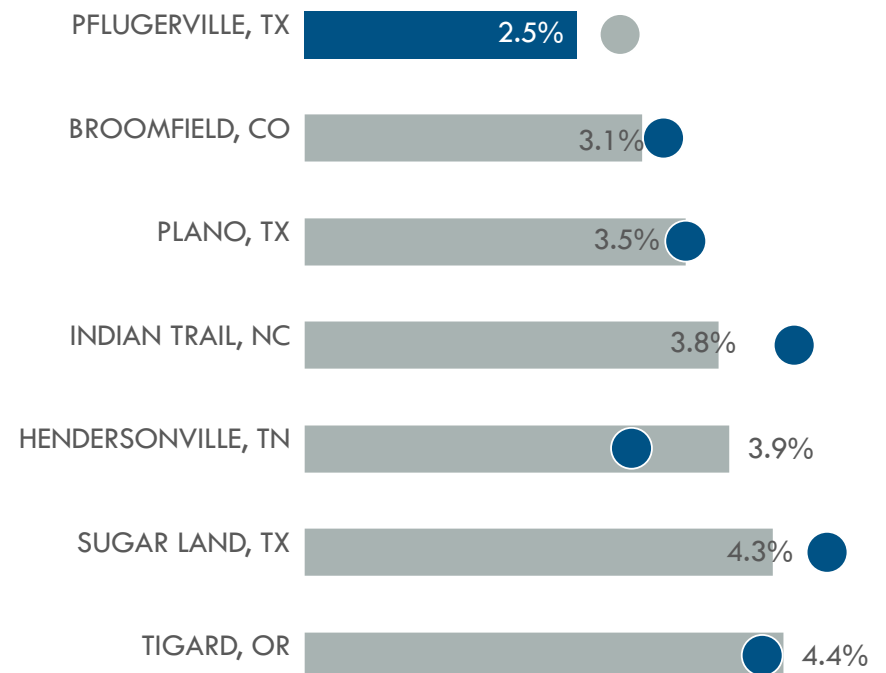
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BENCHMARK EMPLOYMENT GROWTH
2011 – 2016

● - METRO



BENCHMARK UNEMPLOYMENT RATE
MAY 2016



SOURCE: AVALANCHE CONSULTING / EMSI

SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS



Industry Composition

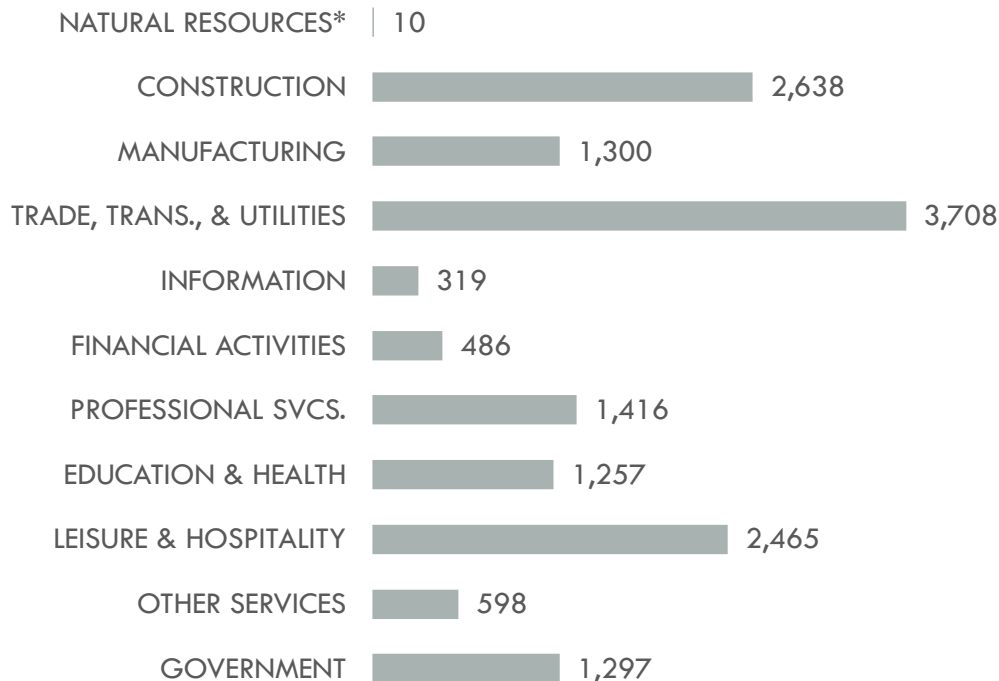
Pflugerville's largest industries are **Trade, Transportation, & Utilities** (which includes both retail and distribution), **Construction**, and **Leisure & Hospitality** (which includes restaurants). Besides transportation, these largest sectors contain few primary jobs – their growth is dictated primarily by population growth and disposable income.

Although smaller in scale, primary job clusters such as **Professional Services** (1,400 jobs; 28% growth) and **Manufacturing** (1,300 jobs; 42% growth) are experiencing high growth and with the right resources, have potential to continue to create jobs.

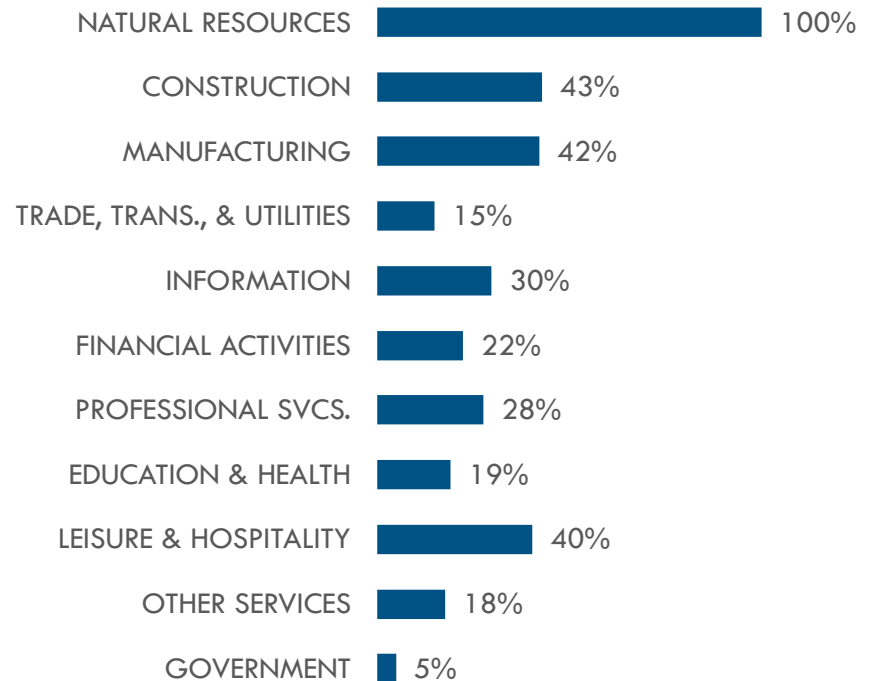
WHY IS THIS IMPORTANT?

Resilient economies employ residents in a diverse mix of industries. A diverse industry base allows communities to better weather economic downturns that affect one industry more than others. A diverse economy also provides a jobs with different educational and experience requirements that help sustain all residents.

PFLUGERVILLE EMPLOYMENT BY INDUSTRY
2016



EMPLOYMENT GROWTH BY INDUSTRY
2011 – 2016



SOURCE: AVALANCHE CONSULTING / EMSI

SOURCE: AVALANCHE CONSULTING / EMSI



*Natural Resources includes Agriculture

Salaries

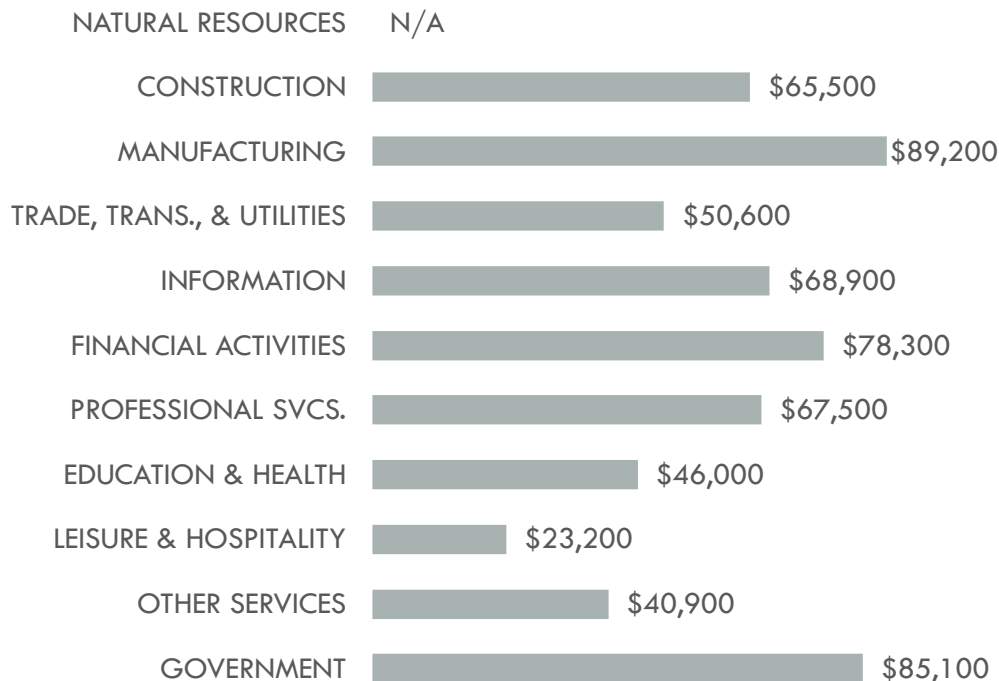
WHY IS THIS IMPORTANT?

Average salaries in Pflugerville vary by industry. With an average wage of nearly \$89,200, Manufacturing is Pflugerville's highest paying industry, followed by Financial Activities (\$78,300). Leisure & Hospitality, with an average annual salary of less than \$23,200, is the city's lowest paying industry.

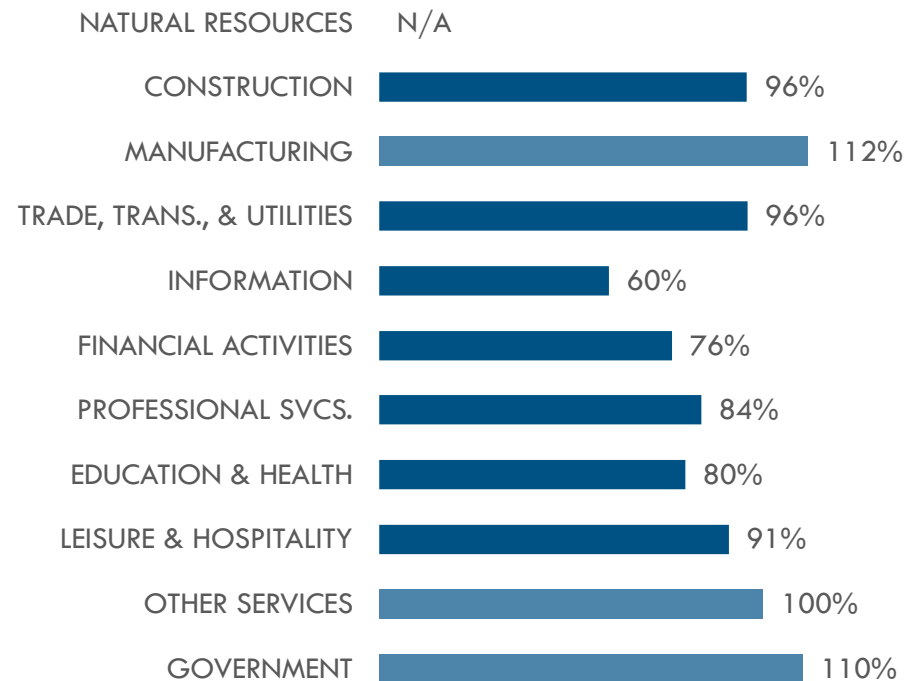
Average salaries for most industries within Pflugerville are between 10% to 15% less than US industry averages. Notable exceptions are Manufacturing and Government, which pay 12% and 10% above the US average respectively.

Examining salaries by industry helps reveal which local industries are more competitive for workers or where workers show higher productivity. Above-average salaries may also indicate high demand for those workers in a community. The presence of high-salary industries is also a sign of positive wealth creation in a community.

PFLUGERVILLE AVERAGE SALARY BY INDUSTRY
2016



PFLUGERVILLE SHARE OF US AVERAGE SALARY BY INDUSTRY
2015



SOURCE: AVALANCHE CONSULTING / EMSI

SOURCE: AVALANCHE CONSULTING / EMSI



Benchmark Salaries

WHY IS THIS IMPORTANT?

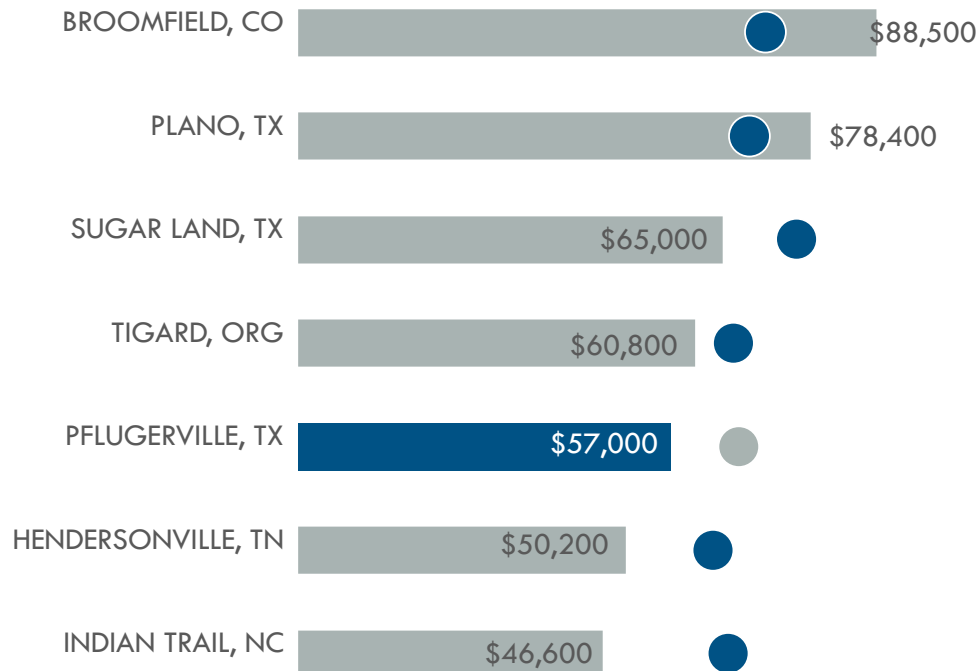
At \$57,000, average annual salaries for all workers in Pflugerville are approximately \$10,500 less than the average for all workers in the Austin metro. Among benchmark communities, Hendersonville, TN, and Indian Trail, NC, have lower average salaries.

Average salaries in most benchmark communities, however, are lower than the regional average. The average salary in Pflugerville increased by 13% from 2011 to 2016, a slightly faster rise than the overall Austin metro.

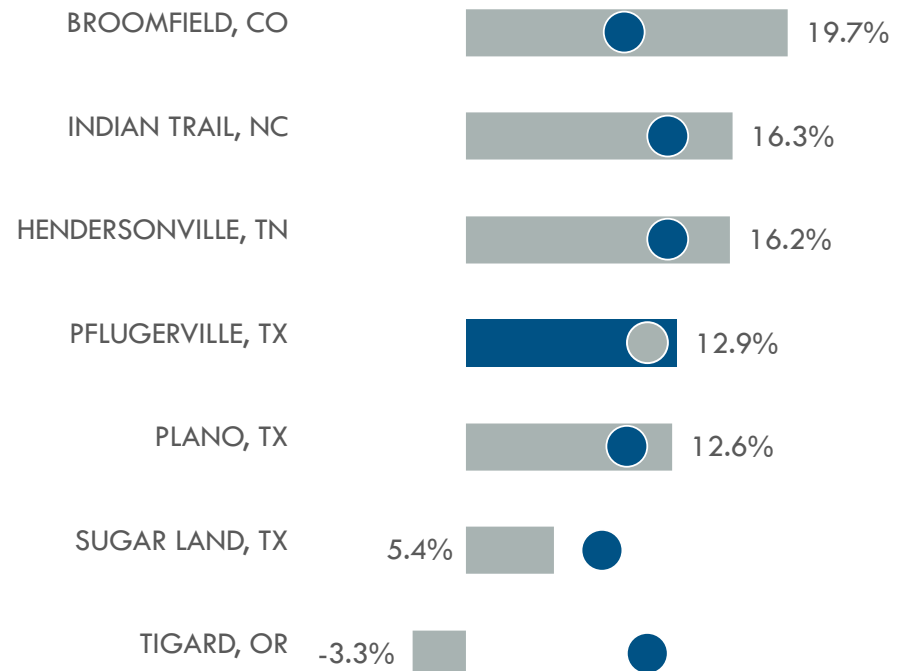
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AVERAGE SALARY – ALL INDUSTRIES,
2016

● - METRO



AVERAGE SALARY GROWTH – ALL INDUSTRIES,
2011 – 2016



SOURCE: AVALANCHE CONSULTING / EMSI

SOURCE: AVALANCHE CONSULTING / EMSI



Gross Regional Product

WHY IS THIS IMPORTANT?

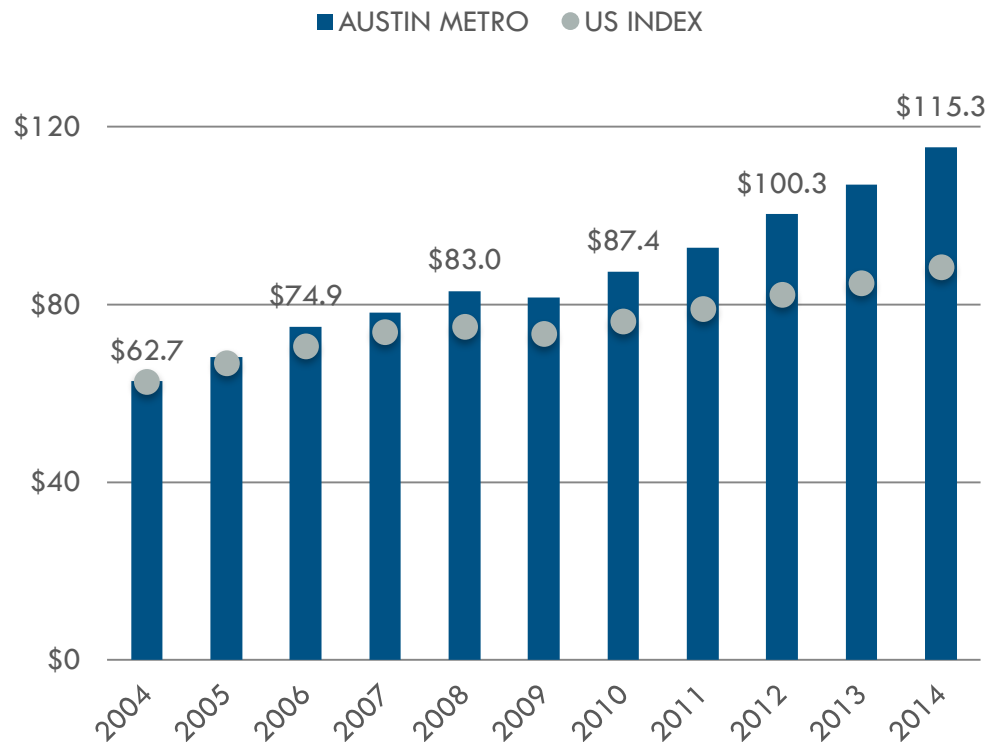
The Austin metro's gross regional product grew consistently faster than the US average over the past decade. Austin's gross regional product grew to over \$115 billion between 2004 and 2014, an increase of nearly 84%. The US gross domestic product increased just 41% during this period.

Austin's growing gross regional product, though impressive, has been partially driven by the region's strong population growth. At less than \$55,000, per capita gross regional product in the Austin metro is less than all benchmark regions except Nashville.

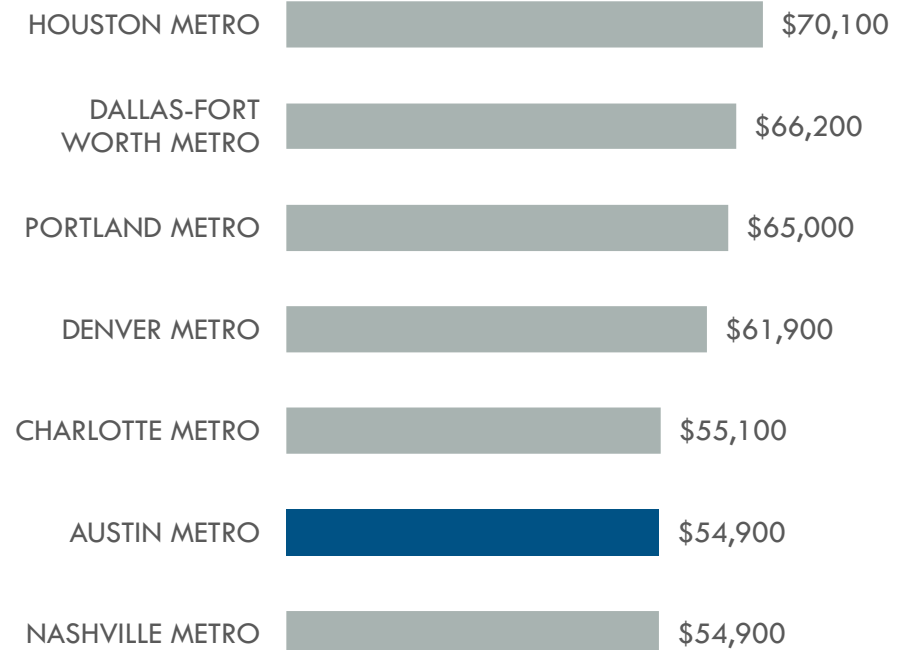
Gross Regional Product is a measure of the overall economic growth and productivity in a region. When GRP growth outpaces job growth, it shows that local workers and industries are becoming more competitive.

As a caveat, GRP measures might not fully capture high tech economy activity as well as it does manufactured good production.

AUSTIN METRO GROSS REGIONAL PRODUCT (\$ BILLIONS),
2004 – 2014



GROSS REGIONAL PRODUCT PER CAPITA,
2014



SOURCE: AVALANCHE CONSULTING / BUREAU OF ECONOMIC ANALYSIS

SOURCE: AVALANCHE CONSULTING / BUREAU OF ECONOMIC ANALYSIS



Exports

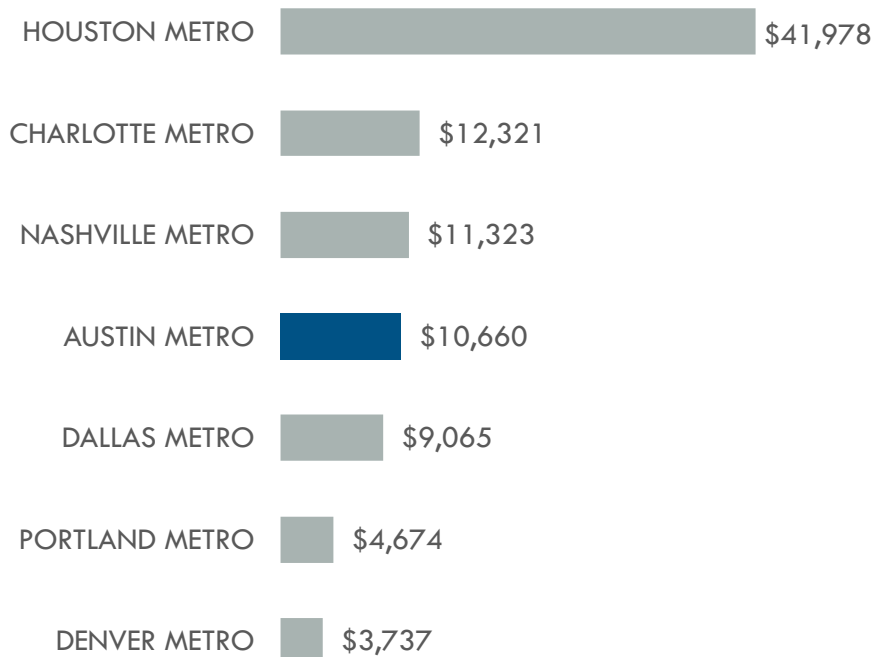
WHY IS THIS IMPORTANT?

The Austin metro currently exports nearly \$11,000 worth of goods and services per employed worker. Among benchmark metros, only Houston and Charlotte have higher levels on exports on a per job basis.

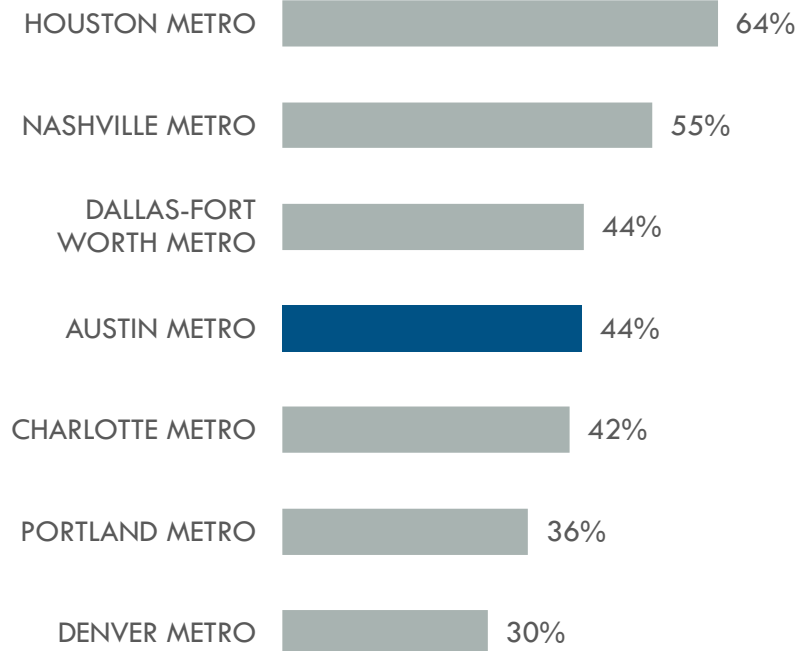
The value of Austin metro exports increased by 58% between 2009 and 2014. During this period, Dallas, Nashville, and Houston experienced greater levels of export growth. In Houston, high energy prices partially fueled export growth.

Exports reflect a region's competitive position. Exports draw outside dollars back into the the community, increasing wealth and spurring secondary impacts across the community. If products and services are exported, they usually represent areas of specialization in the community and value-added work being done.

BENCHMARK EXPORTS PER JOB,
2014



BENCHMARK EXPORT GROWTH,
2009 – 2014



SOURCE: AVALANCHE CONSULTING / BROOKINGS INSTITUTE

SOURCE: AVALANCHE CONSULTING / BROOKINGS INSTITUTE



Exports

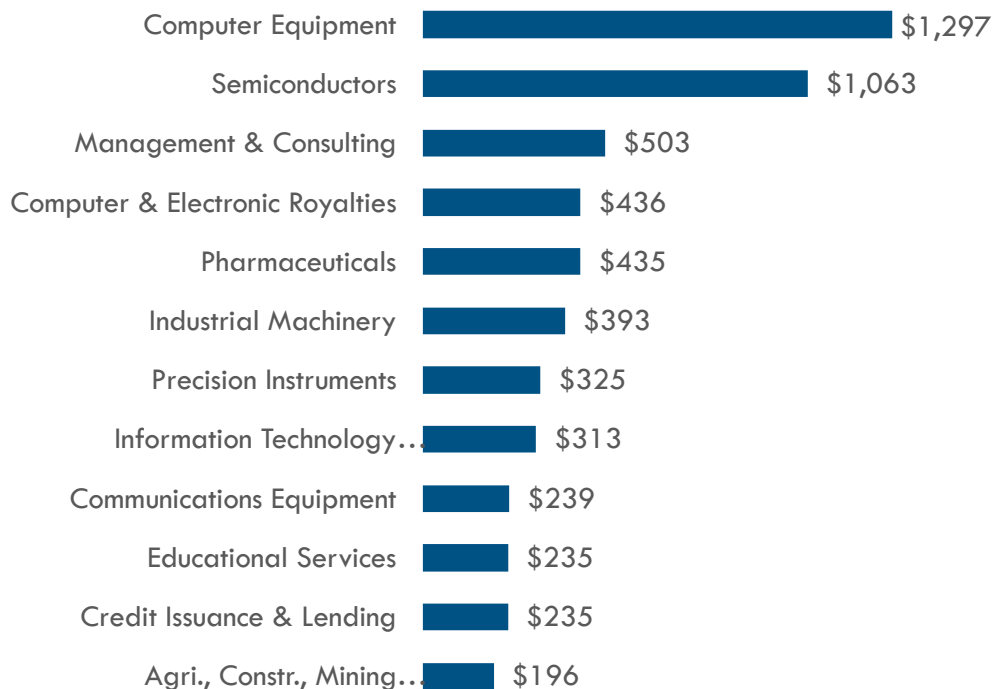
WHY IS THIS IMPORTANT?

Within the Austin metro, the top exported products by value in 2014 were **Computer Equipment** (\$1,300 million), **Semiconductors** (\$1,100m), **Management & Consulting Services** (\$500m), **Computer & Electronic Royalties / IP** (\$440m), and **Pharmaceuticals** (\$440m).

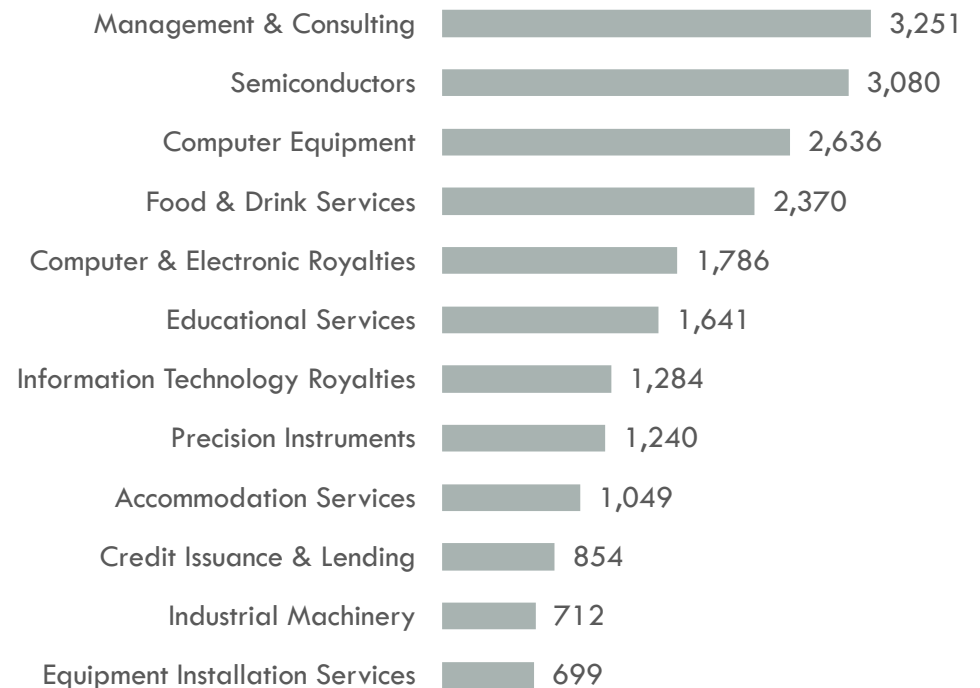
The export sectors directly supporting the most jobs were **Management & Consulting Services** (3,300 jobs), **Semiconductors** (3,100), **Computer Equipment** (2,600), **Food & Drink Services** (2,400), and **Computer & Electronic Royalties / IP** (1,800).

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TOP AUSTIN METRO EXPORTS BY VALUE (MILLIONS),
2014



TOP AUSTIN METRO EXPORTS BY DIRECTLY SUPPORTED JOBS
2014



SOURCE: AVALANCHE CONSULTING / BROOKINGS INSTITUTE

SOURCE: AVALANCHE CONSULTING / BROOKINGS INSTITUTE



Entrepreneurial Activity

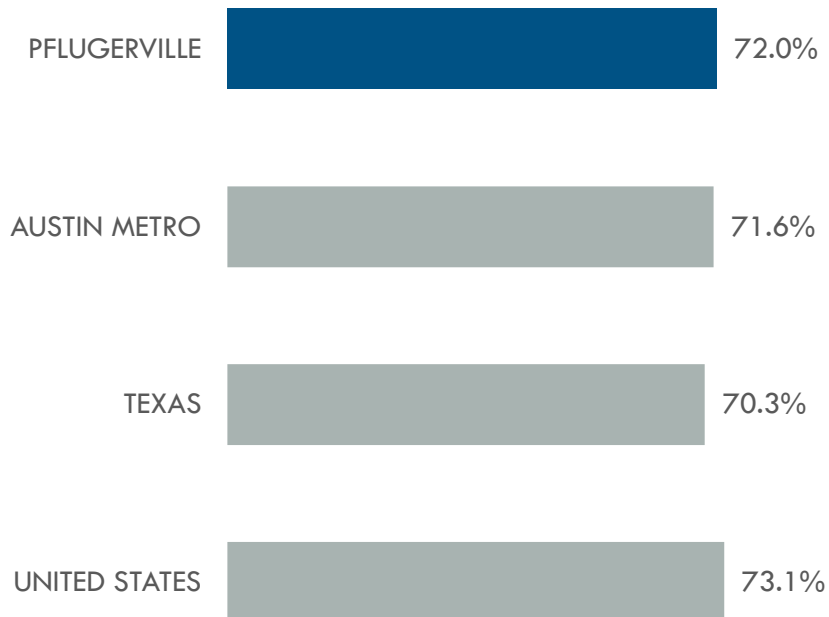
WHY IS THIS IMPORTANT?

Micro businesses, defined as those with fewer than 10 employees, represent 72% of all businesses within Pflugerville. The share of micro businesses in Pflugerville is relatively close to the Austin metro and US averages.

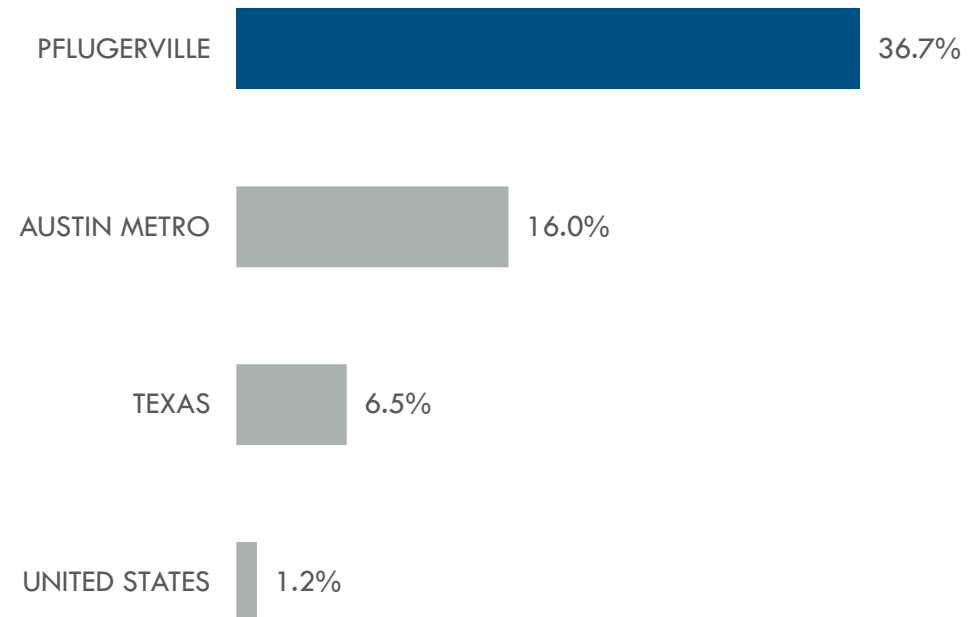
The number of microbusinesses in Pflugerville grew rapidly over the past five years. Between 2009 and 2014, the number of microbusinesses in Pflugerville increased by 37%, more than twice the rate in the Austin metro. During this period, the number of micro businesses in Texas and the US increased just 6.5% and 1.2% respectively.

Businesses that have fewer than ten employees are the heart of the national economy. While few create big job gains all at once and many fail, positive growth of small businesses reflects a thriving economy and the presence of an ecosystem that encourages entrepreneurship by being business friendly.

MICRO BUSINESSES (<10 EMPLOYEES), 2014
% SHARE OF ALL BUSINESSES



GROWTH IN MICRO BUSINESSES (<10 EMPLOYEES),
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS COUNTY BUSINESS PATTERNS

SOURCE: AVALANCHE CONSULTING / US CENSUS COUNTY BUSINESS PATTERNS



Benchmark Entrepreneurship

WHY IS THIS IMPORTANT?

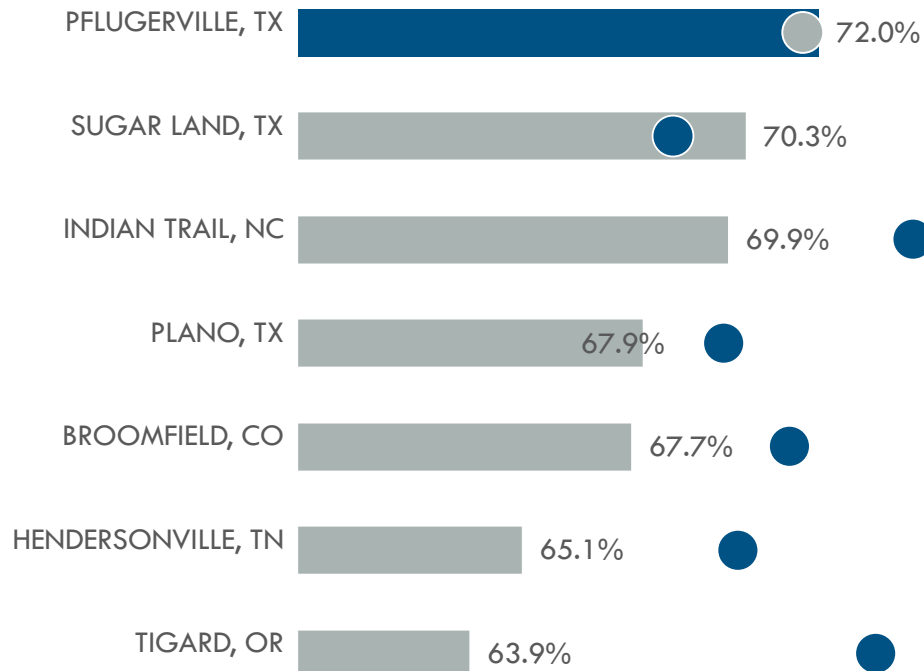
At 72%, Pflugerville has the highest share of micro businesses among all benchmark communities. The high share of micro businesses in Pflugerville is notable because the Austin metro ranks third among benchmark metros. As a share of all businesses, micro businesses are more common in both Charlotte and Portland.

Over the past five years, the number of micro businesses in Pflugerville grew 37%. This pace is faster than the pace in all other benchmark communities.

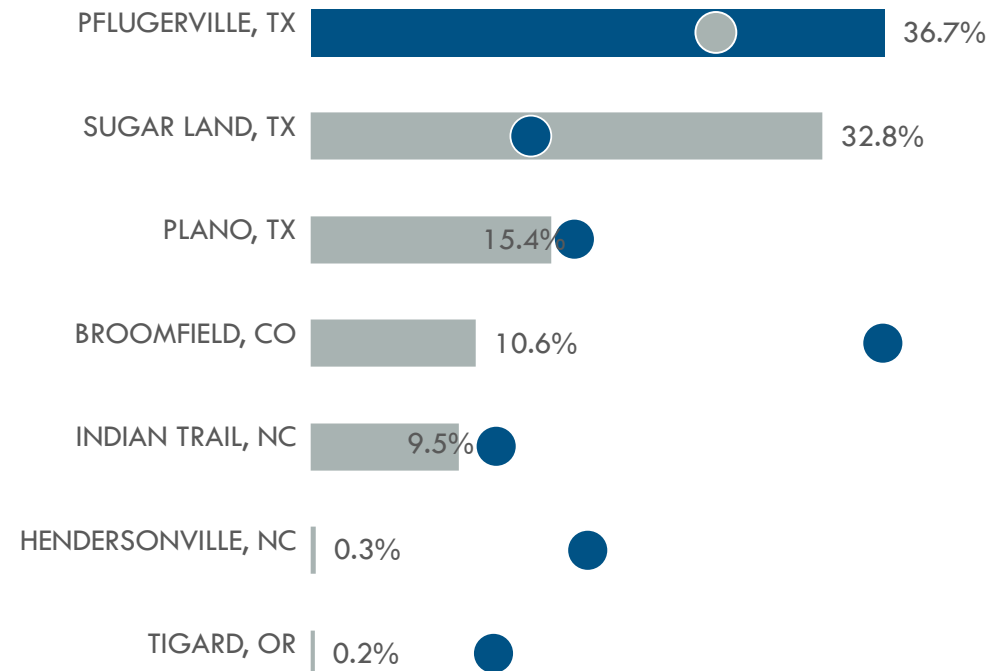
Businesses that have fewer than ten employees are the heart of the national economy. While few create big job gains all at once and many often fail, positive growth of small businesses reflects a thriving economy and the presence of an ecosystem that encourages entrepreneurship by being business friendly.

MICRO BUSINESSES (<10 EMPLOYEES),
% SHARE OF ALL BUSINESSES, 2014

● - METRO



GROWTH IN MICRO BUSINESSES (<10 EMPLOYEES),
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS COUNTY BUSINESS PATTERNS

SOURCE: AVALANCHE CONSULTING / US CENSUS COUNTY BUSINESS PATTERNS



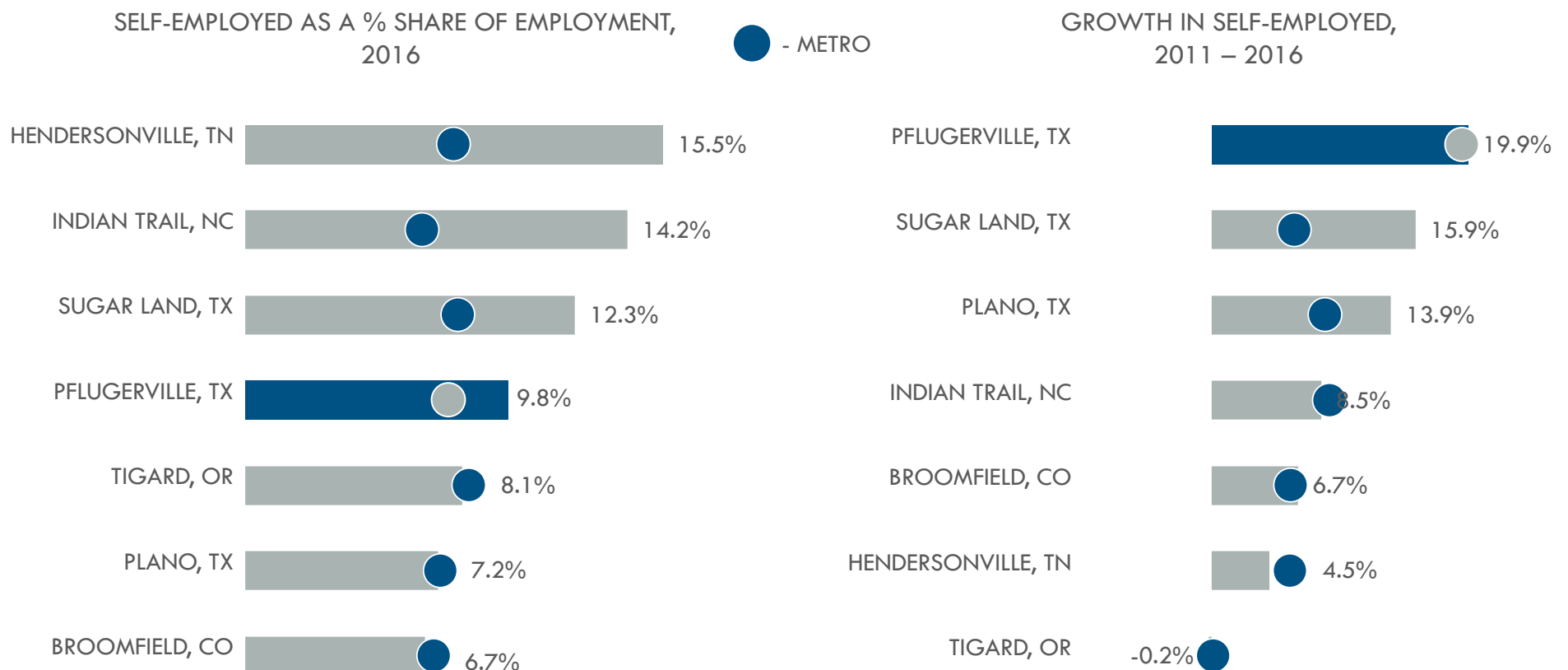
Self Employed

WHY IS THIS IMPORTANT?

With 9.8% of workers self-employed, Pflugerville has a higher share of self-employed workers than the Austin metro and US averages. Compared to benchmark communities, Pflugerville sits in the middle of the pack – with Hendersonville, Indian Trail, and Sugar Land all having higher shares of self-employed individuals.

The number of self-employed grew more rapidly in Pflugerville and the Austin metro than any other benchmarks. From 2011 to 2016, the number of self-employed workers grew nearly 20% in Pflugerville – compared to 2% nationally and 11% benchmark average.

The number of self-employed individuals in a community often indicates a strong entrepreneurial environment. Self-employed individuals make up 7% of the US workforce and 8% of the Texas workforce. These individuals are often working on their own startups and have creative ideas to tap for business expansion.



SOURCE: AVALANCHE CONSULTING / EMSI

SOURCE: AVALANCHE CONSULTING / EMSI



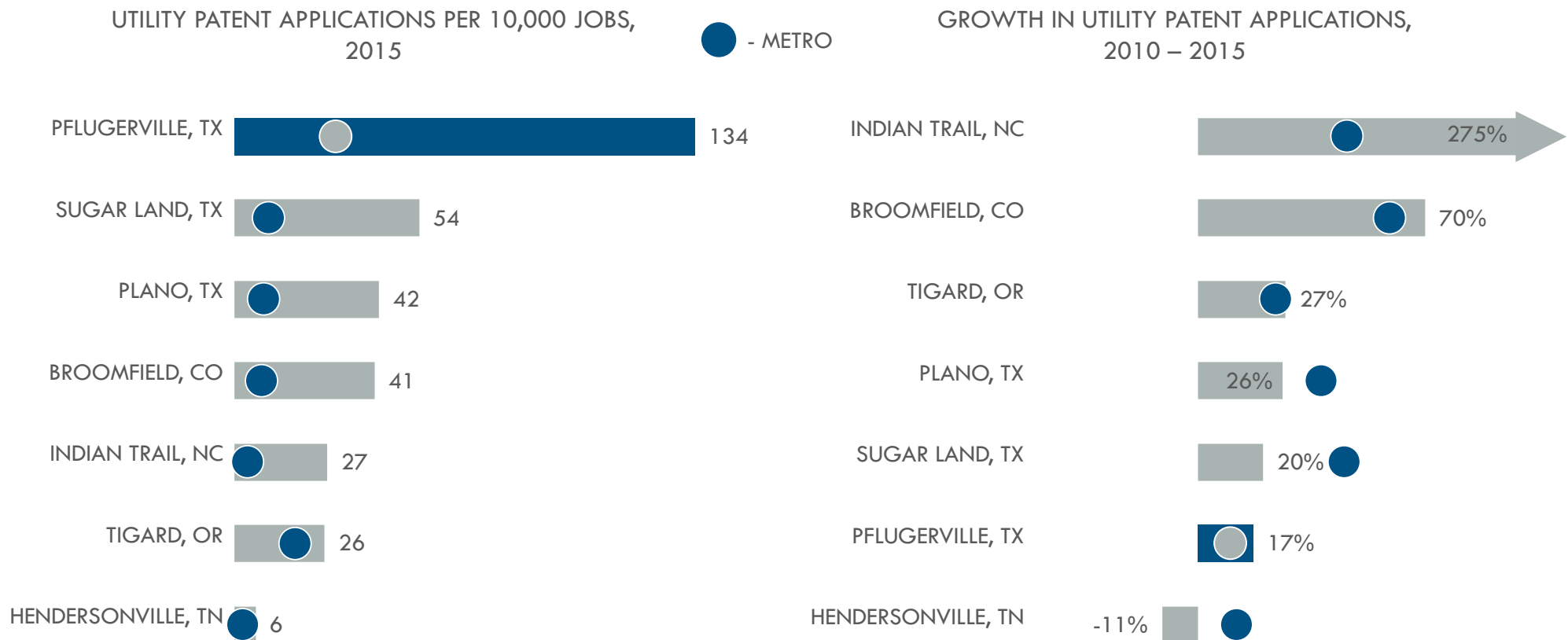
Patent Activity

Pflugerville has an extraordinarily high number of residents applying for patents. In 2015, 134 utility patents were issued to Pflugerville residents for every 10,000 jobs within the city. This share of patent holders is more than double the Austin average and all other benchmarks.

Between 2010 and 2015, the number of patents produced by Pflugerville residents increased by 17%. While the rise in locally awarded patents exceeded the growth of the broader Austin metro, it trailed most benchmark communities.

WHY IS THIS IMPORTANT?

High levels of local patent production within a community may reflect a concentration of innovative businesses and/or innovative individuals. In either instance, local innovation often serves as the basis for increased start-up activity.



SOURCE: AVALANCHE CONSULTING / USPTO

SOURCE: AVALANCHE CONSULTING / USPTO



Office Real Estate

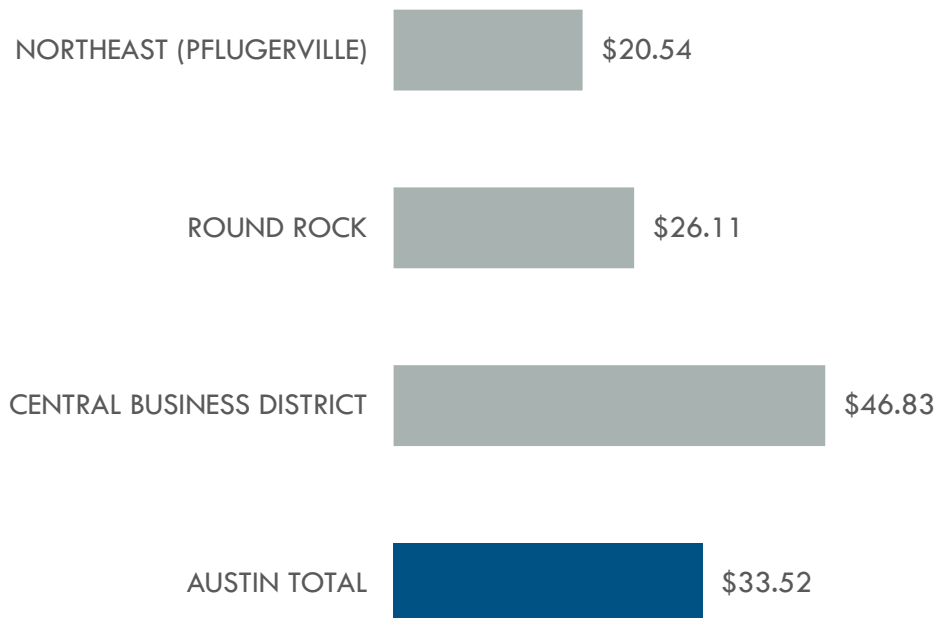
WHY IS THIS IMPORTANT?

The Cushman Wakefield Northeast Austin office market includes Pflugerville as well as several other neighboring communities. Office lease rates within Northeast Austin are lower than much of the region. Average asking office rent within Northeast Austin is less than \$21 per square foot, approximately 40% less than the Austin metro average.

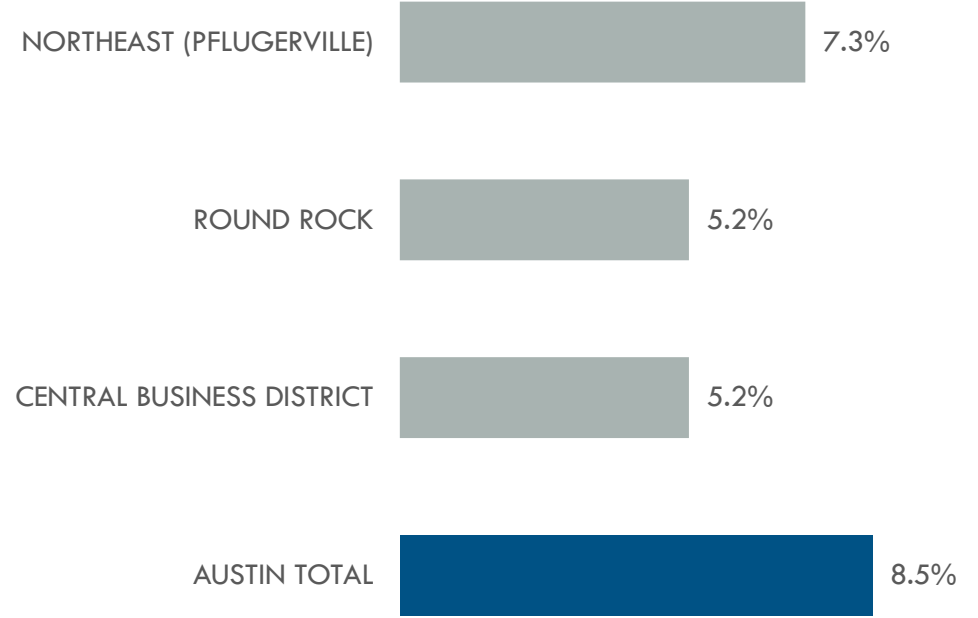
Slightly more than 7% of all office space within Northeast Austin is currently vacant, but this does not reflect the situation in Pflugerville. **Anecdotal evidence and discussions suggests very low vacancy rates and limited availability of office.**

High office lease rates may limit impede entrepreneurship and start-up activity within a community. On the other hand, high vacancy rates within a community may reflect weaknesses in the local economy.

AVERAGE ASKING OFFICE RENT (\$/SF, ALL CLASSES),
Q1 2016



OVERALL VACANCY RATE (ALL CLASSES),
Q1 2016



SOURCE: AVALANCHE CONSULTING / CUSHMAN WAKEFIELD

SOURCE: AVALANCHE CONSULTING / CUSHMAN WAKEFIELD



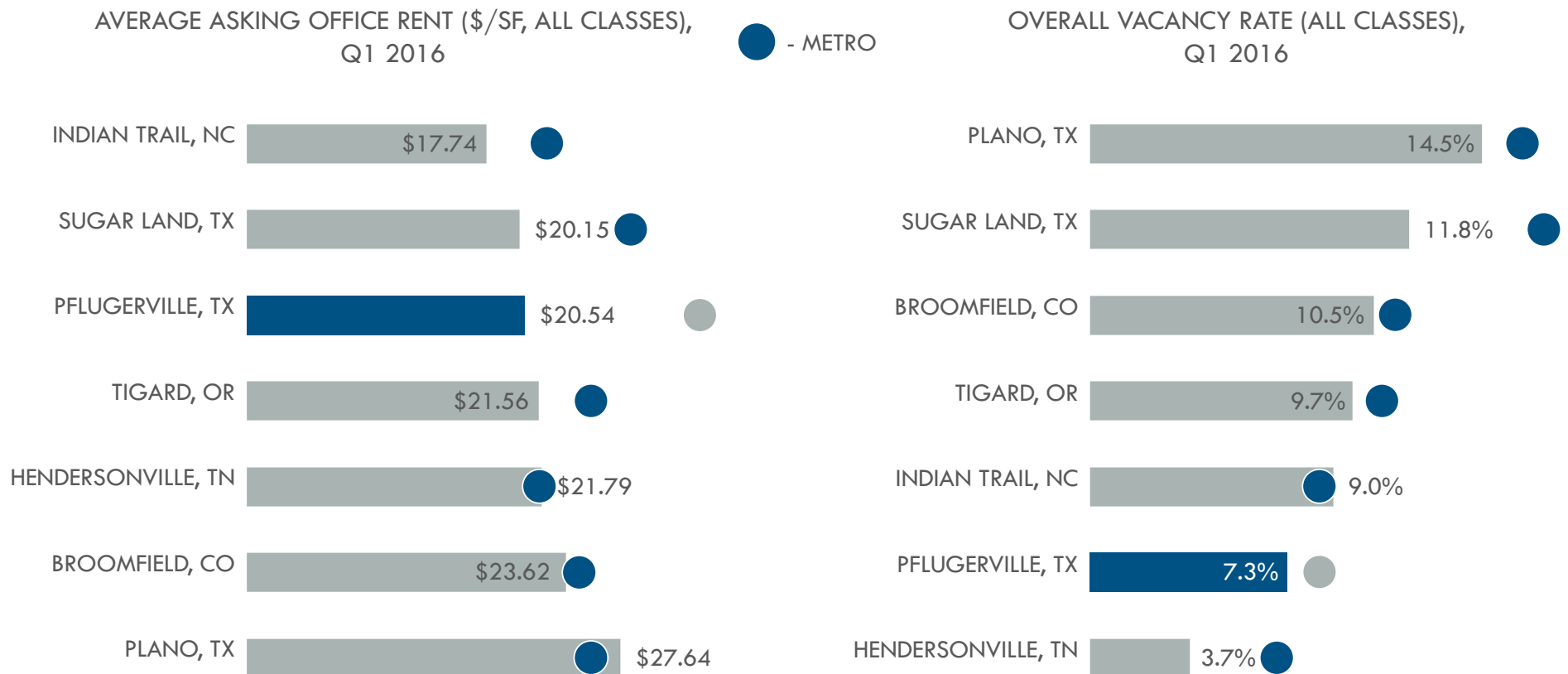
Benchmark Office

WHY IS THIS IMPORTANT?

Office lease rates within Northeast Austin are very competitive relative to other communities. With an average asking rate of \$21 per square foot, Northeast Austin ranked third among benchmarks for office cost. Only Indian Trail and Sugar Land had lower lease rates.

Pflugerville has very little office space available for rent. The benchmarked communities had an average office vacancy rate of 12%, compared to 7.3% in Northeast Austin (and likely much lower in the City of Pflugerville).

High office lease rates may impede entrepreneurship and start-up activity within a community. On the other hand, high vacancy rates within a community may reflect weaknesses in the local economy.



SOURCE: AVALANCHE CONSULTING / CUSHMAN WAKEFIELD

SOURCE: AVALANCHE CONSULTING / CUSHMAN WAKEFIELD



Industrial Real Estate

WHY IS THIS IMPORTANT?

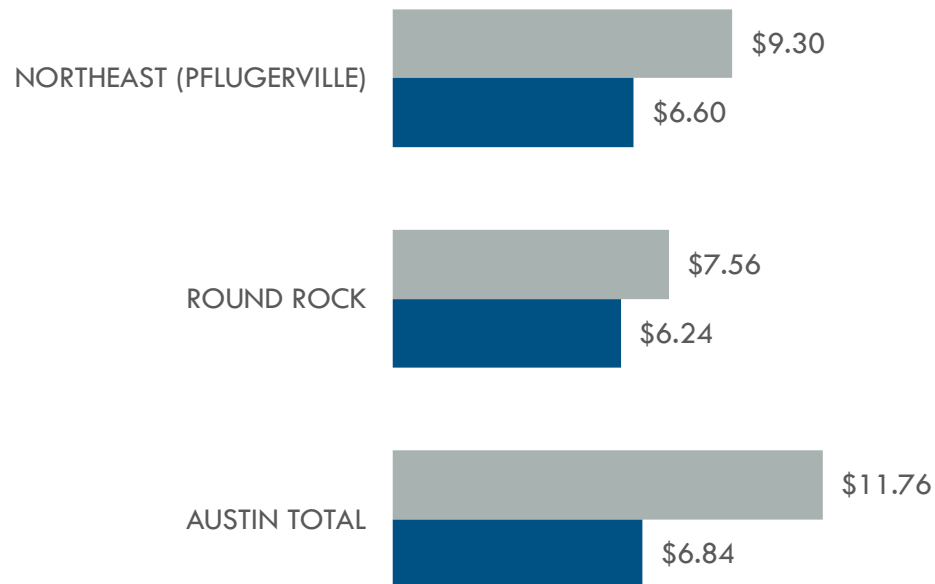
Average net rent for Flex and Warehousing / Distribution space within Northeast Austin (Pflugerville) is \$9.30 and \$6.60 per square foot respectively. Flex and Warehousing space within Pflugerville is less expensive than regional average but slightly more expensive than in Round Rock.

At nearly 16%, the vacancy for industrial real estate within Pflugerville is higher than in Round Rock (8%) or the Austin region as a whole (7%). Anecdotal evidence indicates that much of this vacant space may be located in Northeast Austin outside of Pflugerville.

Available and cost-effective industrial real estate is crucial in supporting industries such as Manufacturing and Logistics. The absence of sufficient, affordable industrial space often precludes the growth of these industries within a community.

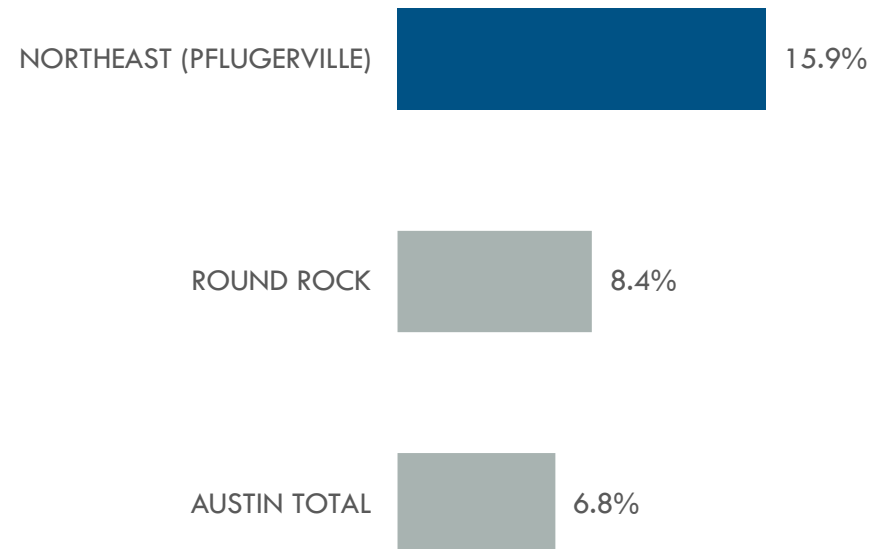
DIRECT WEIGHTED AVERAGE NET RENT (\$/SF),
Q1 2016

■ FLEX ■ WAREHOUSING / DISTRIBUTION



OVERALL VACANCY RATE (ALL TYPES),
Q1 2016

Note: These statistics only reflect buildings available for lease and not buildings for sale. The market for owner-occupied buildings is more difficult to quantify.



Benchmark Industrial

Flex space in Pflugerville is relatively affordable compared to most benchmarks. At \$9.30 a square foot, Flex space in Pflugerville is more expensive than Indian Trail and Plano but more affordable than Sugarland and Broomfield.

Warehouse space in Pflugerville is more expensive than all benchmark communities except Broomfield. Somewhat paradoxically, Pflugerville's industrial real estate has the highest vacancy rate at nearly 16% - but it is important to remember this may be located outside city borders. Higher costs and vacancy rates may also reflect new construction.

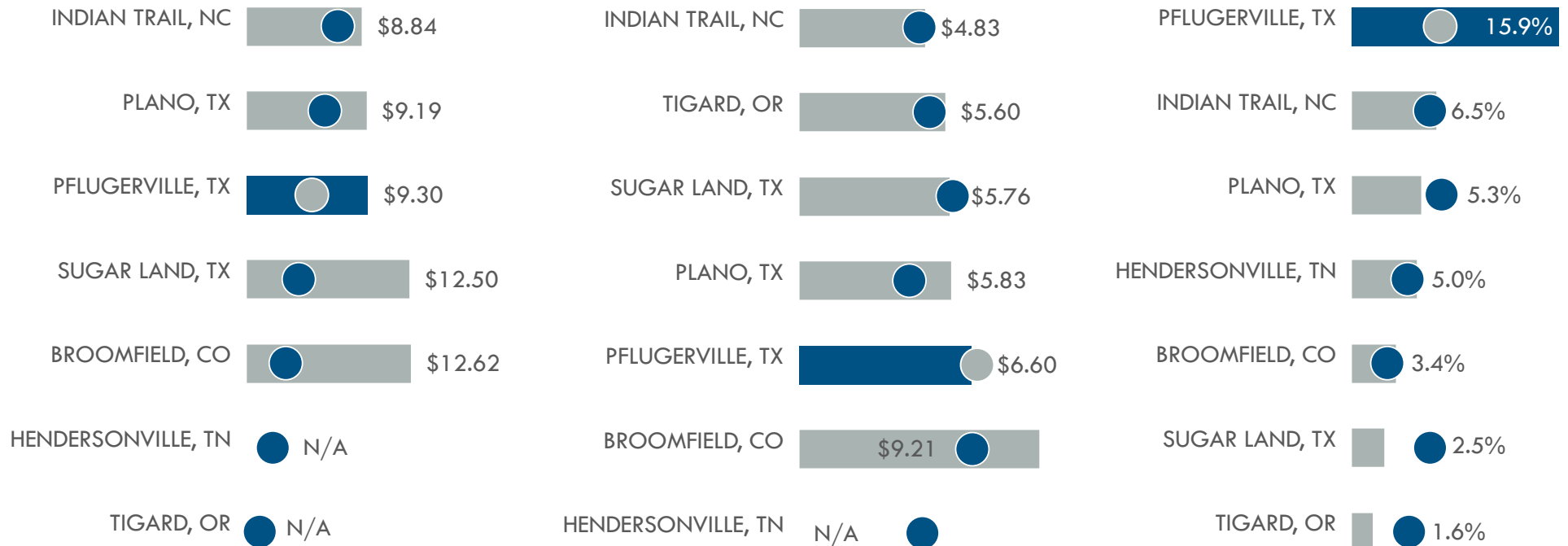
WHY IS THIS IMPORTANT?

Available and cost-effective industrial real estate is crucial in supporting industries such as Manufacturing and Logistics. The absence of sufficient, affordable industrial space often precludes the growth of these industries within a community.

DIRECT WEIGHTED AVERAGE NET RENT (\$/SF),
FLEX, Q1 2016

DIRECT WEIGHTED AVERAGE NET RENT (\$/SF),
WAREHOUSE, Q1 2016

OVERALL VACANCY RATE (ALL TYPES),
Q1 2016



● - METRO

SOURCE: AVALANCHE CONSULTING / CUSHMAN WAKEFIELD



WORKFORCE TRENDS



Population Growth

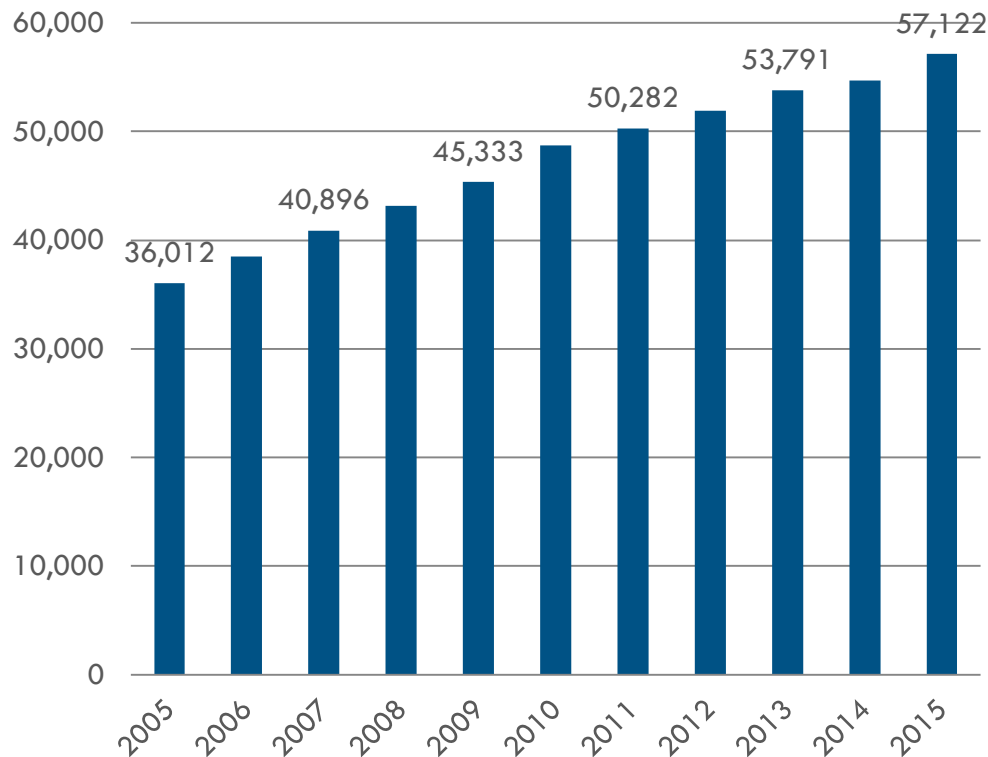
WHY IS THIS IMPORTANT?

Pflugerville is one of the fastest growing cities in America. The local population grew more than 17% from 2010 to 2015 – faster than the entire Austin metro. During this period, Pflugerville’s population grew twice as fast as Texas and more than four times the US rate.

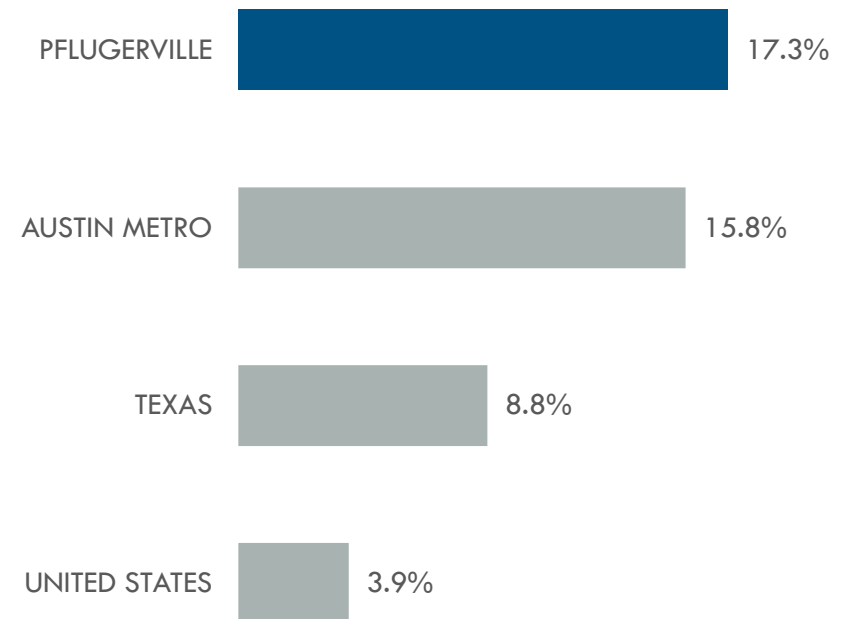
Officially, Pflugerville’s population is approaching 60,000 residents. This figure does not include individuals living in the city’s extra territorial jurisdiction (ETJ). According to city estimates, the combined population of both Pflugerville and its ETJ exceeds 85,000.

Population growth is one of the base indicators of overall economic prosperity in a community. A growing population shows that a community has assets and job opportunities that retain younger residents and attract new workers. A growing population also reassures businesses that they will have workers and new customers available in the future.

PFLUGERVILLE TOTAL POPULATION
2005 – 2015



POPULATION GROWTH
2010 – 2015



SOURCE: AVALANCHE CONSULTING / US CENSUS

SOURCE: AVALANCHE CONSULTING / US CENSUS



Commuting Patterns

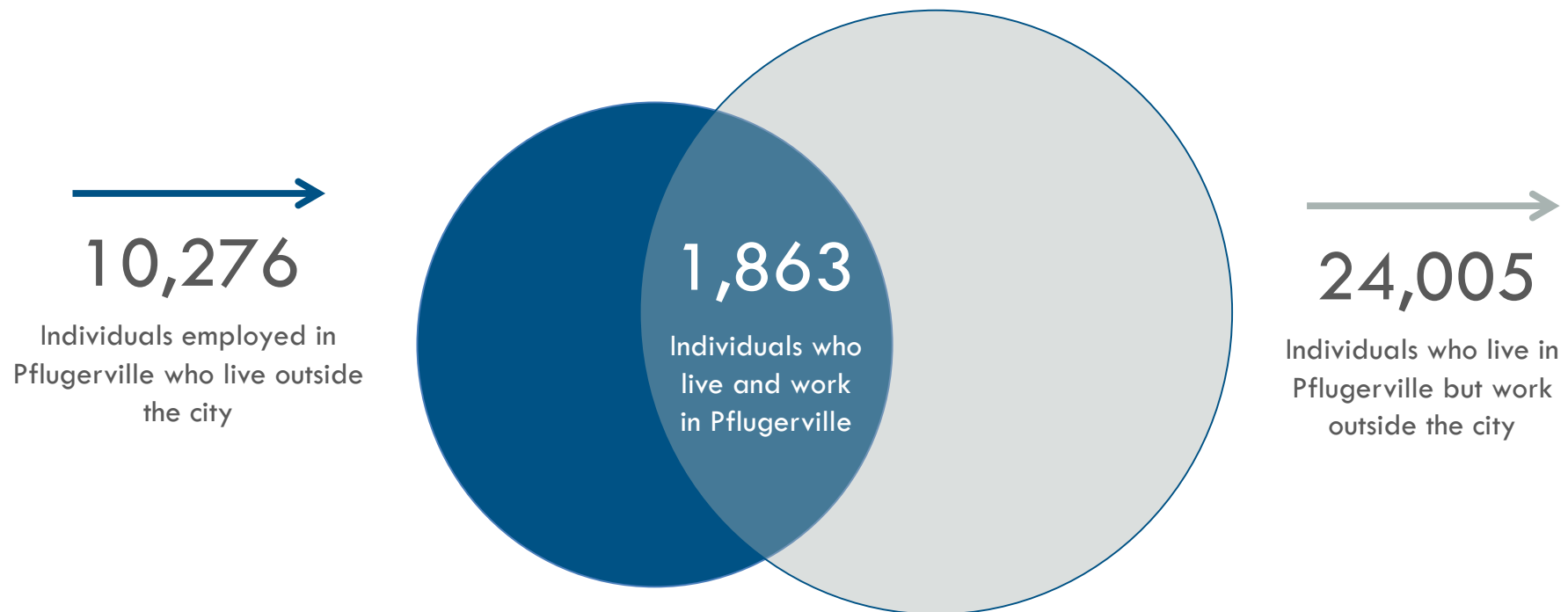
WHY IS THIS IMPORTANT?

Pflugerville hosts two almost entirely separate populations – workers and residents. Pflugerville is home to nearly 27,500 employed individuals. Approximately 25,500 of these workers – **more than 90% of all employed residents living in Pflugerville – commute out to jobs in other cities.**

At same time, more than 85% of all jobs within Pflugerville are filled by individuals who live in other cities. **Fewer than 2,000 individuals both live and work in Pflugerville.**

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skill sets present outside of their communities can significantly increase their available workforce.

PFLUGERVILLE COMMUTING PATTERNS (PRIMARY JOBS),
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS LEHD

Commuting Patterns

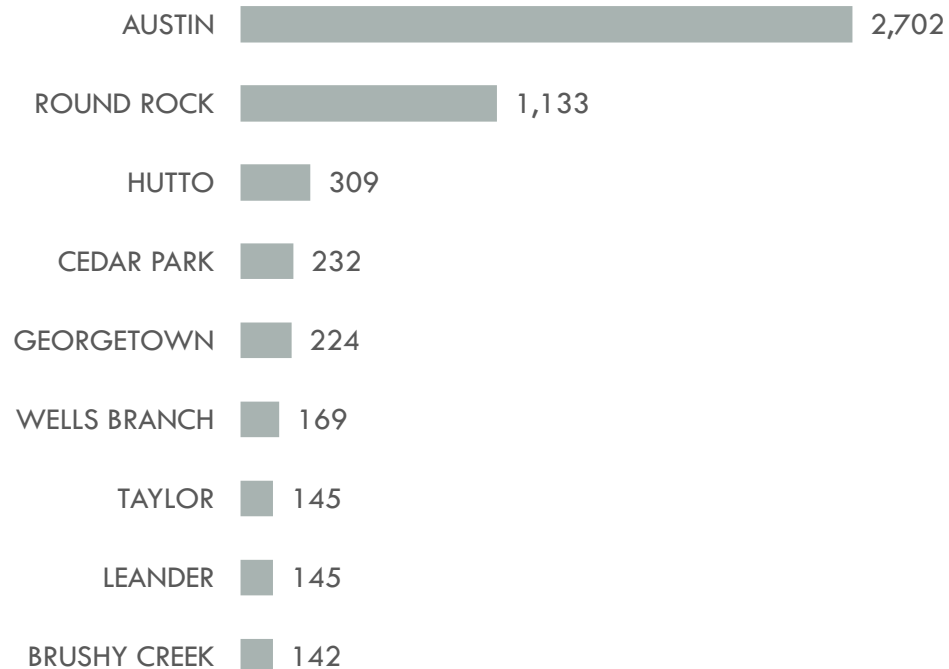
WHY IS THIS IMPORTANT?

Pflugerville is deeply connected to Austin and Round Rock. Together, these two cities account for nearly 40% of all Pflugerville in-commuters. It is difficult to estimate how many workers come from the ETJ, but the top zip code sources of workers are 78660 (21%), 78664 (7%), and 78634 (4%).

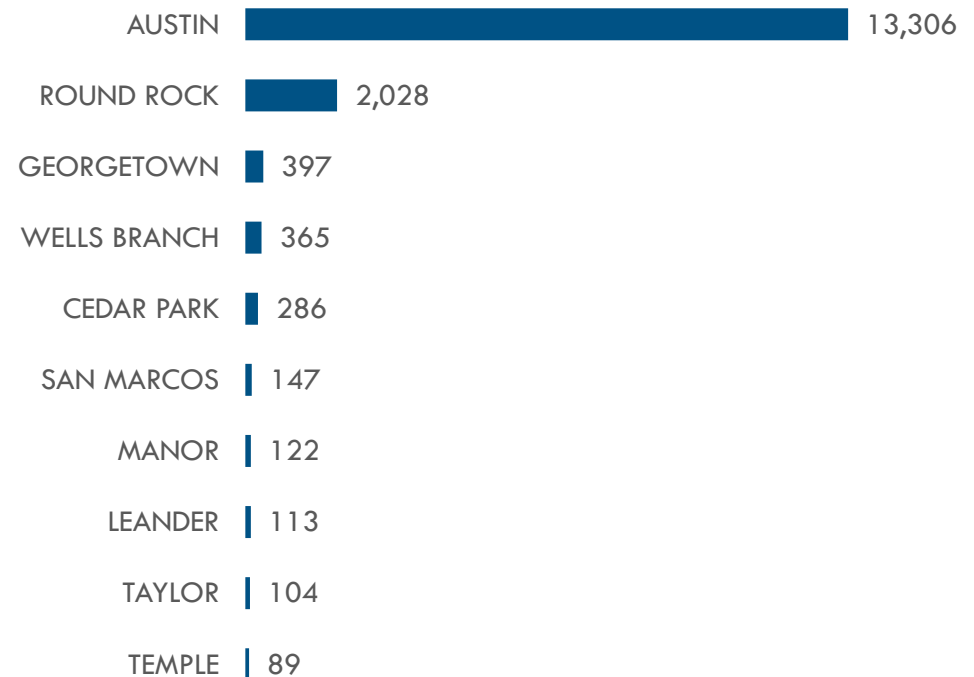
Austin and Round Rock are also the leading employment destinations for Pflugerville residents. **14,000 Pflugerville residents are employed within Austin, representing more than half of residents with jobs.**

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skill sets present outside of their communities can significantly increase their available workforce.

TOP SOURCES OF IN-COMMUTING WORKERS,
2014



TOP DESTINATIONS OF OUT-COMMUTING WORKERS,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS LEHD

SOURCE: AVALANCHE CONSULTING / US CENSUS LEHD



Benchmark Commuting

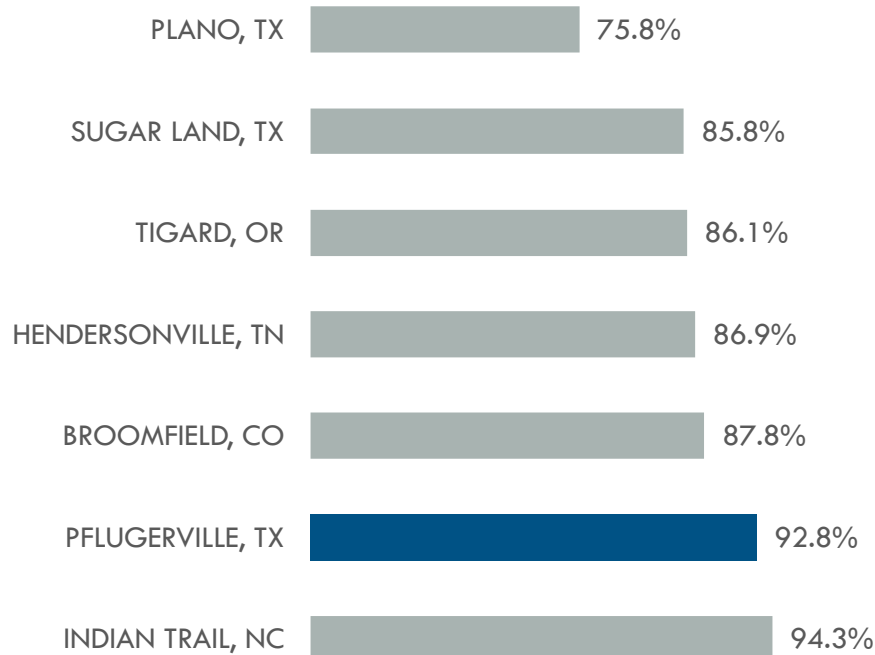
WHY IS THIS IMPORTANT?

Compared to the benchmarks, the percentage of Pflugerville residents that commute to other jurisdictions is relatively high. Nearly 93% of employed residents of Pflugerville work elsewhere. Among the 6 benchmark communities examined, only Indian Trails, NC features a higher share of out-commuters.

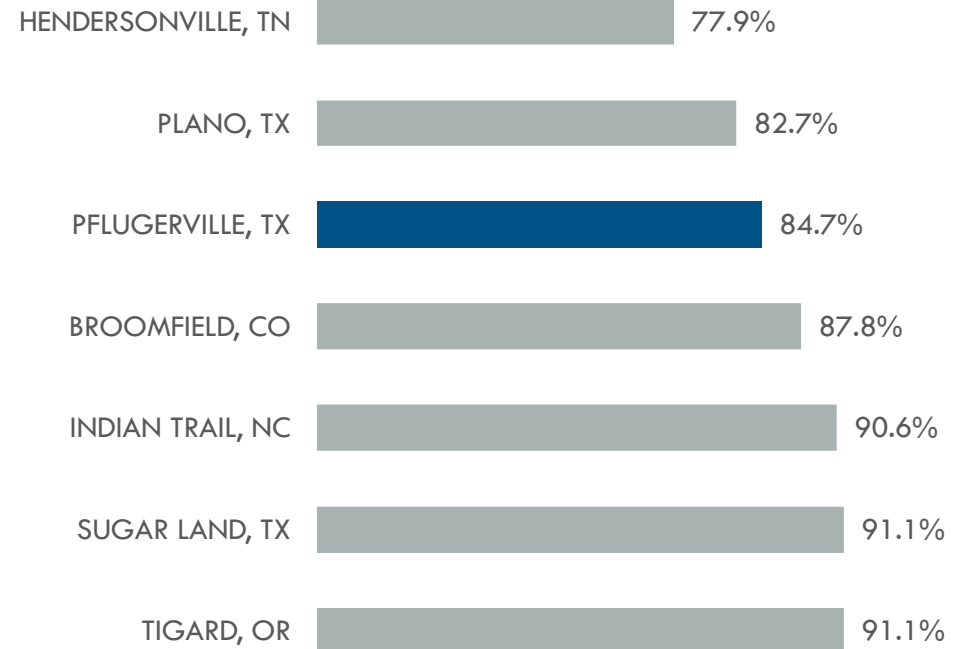
Although Pflugerville depends on imported workers to fill local jobs, the city is more balanced than many of its peers. Non-residents occupy nearly 85% of all jobs within Pflugerville. Only Hendersonville, TN, and Plano, TX, rely less on outside labor.

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skill sets present outside of their communities can significantly increase their available workforce.

SHARE OF RESIDENTS WORKING OUTSIDE THE CITY,
2014



SHARE OF WORKERS LIVING OUTSIDE THE CITY,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS LEHD

SOURCE: AVALANCHE CONSULTING / US CENSUS LEHD



Jobs versus People

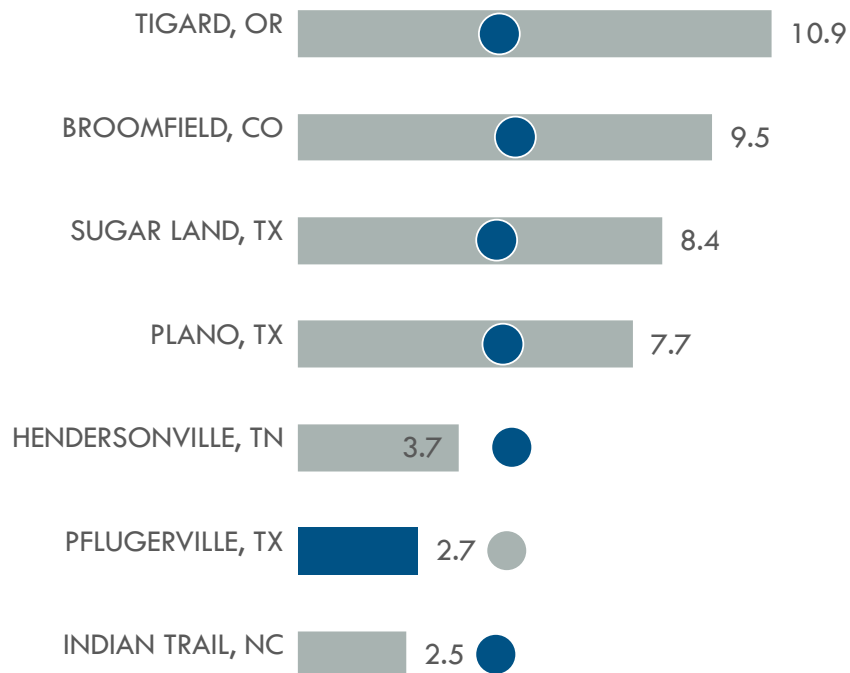
Pflugerville has traditionally been seen as a “bedroom community” with most residents working in other locations. The city has created many new jobs in recent years, but population growth has been even higher than employment growth. This makes Pflugerville appear to be more of a bedroom community.

In 2015, the city was home to 2.7 jobs for every 10 residents. Only Indian Trail had a lower share of jobs per resident. In recent years, the ratio of jobs to residents in Pflugerville rose slightly, suggesting that the imbalance may have peaked.

WHY IS THIS IMPORTANT?

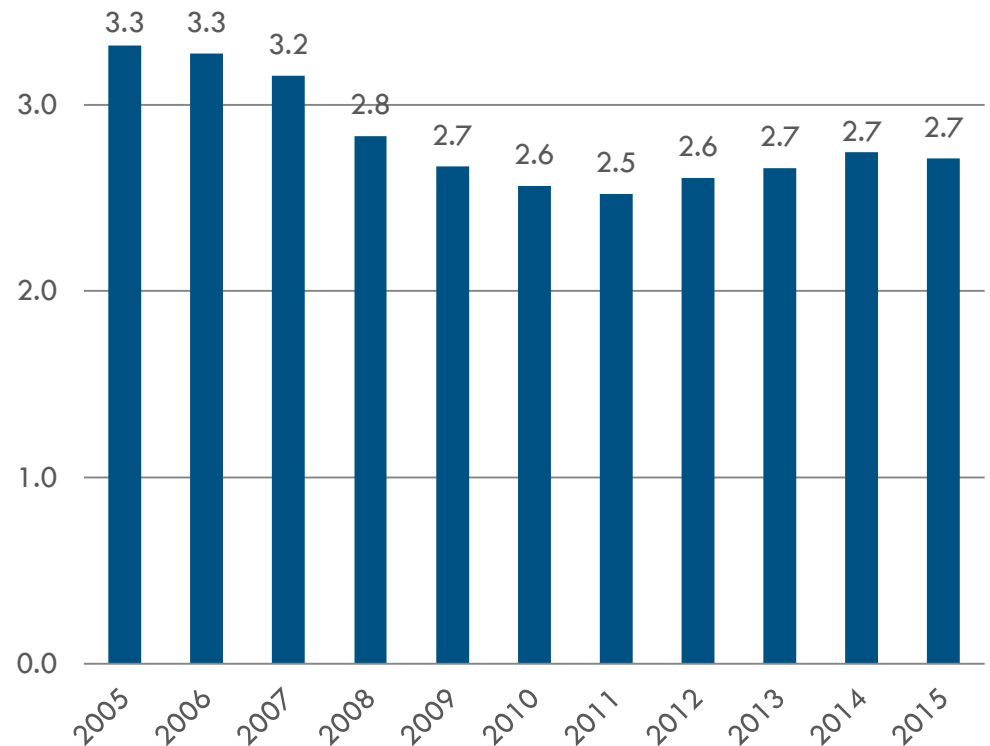
Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skill sets present outside of their communities can significantly increase their available workforce.

NUMBER OF JOBS PER 10 RESIDENTS,
2014



● - METRO

NUMBER OF JOBS PER 10 RESIDENTS,
2005 – 2015



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS / EMSI

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS / EMSI



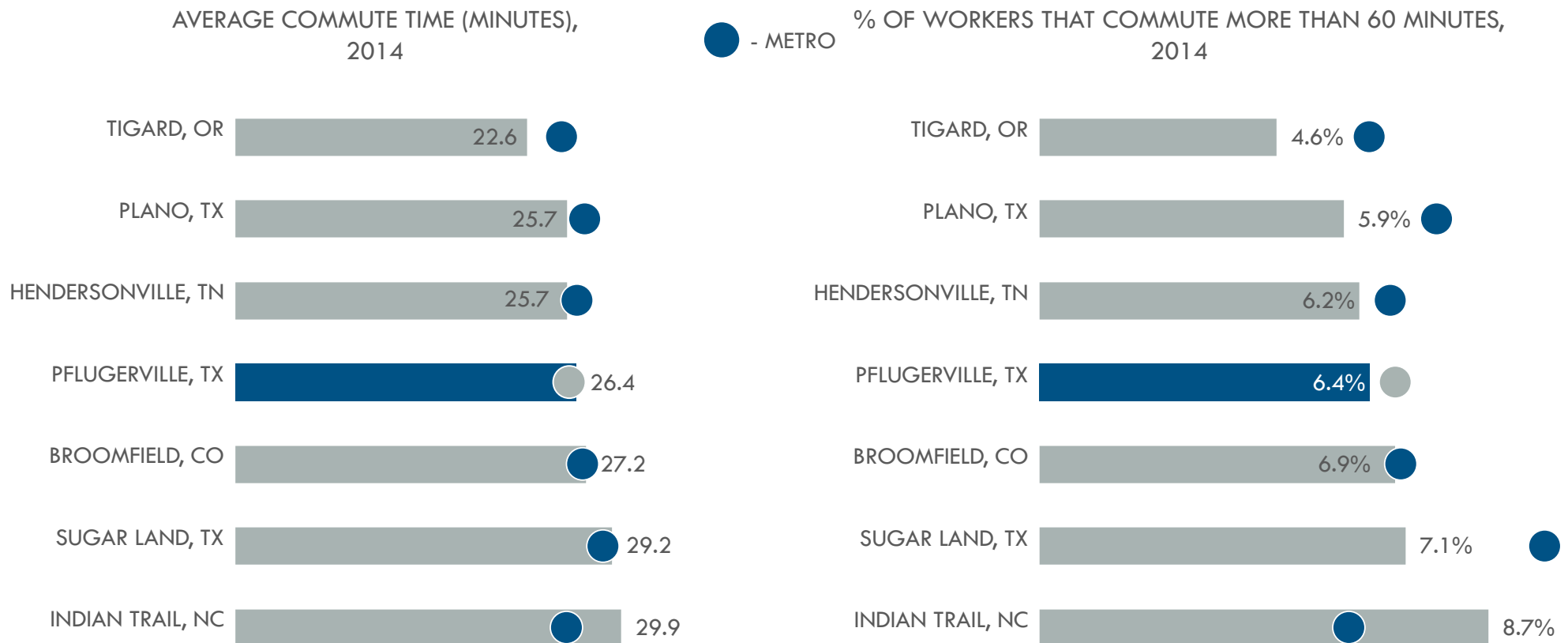
Commute Time

WHY IS THIS IMPORTANT?

Despite frequent complaints about traffic, Pflugerville and Austin have relatively average commute times for the US. The average commute time in Pflugerville is 26.4 minutes, placing it firmly in the middle of selected benchmark communities. At 22.6 minutes, Tigard has the shortest commutes, and Indian Trail the longest commute at 29.9 minutes.

Of employed Pflugerville residents, 6.4% commute 60 minutes or longer to reach their place of employment. Less than 5% of employed Tigard workers commute 60 minutes or more. Nearly 9% of employed Indian Trail residents commute 60 minutes or more.

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skill sets present outside of their communities can significantly increase their available workforce.



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Age Distribution

Pflugerville's population is younger than the US as a whole. Nearly 36% of residents are younger than 24, compared to 33% nationally.

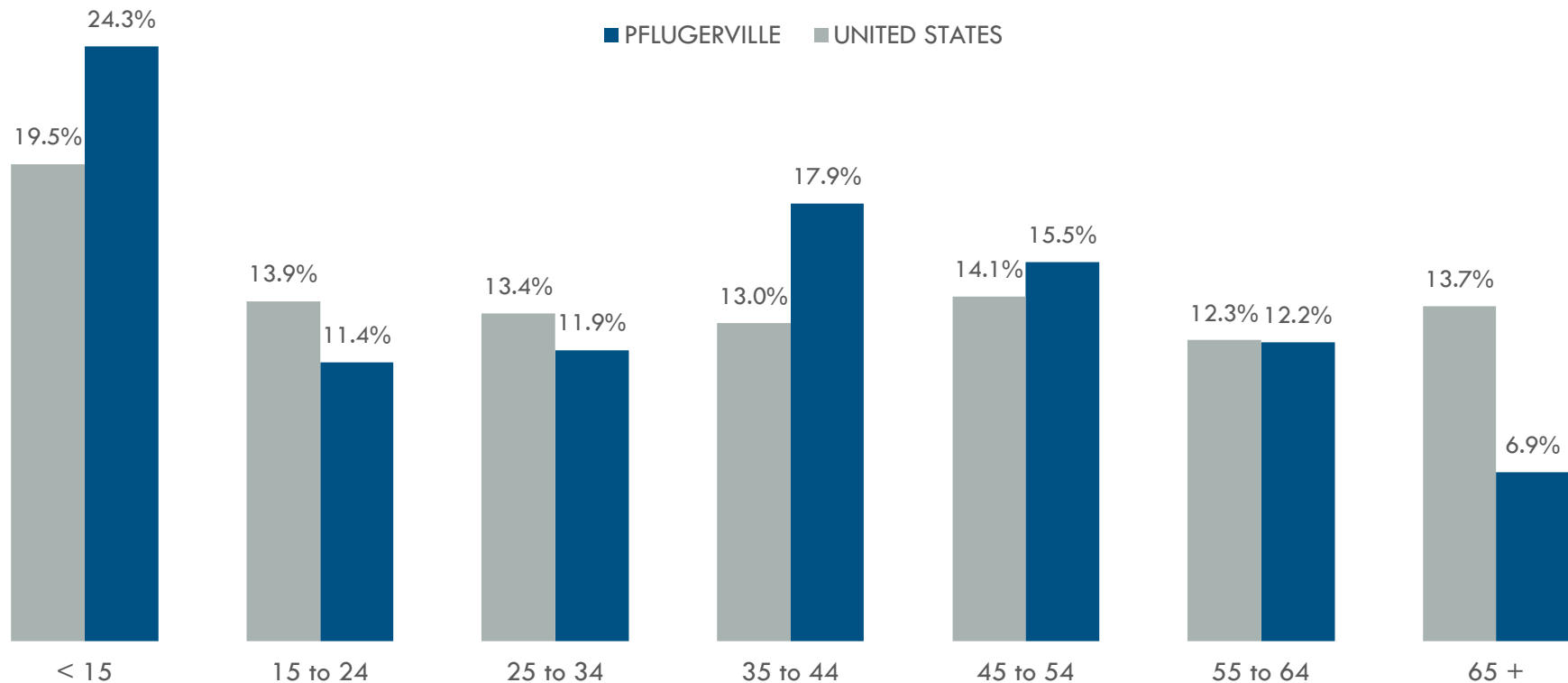
Pflugerville has a smaller proportion of residents between the ages of 25 to 34 relative to the US average (12% versus 13%) but a larger proportion of residents between the ages of 35 to 54 (33% versus 27%). The proportion of Pflugerville residents age 65 and older is barely half the US average (7% versus 14%).

WHY IS THIS IMPORTANT?

The age distribution of a population can help better understand where to prioritize community investments.

Age distribution helps understand gaps in workforce availability and identify populations that may have distinct needs – such as children and the elderly.

SHARE OF POPULATION BY AGE,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Age Distribution

With one exception, every age group within Pflugerville experienced double-digit growth during the past five years. Residents aged 25 to 34 were the only age group that declined in Pflugerville from 2009 to 2014 – an important trend to consider when discussing housing, entertainment, and employment options in the city.

As a whole, Pflugerville is getting older. From 2009 to 2014, the number of residents age 45 and younger living in Pflugerville increased only 15%. At the same time, the number of residents age 45 and older living in Pflugerville nearly doubled.

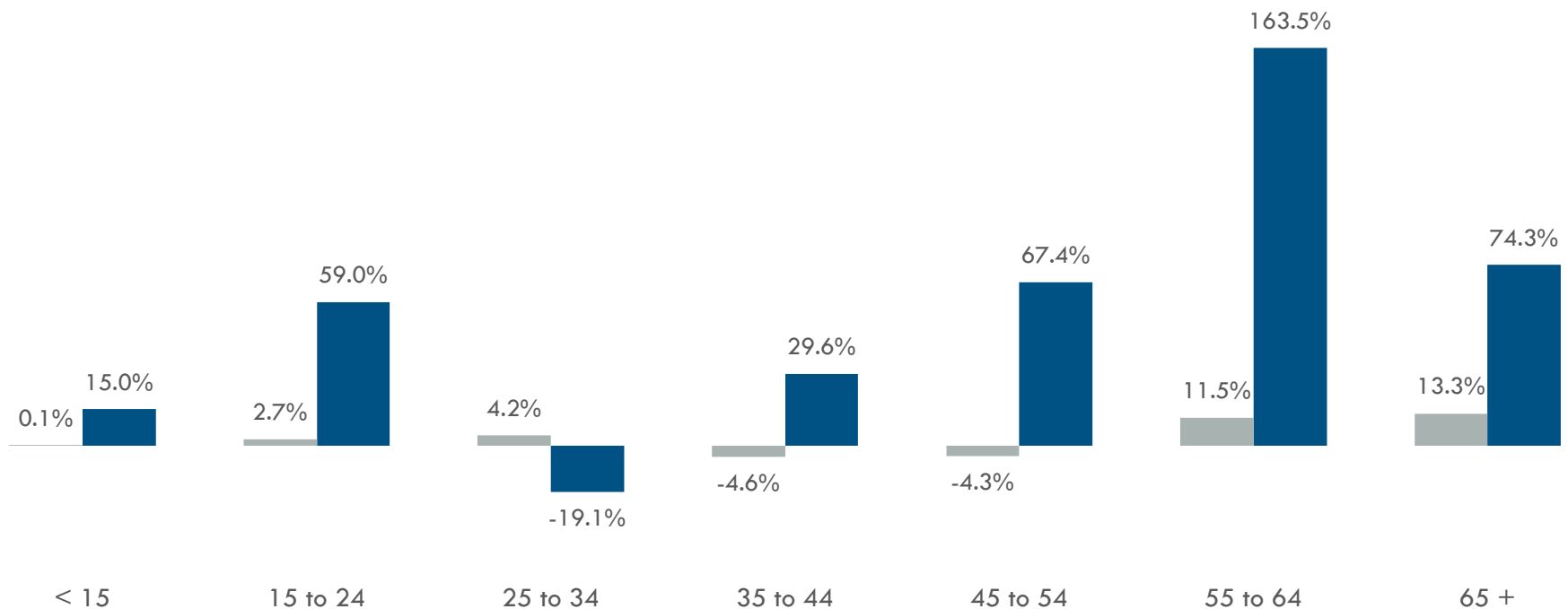
WHY IS THIS IMPORTANT?

Changing age distribution within a community has widespread implications for public investments in areas such as health care, education, and mobility.

Effective planning examines a community's current and changing demographics to better identify necessary programs.

POPULATION CHANGE BY AGE,
2009 – 2014

■ PFLUGERVILLE ■ UNITED STATES



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Benchmark Age

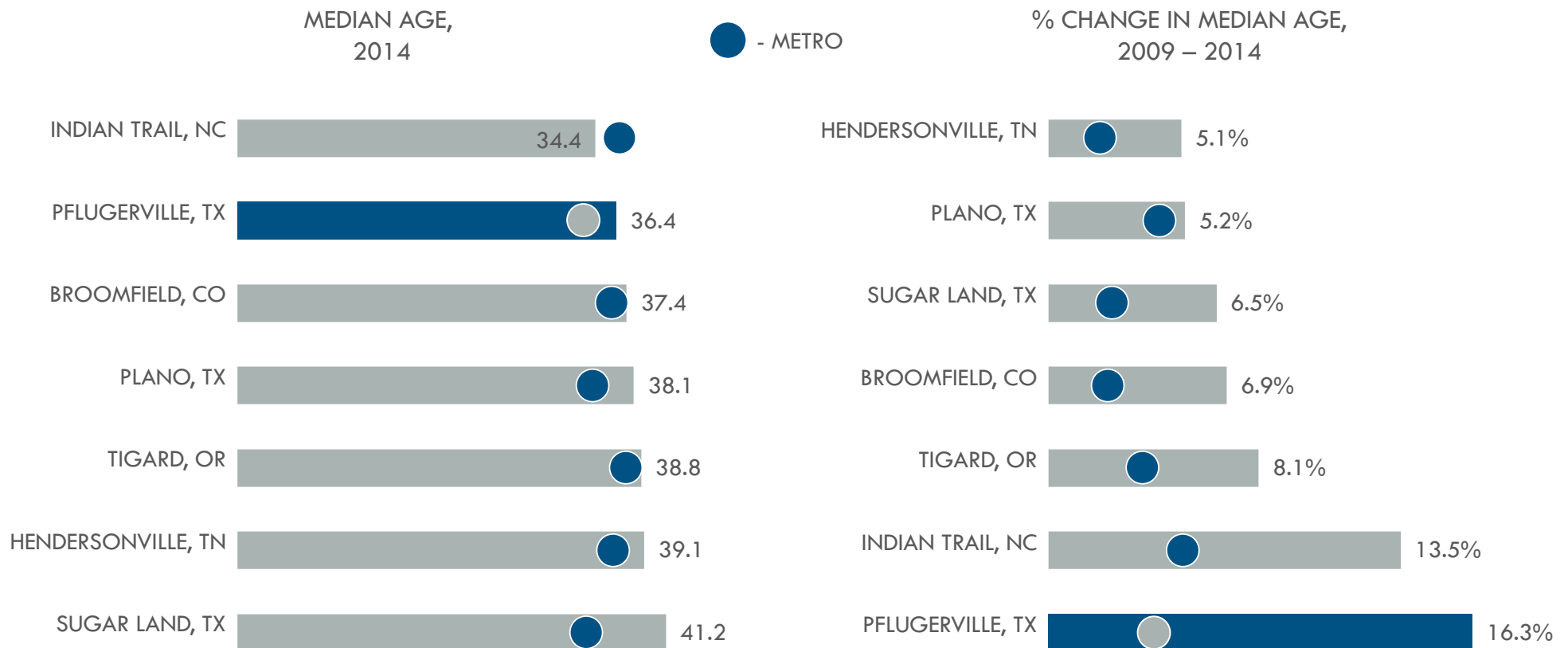
With a median age of 36.4, Pflugerville's population is slightly older than the broader Austin region but younger than every benchmark community except Indian Trail.

As highlighted earlier, however, Pflugerville's population is growing faster among those over 45 years old. Between 2009 and 2014, the median age in Pflugerville increased by more than 16.3%. The increase in the Pflugerville's median age was four times greater than the Austin metro average and exceeded the increase in median age of all benchmark communities.

WHY IS THIS IMPORTANT?

Changing age distribution within a community has widespread implications for public investments in areas such as health care, education, and mobility.

Effective planning examines a community's current and changing demographics to better identify necessary programs.



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Educational Attainment

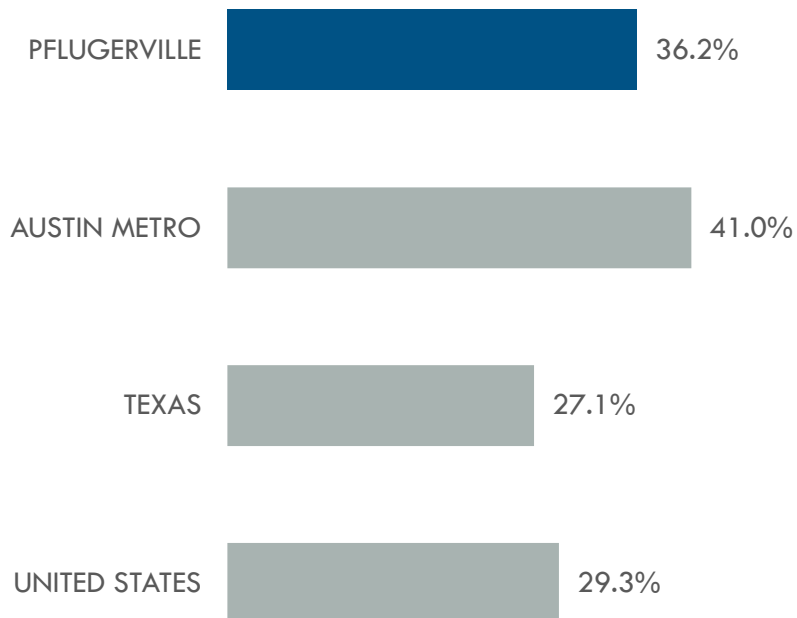
WHY IS THIS IMPORTANT?

Pflugerville is a highly educated community. More than 36% of all residents age 25 and older hold a bachelor's degree or higher level of educational attainment. At the bachelor's degree level, educational attainment levels in Pflugerville are slightly less than the Austin metro average (though the Texas capital is among the country's most educated regions).

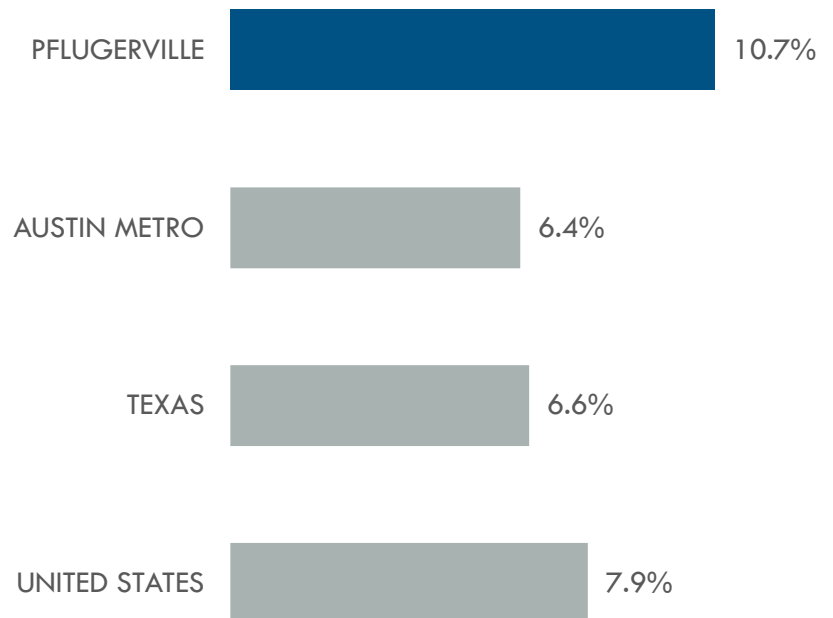
Pflugerville has significantly higher share of residents with associate degrees (11%) than the Austin (6%), Texas (7%), and US (8%) averages.

The modern economy is increasingly knowledge-intensive. New jobs often require education beyond a high-school diploma – ranging from a certificate to a masters degree. Due to this growing reliance on skilled workers, many businesses expand in and choose new locations based on the presence of a well-educated population.

SHARE OF 25 YEARS+ POPULATION
W/ A BACHELOR'S DEGREE OR HIGHER, 2014



SHARE OF 25 YEARS+ POPULATION
W/ AN ASSOCIATE'S DEGREE, 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Young Professionals

WHY IS THIS IMPORTANT?

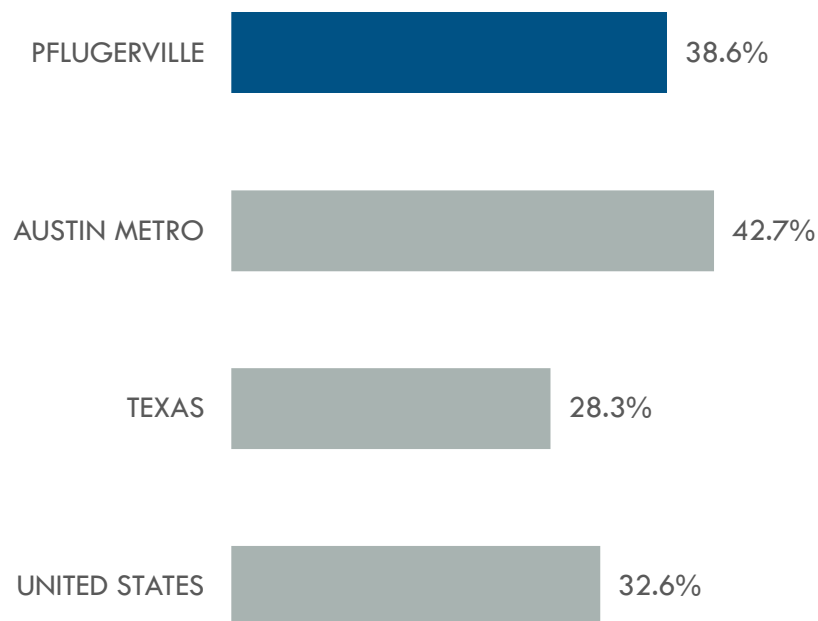
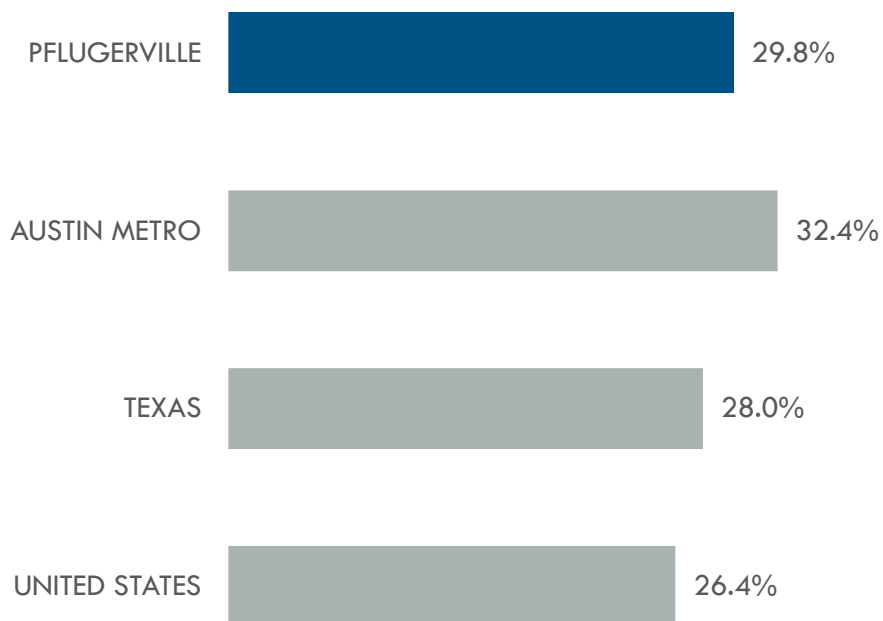
Young Professionals (residents aged 25 to 44 years old) represent approximately 30% of Pflugerville's population. This share of Young Professionals is slightly less than the Austin metro average but greater than the Texas and US averages.

Nearly 39% of Pflugerville's Young Professionals possess a bachelor's degree or higher level of educational attainment. This is also slightly less than the Austin average (one of the most educated metros in America) but greater than Texas and the US.

Young Professionals (residents aged 25 to 44 years old) represent a critical segment of a local workforce for companies seeking to hire new workers with the latest skills and knowledge. Recruiting and retaining residents in this age cohort helps ensure a region can supply a growing labor force for companies.

SHARE OF YOUNG PROFESSIONALS (RESIDENTS AGE 25-44),
2014

SHARE OF YOUNG PROFESSIONALS W/ A BACHELOR'S DEGREE OR
HIGHER, 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Benchmark Talent

Pflugerville possesses a highly educated population, but many of the benchmark regions have even higher educational attainment levels. More than half of all residents age 25 and older in Plano, Sugarland, and Broomfield possess a bachelor's degree.

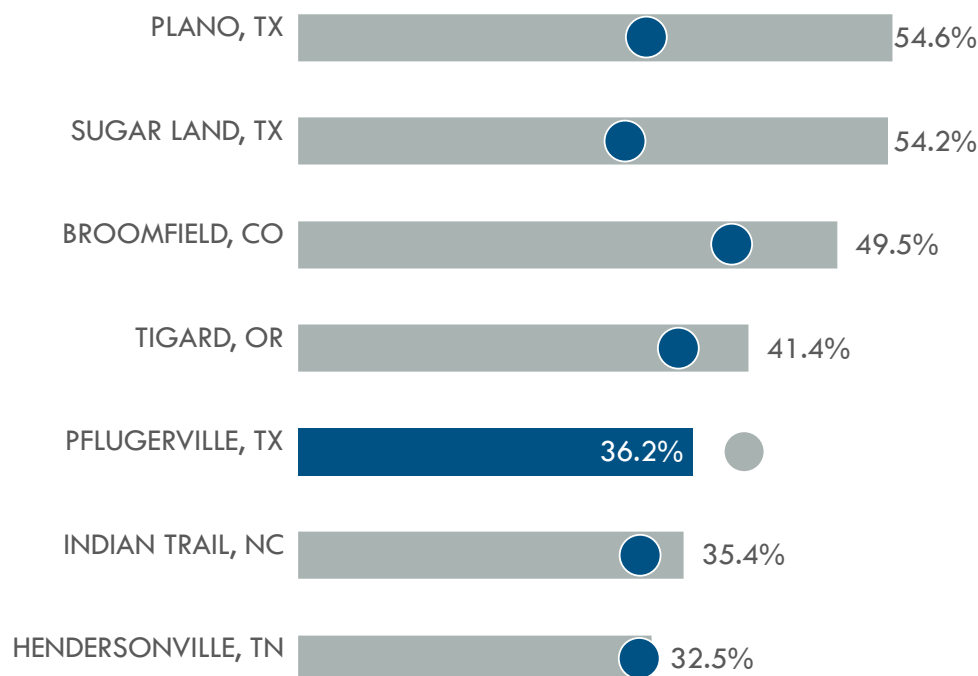
With Young Professionals representing nearly 30% of all residents, Pflugerville has the second highest proportion of Young Professionals among the examined benchmark communities. Only Indian Trail features a slightly higher share of Young Professionals than Pflugerville.

WHY IS THIS IMPORTANT?

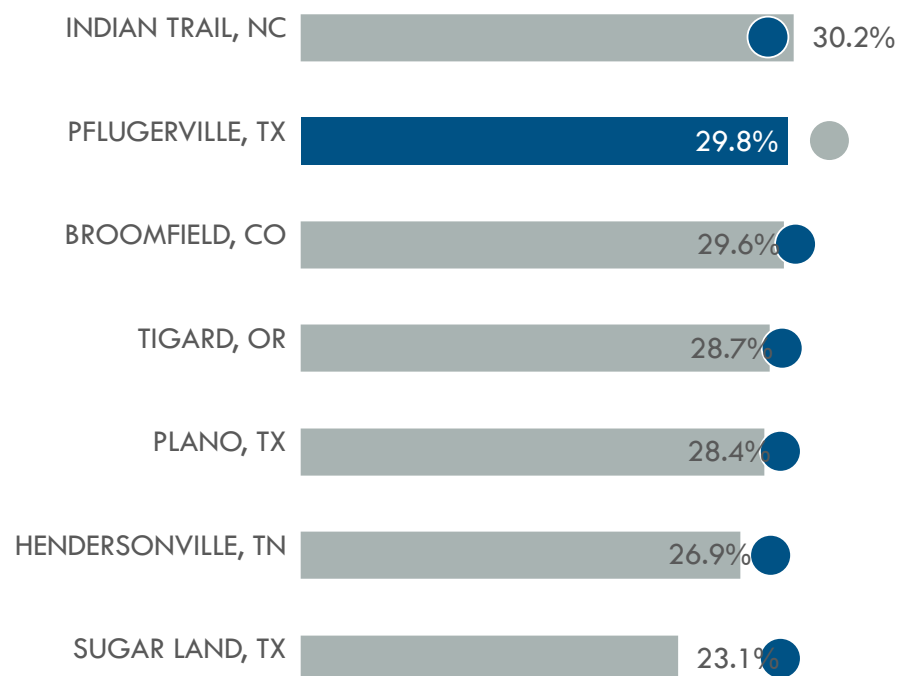
The modern economy is increasingly knowledge-intensive. New jobs often require education beyond a high-school diploma – ranging from a certificate to a masters degree. Due to this growing reliance on skilled workers, many businesses expand in and choose new locations based on the presence of a well-educated population.

SHARE OF 25 YEARS+ POPULATION
W/ A BACHELOR'S DEGREE OR HIGHER, 2014

● - METRO



% OF YOUNG PROFESSIONALS (RESIDENTS AGE 25-44),
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Veterans

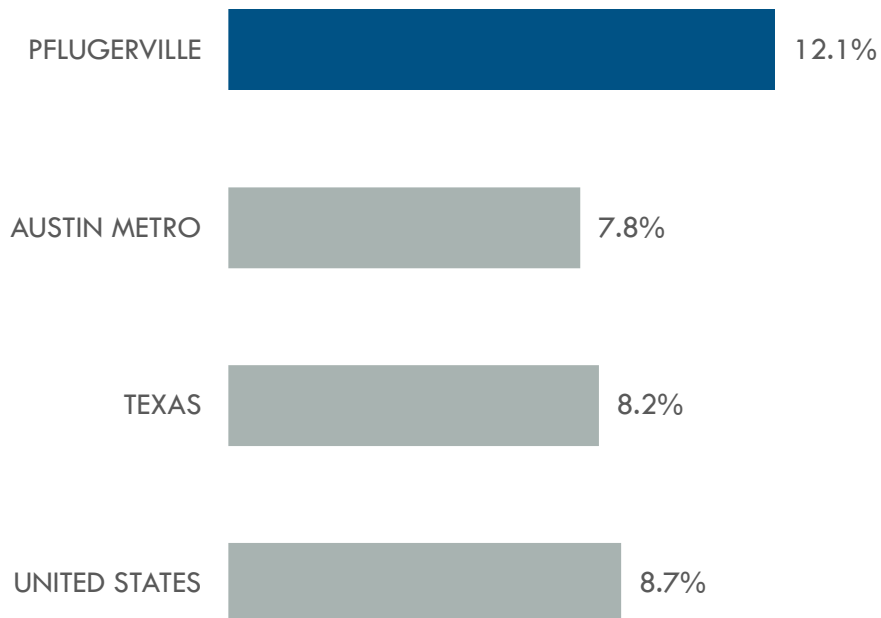
WHY IS THIS IMPORTANT?

Veterans represent more than 12% of Pflugerville's adult population, a high share compared to the Austin metro (8%), Texas (8%), and the US (9%). Veterans in Pflugerville are also relatively young – 53% are under 55 years old, compared to 44% in Austin, 39% in Texas, and 69% nationally.

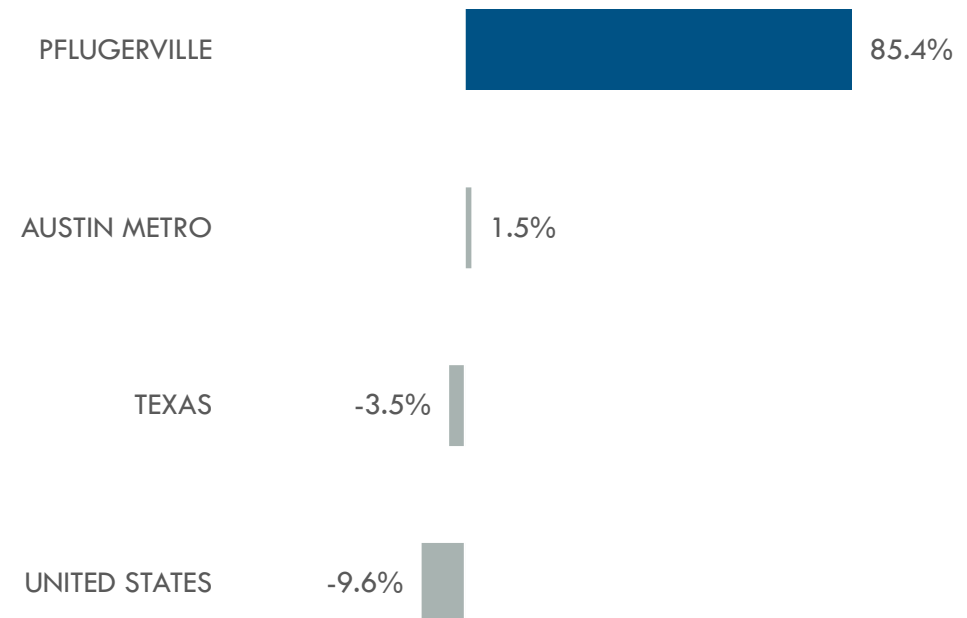
The number of veterans living in Pflugerville increased 85% from 2009 to 2014. In the Austin metro, the number of veterans rose by less than 2%. The number of veterans declined in both Texas and the US during this period.

Many employers consider veterans strong candidates for employment due to their work ethic. Many veterans also exit the military with skills and training in high-demand from private sector employers – especially in manufacturing, logistics, and management fields.

SHARE OF VETERANS IN ADULT POPULATION,
2014



GROWTH IN VETERAN POPULATION,
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Benchmark Veterans

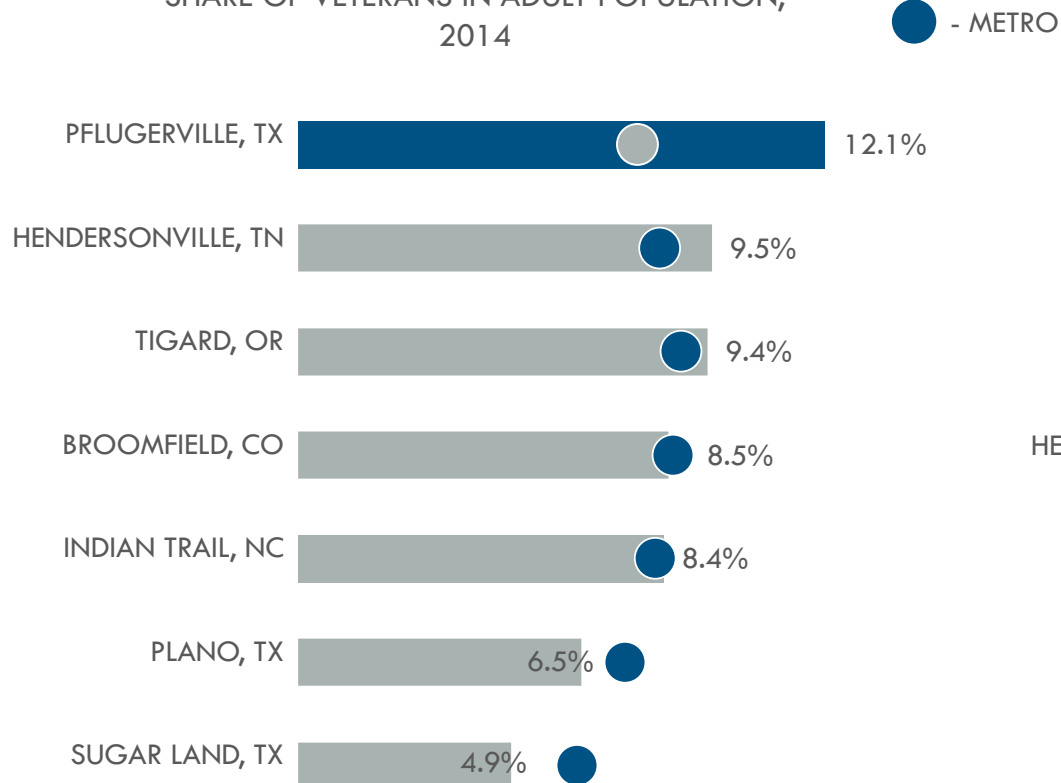
Pflugerville is home to a higher share of veterans than all benchmark communities – and significantly more than the two other Texas communities. Veterans represent less than 7% of the adult population in Plano, TX, and less than 5% of the adult population in Sugar Land, TX. Only Indian Trail had a younger veteran population with 56% under 55 years old. On average, 38% of veterans in benchmark communities were under 55 years old.

The growth of Pflugerville's veteran population also outpaced all benchmark communities over the past five years. Only Indian Trail saw significant growth at 78%.

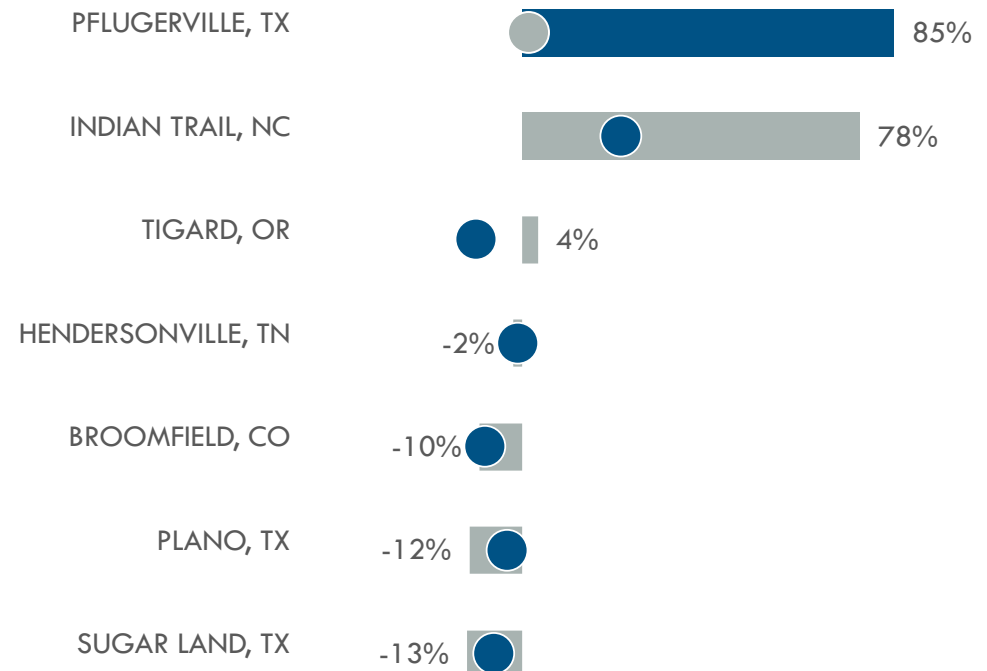
WHY IS THIS IMPORTANT?

Many employers consider veterans strong candidates for employment due to their work ethic. Many veterans also exit the military with skills and training in high-demand from private sector employers – especially in manufacturing, logistics, and management fields.

SHARE OF VETERANS IN ADULT POPULATION,
2014



GROWTH IN VETERAN POPULATION,
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Diversity

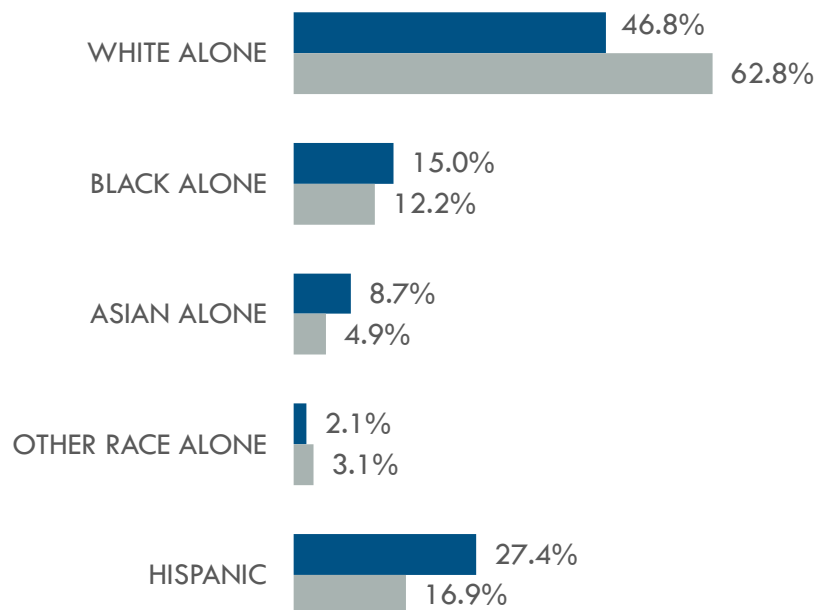
Pflugerville is home to a very diverse population. Non-Hispanic whites represent 47% of Pflugerville's population, 15% less than the US average. Pflugerville also has a larger share of black, Asian, and Hispanic residents than the US average. The population of all racial and ethnic groups in Pflugerville increased by double-digits between 2009 and 2014. The number of Hispanic and black residents grew the fastest, at 53% and 45% respectively. The number of Asians living in Pflugerville increased nearly 34% and the number of white residents rose more than 24%.

WHY IS THIS IMPORTANT?

The racial and ethnic diversity of a community is affected by local geography, history, industry trends, and culture. Research shows that a diverse population and inclusive policies contribute to a thriving economy.

RACIAL & ETHNIC DIVERSITY,
2014

■ PFLUGERVILLE ■ US

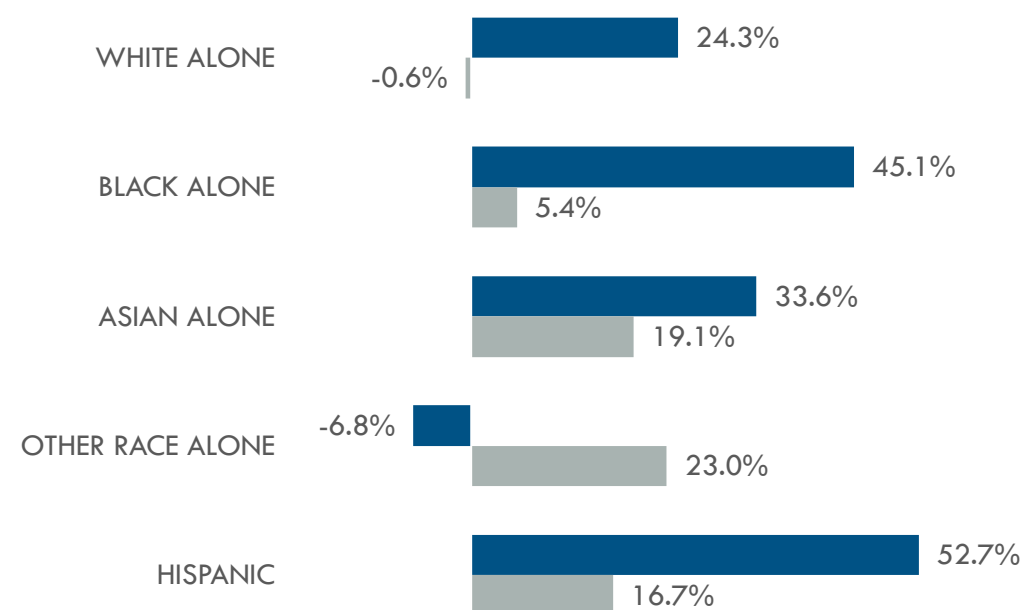


SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



GROWTH BY RACE & ETHNICITY,
2009 – 2014

■ PFLUGERVILLE ■ US



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

Benchmark Diversity

With large black, Asian, and Hispanic population, Pflugerville is a “majority-minority” city. White residents comprise only 47% of the total population. Among benchmark communities, only Sugar Land has a greater share of minority residents. The three Texas cities examined in this report were by far the most diverse.

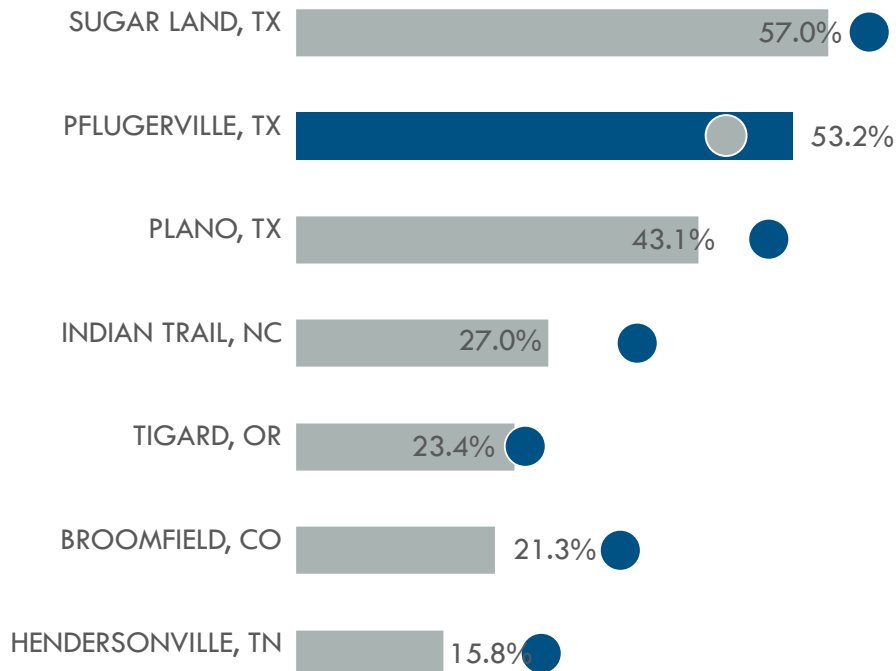
Pflugerville's minority population increased approximately 44% from 2009 to 2014. During this period, only Indian Trail, NC, experienced greater growth in its minority population.

WHY IS THIS IMPORTANT?

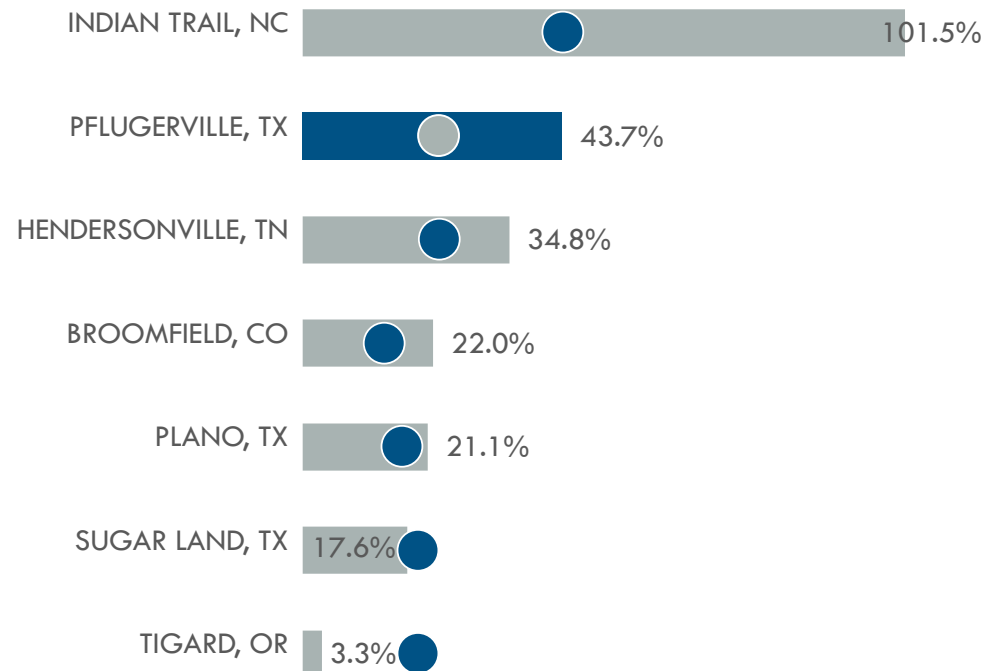
The racial and ethnic diversity of a community is affected by local geography, history, industry trends, and culture. Research shows that a diverse population and inclusive policies contribute to a thriving economy.

SHARE OF MINORITY POPULATION,
2014

● - METRO



GROWTH OF MINORITY POPULATION,
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



QUALITY OF LIFE TRENDS



Median Household Income

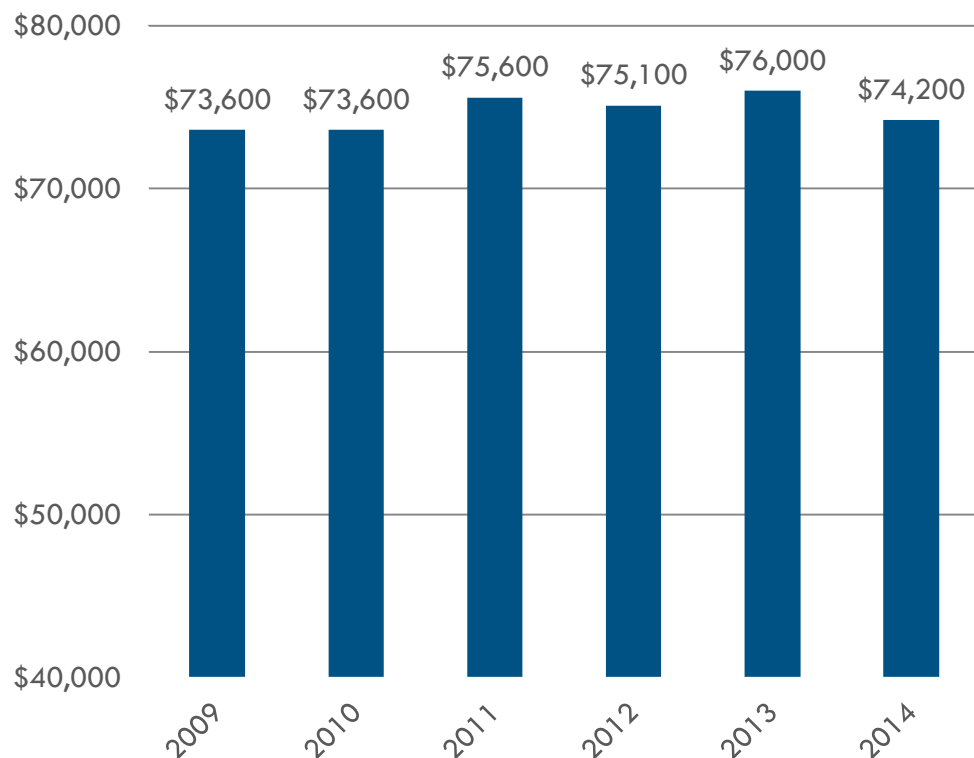
WHY IS THIS IMPORTANT?

At \$74,200, median household income in Pflugerville is more than \$12,000 higher than that of the Austin metro. Below average salaries with above average household incomes reflects that many Pflugerville households are employed outside of the city. Maintaining high household incomes will depend on creating well-paying local primary jobs.

Pflugerville's median household income is also \$20,000 higher than both Texas and the US. Following a trend similar to the rest of the nation, median household income growth was relatively flat in recent years – increasing less than 1% from 2009 to 2014.

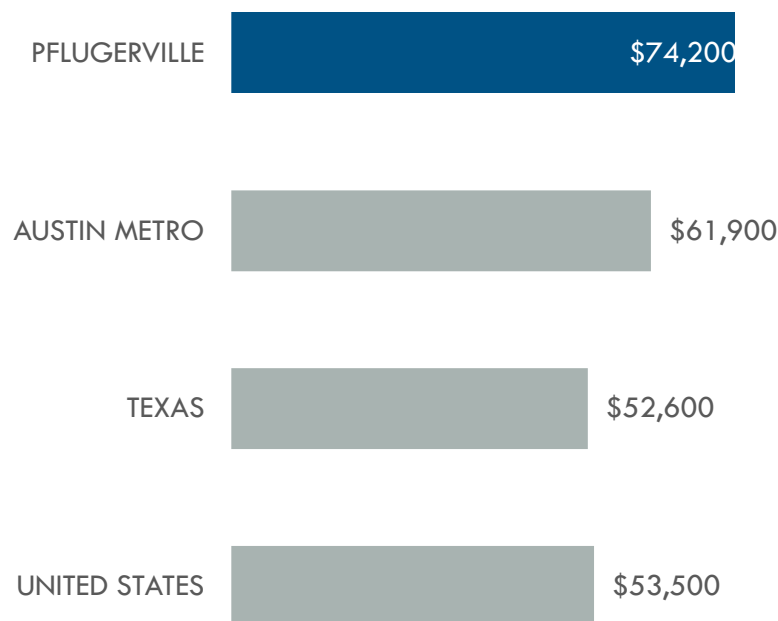
Wealth creation is an important goal of economic development and a strong measure of a community's economic health. When residents of a community have high household incomes they are able to reinvest locally – purchasing goods and services that spur additional economic growth.

PFLUGERVILLE MEDIAN HOUSEHOLD INCOME
2009 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

MEDIAN HOUSEHOLD INCOME,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Poverty Levels

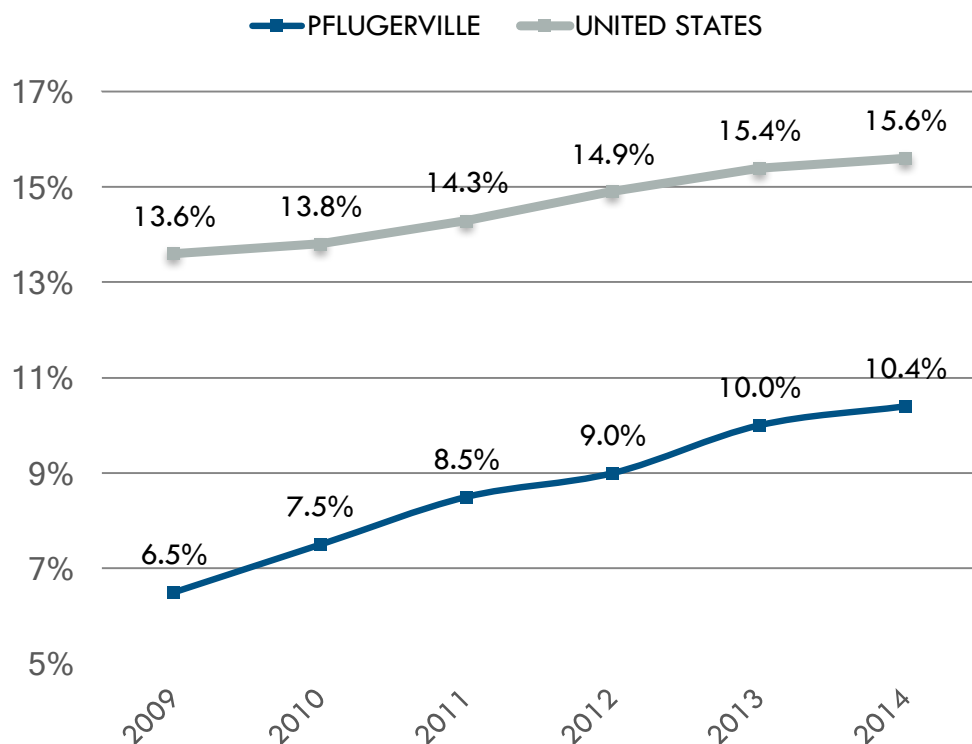
Above average household incomes help contribute to below average poverty levels in Pflugerville. With 10.4% of all residents below the poverty line, Pflugerville has a lower poverty rate than the Austin metro, Texas, and the US.

Starting with the recession in 2008, poverty has been increasing across the US. Poverty levels rose slightly faster in Pflugerville than the US average. From 2009 to 2014, the share of Americans in poverty rose 2%. In Pflugerville, the share rose 3.9% over the same period.

WHY IS THIS IMPORTANT?

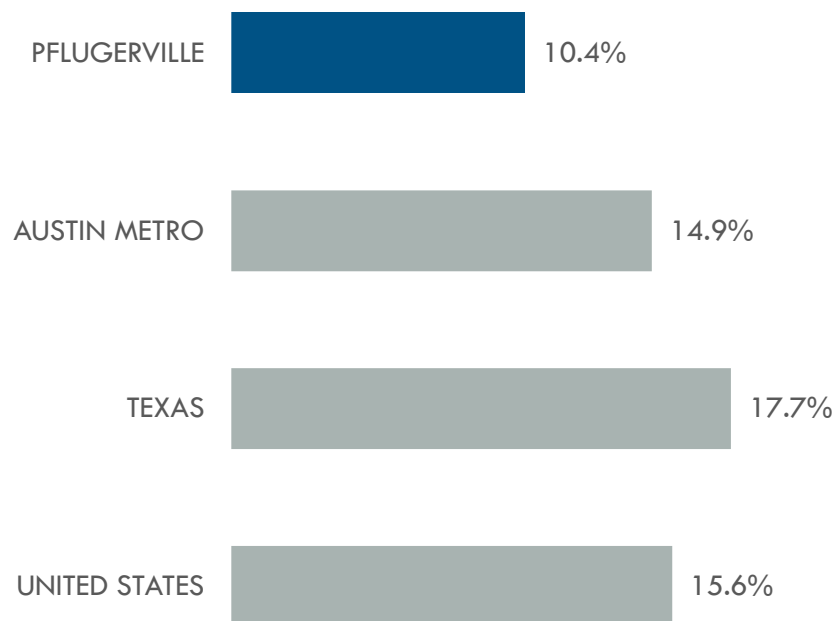
Poverty levels indicate whether residents of a county have incomes and access to jobs that allow them to prosper and support their families. High poverty levels are often the result of limited good job opportunities in a community and put heavy demands on social services.

SHARE OF POPULATION IN POVERTY,
2004 – 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SHARE OF POPULATION IN POVERTY,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



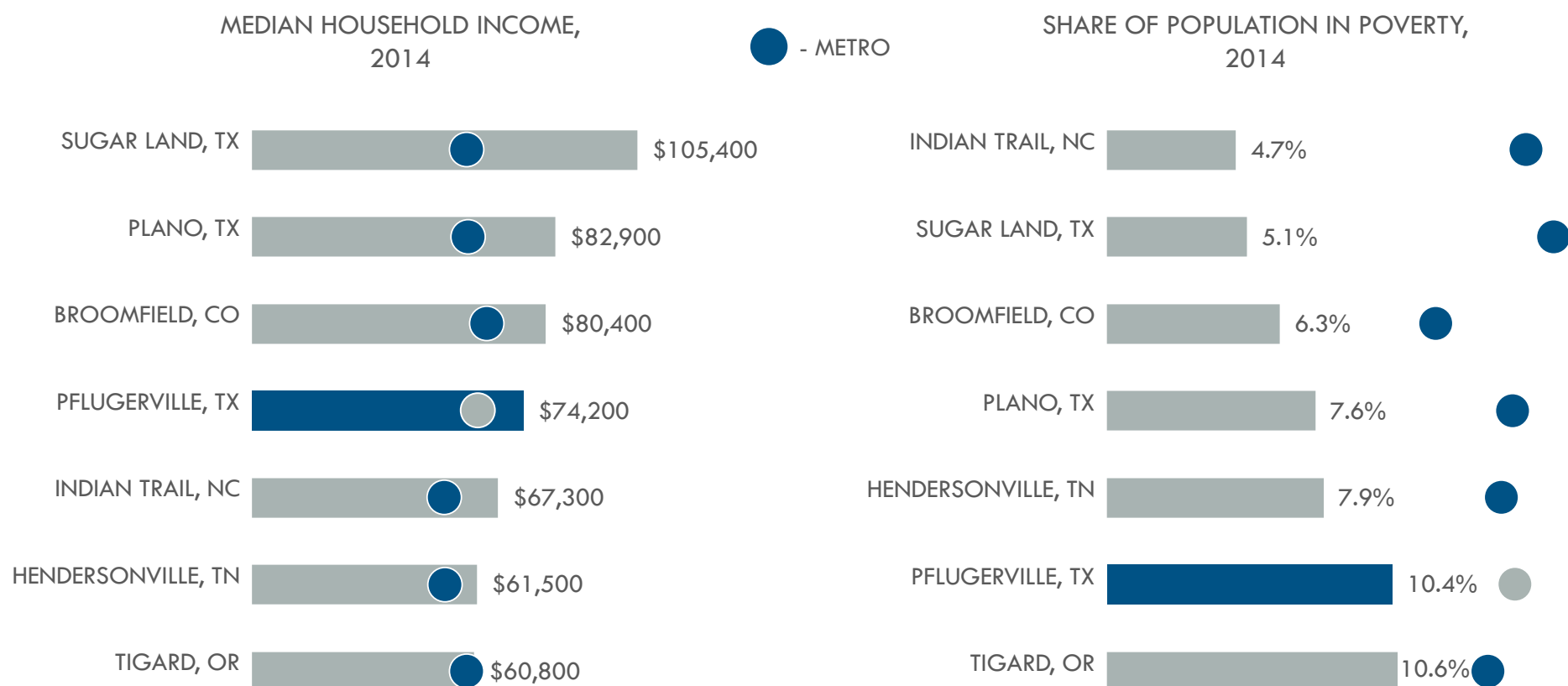
Benchmark Prosperity

WHY IS THIS IMPORTANT?

At \$74,200, median household income in Pflugerville is firmly in the middle the benchmark communities. Sugar Land has the highest median household income, at more than \$105,400. Tigard has the lowest at \$60,800.

Among benchmark communities, Pflugerville has the second highest share of residents living in poverty at 10.4%. Only Tigard has a slightly higher rate at 10.6%. Interestingly, both cities are closest to their metro averages – indicating that **benchmarks with low poverty are in regions with much greater geographic income inequality.**

Higher household incomes typically reflect greater economic opportunities and the presence of many households featuring two wage earners. Elevated levels of poverty within a community are correlated with a host of negative outcomes, including lower levels of labor participation, educational attainment, and life expectancy.



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



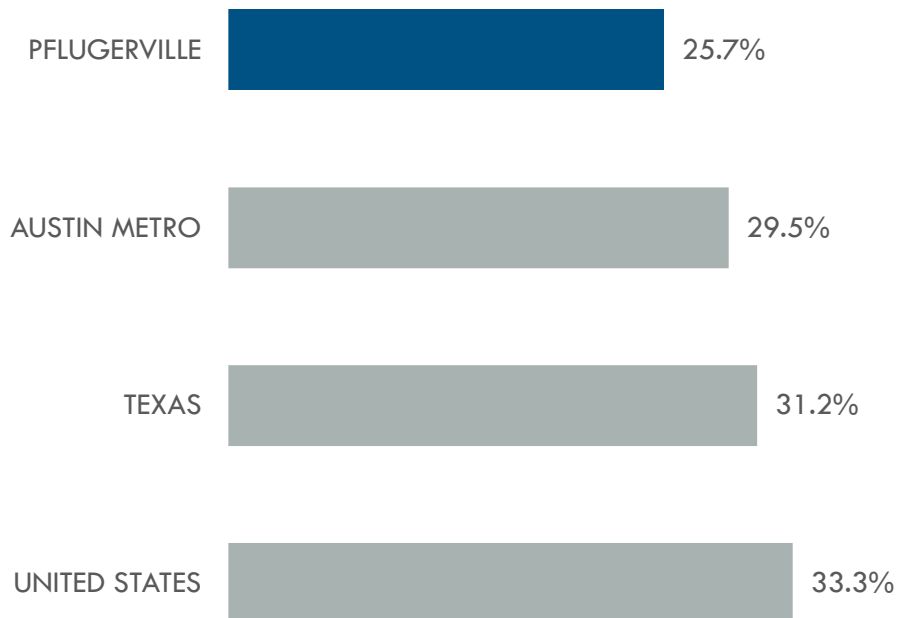
Housing Affordability

WHY IS THIS IMPORTANT?

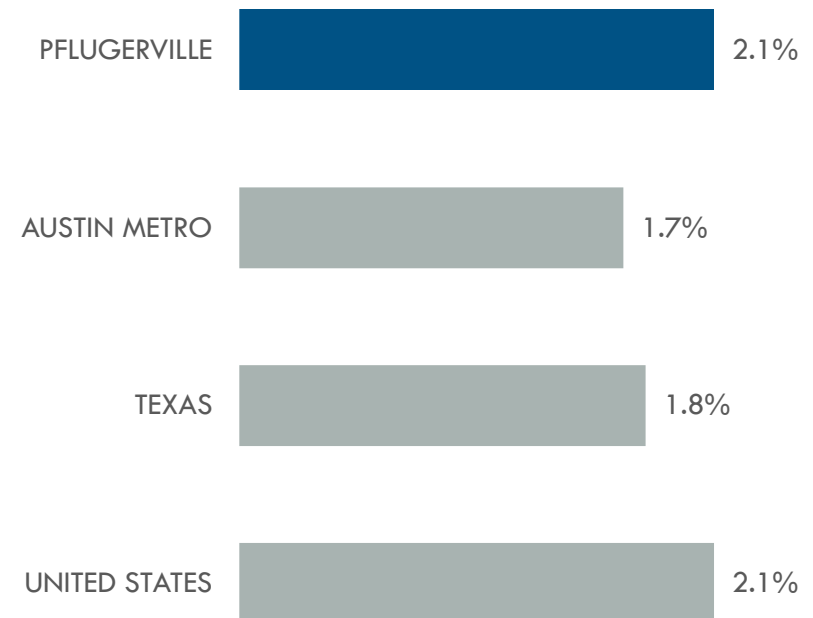
Relative to income levels, Pflugerville offers homeowners affordable housing options. Less than 26% of Pflugerville homeowners are considered “cost burdened” (households spending 30% or more of income on housing). In the Austin metro, approximately 30% of all homeowners are cost burdened. Nationally, one in three homeowners is cost burdened. At 2.1%, Pflugerville has a slightly higher home vacancy rate than the Austin metro, Texas, and US averages. Given Pflugerville’s rapid population growth, it is likely that the elevated vacancy rates reflect the presence of recently constructed homes that remain briefly unoccupied prior to sale.

The availability and affordability of housing directly affects the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgages or rent).

SHARE OF HOMEOWNERS IN UNAFFORDABLE HOUSING
(30% OR MORE OF INCOME), 2014



HOME VACANCY RATE,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Housing Affordability

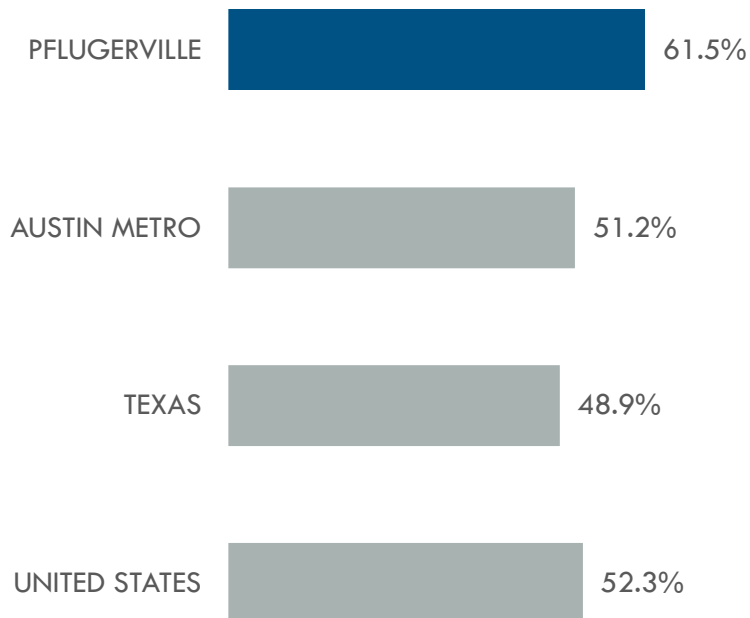
WHY IS THIS IMPORTANT?

Pflugerville is much less affordable for renters than homeowners. More than 60% of all renters in Pflugerville spend 30% or more of their income on housing costs. The proportion of cost burdened renters in Pflugerville is higher than the Austin metro, Texas, and US.

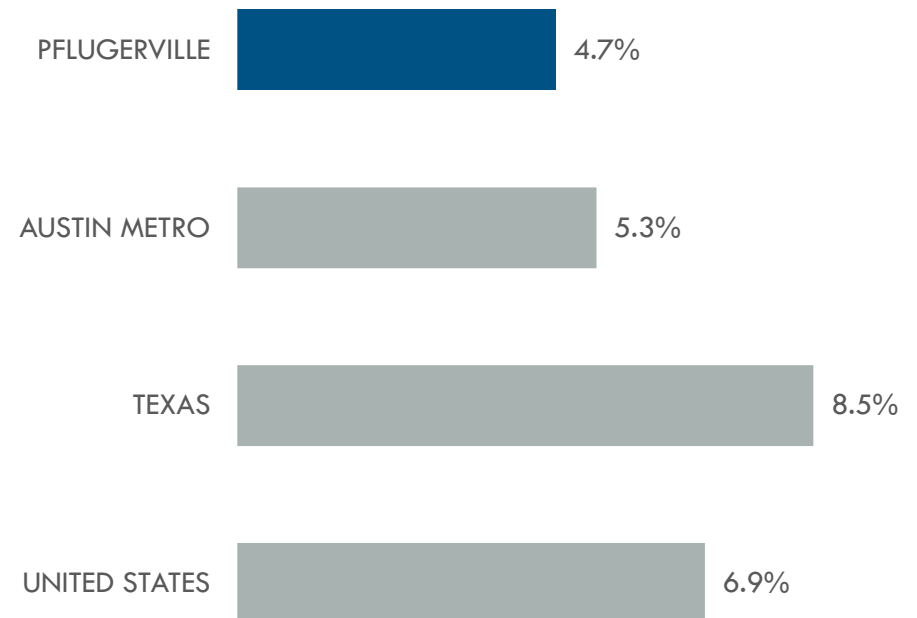
The relatively high cost of renting within Pflugerville reflects an insufficient supply of rental housing. The rental vacancy rate in Pflugerville is 4.7%, which is below than the Austin metro's already low 5.3% vacancy rate. Rental vacancy rates for Texas and the US are 8.5% and 6.9% respectively.

The availability and affordability of housing directly affects the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgages or rent).

SHARE OF RENTERS IN UNAFFORDABLE HOUSING
(30% OR MORE OF INCOME), 2014



RENTAL VACANCY RATE,
2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Benchmark Housing

WHY IS THIS IMPORTANT?

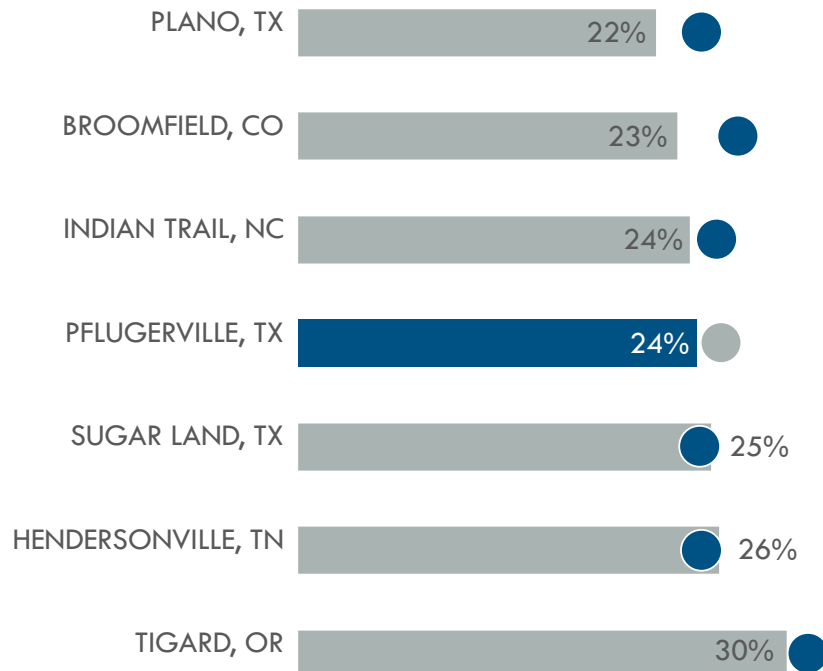
Pflugerville is relatively average in terms of affordability of homes to purchase but the least affordable location for renters among the benchmarks. An average of 24% of Pflugerville homeowners are cost-burdened compared to an average of 25% among all the benchmarks. Plano is the most affordable for homeowners, and Tigard the least.

On average 47% of renters in benchmarks are in unaffordable housing, compared to 62% in Pflugerville. Pflugerville's rental market is less affordable to residents than all six full metropolitan areas examined as well.

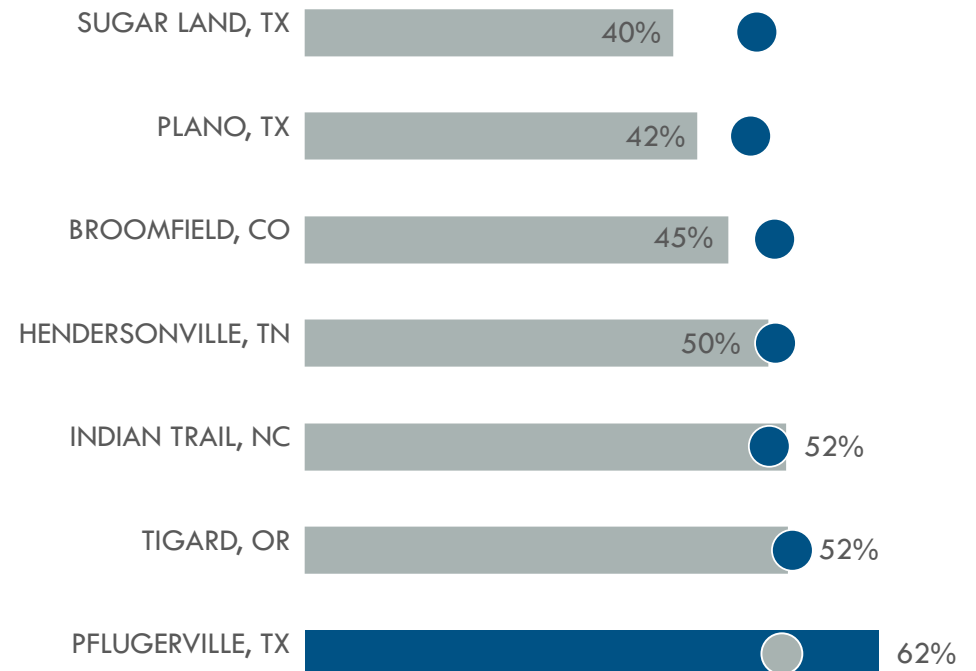
The availability and affordability of housing directly affects the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgages or rent).

SHARE OF HOMEOWNERS IN
UNAFFORDABLE HOUSING, 2014

● - METRO



SHARE OF RENTERS IN
UNAFFORDABLE HOUSING, 2014



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



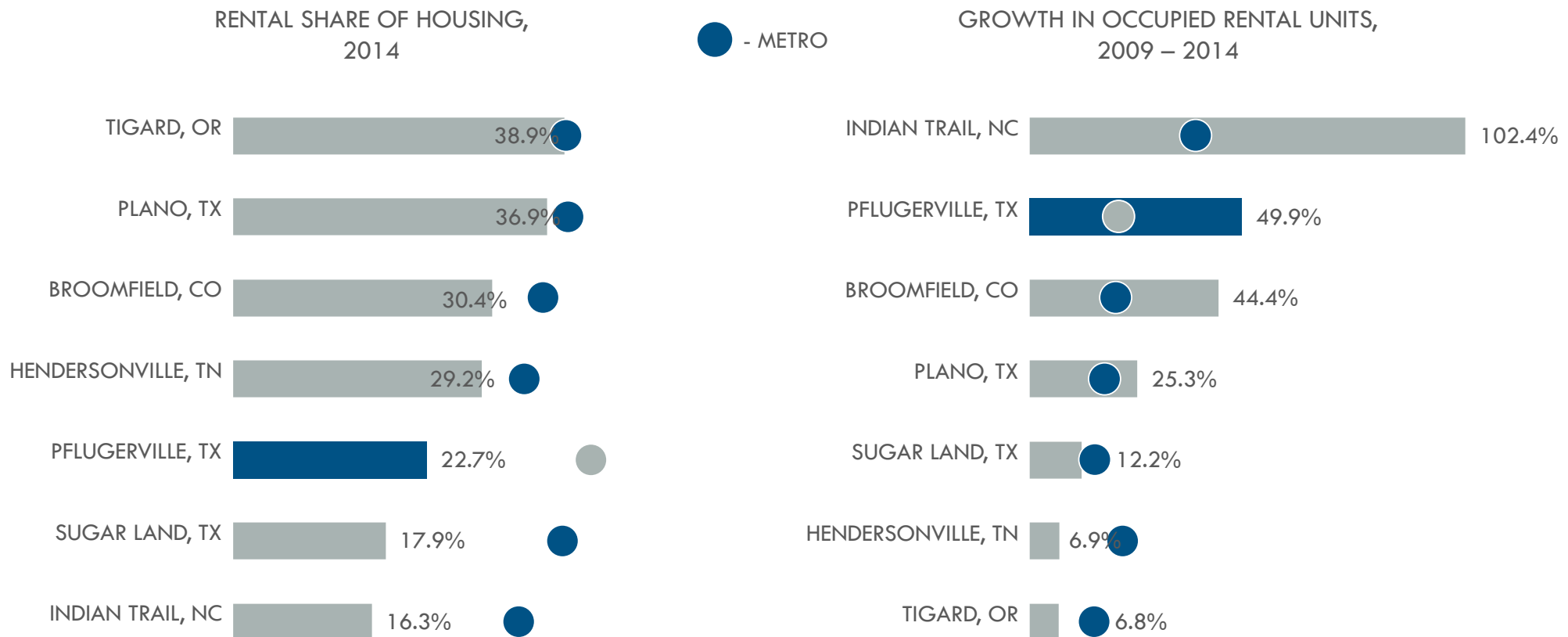
Rental Trends

WHY IS THIS IMPORTANT?

The cost of rental housing in Pflugerville indicates that there is an insufficient supply of rental units in the community, and this holds up when examining the data. Rental units comprise only 23% of all housing in Pflugerville – compared to an average of 28% among benchmarks.

There is some indication that this trend is changing – from 2009 to 2014, the number of rental properties in Pflugerville grew 50% - faster than the 21% growth in the Austin metro. Only Indian Trail experienced a greater increase in rental units during this period.

The availability and affordability of housing directly affects the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgages or rent).



SOURCE: AVALANCHE CONSULTING / US CENSUS ACS

SOURCE: AVALANCHE CONSULTING / US CENSUS ACS



Crime

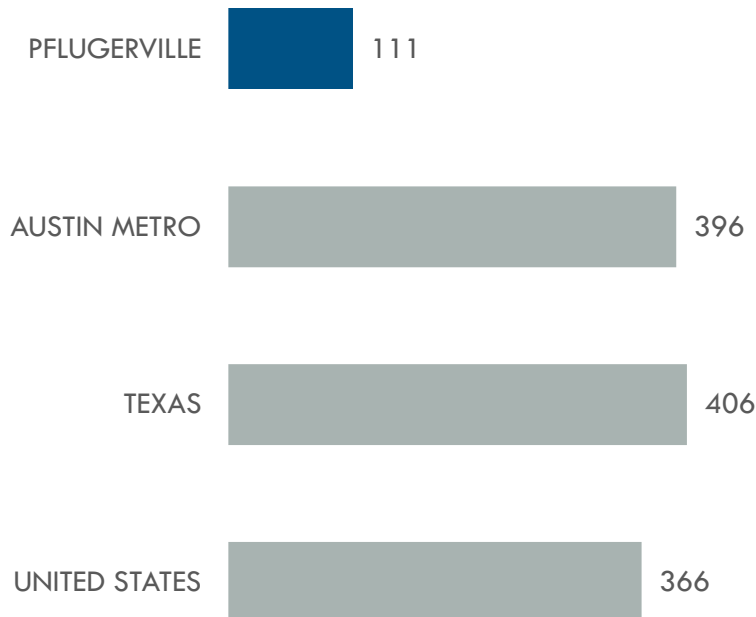
WHY IS THIS IMPORTANT?

Pflugerville is a safe community. On a per capita basis, there is significantly less crime than in the Austin metro, Texas, and US.

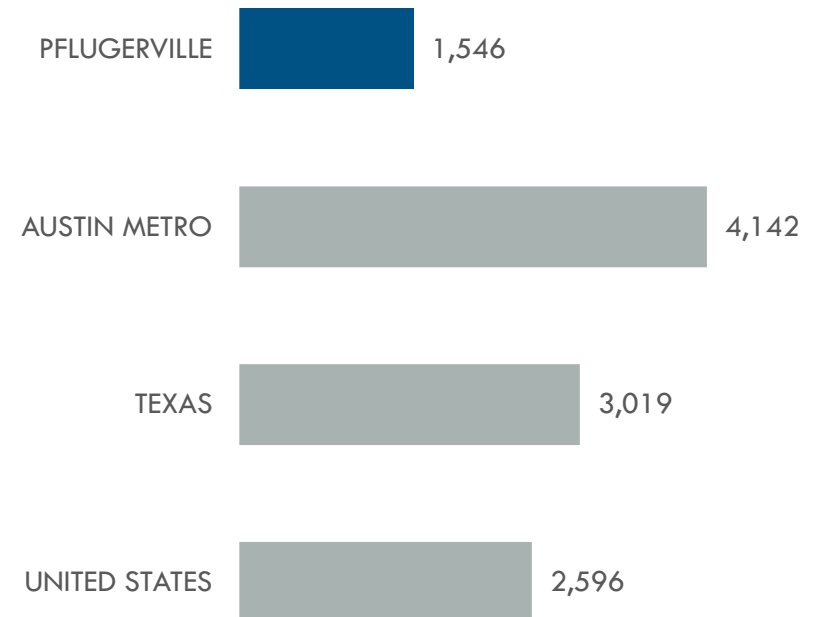
In 2014, Pflugerville had an adjusted violent crime rate of 111 incidents per 100,000 residents. This was approximately 75% less than the Austin metro and Texas ratios of 396 and 406 respectively. In 2014, there were fewer than 1,600 incidents of property crime in Pflugerville per 100,000 residents. This was less than half the rate in the Austin metro and Texas.

Actual and perceived crime rates play a significant role in location decisions for residents and businesses.

VIOLENT CRIME PER 100K,
2014



PROPERTY CRIME PER 100K,
2014



SOURCE: AVALANCHE CONSULTING / FBI UNIFORM CRIME STATISTICS

SOURCE: AVALANCHE CONSULTING / FBI UNIFORM CRIME STATISTICS



Benchmark Crime

Pflugerville ranked third lowest among the benchmark communities for both violent and property crime.

Among the six other benchmarks, the only two communities with a lower rate of violent crime are Broomfield and Indian Trail. The only two benchmarks with lower property crime rates are Indian Trail and Hendersonville.

WHY IS THIS IMPORTANT?

Actual and perceived crime rates play a significant role in location decisions for residents and businesses.



SOURCE: AVALANCHE CONSULTING / FBI UNIFORM CRIME STATISTICS

SOURCE: AVALANCHE CONSULTING / FBI UNIFORM CRIME STATISTICS



Quality of Life

WHY IS THIS IMPORTANT?

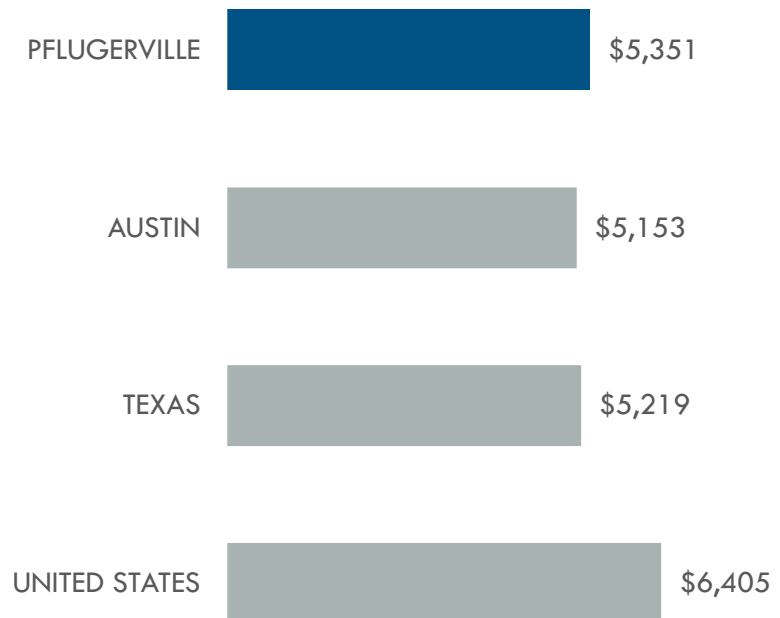
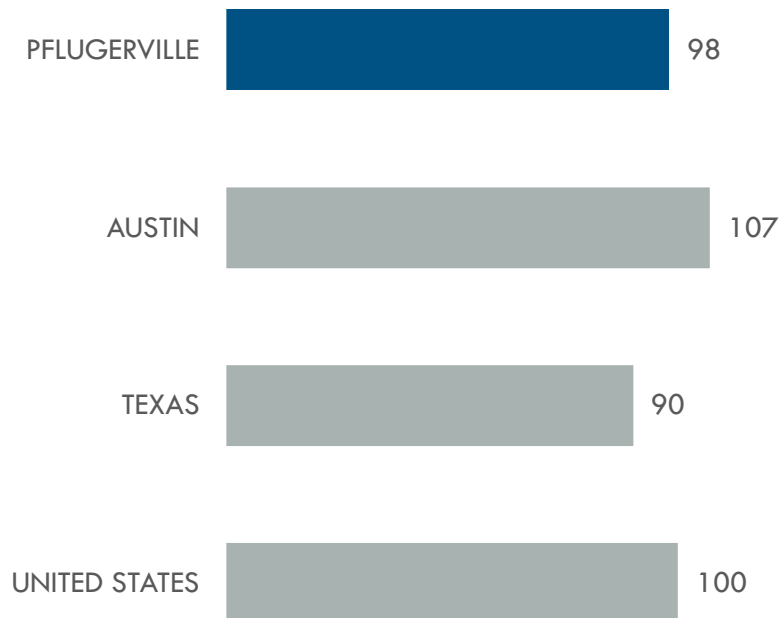
Overall, Pflugerville is a relatively affordable community, with a lower cost of living than the Austin metro or US averages. Pflugerville's cost of living index is 98, relative to a US benchmark of 100. This comes in above the Texas average of 90 but well below Austin's index of 107.

Pflugerville also invests more in education. Instructional spending in Pflugerville totaled more than \$5,300 per pupil in 2016, exceeding both the Austin metro and Texas. Nationally, the US spends more than \$6,400 on instructional expenditures.

Cost of living is an important component of quality of place. Regions with high costs of living may find it difficult to attract and retain talent.

COST OF LIVING INDEX,
2016

INSTRUCTIONAL SPENDING PER K-12 STUDENT,
2016



SOURCE: AVALANCHE CONSULTING / SPERLING'S BEST PLACES

SOURCE: AVALANCHE CONSULTING / SPERLING'S BEST PLACES



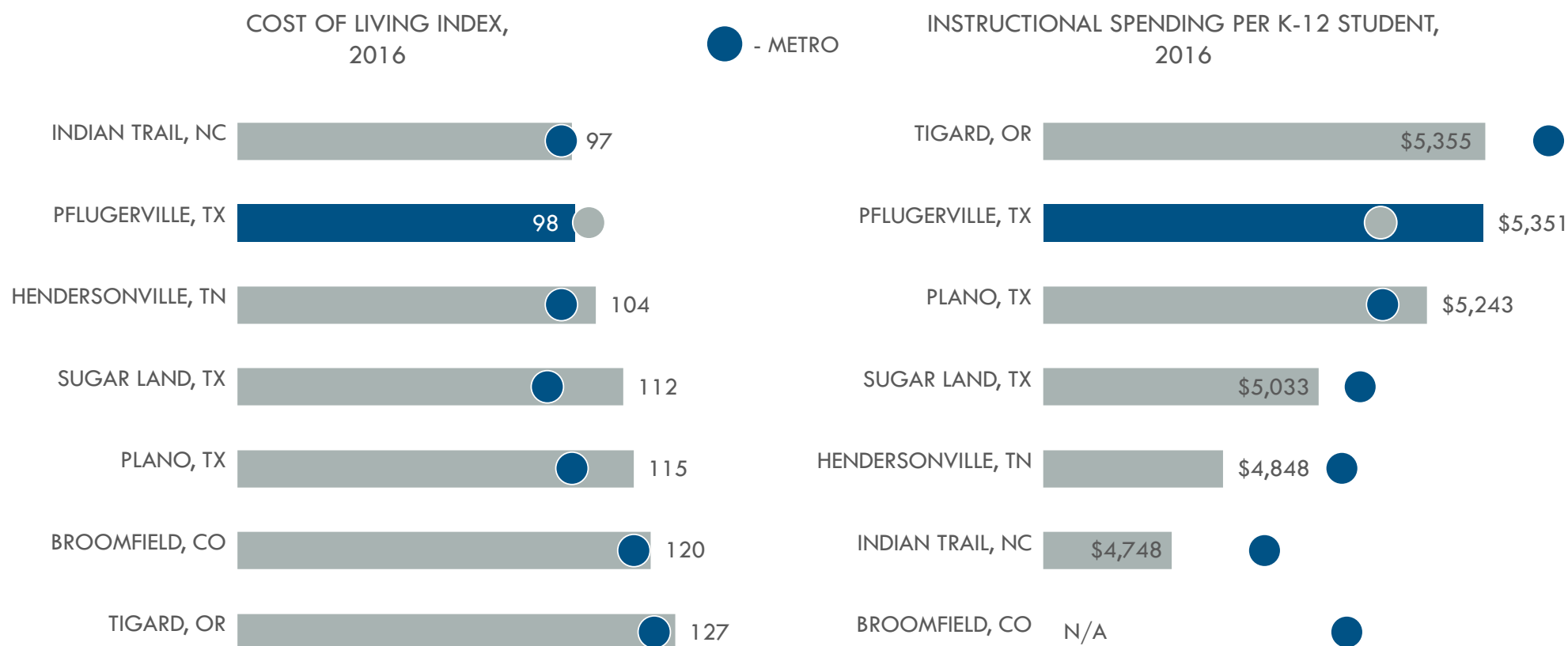
Benchmark Quality of Life

WHY IS THIS IMPORTANT?

Pflugerville is an affordable community – both within the Austin metro and relative to other major cities. The city maintains low costs relative to the entire nation while still making significant investments in education and infrastructure. Among benchmark communities, only Indian Trail had a lower cost of living at 97. Among metros, only Houston, Charlotte, and Dallas were more affordable.

The level of spending on school students was also second highest among benchmarks. Only Tigard and Portland spent more per K-12 student instruction.

Cost of living is an important component of quality of place. Regions with high costs of living may find it difficult to attract and retain talent.



SOURCE: AVALANCHE CONSULTING / SPERLING'S BEST PLACES

SOURCE: AVALANCHE CONSULTING / SPERLING'S BEST PLACES

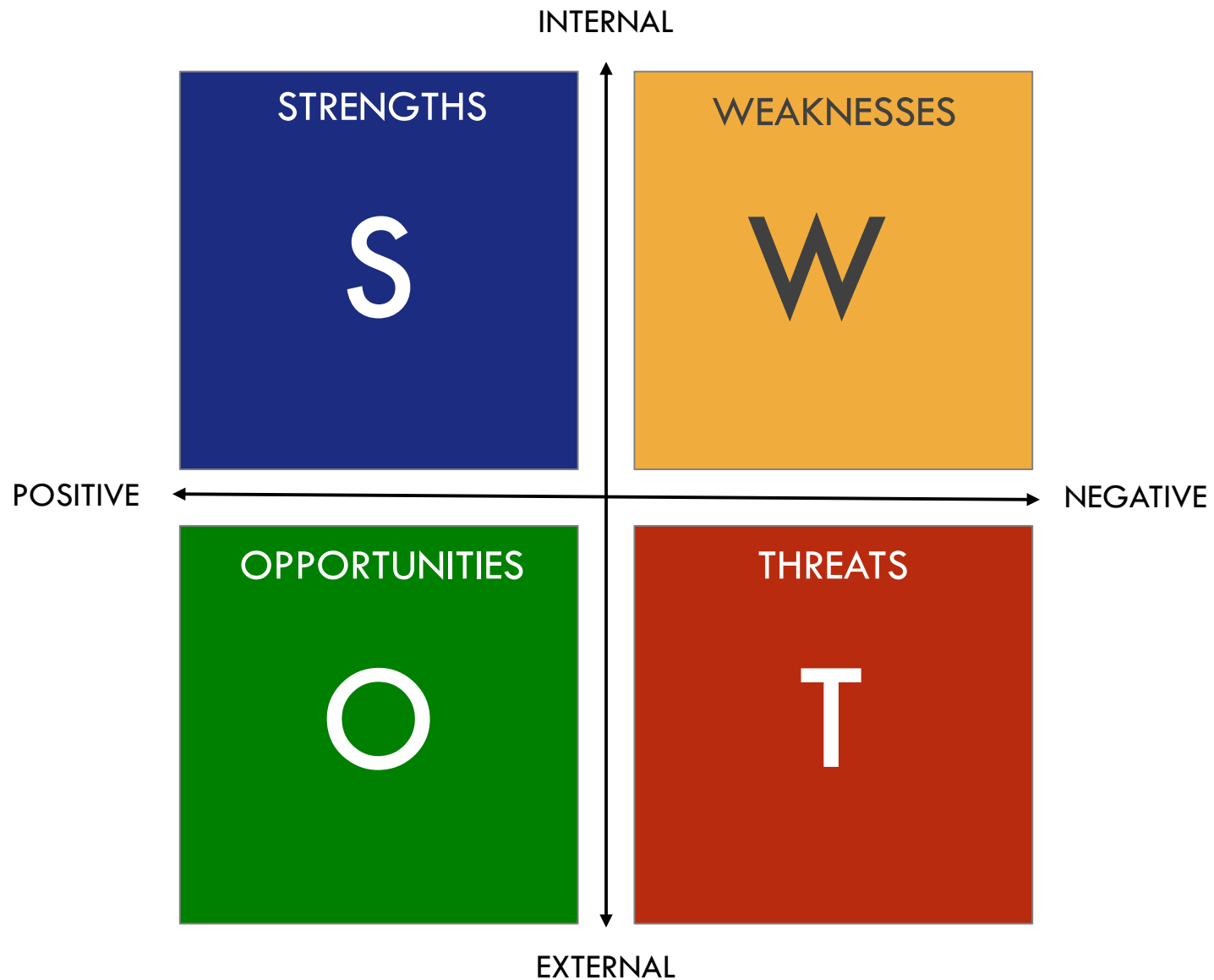


SWOT ANALYSIS

The following SWOT Analysis summarizes Pflugerville's differentiating strengths, weaknesses, opportunities and threats revealed in the stakeholder input and data analysis.

It provides a foundation for identifying target industries and crafting the strategic plan.





The SWOT Assessment presents a summary of Pflugerville’s strengths, challenges, opportunities, and threats. The SWOT incorporates findings from quantitative information detailed in the Competitive Assessment, input from stakeholders, and the consulting team’s national perspective and expertise.

BUSINESS & ENTREPRENEURIAL CLIMATE

STRENGTHS

- Pflugerville is open to development and willing to work with businesses to help them succeed.
- The regulatory environment is considered much friendlier than the City of Austin and other regional communities.
- Pflugerville's geographic location provides convenient logistical access into all of Greater Austin and connecting outside the region.
- Pflugerville has a high share of patent holders – reflecting the number of highly educated residents and inventors, many of whom work for regional technology companies and startups.

WEAKNESSES

- Some local businesses feel that they do not have the resources, networking, and professional development opportunities they desire.
- There is a perception that the City of Pflugerville and Travis County do not always work together.
- Pflugerville's incentive policy is not directly tied to goals and target industries – making it difficult to determine when they should be utilized.
- The number of homegrown businesses, including restaurants and retail, is currently limited.

OPPORTUNITIES

- Improving intergovernmental relations between the City, Travis County, and Williamson County could lead to greater consistency of operations for businesses.
- Pflugerville's large share of self-employed residents, patent holders, and burgeoning entrepreneurs could benefit from additional resources such as office space and support services.
- Providing additional staffing and support for the Business Retention & Expansion program to identify and assist with local business needs.
- Elevate Pflugerville as a regional leader and partner with others, connecting with regional assets such as higher ed and the Austin Innovation District.
- Ensure Pflugerville has ready sites and buildings to accelerate its competitiveness as a hub for primary jobs.

THREATS

- Without a higher share of daytime jobs, Pflugerville could become stuck as a largely bedroom community, which has negative implications for long-term economic resiliency and tax base for maintaining a high quality community.
- Pflugerville no longer has the highest tax rate in the Austin region, but overall property taxes are still relatively high and may impede development.
- Failure to restructure debt will come at a high price for the City.



EDUCATION & WORKFORCE

STRENGTHS

- Pflugerville has a well-educated population and a great school district.
- This city also draws labor from a large, highly-skilled labor shed that covers most of the Austin metro.
- Pflugerville is located close to a wide range of strong post-secondary educational institutions, including the University of Texas, Texas State University, St. Edwards University, EWCHEC, and Austin Community College.
- Pflugerville ISD currently offers dual credit courses with ACC and EWCHEC.
- The rapidly growing population in Pflugerville and the Austin metro provide a pipeline of new workers.
- Pflugerville's large veteran base is an attractive labor force and competitive advantage.

WEAKNESSES

- Pflugerville ISD's success in academic achievement and career-readiness programs is not well known within the community.
- Although there are many colleges and universities located throughout the region, Pflugerville is not yet well connected to the region's higher education institutions.

OPPORTUNITIES

- Continue to expand partnerships between Pflugerville ISD, private employers, and post-secondary educational institutions (locally and regionally) to better prepare students for target industry careers.
- Continue to broadly communicate the ISD's success stories.
- Increase hands-on learning opportunities in high tech and advanced manufacturing through internship and apprenticeship programs.
- Continue to commit to providing the highest quality educational system possible for Pflugerville's families. Attract training grants and resources related to target industry skillsets, as well as programs tailored for veterans.

THREATS

- Limited awareness of the educational strengths in Pflugerville may perpetuate misperceptions about the community in the Austin region.
- Without the presence of a thriving job base in Pflugerville, the community will export the people it trains and educates.



INFRASTRUCTURE

STRENGTHS

- Pflugerville's geographic location and highway infrastructure make it highly competitive for distribution operations, with convenient access via SH-130, I-35, SH-45, Austin Bergstrom International Airport, and the Austin Executive Airport.
- Pflugerville has greenfield land along major highways.
- The One Thirty Commerce industrial park has been incredibly successful.
- Pflugerville offers competitive electrical rates and has a well-developed water plan to ensure availability and pricing into the future.
- Office and other real estate is generally more affordable in Pflugerville than much of the Austin region.

OPPORTUNITIES

- The industrial park is currently full, indicating a high-demand for this type of product and presenting an opportunity for expansion of the park or development of another property.
- SH-130 presents a unique opportunity for Pflugerville to emerge as a primary job hub in the Greater Austin region - with easy access and room to grow.
- Pflugerville's rapid growth and attractive location within the Austin metro allow the city to maintain high standards for future investments – both in terms of design criteria and the types of businesses it helps grow.

WEAKNESSES

- There are few existing buildings ready for businesses to occupy in Pflugerville. This shortage includes office product (Class A and Class B), light industrial, and commercial.
- Although Pflugerville has many greenfield sites with plans for utilities, getting these properties shovel-ready with utilities in place will take time and money.
- A lack of I-35 frontage for the city may have deterred certain office users from locating in Pflugerville in the past due to lack of visibility.
- Pflugerville's many greenfield properties and limited major primary office or other employers make the market appear "unproven" to some developers.

THREATS

- Without new real estate product to market to companies looking to open new facilities, Pflugerville will be challenged to expand and attract primary businesses.
- Without a firm commitment to creating primary jobs (e.g. appropriate zoning that supports logistics, manufacturing, and office development), residential and retail development could threaten to absorb Pflugerville's prime business sites.
- If the City is unable to maintain tax revenues, road and water infrastructure may fail to keep up to date with rapid population and business growth.



MARKETING & IDENTITY

STRENGTHS

- Pflugerville is recognized as one of the fastest growing cities in America and has a high quality of life.
- Pflugerville is located in Texas and the Austin region, which have strong international brands and marketing arms in Opportunity Austin and Team Texas.
- As the Austin region grows and faces transportation challenges, many community leaders are pursuing a development strategy focused on creating multi-nodal employment centers spread geographically throughout the region. Pflugerville is geographically well-positioned to be one of these centers.

WEAKNESSES

- Although Pflugerville residents feel a strong sense of community pride, there isn't a unified vision and identity.
- Many residents of the Greater Austin region have misconceptions about Pflugerville that are far from reality.
- Pflugerville is appearing on more national lists due to its rapid growth and high quality of life, but national awareness of the city remains low, and many still view it as relatively quaint small town.

OPPORTUNITIES

- Adopting a shared vision, goals, and brand identity for the community will help coordinate development activities and provide a decision-making lens for all local leaders.
- Launch a year-round internal marketing campaign to bolster community pride and unity.
- Build PCDC's reputation as a trusted regional partner and leader. This will result in economic development opportunities.
- Increase regional awareness of Pflugerville's many assets and its emergence as hub of innovative primary businesses.
- Continue to promote Pflugerville to target industries, site consultants, and other business influencers.

THREATS

- Without increased awareness of Pflugerville's true identity and numerous opportunities, many businesses and developers in the Austin metro, Texas, and nation may continue to pursue opportunities in other communities in the Greater Austin region.
- Pflugerville's small-town feel is one of its cherished qualities, but the city must also embrace urban changes and quality improvements as it grows rapidly, or it may appear dated and unattractive to new businesses and residents.



QUALITY OF LIFE

STRENGTHS

- Pflugerville was recently recognized as the #2 best place to live in Texas and #12 nationally.
- The city boasts low crime rates, an excellent ISD, extensive parks and trails, youth sports and recreation opportunities, and relative affordability within the region.
- Pflugerville is a highly ethnically, racially, and age diverse community with a strong small-town culture and sense of civic pride.
- The number of retail businesses and restaurants has grown rapidly in recent years – allowing residents to shop and eat closer to home and keep tax dollars in the community.

OPPORTUNITIES

- Construction of a family-friendly town center would add to the entertainment options in Pflugerville and provide another destination for visitors.
- Pflugerville would benefit from exploring options for developing a community gathering area or town center that includes businesses that serve families, provides a new home for civic organizations, hosts community events, and creates a more walkable, urban core.
- Commit to being intentional with all future development, setting high standards and being patient.
- Continue to expand Pflugerville's recreational amenities such as parks, trails, and sports complexes.

WEAKNESSES

- Multi-family and rental housing options are relatively limited and expensive.
- Some residents are concerned about increasing congestion.
- It is challenging to keep roads, parks, and other infrastructure up to date to meet the needs of a rapidly growing population.
- There are limited homegrown dining and retail options in the community.
- There is a perception that there are limited alternative entertainment options for families outside sports and school activities.
- Pflugerville lacks a distinct downtown or other central location for community gathering and events.

THREATS

- If Pflugerville does not expand the diversity of housing options, the city may face challenges retaining and attracting critical demographics of a labor force, such as young professionals, tradespeople, and corporate executives.
- Traffic congestion concerns could increase if roadways are not maintained and expanded to match population growth patterns.



PFLUGERVILLE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Chapter 2: Target Industry Analysis

NOVEMBER 2016

TABLE OF CONTENTS

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ABOUT THIS STRATEGY

This Comprehensive Economic Development Strategy provides Pflugerville with a unified vision and strategic approach to achieving a robust, resilient economy over the next three years and beyond. The Strategy is designed to provide the Pflugerville Community Development Corporation (PCDC), City of Pflugerville (City), and other business, education, nonprofit, and public sector leaders with a cohesive action plan that ensures everyone is working in-step toward a shared vision and goals.

Once complete, the Comprehensive Economic Development Strategy will include three chapters:

Chapter 1, Community Assessment

This first chapter of the Strategy provides an in-depth trend analysis of Pflugerville's competitive position relative to the Austin metro, Texas, US, and six benchmark cities in comparative national metros. It also includes a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Evaluation, combining the findings of the trend analysis with input received from the Strategy's Steering Committee and more than 50 local, regional and state stakeholders. A strategic vision, goals and recommendations begin to emerge from the findings of the SWOT.

Chapter 2, Target Industry Analysis

The Strategy's second chapter includes the consulting team's recommended target industries and niche sectors. Target industries and niches are those audiences that will be the focus of Pflugerville's economic development initiative, in terms of marketing, product development, and workforce development. The process of target industry selection blends a cluster and location quotient analysis with a review of data trends, SWOT evaluation, and on-the-ground examination of Pflugerville's assets.

Continued...



ABOUT THIS STRATEGY

Chapter 3, Strategic Action Plan

The Strategy's final chapter will recommend a three-year program of work that will advance Pflugerville's economy. It will set the community on-course for achieving its economic development vision and goals. The Strategic Action Plan will begin with profiles of national best practices from communities facing similar opportunities and target industries. The Action Plan will cover topics related to marketing, infrastructure, workforce development, public policy, quality of place, and other factors that affect Pflugerville's competitiveness. Each recommendation in the Action Plan will be accompanied by implementation tactics – timing, roles and responsibilities, and performance metrics. *(Note: This Chapter will be developed following completion of Chapters 1 and 2.)*

Special Focus, Workforce and Educational Institution Analysis

Access to talent is the top driver of business expansion and relocation decisions today. Understanding the dynamics of Austin region's workforce development and educational infrastructure will give Pflugerville a better informed advantage. As a supplement to the Comprehensive Economic Development Strategy, the consulting team offers a deeper dive into the talent-related assets available in Pflugerville's larger regional market.



STEERING COMMITTEE

Avalanche and PCDC would like to thank the strategic planning Steering Committee for helping inform and guide the development of this strategic plan. This diverse group of Pflugerville stakeholders ensured that strategic plan reflects the perspective and desires of the entire community.

(Note: We will add titles and organizations.)

Pflugerville Steering Committee Members	Comprehensive	Economic	Development	Strategy
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Amanda Maegden				
Barth Timmerman				
Boris Milensky				
Brad Marshall				
Brigid Shea				
Carlton Inniss				
Charles Harvey				
Chris Davenport				
Clay Leben				
Darren Strozewski				
Dilip Naik				
Donnie Vanelli				
Dr. Alex Torrez				
Father Craig DeYoung				
Heather Biagas				
Jacquelyn Smith				
Janice Heath				

Jeff Coleman	
Jeff Travillion	
Jeffrey Burratto	
Amy Ellsworth	
Mike Marsh	
Patricia Gervan-Brown	
Renea Mitchell	
Robert Andrade	
Ron Moellenberg	
Rudy Metayer	
Ryan Merritt	
Terri Toledo	
Tiffany Daniels	
Victor Gonzales	
Wade Lindstrom	
Zane Cole	



INTRODUCTION

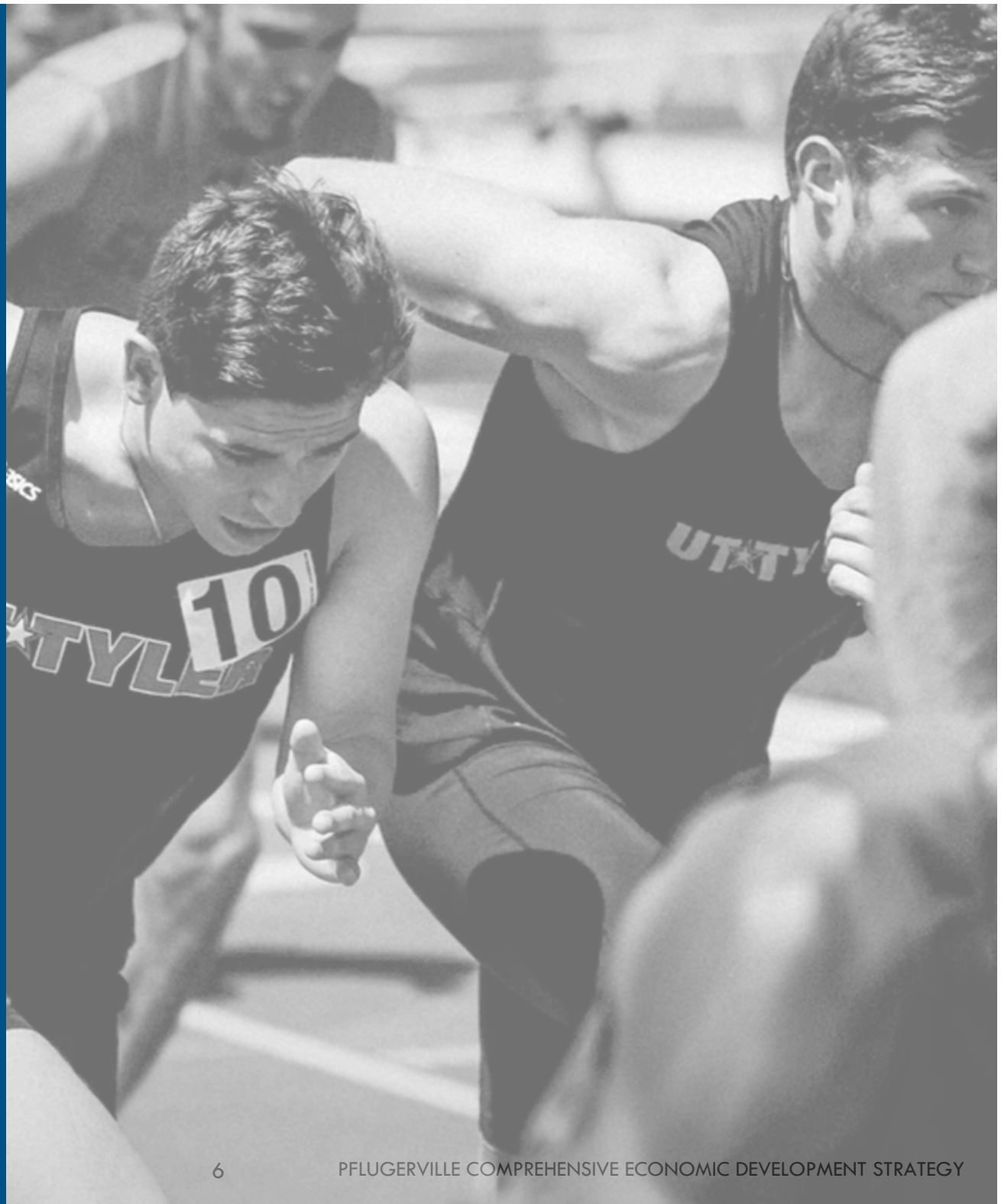
This chapter of the strategy opens with an in-depth examination of the industry clusters currently present in Pflugerville and the Austin metropolitan region. This analysis builds on the competitive strengths identified in Chapter 1 to help identify target industry clusters that present the greatest opportunities for primary job growth in Pflugerville.

The chapter continues with a discussion of how and why target clusters are identified and the recommended target industry clusters and niche sectors for Pflugerville's economic development efforts.

The chapter concludes with target cluster profiles. These profiles provide an overview description of each cluster, global factors affecting the industry, local and regional employment and salary trends, a summary of the factors that affect the cluster's growth, and sales messages that explain why the cluster makes sense in Pflugerville.



INDUSTRY CLUSTER PERFORMANCE



INDUSTRY CLUSTER INTRODUCTION

The Performance Evaluation begins with an analysis of Pflugerville's overall industry cluster trends in recent years. Examining the performance of both the community's and larger region's industry clusters provides insight into Pflugerville's strengths and opportunities.

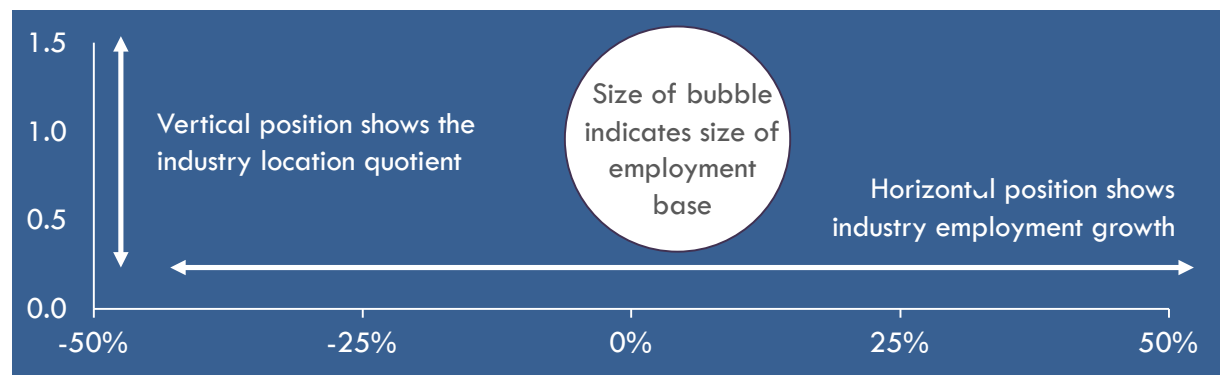
This analysis looked at location quotients (LQs), industry cluster employment, new job creation, and growth rates for thirty industry clusters within Pflugerville. Fast-growing clusters, for example, often reflect immediate opportunities for recruitment and expansion efforts. Clusters that are more concentrated in the region relative to the US average may reflect regional advantages such as skilled workforce or geographic advantage that can be leveraged for future economic development efforts.

The bubble charts on the following pages should be interpreted as follows:

Horizontal Axis: Employment growth rate for the past five years.

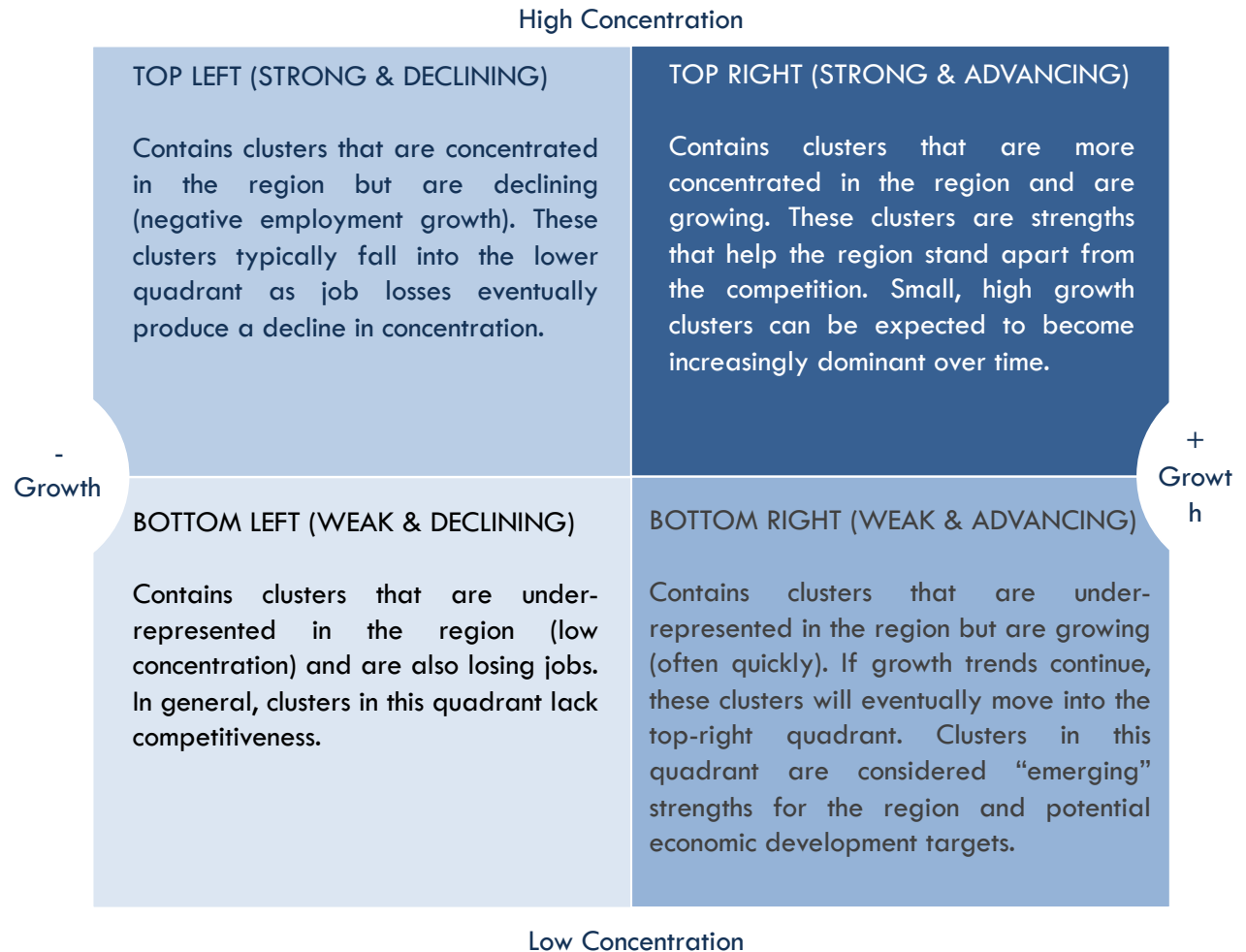
Vertical Axis: The Location Quotient (LQ). LQs calculate the relative concentration of industry jobs in a community compared to the US average. An LQ of 1.0 indicates the same concentration as the US average. An LQ above 1.0 is more concentrated than the US average, aka that the cluster has more jobs per capita.

Size of Bubble: Total employment in each cluster.



INDUSTRY CLUSTER STORIES

The chart's four quadrants each tell a story:



PFLUGERVILLE

RECENT

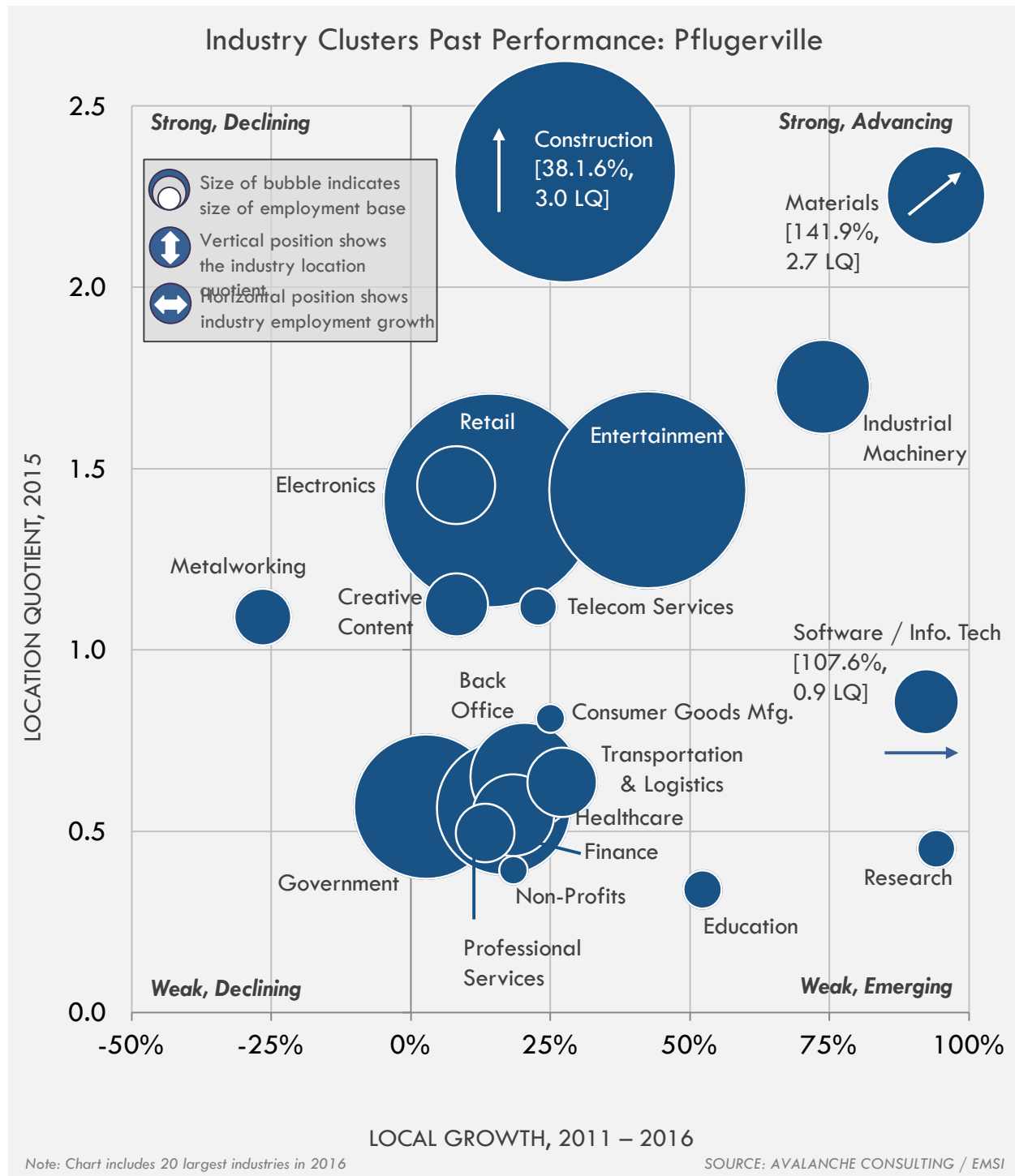
PERFORMANCE

Pflugerville is home to approximately 15,500 jobs. Between 2011 and 2016, total employment in the city increased 24% - with all industry clusters growing except Metalworking.

The largest industry clusters in Pflugerville are Construction (3,050 jobs), Retail (2,900), Entertainment (2,475 jobs), Government (1,350 jobs), and Healthcare (1,150 jobs). These five clusters account for more than 70% of employment within Pflugerville and are reflective of a traditional bedroom community. Rapid housing growth fuels Construction employment. Residential population growth in turn fuels Retail and Entertainment, and Government, which is comprised largely of school district jobs, also serving residents.

Over the past five years, several smaller, primary employment clusters were the fastest growing in Pflugerville. From 2011 to 2016, Materials employment grew 142%. Software & Information Technology and Research employment increased by 107% and 94% respectively. Industrial Machinery employment rose nearly 75%.

The most concentrated industries (as a share of all jobs) in Pflugerville are Construction (3.0 LQ), Materials (2.7 LQ), and Industrial Machinery (1.7 LQ). On a per capita basis, Pflugerville also has more Retail and Entertainment employment relative to the US average.



AUSTIN METRO RECENT PERFORMANCE

There are approximately 960,000 jobs in the Austin Metro. Over the past five years, the Austin metro has been one of the country's fast growing regions. Employment grew more than 22% from 2011 to 2016. Growth has been broad-based, with nearly every cluster creating jobs.

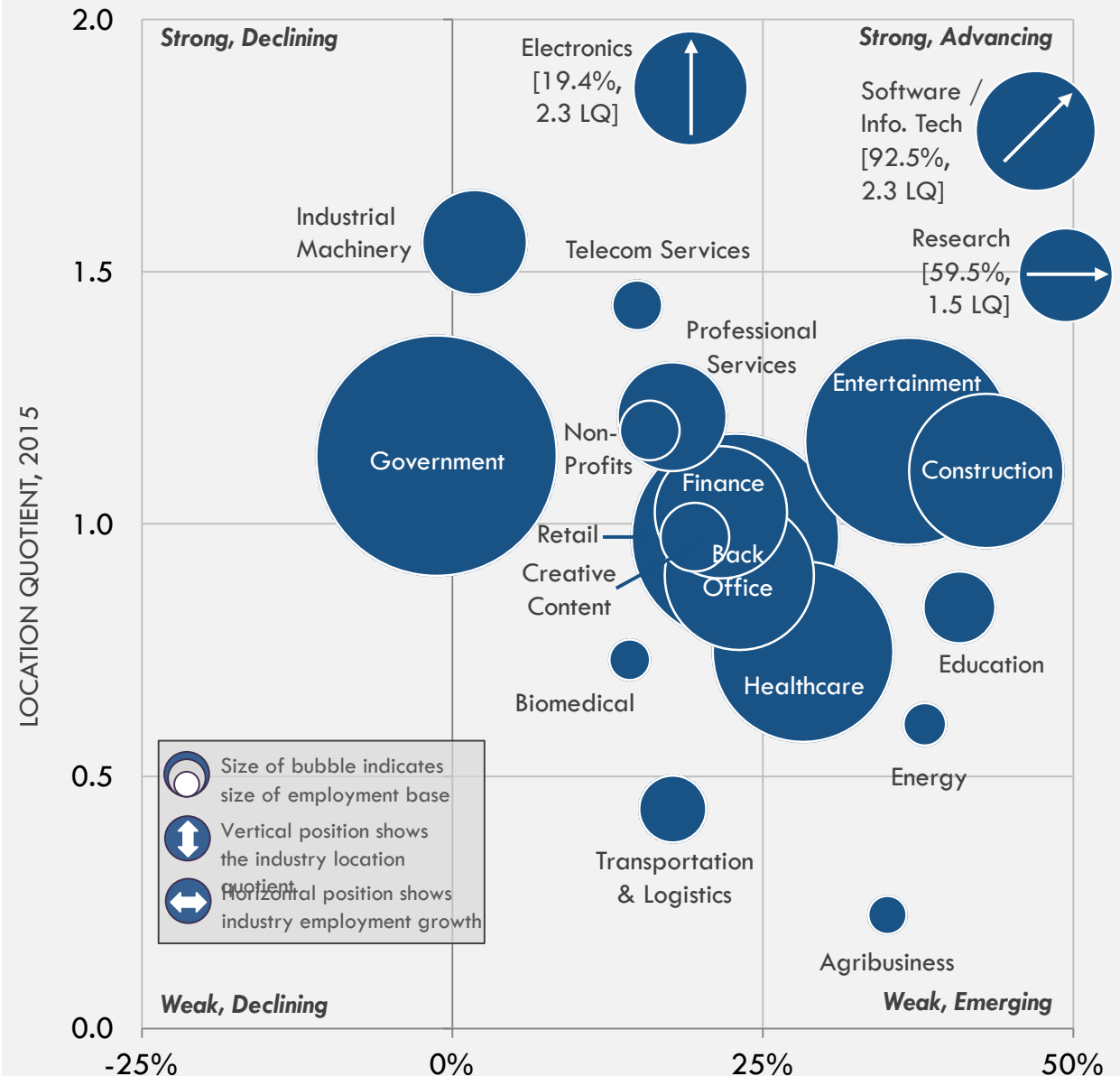
Many of Austin's largest industries are the same as Pflugerville's, including Government (165,950 jobs), Retail (124,000), Entertainment (123,675 jobs), and Healthcare (94,250 jobs). These four clusters, however, account for barely half of employment within the Austin metro.

In recent years, the Austin metro has created high-skill, high-wage jobs as well as consumer-oriented clusters that benefit from strong population growth. Software & Information Technology employment increased by more than 90% from 2011 to 2016. Research employment rose by nearly 60%. Construction and Entertainment employment grew by 43% and 37% respectively.

The most concentrated clusters in the Austin metro include Electronics (2.3 LQ), Software & Information Technology (2.3 LQ), Industrial Machinery (1.6 LQ), and Research (1.5 LQ).



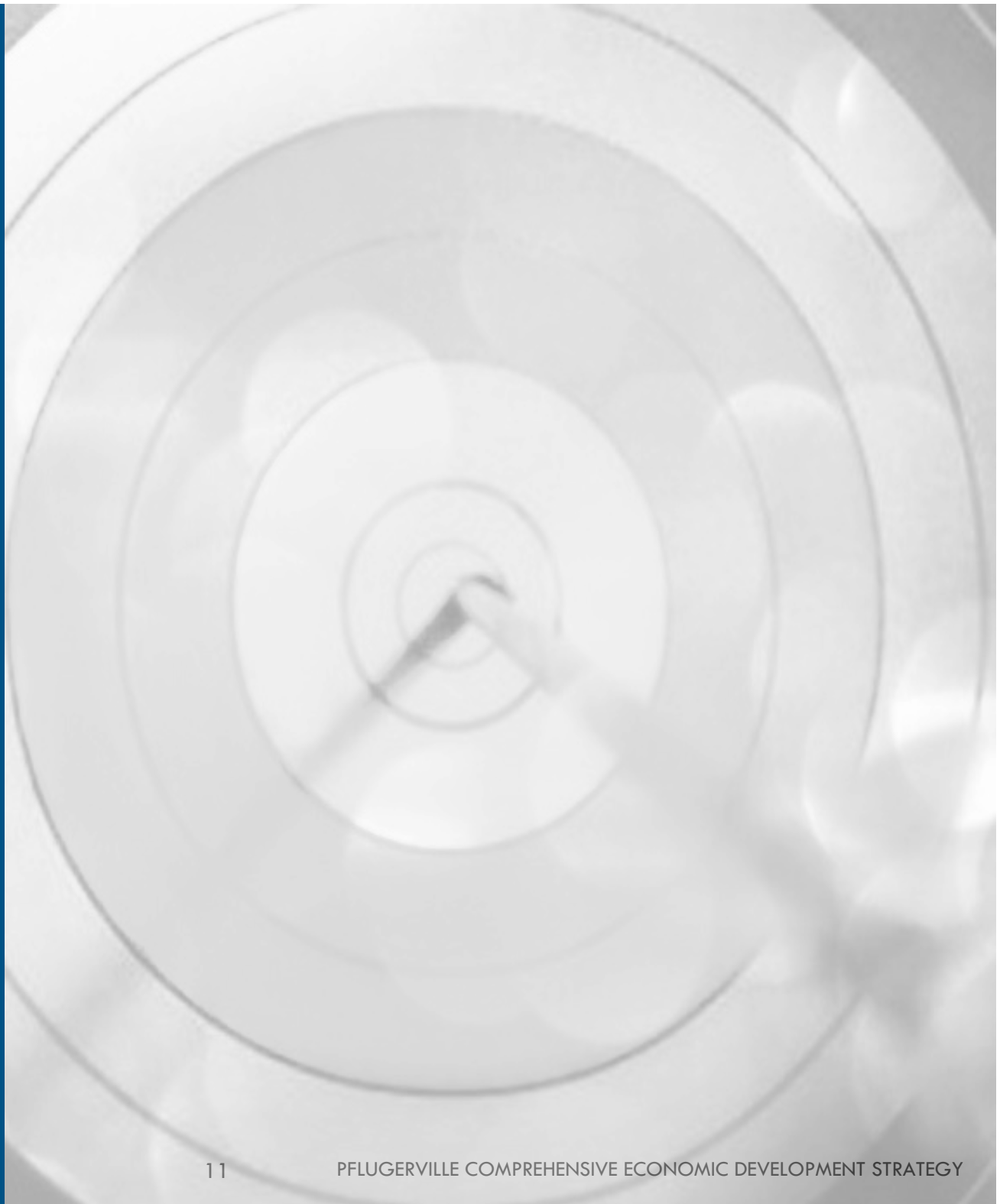
Industry Clusters Past Performance: Austin Metro



Note: Chart includes 20 largest industries in 2016

SOURCE: AVALANCHE CONSULTING / EMSI

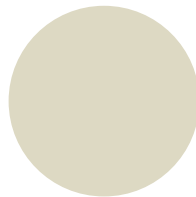
TARGET CLUSTER IDENTIFICATION



CLUSTER EVALUATION & SELECTION

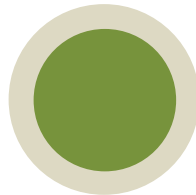
Target selection is not an exact science – no single mathematical formula can perfectly identify target clusters. Target selection is instead an iterative process – combining both quantitative and qualitative information. Through a process of data analysis and conversations within the community, target clusters and supporting niche sectors are identified and tailored to each community's needs and opportunities.

Target cluster selection is driven by four primary questions that serve as filters in the selection process:



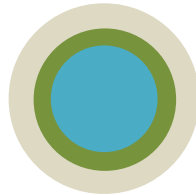
1. Is the cluster employment growing and projected to grow within the city, region, and the US?

Examining national and international trends helps understand if the target cluster will continue to grow and create opportunities in Pflugerville.



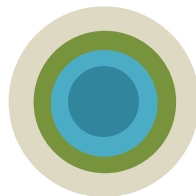
2. What clusters have an existing presence in the region?

Clusters with an existing concentration in the region reflect local competitive strengths and present some of the best opportunities for expansion, recruitment, and startup growth.



3. Which clusters are best suited to the city's assets?

The strategic planning process identified Pflugerville's strengths, challenges, and assets – summarized in Chapter 1. The ability of these assets to support cluster ecosystems and expanded activity was an important filter.



4. Which clusters align with the city's goals and values?

Each cluster was evaluated on whether it reinforces the goals and values identified by Pflugerville residents and leaders through conversations and focus groups in the strategic planning process.



TARGET CLUSTER SELECTION

Following the review and selection process outlined in this chapter, Avalanche recommends the following four target clusters for Pflugerville.


- Advanced Manufacturing
- Professional Technology Services
- Supply Chain Businesses
- Headquarters


These targets provide high-growth opportunities for a variety of residents and communities within Pflugerville.


Niche sectors in each cluster are identified as special opportunities unique to Pflugerville.

TARGET CLUSTER

NICHE SECTORS

 ADVANCED MANUFACTURING	Additives
	Advanced Materials & Technologies
	Aerospace & Defense Technology
	Cleantech Production
	Computer & Electronic Parts
	Medical Devices

 PROFESSIONAL TECHNOLOGY SERVICES	Gaming & Mobile Applications
	Healthcare Information Technology
	Research & Development
	Software/IT

 SUPPLY CHAIN BUSINESSES	Data Storage & Analytics
	Financial Services
	Office Support Services
	Warehousing & Distribution

	HEADQUARTERS
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TARGET ALIGNMENT

When examining potential target clusters for Pflugerville, it was important to consider how each industry fit into the broader regional and state economic development efforts.

Opportunity Austin, the regional economic development organization, and Team Texas, the statewide marketing agency, have identified key industries on which they focus their economic development efforts and resources. These industries were identified based on the competitive advantages for each in the Austin metro and the State of Texas.

Not every statewide target industry and niche sector has a place in Pflugerville, but it is important to ensure that each Pflugerville target cluster fits within the broader regional and state framework. This will ensure that Pflugerville is an integral part of the regional and state identity and can effectively utilize marketing, educational, financial, and other resources available from these larger organizations.

At the same time, it is essential to highlight the assets and opportunities that make Pflugerville unique within each of these broader target clusters. When a business in one of these targets is considering expanding or relocating in Texas or Austin, we must ensure that Pflugerville is at the top of their list of locations.

TARGET CLUSTER ALIGNMENT

PFLUGERVILLE	OPPORTUNITY AUSTIN	TEAM TEXAS
ADVANCED MANUFACTURING	ADVANCED MANUFACTURING	ADVANCED TECHNOLOGY & MANUFACTURING
	CLEAN ENERGY & POWER TECHNOLOGY	ENERGY
	SPACE TECHNOLOGY	AEROSPACE, AVIATION, & DEFENSE
PROFESSIONAL TECHNOLOGY SERVICES	LIFE SCIENCES	BIOTECHNOLOGY & LIFE SCIENCES
	CREATIVE & DIGITAL MEDIA TECHNOLOGY	INFORMATION & COMPUTER TECHNOLOGY
SUPPLY CHAIN BUSINESSES	DATA MANAGEMENT	
HEADQUARTERS	CORPORATE HEADQUARTERS & REGIONAL OFFICES	
		PETROLEUM REFINING & CHEMICAL PRODUCTION



TARGET CLUSTER PROFILES

The Target Cluster Profiles on the following pages provide detailed information about each recommended target cluster for Pflugerville. The profiles include an overview of each cluster, describing the dynamics of the cluster, global forces affecting it, business and workforce needs, and local and national trends. A recommended “Development Approach” indicates whether a cluster should be targeted through recruitment, expansion, or startup programs. Each profile concludes with a series of sales messages highlighting competitive opportunities within Pflugerville that can facilitate business development efforts.

These profiles are intended to educate local leadership about each cluster, their niche sector opportunities, and the factors that will influence their growth within Pflugerville. The profiles will also arm the Pflugerville Community Development Corporation with information and marketing materials to help support business expansion, startup, and recruitment activities in each cluster.



ADVANCED MANUFACTURING

NICHE SECTORS

Additives

Advanced Materials & Technologies

Aerospace & Defense Technology

Cleantech Production

Computer & Electronic Parts Manufacturing

Medical Devices



ADVANCED MANUFACTURING

NICHE SECTORS

Additives

Advanced Materials & Technologies

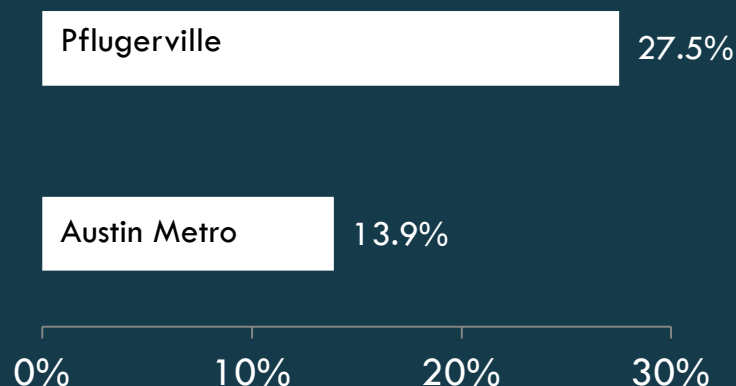
Aerospace & Defense Technology

Cleantech Production

Computer & Electronic Parts Manufacturing

Medical Devices

MANUFACTURING EMPLOYMENT GROWTH, 2011- 2016



Cluster Overview

Advanced Manufacturing is the transformation of raw materials into component pieces and finished products using complex machinery. Despite widespread negative media stories, the death of US manufacturing is often exaggerated. Manufacturing employment contracted during the Great Recession, but the US remains the world's second-largest manufacturer after China. Additionally, manufacturing employment has increased for five consecutive years in the US – the best performance in the last 30 years. The cluster currently employs approximately 12.3 million individuals in the US.

US Advanced Manufacturing operations remain globally competitive thanks to substantial gains in productivity. This productivity is driven by efficient operations and an increasingly skilled workforce. Firms typically utilize complex and expensive machinery that require skilled workers with specialized training. A growing demand for these skills supports relatively high wages in the cluster. Advanced Manufacturing's capital intensive nature and strong wage levels make the sector highly attractive to communities throughout the US. As a result, Advanced Manufacturing is among the country's most highly sought clusters.

Advanced Manufacturing operations require specific infrastructure and workforce support. Locations with a skilled, low-cost workforce and plentiful, affordable energy supplies are critical in maximizing productivity and reducing costs. Specific Advanced Manufacturing niche sectors may also require sizable water and wastewater capacity. To help facilitate delivery of and finished products, Advanced Manufacturing firms often locate in close proximity to an interstate. They may also require sites with rail access to facilitate the transport of raw materials. Due to the increasing sophistication of the corporate site selection process, aggressive incentives packages are often required to recruit large-scale Advanced Manufacturing operations.

Global Forces

Beginning in the 1970s, domestic manufacturing employment began to decline in the wake of offshoring to lower costs environments. Recently, however, **US Manufacturing has enjoyed a resurgence** as domestic production has become more globally competitive. **Increased automation** and the continued **adoption of robotics** have helped make US Manufacturers the world's most productive. Stagnant wages at home and **rising foreign labor costs** have increased the cost competitiveness of US workers, though a stronger dollar has recently emerged as a headwind to growth. **Declining energy prices** have lowered the cost of US production and transportation. US manufacturers also benefit from growing concerns about **lax intellectual property protection overseas**.

ADVANCED MANUFACTURING

NICHE SECTORS

Additives

Advanced Materials & Technologies

Aerospace & Defense Technology

Cleantech Production

Computer & Electronic Parts Manufacturing

Medical Devices

AVERAGE MANUFACTURING SALARY, 2016

○ AVERAGE SALARY OF ALL JOBS

Pflugerville



\$89,163

Austin Metro



\$116,365

\$0 \$50,000 \$100,000 \$150,000

Niche Sectors

Additives – Manufacturing has traditionally involved creating component parts and then assembling these pieces into a finished product or new component. Additive manufacturing involves the production of an object by placing ultrathin layers of material on top of one another. Additive manufacturing has long been used to quickly and inexpensively create prototypes. In recent years, Additive manufacturing has also been adopted in the manufacturing of custom objects such as dental implants. Additives use far fewer materials than conventional manufacturing techniques, resulting in lighter products and significant cost savings. As a result, Additive Manufacturing is becoming increasingly common in advanced industries such as aerospace. General Electric, for example, recently incorporated additive components into its aviation products. Continued advances in Additives are projected to drive growth across a variety of industries, including motor vehicles, medical supplies, and consumer products.

Advanced Materials & Technologies – Advanced Materials & Technologies encompasses the research, development, manufacturing, and application of new materials derived from innovations in metal, polymers, glasses, composites, and textiles. Advanced Materials are also used in many different industries. The rise of Additives and the need for lighter, stronger component materials in automobiles and aircraft contributes to the demand for advanced composite materials and new alloys. The ability of Advanced Materials to enhance or replace natural functions has also created new opportunities in the area of healthcare. Greater incorporation of technology into textiles has led to the creation of “functional fabrics” with novel properties such as exceptional flame resistance, extraordinary strength, or sensing capabilities.

Aerospace & Defense Technology – Aerospace & Defense Technology encompasses a diverse range of activities, including the development and manufacture of aircraft, engines, parts, missiles, and space vehicles. A global increase in consumer air passenger traffic, combined with technological advances in unmanned aerial vehicles (UAVs), Aerospace has been one of the more resilient sectors of the US manufacturing industry during the past decade. The continued growth of international air travel demand is expected to fuel sustained growth in new aircraft production. Additionally, the emerging UAV market is projected to nearly double during the next 10 years.

ADVANCED MANUFACTURING

NICHE SECTORS

Additives

Advanced Materials & Technologies

Aerospace & Defense Technology

Cleantech Production

Computer & Electronic Parts Manufacturing

Medical Devices

AUSTIN METRO MANUFACTURING EXPORTS, 2010-
2015 (IN BILLIONS)



Niche Sectors

Cleantech Production – Cleantech Production is a broad industry cluster that involves the manufacturing of various products that reduce carbon output through innovations in transportation, energy production and transmission, and energy efficiency. With more than 200 existing companies employing 20,000 workers, the Austin region is already an established Cleantech leader thanks to a strong research university, an existing technology cluster, and Texas' extensive energy expertise. Global demand for Cleantech products continues to increase as a result of more stringent environmental regulations. The landmark Paris Agreement, which involves nearly 200 countries that account for more than half of greenhouse gas emissions throughout the world, will require the US to significantly reduce emissions by 2025. Such pressures have already helped triple renewable energy production within Texas during the past decade. Increased fuel economy standards have also contributed to the growth of the electric vehicle market; since 2011, sales of plug-in electric vehicles have increased six-fold. The growing adoption of smart grid technologies by both energy producers and consumers – fueled by regulation and cost-saving potential – is also contributing to the growth of Cleantech Production sector.

Computer & Electronic Parts Manufacturing – Computer & Electric Parts Manufacturing includes the production of individual components and finished products that typically feature integrated circuits. In recent years, Computer & Electric Parts Manufacturing employment growth has been driven by the integration of electronics in a variety of products. 30 years ago, for example, electric components represented less than 5% of automobile production costs. Today, the figure exceeds 25% and can be much higher for hybrids. Other areas of growth include mobile devices, healthcare, communications, and data processing. In the past several years, Central Texas has proven adept at supporting the Computer & Electronic Parts Manufacturing cluster; since 2011, employment in the Austin metro and Pflugerville has increased 19% and 8 % respectively.

Medical Devices – Medical Devices include a variety of products, from basic items such as surgical gloves and instruments to remarkably complex medical diagnostic tools. Research and development is critical to the industry; Medical Device R&D investment is more than twice the average for all manufacturing sectors. As a result, Medical Device companies often cluster in regions with established technology sectors. In recent years, growth in the Medical Device industry has been fueled by three broad trends. At home, the aging of the US population assures a growing market for a variety of healthcare products, including Medical Devices. Abroad, rising incomes in developing countries are creating new market opportunities for Medical Device manufacturers. Finally, technological advances are contributing to entirely new product categories such as wearable technologies.

ADVANCED MANUFACTURING

NICHE SECTORS

Additives

Advanced Materials & Technologies

Aerospace & Defense Technology

Cleantech Production

Computer & Electronic Parts Manufacturing

Medical Devices

Local Sales Messages

- Pflugerville has an existing base of manufacturing companies that are growing faster than the Austin metro and present opportunities to expand. The broader Austin region also has a large existing cluster – with nearly 60,000 manufacturing jobs and exports in Computer Equipment, Semiconductors, Industrial Machinery, Precision Instruments, and more.
- Pflugerville's geographic location and highway infrastructure make it an ideal location for manufacturers importing components and exporting finished products. The city has easy access via SH-130, IH-35, and SH-45, and it is close to Austin Bergstrom International Airport and the Austin Executive Airport.
- Pflugerville has secured water rights for the foreseeable future and has a long-term infrastructure plan that will ensure a reliable and affordable supply of water to businesses. Pflugerville also offers deregulated electricity at rates below the regional average.
- Pflugerville has greenfield properties at a much more affordable price than many communities throughout the Austin region. PCDC and local partners can act quickly to make sites shovel-ready. Current zoning allows for certain light industrial uses, but may limit the types of Advanced Manufacturing users that can locate in Pflugerville.
- The Dell Medical School is currently under construction down the highway from Pflugerville and, when tied with ongoing research activities at the University of Texas, will present numerous opportunities to advance the region's already large medical device manufacturing sector.
- The Department of Defense announced plans to establish a Defense Innovation Unit Experimental (DIUx) office in Austin that will focus on identifying innovative manufacturing and technology solutions to the nation's defense challenges.
- Pflugerville has a high concentration of working age veterans and residents with associate degrees –revealing a workforce that is attractive to many manufacturing employers with a balanced mix of both skilled trade workers and advanced degree holders.
- Pflugerville benefits from dozens of educational institutions in the region that provide training and degrees to support manufacturing operations – including technical training at ACC and EWCHC and advanced engineering degrees at UT and Texas State University.
- The State of Texas, Team Texas, and Opportunity Austin all actively support manufacturing expansion, innovation, and recruitment.

PROFESSIONAL TECHNOLOGY SERVICES

NICHE SECTORS

Gaming & Mobile Applications

Healthcare Information Technology

Research & Development

Software/IT



PROFESSIONAL TECHNOLOGY SERVICES

NICHE SECTORS

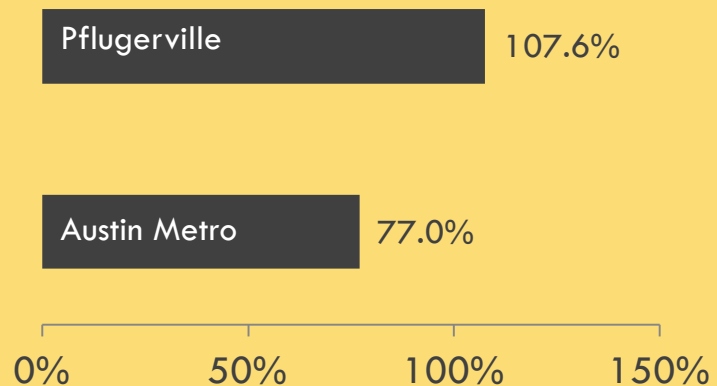
Gaming & Mobile Applications

Healthcare Information Technology

Research & Development

Software/IT

PROFESSIONAL TECHNOLOGY SERVICES EMPLOYMENT GROWTH, 2011-2016



Cluster Overview

Professional Technology Services includes software production, mobile game and application development, computer systems research and development, computer systems design, data security, and technology consulting services. Fueled by growth in a variety of niche clusters, Professional Services Technology employment increased three times faster than the overall job market between 2011 and 2016.

Professional Technology Services firms require minimal infrastructure support. Instead, talent availability and financing are paramount. In many parts of the US, the Professional Technology Services workforce is insufficient to meet the demand for skilled positions. As a result, Professional Technology Services often cluster in regions boasting a major university that can provide a continuous supply of new workers with the latest computer programming skills. Locations with smaller, more specialized schools with celebrated computer science programs are also attractive to prospective Professional Technology Services firms.

Venture capital financing is also critical to supporting local Professional Technology firms. The most successful Professional Technology Services ultimately hope to establish a dominant presence in their field. Doing so, however, often requires years of forgone profitability. Venture capital is vital in sustaining operations during this period. Although venture capital is highly concentrated in San Francisco and San Jose, smaller tech hubs such as Austin are developing local venture capital networks.

Global Forces

Many companies are adopting a “**mobile first**” strategy that prioritizes Mobile Applications above desktop-based experiences. The trend reflect changing consumer behavior. **October 2016 marked the first time mobile and tablet devices accounted for more web traffic than desktop and laptop computers.** The rise of non-traditional computing devices also includes **the Internet of Things**, consumer objects such as watches and thermostats that are connected to digital networks. **The growing ubiquity of devices with access to highly personal information also creates new cyber security risks;** in 2016, maliciously hacked webcams caused one of the largest cyber-attacks in history. The incident underscores **the need for advanced cyber security capabilities in so-called smart objects.**

PROFESSIONAL TECHNOLOGY SERVICES

NICHE SECTORS

Gaming & Mobile Applications

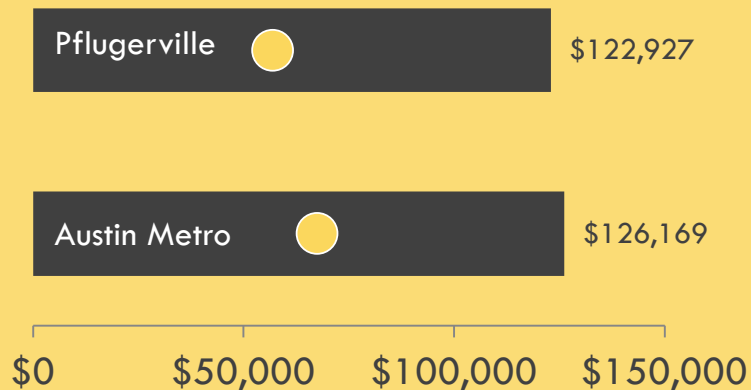
Healthcare Information Technology

Research & Development

Software/IT

ESTIMATED AVERAGE PROFESSIONAL TECHNOLOGY SERVICES SALARY, 2016

○ AVERAGE SALARY OF ALL JOBS



Niche Sectors

Gaming & Mobile Applications – Mobile Applications are so central to the smartphone ecosystem it seems hard to believe that Apple launched the original iPhone in the absence of any third-party applications. Since then, more than 3 million Mobile Applications have been developed for Apple's App Store and Google Play Stores. Today, Mobile Applications represent a \$120 billion market. The growth of Mobile Applications has also helped bolster the market for Gaming Applications; games represent approximately 25% of apps available from Apple's App Store. The Gaming industry continues to thrive thanks to an increasingly broad demographic appeal and a multi-channel strategy that provides consumers with multiple opportunities for play. The market for games continues to expand beyond the traditional base of young males – today adult women are the largest consumers of digital games. The gaming industry has also benefitted from exposure across multiple platforms, including mobile phones, traditional computers, and dedicated consoles. Looking ahead, future growth in Gaming & Mobile Applications is likely to come from areas such as mobile payment services, Health IT apps, and new virtual reality devices.

Healthcare Information Technology – The US healthcare industry is largely immune to broader macroeconomics trends – driven instead by demographics and technological innovation. Regardless of the state of the overall economy, healthcare spending continues to increase. With an estimated 10,000 Baby Boomers becoming eligible for Medicare every day for the next 15 years, demographic dynamics are all but certain to drive further increases in domestic health care spending in the years ahead. According to federal government projections, within a decade healthcare will capture \$1 of every \$5 spent in the US. Healthcare Information Technology provides a range of software and services to support the expand provision of medical care.

As an emerging cluster, Healthcare Information Technology has no formal definition. In general, however, Healthcare Information Technology encompasses services such as patient record and insurance document management, data storage and predictive analytics of medical care and clinical trial results, medical hardware such as wearable devices, and specialized software to facilitate treatment, monitor activity, and improve patient outcomes. While delivering on the full promise of Healthcare Information Technology is likely to take many years, investors are already signaling the cluster's potential. According to the *Wall Street Journal*, for example, medical venture capital funding in the US hit a record \$3.9 billion in the first quarter of 2015. The resulting greater availability of health-oriented venture capital is helping fuel growth in new Healthcare Information Technology companies.

PROFESSIONAL TECHNOLOGY SERVICES

NICHE SECTORS

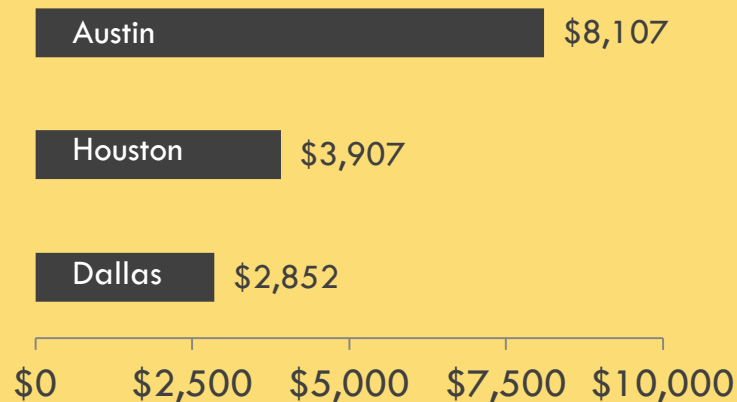
Gaming & Mobile Applications

Healthcare Information Technology

Research & Development

Software/IT

BUSINESS RESEARCH & DEVELOPMENT SPENDING PER \$1 MILLION GROSS REGIONAL PRODUCT, 2013



Niche Sectors

Research & Development – Research & Development involves the process of scientific discovery in attempt to develop new products and services. As the US economy has become increasingly knowledge based, the number of R&D jobs has continued to increase; during the past 15 years, private R&D employment has increased three times faster than the US average for all industries. R&D expenditures by US businesses currently exceeded \$340 billion annually. Such spending is disproportionately concentrated in a handful of industries and locations. Just two clusters – Manufacturing and Software/IT – account for nearly 80% domestic R&D expenditures. Additionally, half of all R&D spending in the US is absorbed by five states, including Texas. As a percentage of regional gross domestic product, the Austin metropolitan area has the highest level of corporate R&D expenditures within the Lone Star State. Unsurprisingly, the Austin metro also produces more patents on a per capita basis than any other region in Texas. The Austin metro also outperforms most metropolitan areas in the US on patent productivity, and Pflugerville has a uniquely high share of patent inventors within the region.

Software/IT – In recent years, global sales of personal computers have slowed as more consumers utilize tablets and mobile phones for personal and business computing. As a result, the enterprise market has assumed an ever-larger role for Software/IT products and services. Big data and cloud computing are especially notable drivers of growth. The ubiquity of computer technology has propelled an exponential increase in data production. By providing companies with the power to analyze vast volumes of data, Big data can help identify patterns and leverage predictive analytics to identify future outcomes. Market opportunities in areas such as Finance, Health Care, and Government are likely to drive additional demand for Big Data in the years ahead. The increased production of information has also contributed to growth in cloud computing, which allows users to outsource the management, processing, and storage of data to off-site third-party vendors. Cloud computing helps companies quickly scale their operations based on real-time demand. Amazon's web services division, for example, is responsible for delivering content for both Netflix and Instagram. As more and more sensitive information is moved to the cloud, the demand for ever more sophisticated cyber security software also increases. In the past year alone, hackers gained access to 500 million Yahoo email accounts, up to 80 million personal records from the second-largest health insurance firm in the US, and 25 million personnel files from the federal Office of Personal Management. Hackers even gained access to the personal email account of the FBI Director, further underscoring the country's need for improved cybersecurity capabilities.

PROFESSIONAL TECHNOLOGY SERVICES

NICHE SECTORS

Gaming & Mobile Applications

Healthcare Information Technology

Research & Development

Software/IT

Local Sales Messages

- Professional Technology Services are primarily dependent on hiring and retaining a highly educated and skilled workforce, and Pflugerville benefits from a large, well-educated workforce that lives in the city in addition to a labor pool of 800,000 skilled workers spread across the Austin region.
- Pflugerville is central in the Austin region, one of the nation's largest and fastest growing technology centers – attracting thousands of new professional workers every week and supporting the operations of a diverse base of homegrown and international technology companies from Facebook to Google to Apple.
- The Austin region is one of the most innovative in the country, with research and new product development occurring across public and private organizations, including the University of Texas, one of the nation's largest research universities.
- Residents of Pflugerville are some of the most innovative in America. Pflugerville has a remarkably high concentration of these patent holders with 134 applicants per 10,000 jobs, compared to 7 per 10,000 jobs in Austin.
- Pflugerville residents are highly entrepreneurial – with an above average concentration of small businesses and self-employed individuals.
- Within the Austin, Pflugerville offers some of the most affordable, centrally located land for office development – with the potential to support startups through construction of smaller, co-working and shared office space and also attract large technology companies seeking to build campus environments.
- Pflugerville offers a family-friendly, high quality of life with numerous outdoor recreation opportunities and excellent schools, which makes the city an attractive location for many technology workers to live, work, and play.
- The Austin region has numerous incubators and organizations such as Austin Tech Incubator that encourage and support the development of new software and technology companies throughout the region.
- The development of the Austin Innovation District along IH-35 near the Dell Medical School will bring further technological innovation to the region, and with close proximity, Pflugerville has an opportunity to build physical and business connectivity to the district.

SUPPLY CHAIN BUSINESSES

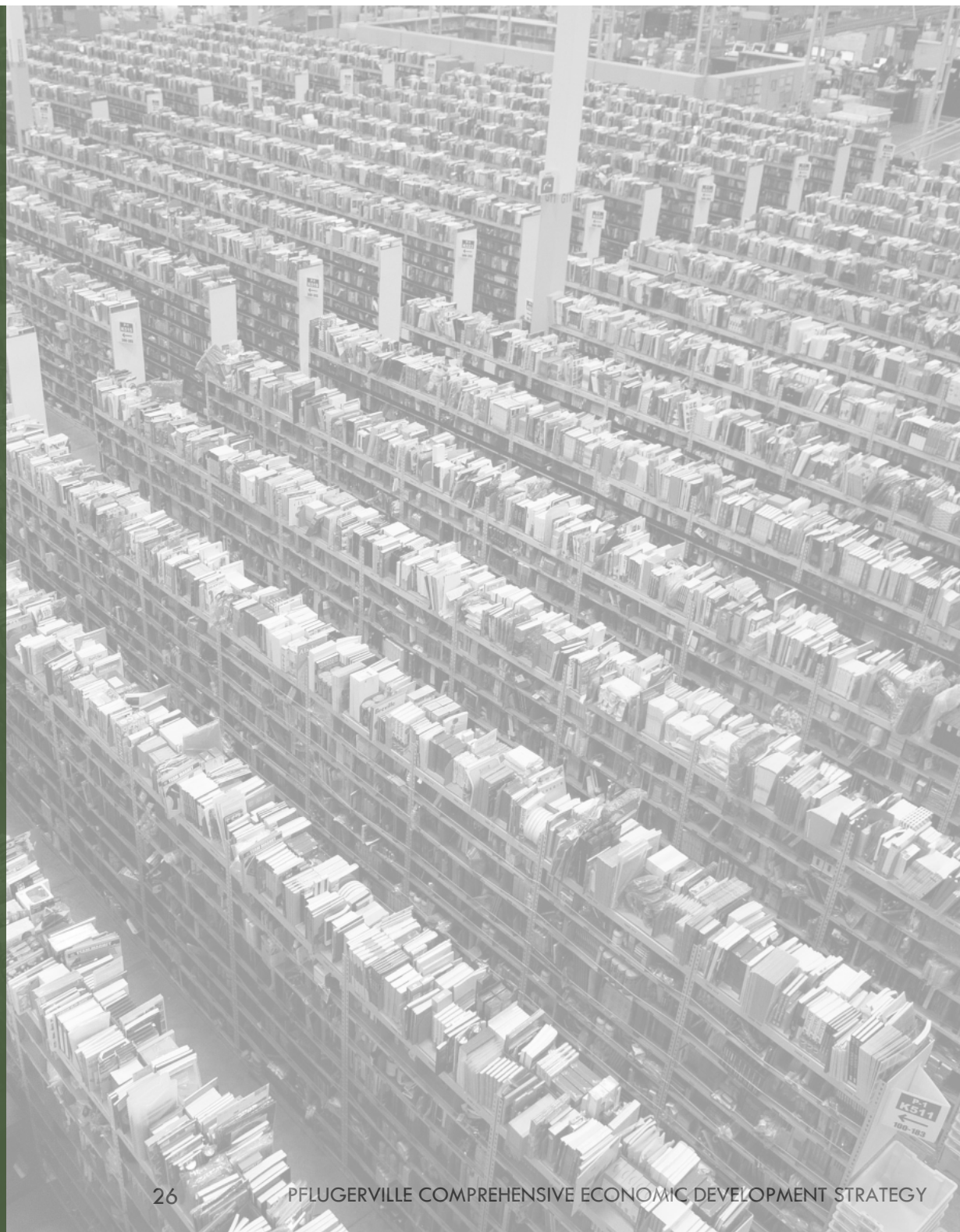
NICHE SECTORS

Data Management

Financial Services

Office Support Services

Warehousing & Distribution



SUPPLY CHAIN BUSINESSES

NICHE SECTORS

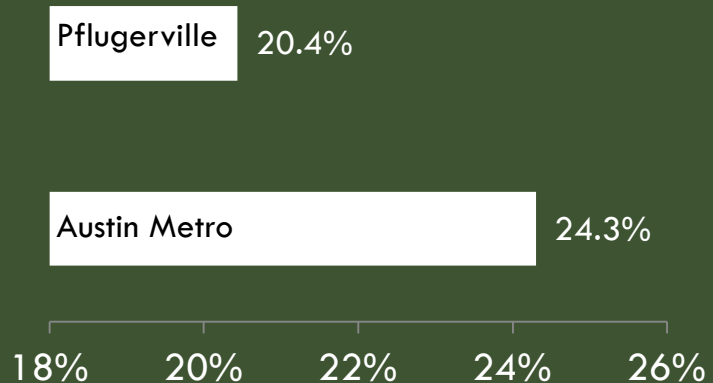
Data Management

Financial Services

Office Support Services

Warehousing & Distribution

SUPPLY CHAIN BUSINESSES EMPLOYMENT GROWTH, 2011-2016



Cluster Overview

Supply Chain Businesses include an array of operations that are central to a major metropolitan economy. Specifically, the cluster includes Data Management, Financial Services, Office Support Services, and Warehousing & Distribution. Growth in Supply Chain Businesses typically relates to broader economic trends within a region. Supply Chain Businesses in Central Texas, for example, benefit from regional and statewide gains in population and economic activity. Corporate expansion throughout Texas fuels demand for Data Management Services. Strong population and job growth requires additional Warehousing & Distribution capacity. A greater Financial Services presence helps facilitate increased commercial and consumer monetary needs.

Over the past five years Supply Chain Business employment in Pflugerville and the Austin metro have increased by 20% and 24% respectively. Increased real estate development within the Austin metro's urban core, which has fueled substantial increases in land costs while reducing available inventory, may increasingly favor outlying communities. As Supply Chain Businesses increasingly search for Central Texas locations featuring lower labor and real estate costs, large pools of skilled workers, and less congested road networks, locales such as Pflugerville are well-positioned to capture additional growth.

Global Forces

The rise of cloud computing, combined with a continued increase in the number of devices capable of producing data, has propelled an explosion in information worldwide; according to an estimate from IBM, **90% of all information ever created has been produced in just the past two years**. In an attempt to broaden their digital ecosystems into new areas, the dominant information technology firms are beginning to enter the Financial Services market. **The entrance of new players** such as Square, Apple, Samsung, and Google into payment services only **underscore growing competition from non-banks and an increased emphasis on technological innovation** within Financial Services. Younger consumers are especially wary of existing Financial Services offerings—**one third of Millennials don't think they will need a bank in five years. A growing number of Americans are also increasingly wary of free trade**. Already, the globalization trends of the past two decades are showing signs of strain; despite a growing economy, US international trade declined in 2015. The recent completion of the **Panama Canal** expansion may provide a boost to the Warehousing & Distribution cluster. Regardless of global trends in trade, regions with strong population and employment growth will enjoy continued Warehousing & Distribution growth.

SUPPLY CHAIN BUSINESSES

NICHE SECTORS

Data Management

Financial Services

Office Support Services

Warehousing & Distribution

AVERAGE SUPPLY CHAIN BUSINESSES SALARY, 2016

○ AVERAGE SALARY OF ALL JOBS

Pflugerville

○ \$54,009

Austin Metro

● \$68,865

\$0 \$20,000 \$40,000 \$60,000 \$80,000

Niche Sectors

Data Management & Analytics – Data Management includes storage, distribution, and analysis of vast volumes of information. The explosion of global data production has fueled substantial growth in the demand for Data Management facilities. During the past year, Google announced plans for 10 new data centers. In an effort to lessen its reliance on Amazon, Apple has embarked on a multi-billion dollar data center building campaign. Next year, Microsoft will open two new data centers, including one in San Antonio. With a growing number of companies and consumers adopting cloud computing, the need for new and expanded Data Management facilities is expected to only further increase in the years ahead. According to an analysis by real estate firm JLL, the Data Management market is expected to double by 2021. The Austin region continues to offer Data Management firms with a very attractive operating environment. Central Texas features very competitive interest rates, extensive telecommunications infrastructure, relative safety from natural disasters, and a large existing technology cluster. Within the region, Pflugerville offers deregulated and relatively affordable electricity.

Financial Services – Financial Services includes products and services related to the management of money and aligned activities such as insurance, investment, and asset management. The Financial Services cluster also includes support services such as data and management and customer service centers. Since the turmoil of the economic downturn, the Financial Services sector has stabilized. A changing regulatory and competitive landscape, however, present both new opportunities and challenges. Legislation passed in the wake of the Great Recession has increased both the complexity and cost of regulatory compliance, while also limiting specific financial activities such as speculative investments. Such changes, however, have helped support growth in areas such as compliance and risk management. Low interest rates—long seen as a drag on revenue—haven’t precluded profits; in 2016, US banks reported their most profitable quarter ever. With the Federal Reserve looking to soon raise interest rates for only the second time in the past decade, 2017 may usher in a period of even greater Financial Services revenues. Already, sustained economic growth has also contributed expanded consumer lending (though commercial lending remains largely flat). In the longer-term, technology will create new markets. With cybersecurity threats increasingly in both severity and frequency, cyber insurance will be a growing market. According to the Insurance Information Institute, US businesses spent more than \$2 billion for cyber insurance in 2015. PricewaterhouseCoopers estimates the market will grow to \$7.5 billion by the decade’s end. The sharing economy may lead to new products for home and automobile insurance. The integration Financial Services and Information, dubbed Fintech, promises to disrupt traditional banking by introducing new payment platforms, leveraging data analytics to reduce cost and more accurately assess risk, and revolutionizing the manner in which financial transactions are facilitated.

SUPPLY CHAIN BUSINESSES

NICHE SECTORS

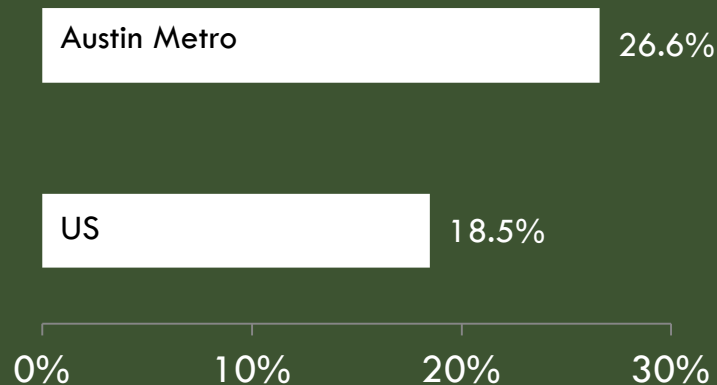
Data Management

Financial Services

Office Support Services

Warehousing & Distribution

CHANGE IN VALUE OF COMMODITY FREIGHT SHIPMENTS (ALL MODES), 2007-2012



Niche Sectors

Office Support Services – Office Support Services provide administrative, accounting, and information technology support to larger organizations in a variety of industries. Office Support Services firms may be separate, third-party entities that handle specific operations on behalf of external clients or internal departments within larger corporations. For example, while the trading desk of the largest financial services firms are typically located in New York City, the billing and sales operations are often situated elsewhere. In addition to banking and insurance, demand for Office Support Services is also fueled by the healthcare industry. The continued growth and complexity of US healthcare system supports a sustained need for services such as medical record management and regulatory compliance. Office support services are typically attracted to locations with competitive labor and real estate costs, a pro-business tax and regulatory environment, and a moderately-skilled workforce.

Warehousing & Distribution – Over the past quarter century, the Warehousing & Distribution cluster has enjoyed robust growth thanks a dramatic rise in global trade, a revitalized domestic manufacturing sector, and evolving consumer preferences. The North American Free Trade Agreement (NAFTA), signed in 1994, helped usher in a era of new trade agreements between the US and foreign countries. The US currently has free trade agreements with 20 countries collectively representing 35% of the global economy, a figure that could rise to 75% if recently negotiated agreements are ratified by the US. In recent years, the resurgence of domestic manufacturing has also contributed Warehousing & Distribution growth. After decade of decline, US manufacturing is once again expanding; since 2009, the value of US exports has soared 44%. Finally, Warehousing & Distribution has also benefited from the growth of online commerce. In 2007, after more than a decade of operations, Amazon had less than 4 million square feet of distribution space. In 2016 alone, Amazon added 15 million square feet to its fulfillment center network. These three trends—global trade, manufacturing production, and e-commerce—have supported significant employment growth. During the past decade Warehousing & Distribution employment has increased 60% more than the overall US employment during the past decade. Communities in Texas, which features one of the country's fastest growing economies and populations, remain well-positioned to capture additional Warehousing & Distribution jobs.

SUPPLY CHAIN BUSINESSES

NICHE SECTORS

Data Management

Financial Services

Office Support Services

Warehousing & Distribution

Local Sales Messages

- Pflugerville is one of the fastest growing cities in America located in one of the fastest growing metropolitan regions. The rapid growth of residents and businesses creates continuous demand for a range of business services to maintain supply chains that fuel this growth. Services in demand include data management, accounting and finance, warehousing and distribution, and much more.
- As the urban core and larger existing office centers in the Austin region grow increasingly crowded and expensive, supply chain businesses must seek more affordable and logistically connected locations in the region.
- Pflugerville presents a range of assets to support supply chain businesses in the Austin region:
 - Geographic proximity to the urban core and employment centers across the metro.
 - Convenient transportation access to all parts of the Austin region and the rest of Texas via SH-130, IH-35, SH-45, and other highways.
 - Proximity and quick access to the Austin Executive Airport and Austin Bergstrom International Airport
 - Relatively affordable appropriately zoned land for office and distribution activities along the SH-130 corridor and elsewhere
 - Pflugerville offers deregulated electricity at rates below the regional average – making it one of the most cost competitive communities in the region.
- Well established and flexible supportive educational programs at ACC, EWCHEC, UT, Texas State, and other regional colleges and universities support all sectors.
- Supply Chain Businesses present well-paying employment opportunities for a range of skillsets – from certificates and associate degrees to bachelor's and master's – allowing all Pflugerville residents to find opportunities for career development.
- Pflugerville has developed a long-term plan to supply water for businesses and residents. Combined with reliable power and telecommunications infrastructure, the city is a competitive location for data centers and other utility dependent operations.

HEADQUARTERS



HEADQUARTERS

Overview

Headquarters include both corporate and public sector facilities. Headquarters are typically located in communities with a large workforce, extensive transportation infrastructure, plentiful and affordable real estate, and high-speed broadband availability. With a labor force characterized by moderate- and high-skill positions, headquarters require locations with ample talent. Close proximity to major thoroughfares and highways helps headquarters draw from an even larger pool of workers. The presence of a major airport with direct connections to facilities in other parts of the country may also be desirable. Physically, headquarters are often built in Class A office structures and utilize a campus design, which requires large tracts of land for development development. Given the modern economy's reliance on digital communication, high-speed internet connections with abundant bandwidth are an absolute requirement.

Global Forces

During the past decade, corporations have become increasingly sophisticated in their site selection strategies. Traditionally, the largest US companies largely remained rooted in their original hometown. With companies becoming more globally oriented and communities adopting more aggressive tax incentive policies, corporate relocations have become more common. In 2016, for example, General Electric was offered more than \$150 million dollars in incentives to relocate its corporate headquarters to Boston. For smaller companies, relocations are less often driven by specific tax incentives and instead a community's business operating environment. States in the Sunbelt, including Texas, have been especially effective in attracting corporate headquarters. Similarly, the locations of regional offices are typically motivated less by incentives but rather a competitive cost of doing business. Regional offices are also more likely to be located in relative proximity to a company's customer base. Other company specific requirements, such as the availability of a multi-lingual workforce, may also play a role in the site selection process.

Many local and state government offices were built in locations central to the urban core when land costs were lower and transportation access was easier. In recent years, many cities and states have relocated large office operations and specific departments outside of urban cores. The trend has been fueled by the prospect of expensive renovations to aging buildings, the outward migration of workers to the suburbs, and potential financial windfalls from the sale of increasingly expensive land within the city center.

HEADQUARTERS

Local Sales Messages

- Pflugerville is a highly attractive destination for corporate headquarters, regional offices, and government department centers – offering a high quality of life, competitive business environment, and supportive infrastructure.
- Texas is consistently ranked one of the best states for business in the nation – with no personal or corporate income tax and a competitive regulatory environment that makes it an attractive place to operate large corporate businesses.
- Pflugerville is a physically attractive community that offers an increasingly diverse housing stock that is attractive to the range of workers that operate headquarters – including business leaders, managers, and professional workers.
- The retail options for dining and shopping continue grow and diversity in the city, making it a more attractive location for attracting employees, entertaining clients, and lunchtime dining options for a large, headquarters employment center.
- Within the Austin region, Pflugerville offers a unique combination of proximity to the urban core, affordable greenfield land, and infrastructure ready for development. This attributes make the city a rare location in the Austin region for a company or government office to establish a large campus or other office facility.
- The presence of the Austin Executive Airport on the end of town can provide easy access for executives and clients visiting a headquarters located in Pflugerville. Austin Bergstrom International Airport is also in close proximity with an increasing number of international flights to markets in Europe and Asia.

PFLUGERVILLE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Special Focus: Workforce & Education Institution Analysis

NOVEMBER 2016

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ABOUT THIS STRATEGY

This Comprehensive Economic Development Strategy provides Pflugerville with a unified vision and strategic approach to achieving a robust, resilient economy over the next three years and beyond. The Strategy is designed to provide the Pflugerville Community Development Corporation (PCDC), City of Pflugerville (City), and other business, education, nonprofit, and public sector leaders with a cohesive action plan that ensures everyone is working in-step toward a shared vision and goals.

Once complete Comprehensive Economic Development Strategy, will include three chapters:

Chapter 1, Community Assessment

This first chapter of the Strategy provides an in-depth trend analysis of Pflugerville's competitive position relative to the Austin metro, Texas, US, and six benchmark cities in comparative national metros. It also includes a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Evaluation, combining the findings of the trend analysis with input received from the Strategy's Steering Committee and more than 50 local, regional and state stakeholders. A strategic vision, goals and recommendations begin to emerge from the findings of the SWOT

Chapter 2, Target Industry Analysis

The Strategy's second chapter includes the consulting team's recommended target industries and niche sectors. Target industries and niches are those audiences that will be the focus of Pflugerville's economic development initiative, in terms of marketing, product development, and workforce development. The process of target industry selection blends a cluster and location quotient analysis with a review of data trends, SWOT evaluation, and on-the-ground examination of Pflugerville's assets.

Continued...



ABOUT THIS STRATEGY

Chapter 3, Strategic Action Plan

The Strategy's final chapter will recommend a three-year program of work that will advance Pflugerville's economy. It will set the community on-course for achieving its economic development vision and goals. The Strategic Action Plan will begin with profiles of national best practices from communities facing similar opportunities and target industries. The Action Plan will cover topics related to marketing, infrastructure, workforce development, public policy, quality of place, and other factors that affect Pflugerville's competitiveness. Each recommendation in the Action Plan will be accompanied by implementation tactics – timing, roles and responsibilities, and performance metrics. *(Note: This Chapter will be developed following completion of Chapters 1 and 2.)*

Special Focus, Workforce and Educational Institution Analysis

Access to talent is the top driver of business expansion and relocation decisions today. Understanding the dynamics of Austin region's workforce development and educational infrastructure will give Pflugerville a better informed advantage. As a supplement to the Comprehensive Economic Development Strategy, the consulting team offers a deeper dive into the talent-related assets available in Pflugerville's larger regional market



STEERING COMMITTEE

Avalanche and PCDC would like to thank the strategic planning Steering Committee for helping inform and guide the development of this strategic plan. This diverse group of Pflugerville stakeholders ensured that strategic plan reflects the perspective and desires of the entire community.

(Note: We will add titles and organizations.)

Pflugerville Steering Committee Members	Comprehensive	Economic	Development	Strategy
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Amanda Maegden				
Barth Timmerman				
Boris Milensky				
Brad Marshall				
Brigid Shea				
Carlton Inniss				
Charles Harvey				
Chris Davenport				
Clay Leben				
Darren Strozewski				
Dilip Naik				
Donnie Vanelli				
Dr. Alex Torrez				
Father Craig DeYoung				
Heather Biagas				
Jacquelyn Smith				
Janice Heath				

Jeff Coleman	
Jeff Travillion	
Jeffrey Burratto	
Amy Ellsworth	
Mike Marsh	
Patricia Gervan-Brown	
Renea Mitchell	
Robert Andrade	
Ron Moellenberg	
Rudy Metayer	
Ryan Merritt	
Terri Toledo	
Tiffany Daniels	
Victor Gonzales	
Wade Lindstrom	
Zane Cole	



WORKFORCE & EDUCATIONAL INSTITUTION ANALYSIS

$$\begin{aligned} V_{act} &= q_0(N - N_0)(1 - \varepsilon_s) \\ &= T_0 q_0(N - N_0)(1 - \varepsilon_s) \\ \frac{T_0 q_0}{V_{act}} &= 1 \end{aligned}$$



INTRODUCTION

The availability of appropriately skilled workers is one of the primary factors determining whether a business can locate or expand in a community. Immigration of new, educated residents can provide a source of workers for expanding businesses, but the remaining needs must be filled through education of students and adults already living in a community. Understanding the K-12 and post-secondary educational resources available in a community and how they match with growing occupational sectors helps identify opportunities to connect local employers and students.

It is important to remember that this is a regional story. Pflugerville is intimately connected to the greater Austin region – sending its residents out to work in other cities each day and drawing workers from numerous counties. This broad, regional labor shed is a significant asset to the community – **expanding the pool of available labor from 26,000 employed residents in Pflugerville to nearly 800,000 working adults within the broader region.**

Incorporating the broader labor shed also expands Pflugerville’s educational resources beyond the successful local ISD and private schools to include the University of Texas, one of the nation’s top public universities; Texas State University, one of the nation’s fastest growing; numerous Austin Community College campuses; East Williamson County Higher Education Center; the Texas State University Round Rock campus; and many more.

We then examine which occupations are currently growing in Pflugerville and forecast to grow in the near future – and compare these to the existing workforce in the city. We also examine occupations that are in highest demand and shortest supply in the broader labor shed, identifying stress points in the regional workforce supply chain that may create growth challenges for existing and targeted businesses in Pflugerville.

Lastly we provide a summary of relevant programs at regional educational institutions. This is a resource for local employers and economic developers and also highlights areas that may be addressed through this strategic plan.



LABOR SHED IDENTIFICATION

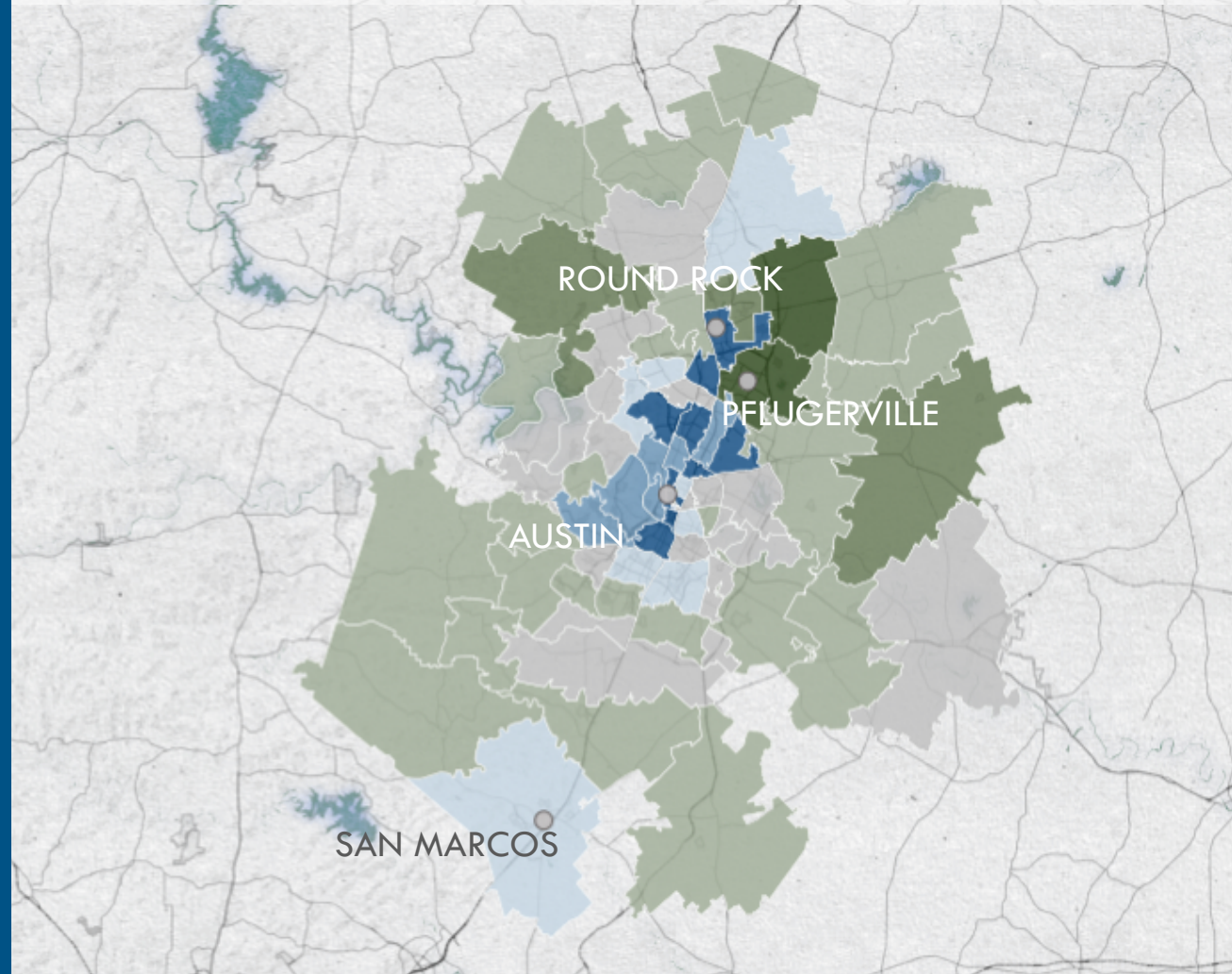
WHAT IS PFLUGERVILLE'S TRUE LABOR SHED?

The City of Pflugerville both imports and exports workers to virtually every corner of the Austin metropolitan region.

Pflugerville draws many workers from Austin and Round Rock, but the city sends a much higher share of working residents back to these locations. As a result, Pflugerville draws the most net workers (in-commuters minus out-commuters) from communities outlying the Austin metropolitan area – Hutto, Leander, Taylor, Brushy Creek, etc.

Pflugerville exports the most net workers to Austin's urban core and downtown Round Rock. The resulting commuting pattern looks like a donut – with Pflugerville exporting workers to the center and attracting workers from the region's periphery.

PFLUGERVILLE COMMUTER INFLOW & OUTFLOW



PFLUGERVILLE
EXPORTS WORKERS

PFLUGERVILLE
IMPORTS WORKERS

SOURCE: AVALANCHE CONSULTING / SPERLING'S BEST PLACES



LABOR SHED IDENTIFICATION

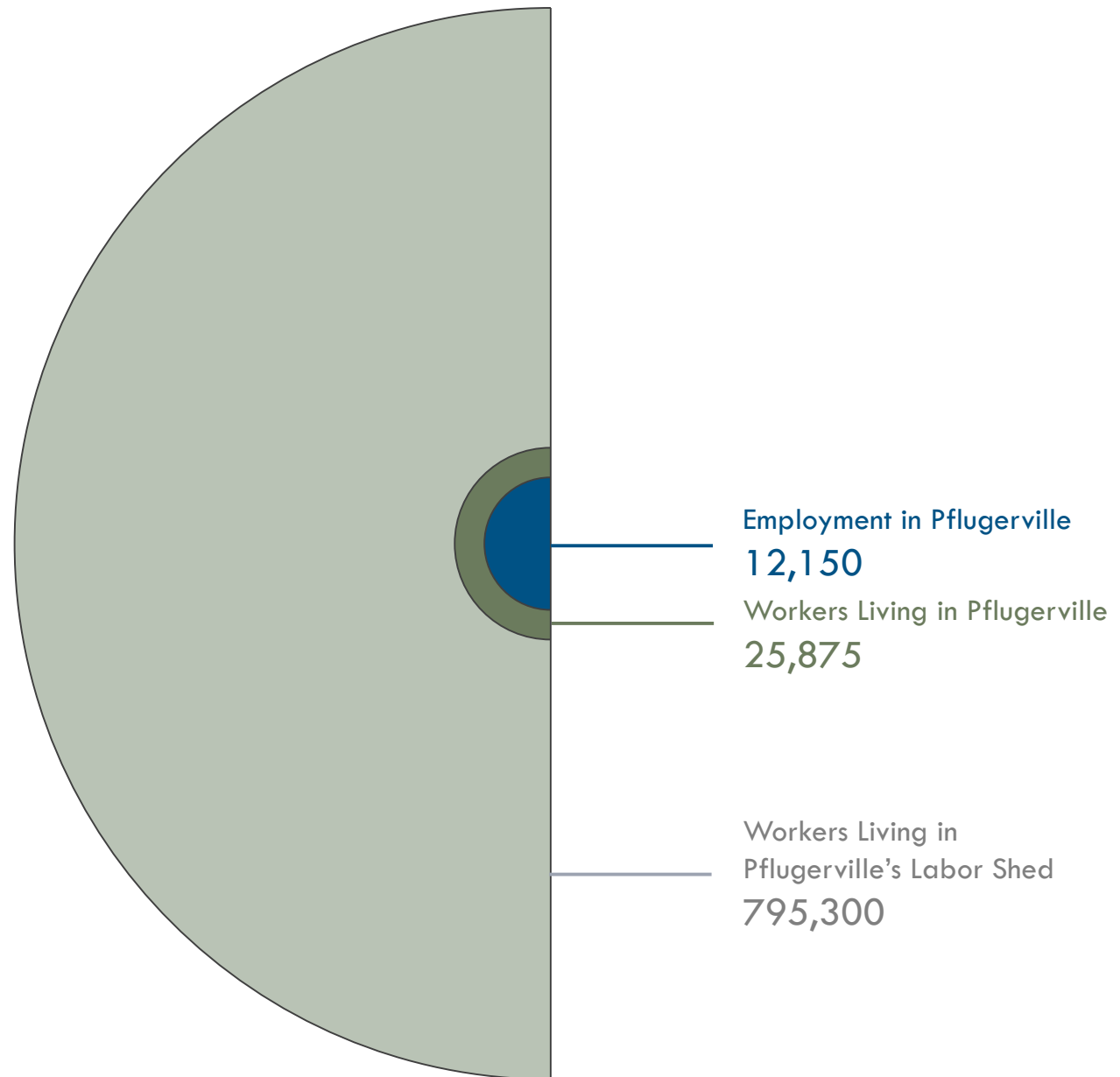
HOW MANY WORKERS ARE IN PFLUGERVILLE'S LABOR SHED?

In many ways, Pflugerville has the typical employment dynamics of a bedroom community located near a major metropolitan urban center.

Pflugerville is home to more than 12,000 jobs, and nearly 26,000 workers actually live in the city. Yet only 1,900 of these individuals both live and work in Pflugerville. As a whole we know that these individuals earn slightly less than those working outside of Pflugerville – with 43% of those working and living in Pflugerville earning over \$40,000 annually, compared to 53% of those working outside.

When we look beyond the 26,000 workers in the city, we see more than 795,000 currently employed individuals that reside within Pflugerville's Labor Shed. All of these workers can be considered part of the available pool of labor from which employers in Pflugerville can draw.

PFLUGERVILLE EMPLOYMENT & LABOR SHED DYNAMICS, 2014



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS / US CENSUS BUREAU



PFLUGERVILLE OCCUPATION GROWTH

WHAT OCCUPATIONS ARE GROWING WITHIN PFLUGERVILLE?

Pflugerville created more than 2,800 jobs between 2011 and 2016, an increase of approximately 22%. These new jobs were primarily concentrated in a handful of industries and occupations.

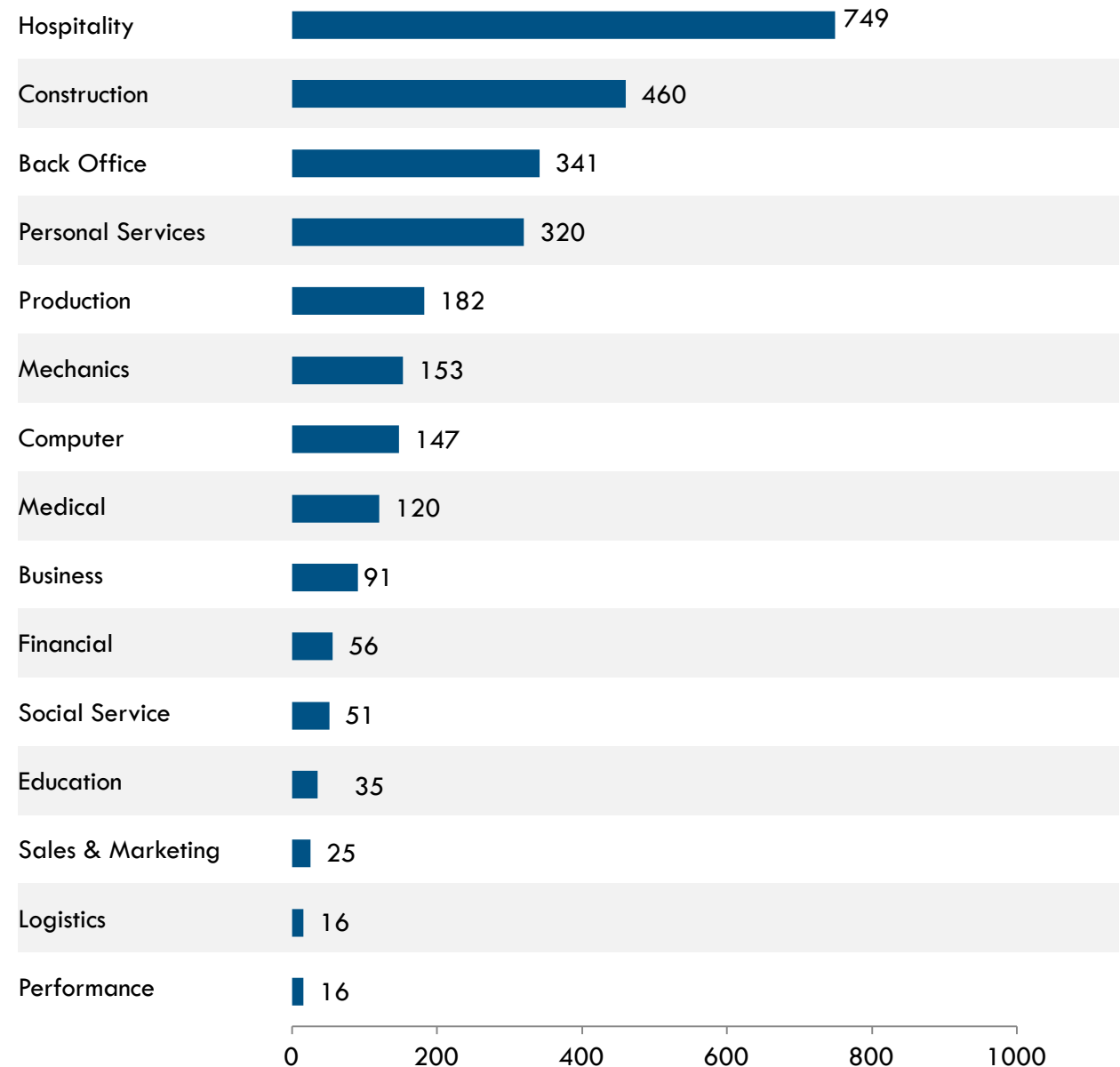
Over the past five years, four occupation clusters created 65% of all jobs in Pflugerville – Hospitality, Construction, Back Office, and Personal Services.

Creating nearly 750 new jobs, Pflugerville's Hospitality cluster experienced the strongest growth. These jobs are primarily in Food & Culinary with very recent growth in Hotels & Conventions. Construction also saw significant gains, with nearly 460 new jobs. The Personal Services cluster was responsible for 320 new jobs – primarily in Retail.

Back Office operations supported the creation of more than 340 jobs – many in Information, Office Administration, and Finance.

Production also saw strong growth – primarily in Assembly and Machinery. Growth in Computer occupations was in Software and Support.

PFLUGERVILLE EMPLOYMENT GROWTH BY LEADING OCCUPATIONS,
(OCCUPATIONS WITH EMPLOMENT INCREASES OF AT LEAST 15 JOBS), 2011 - 2016



SOURCE: AVALANCHE CONSULTING / EMSI



PFLUGERVILLE OCCUPATION GROWTH

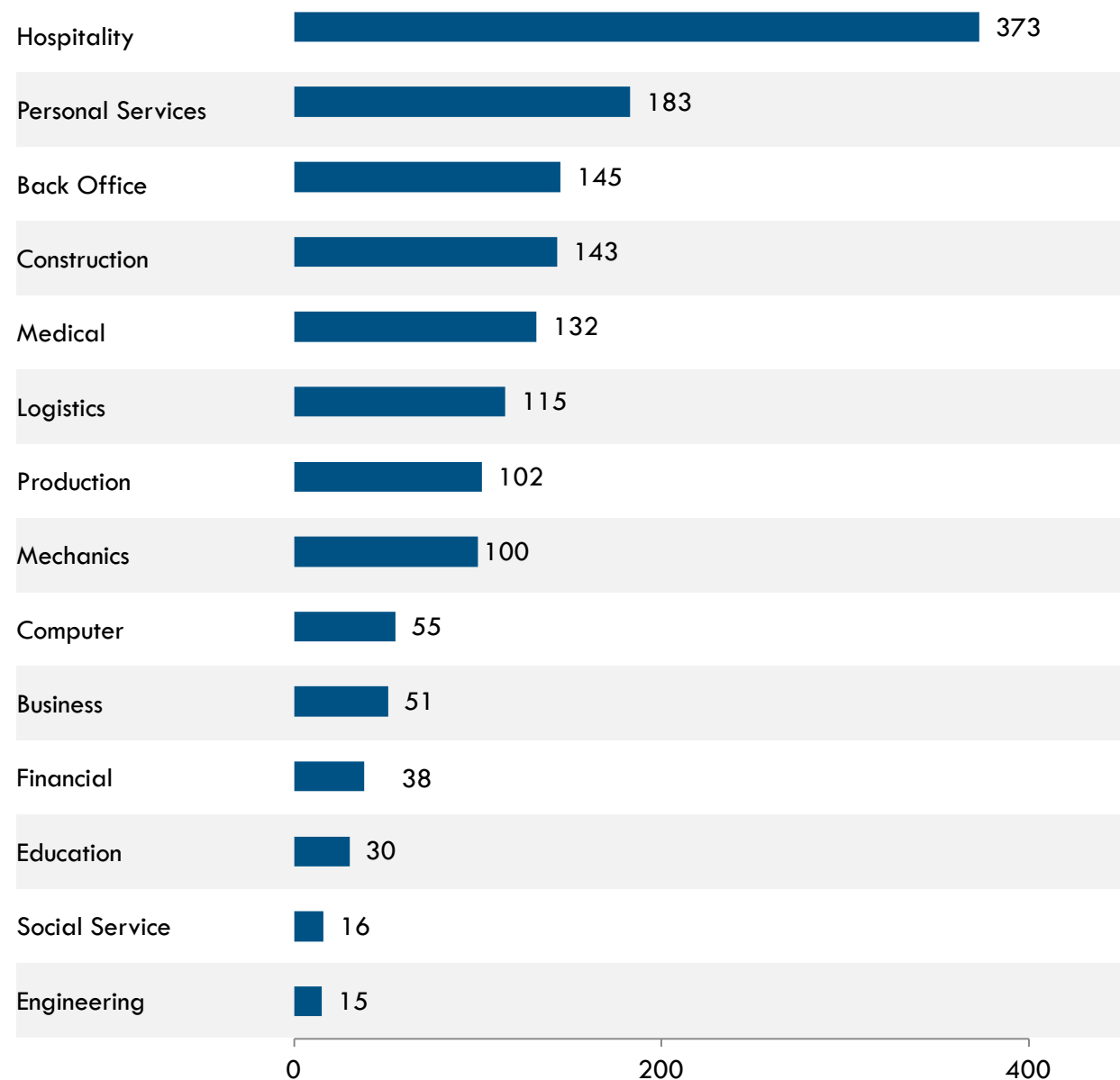
WHAT OCCUPATIONS ARE PROJECTED TO GROW WITHIN PFLUGERVILLE OVER THE NEXT 5 YEARS?

Existing projections show occupational growth in Pflugerville that generally matches recent growth in the city. Currently, base forecasts expect Hospitality to lead growth with nearly 375 new jobs in Pflugerville by 2021. The next highest forecast growth clusters are Personal Services (183 new jobs), Back Office (145), Construction (143).

Importantly, existing employment forecast for Pflugerville reflect both the past performance of the US economy as a whole and trends specific to a region. **These projections do not readily take into account economic development decisions that will emerge from this Strategy.** As a result, these forecast should be seen as a continuation of the status quo. One of the primary purposes of an economic development strategy is to improve the projected fortunes of a community, including increased employment growth within targeted industries.

Currently growing primary occupation clusters that will be important to Pflugerville target industries include Medical (132 forecast new jobs), Logistics (115), Production (102), Computer (55), Business (51), Financial (38), and Engineering (15).

PFLUGERVILLE PROJECTED EMPLOYMENT GROWTH BY LEADING OCCUPATIONS, (OCCUPATIONS WITH EMPLOYMENT INCREASES OF AT LEAST 15 JOBS), 2016 - 2021



SOURCE: AVALANCHE CONSULTING / EMSI



A SURPLUS OF LABOR

DOES PFLUGERVILLE HAVE ENOUGH WORKERS TO SUPPORT FUTURE EMPLOYMENT GROWTH?

Four major occupation clusters fueled a large share of recent and forecast employment growth in Pflugerville, but the city possesses a diverse labor force capable of supporting many different industries.

Pflugerville is home to approximately 15,000 more workers than jobs. When examining the Pflugerville Extraterritorial Jurisdiction (ETJ), this imbalance is even higher – with 20,000 more workers living in the ETJ than jobs existing locally.

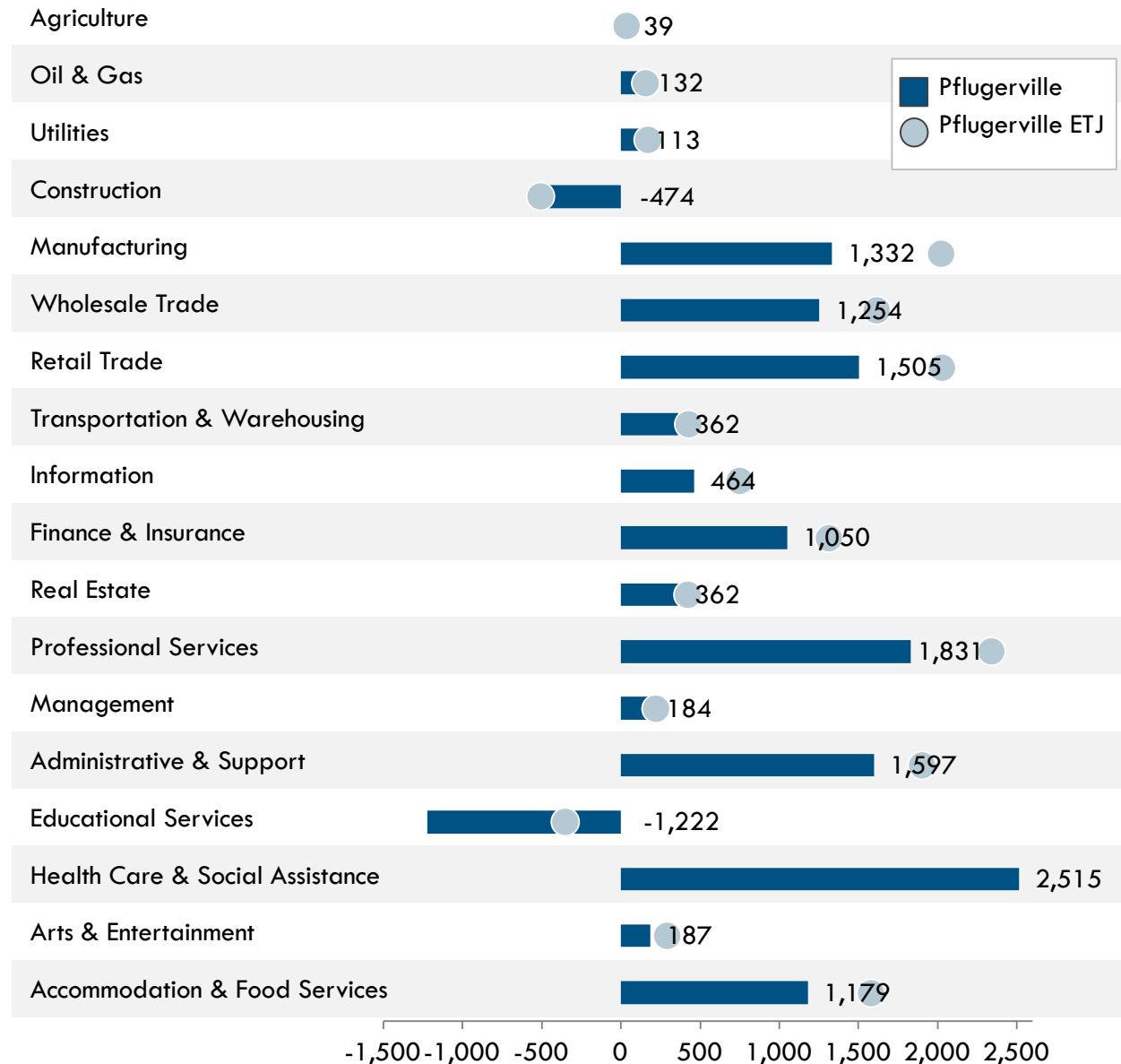
Because there are so many more workers than jobs in Pflugerville, the city has a surplus of available workers in nearly every industry. For example, more than 2,150 Pflugerville residents are employed in Professional Services. Within Pflugerville, however, there are only 300 Professional Services jobs.

Construction and Educational Services are the only two industries within Pflugerville that do not have a surplus of potential workers living locally.

Given the Austin region's traffic congestion, many Pflugerville residents currently employed elsewhere would likely prefer to worker closer to home if possible. As a result, Pflugerville possesses significant “flex” capacity that can support employment growth across virtually industry.



DIFFERENCE BETWEEN WORKERS LIVING WITHIN COMMUNITY & JOBS WITHIN COMMUNITY, 2014



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS / US CENSUS BUREAU

LABOR AGE COMPOSITION

WILL A WAVE OF RETIRING WORKERS LIMIT EMPLOYMENT GROWTH WITHIN PFLUGERVILLE?

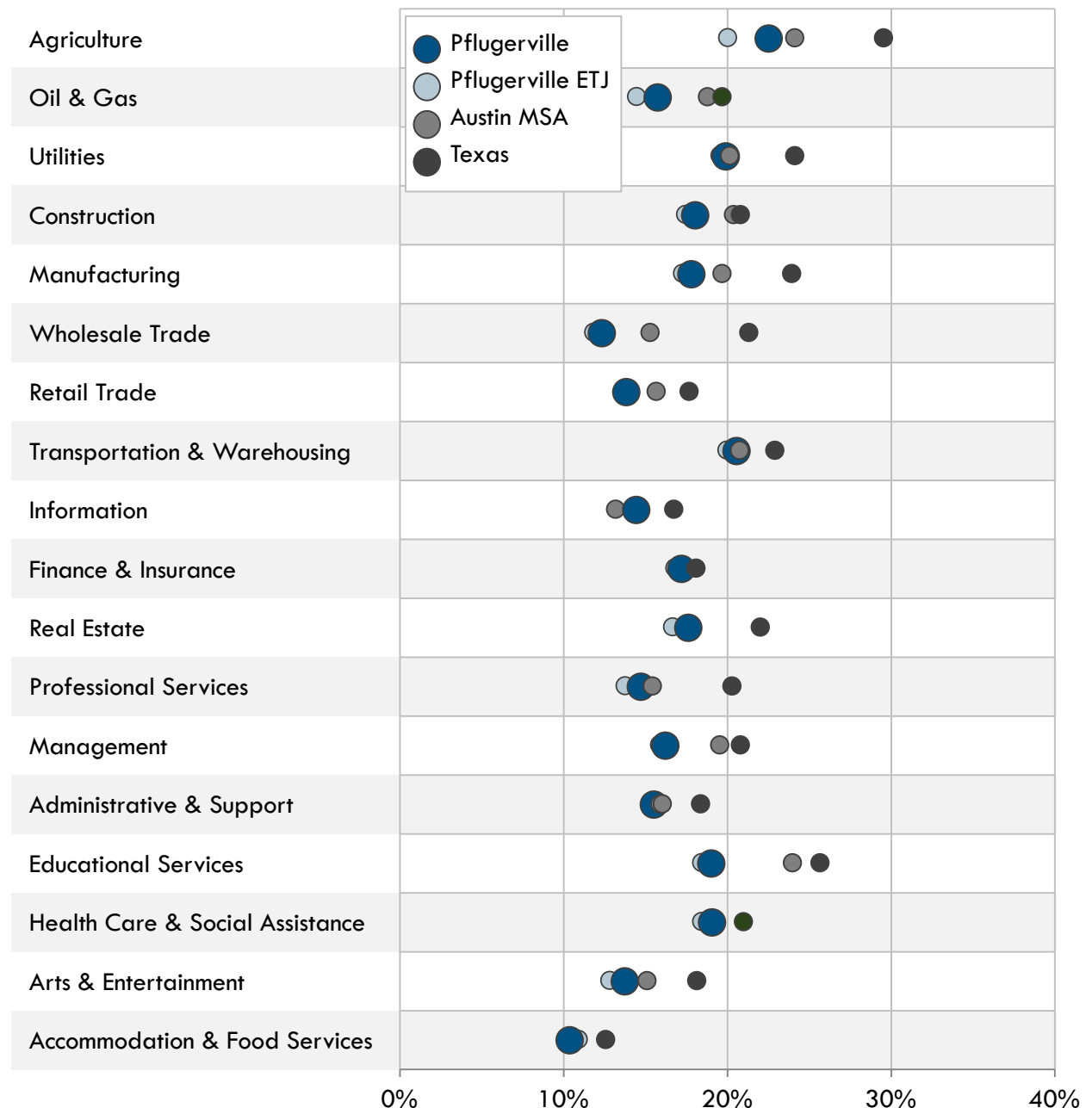
Over the next two decades, a large share of working Americans will retire, creating vacancies in existing positions alongside new job creation. In communities with older populations, this has the potential to create significant strain as the pool of available labor shrinks dramatically. Pflugerville thankfully benefits from a relatively young workforce.

Pflugerville is unlikely to experience a significant loss of workers due to retirement. More than 20% of the national workforce is age 55 or older – considered “approaching retirement,” which is generally between 65 and 67 in the US.

In Pflugerville, only 17% of the workforce is over 55 years old. More specifically, **Pflugerville’s workforce is younger than the US, TX, and Austin Metro averages in nearly every industry.**

The only exceptions are Information and Finance & Insurance. In these two industries, Pflugerville’s labor force is slightly older than the Austin region as a whole but still younger than the state average.

PERCENTAGE OF WORKERS AGE 55+, 2015



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS / US CENSUS BUREAU



REGIONAL EDUCATIONAL INSTITUTIONS

WHAT EDUCATIONAL INSTITUTIONS EXIST LOCALLY?

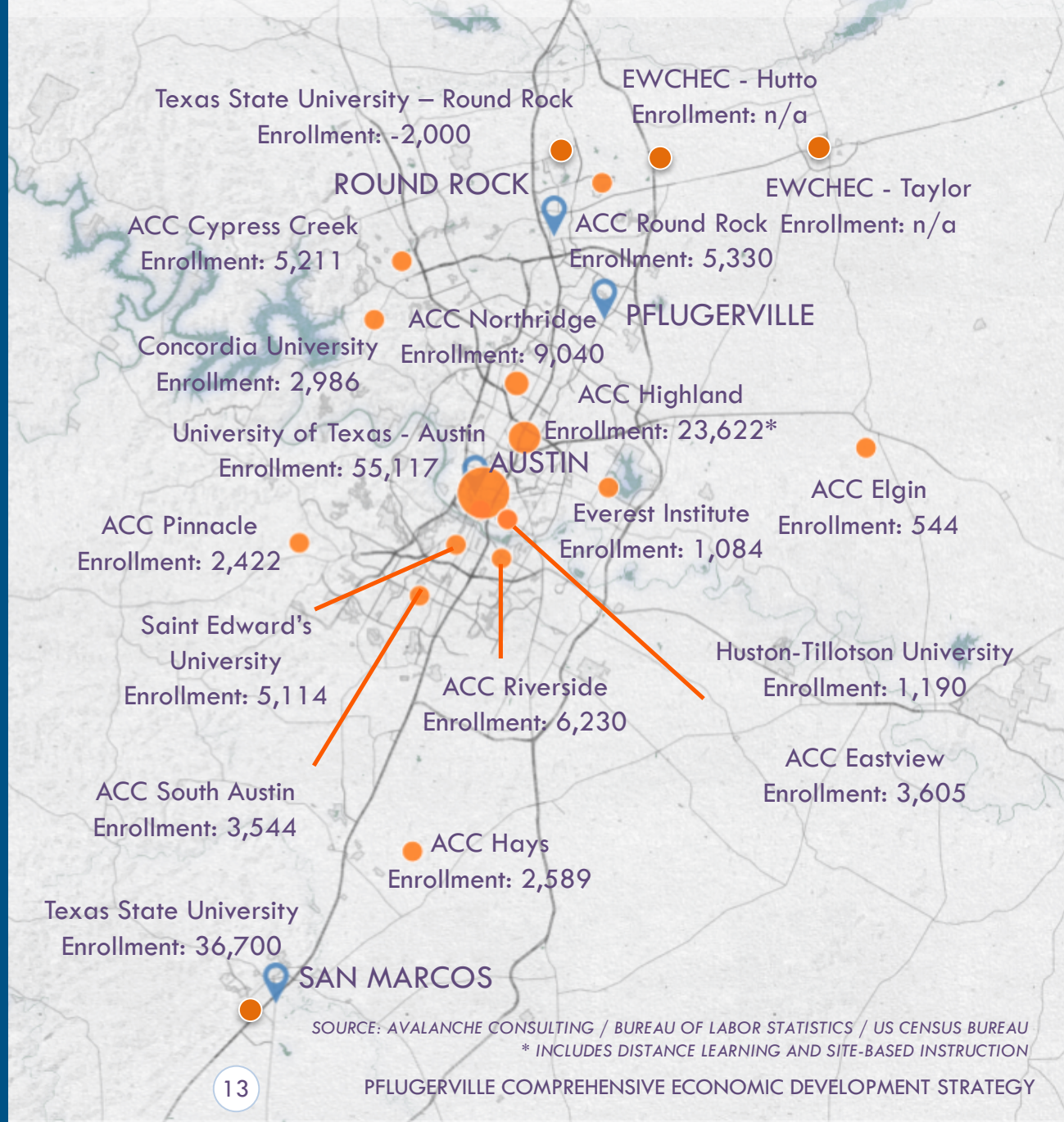
The Austin metropolitan region has many sources of talent production. **Collectively, enrollment at the region's largest colleges and universities totals nearly 200,000 students.**

This includes all students enrolled in public or non-profit colleges and universities with at least 1,000 students. The University of Texas, with more than 55,000 students, has the largest single campus. Austin Community College, with more than 66,000 students disbursed across 11 campuses, is the largest institution by enrollment within the region. Other leading colleges and universities in the region include Texas State University (36,700 students), Saint Edward's University (5,100) and Huston-Tillotson University (1,200).

The Austin region is also home to the East Williamson County Higher Education Center. Located approximately 10 miles northeast of Pflugerville, the facility offers programs of study from Temple College, Texas State Technical College, and Texas A&M University Central Texas.



GREATER AUSTIN COLLEGES & UNIVERSITIES BY ENROLLMENT (INCLUDES PUBLIC AND NON-PROFIT SCHOOLS WITH AT LEAST 1,000 STUDENTS), 2015



REGIONAL TALENT PRODUCTION

IS THE REGION PRODUCING TALENT LOCALLY?

The Austin metro is one of the most talent rich regions in the US. Each year, regional colleges and universities award more than 27,000 post-secondary degrees in a wide array of disciplines.

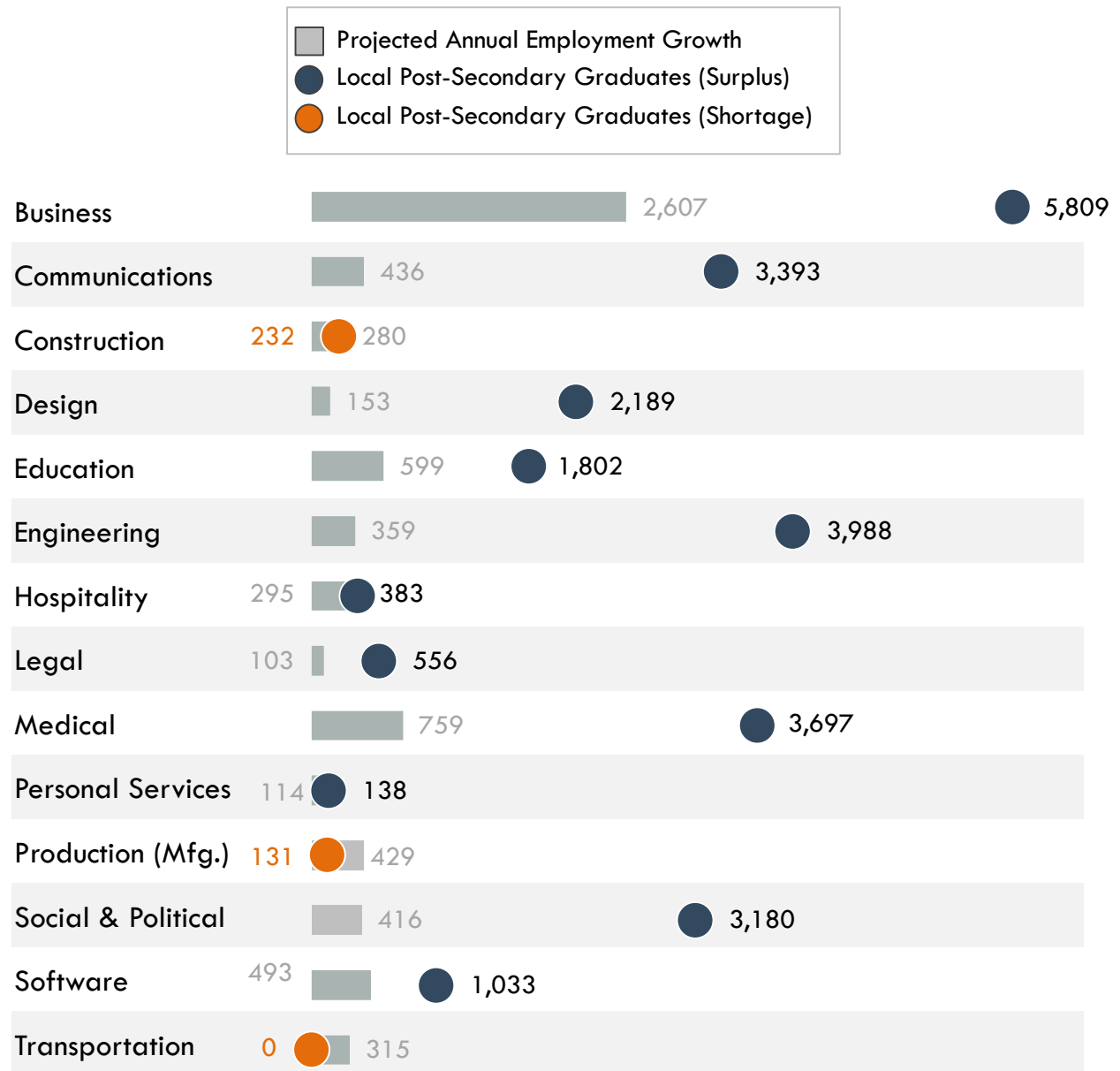
Over the next decade, local talent production is projected to match the needs of most industries. Many occupation clusters will receive a **surplus of qualified college graduates in the coming years** – including Business, Communications, Engineering, and Medical.

Within the Austin region, only three occupation clusters are forecast to have a short supply of local graduates. The region currently under supplies graduates in Construction, Production (Manufacturing), and Transportation. Many jobs in these three clusters, however, do not require post-secondary education.

Nonetheless, because these occupation clusters face the shortest supply within the Austin region, employers in Pflugerville may face challenges finding qualified employees in Transportation, Construction, and Manufacturing fields. It will be especially important to connect local employers to educational programs that do exist in these areas in Pflugerville ISD and at EWCHEC, ACC, and other institutions.



PROJECTED JOB CREATION BY OCCUPATION CLUSTER IN THE AUSTIN METRO VERSUS LOCAL POST-SECONDARY GRADUATES BY FIELD, 2016 - 2026



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS / US CENSUS BUREAU

WAGE COMPETITION

DOES PFLUGERVILLE OFFER COMPETITIVE WAGES TO ATTRACT TALENT FROM ACROSS THE REGION?

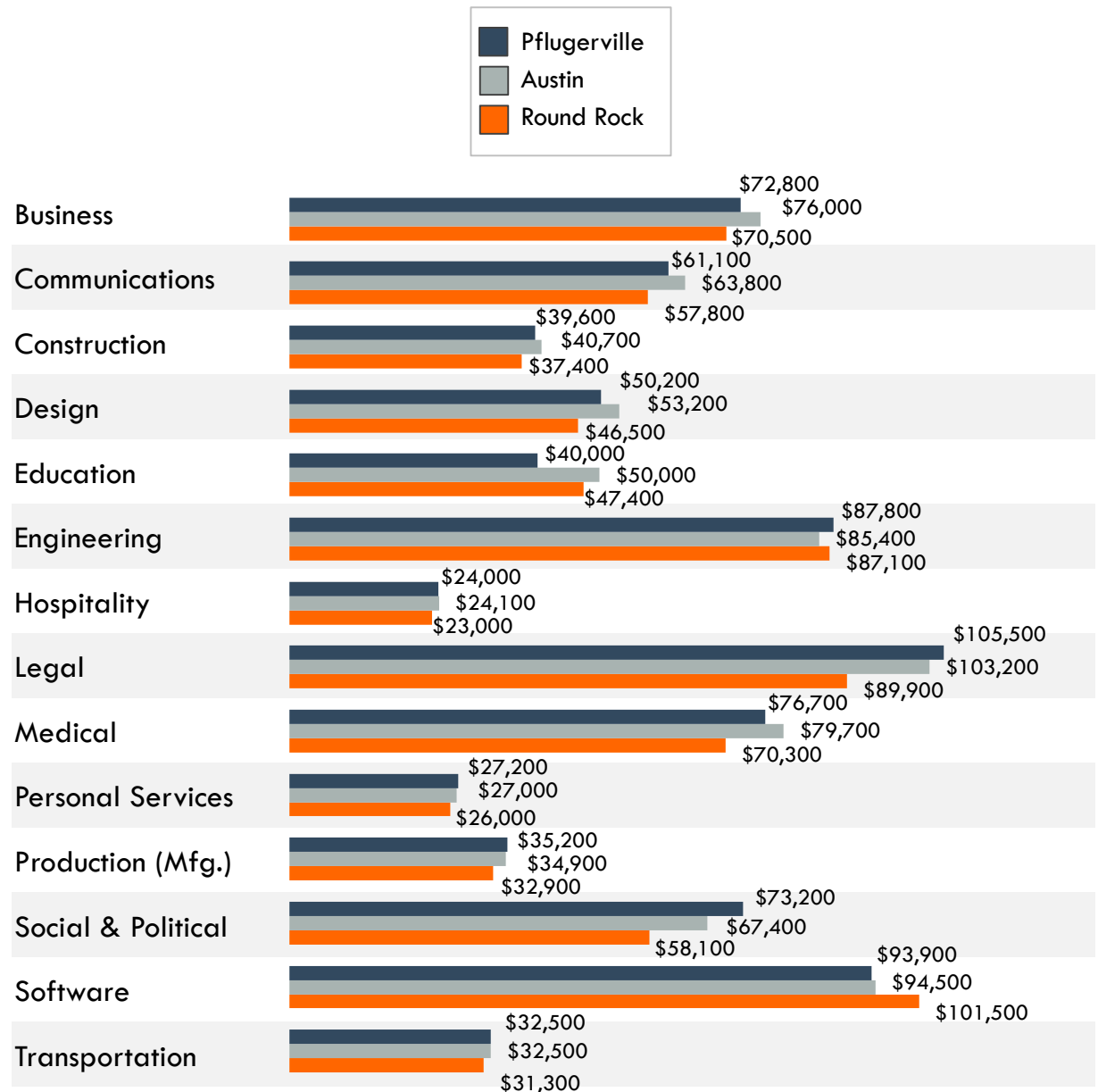
Employers in Pflugerville have the potential to draw workers from nearly 800,000 individuals in the labor shed. One can ask whether those employers will be able to lure those workers away from existing jobs or convince them to relocate or commute to Pflugerville.

One of the factors determining whether Pflugerville employers can hire workers is the wage levels being offered to prospective employees. If Pflugerville wages are competitive with other cities in the Austin region, employers should be able to find and hire the workers they require.

Thankfully, an examination of the relative salaries in the region reveals that Pflugerville employers offer competitive wages for nearly all occupations. Most occupations in Pflugerville offer average salaries near the average for the Austin Metro – the one standout exception is the Education occupation cluster.

Employees in the Education occupation cluster in Pflugerville earn on average \$40,000 a year compared to \$50,000 in Austin and \$47,700 in Round Rock. This statistic is reflected in anecdotal stories from interviews about the challenges retaining skilled teachers in Pflugerville ISD due to lack of wage competitiveness.

RELATIVE REGIONAL AVERAGE ANNUAL SALARY BY OCCUPATION CLUSTER, 2016



SOURCE: AVALANCHE CONSULTING / EMSI



REGIONAL TALENT PRODUCTION

HOW DOES AUSTIN'S TALENT & ATTRACTION COMPARE TO OTHER REGIONS?

In the long-term, local talent production is the most sustainable means of maintaining a workforce with the skills demanded by employers. By giving your children skills that allow them to find jobs in your community, both employers and residents benefit.

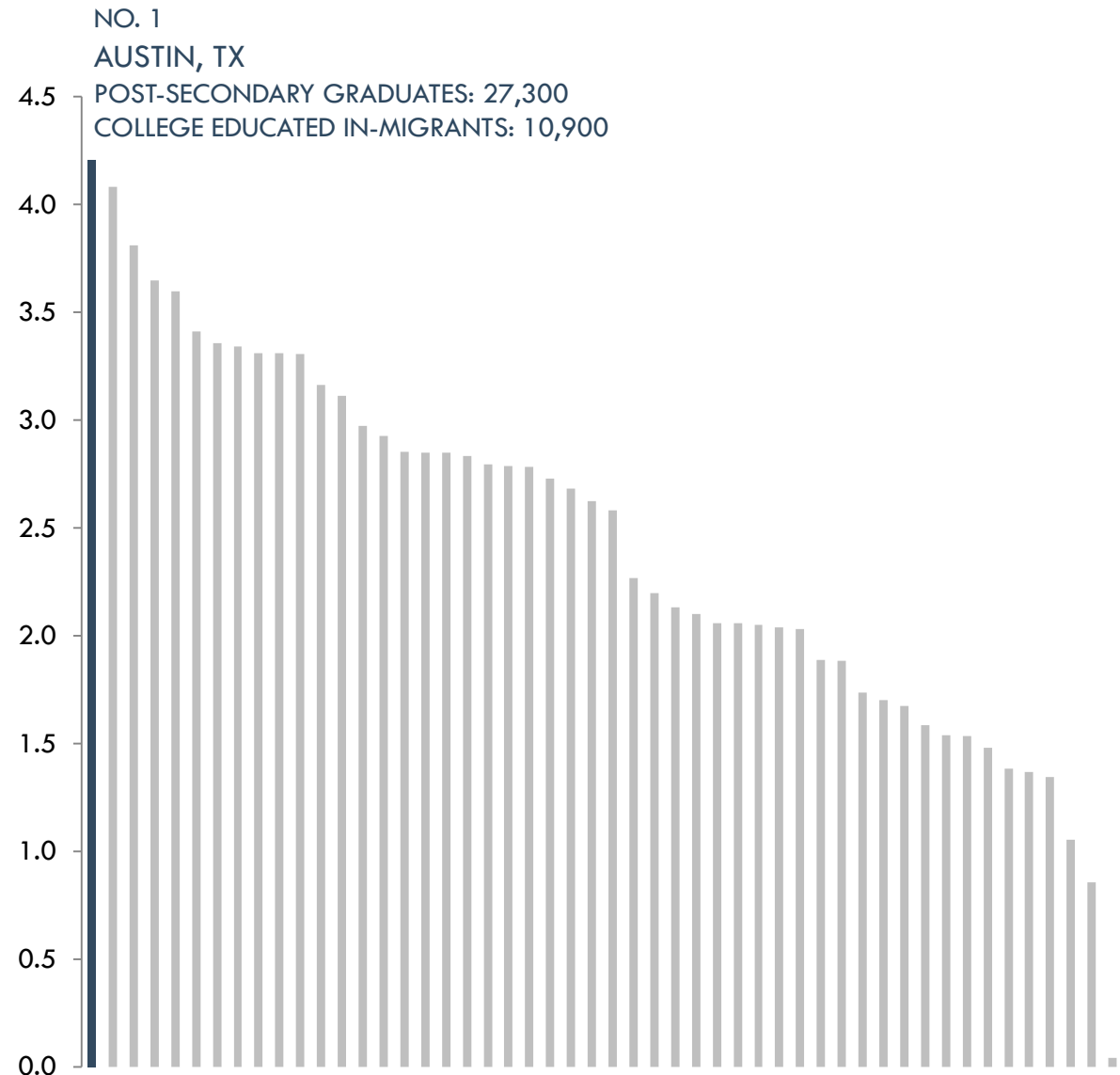
When local supply does not keep up with the demand for workers, attracting talented individuals to a community is the other primary way of filling job openings.

The **Austin metro is one of the most successful regions in the US at attracting outside talent.** On a net basis, in 2015 the Austin region gained nearly 11,000 college-educated individuals. This is in addition to the more than 27,000 individuals graduating from post-secondary institutions in the region.

In 2015, local talent production and attraction represented 4.2 individuals for every 100 jobs. Among the largest 50 metro areas in the US, no region created more talent on a per capita basis than Austin.

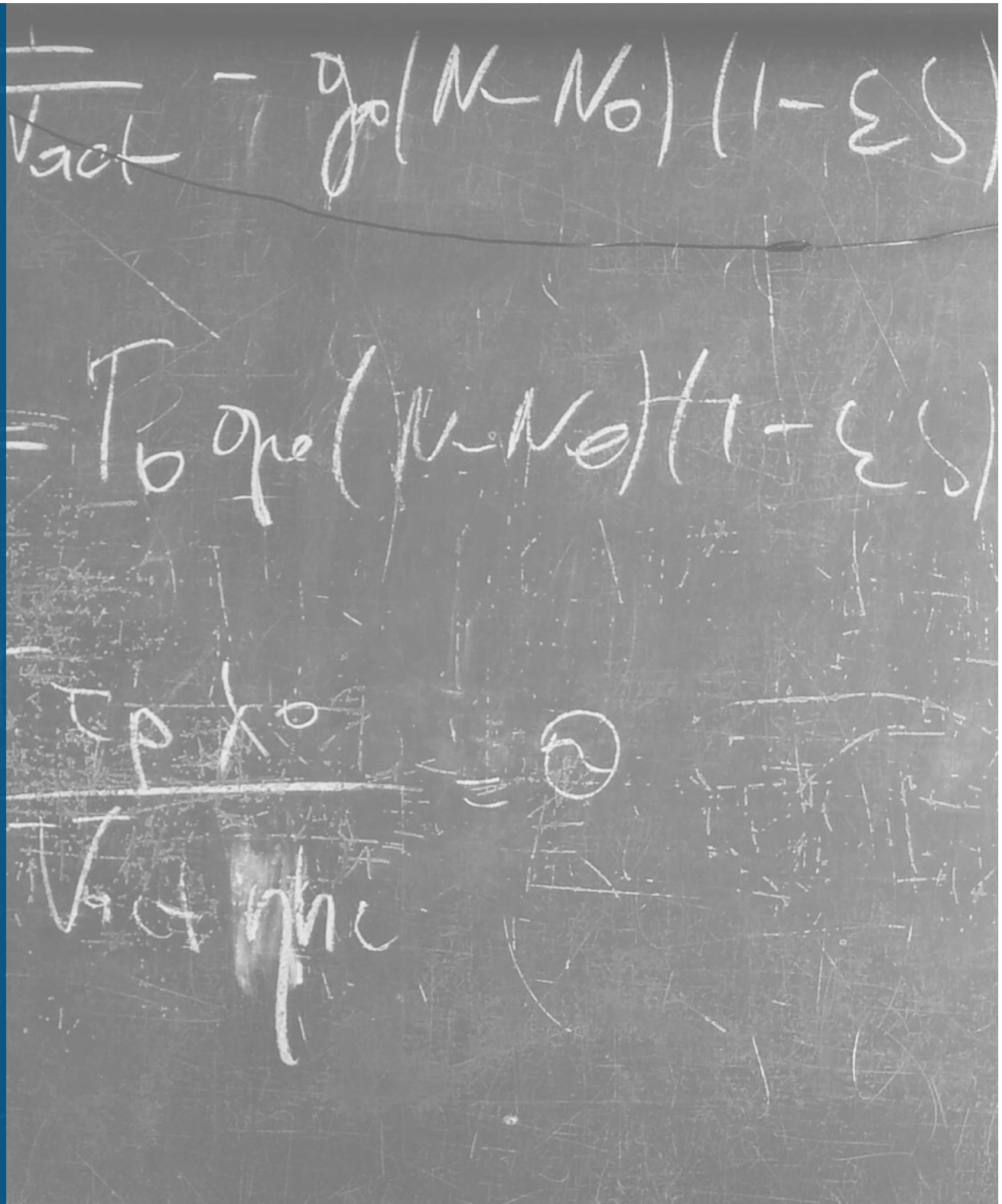


ANNUAL TALENT INFLUX OF LARGEST 50 METROS (LOCAL POST-SECONDARY GRADUATES & COLLEGED EDUCATED MIGRANTS PER 100 JOBS), 2015



RELEVANT PROGRAM INVENTORY

The following pages highlight programs at the main education institutions serving Pflugerville. Each institution offers many fields of study, but for the purposes of this strategy, we have only highlighted those were the greatest relevance to existing employers and target industry businesses in Pflugerville.



PFLUGERVILLE INDEPENDENT SCHOOL DISTRICT (PFISD)



The Pflugerville Independent School District (PISD) has grown significantly in the 114 years since its founding – expanding to serve all of Pflugerville and portions of five surrounding communities. Rapid population growth in recent years has led to the construction of numerous new schools. Despite the strain associated with rapid growth in facilities and students, PISD continues to outperform expectations – sending more students to college, preparing them with STEM and technical skills, developing strategic partnerships throughout the region, and providing a foundational asset for the entire community.

PISD's College & Career Readiness Department and Career & Technical Education tracts work to prepare students for the modern economy and offer a range of programs relevant to local economic development, including:

- Health Science
- Engineering
- Biomedical Science
- Computer Science
- Computer Maintenance & Networking
- Information Technology
- Banking & finance
- Business Management & Marketing
- Video Game Design
- Welding

More information is available at <http://www.pfisd.net/Page/317>



AUSTIN COMMUNITY COLLEGE (ACC)



Austin Community College has campuses stretching across the Austin metro, from Oak Hill and Kyle in the south to Cedar Park and Round Rock in the north. The Round Rock campus opened in 2010. Pflugerville is not currently located within an ACC district, so Pflugerville residents would pay out-of-district tuition to attend. ACC programs nonetheless remain an important and close proximity resource for employers and students.

A sample of programs in Round Rock relevant to Pflugerville's economic development include:

- Accounting
- Allied Health Science
- Automotive Technology and Outdoor Powered Equipment
- Biology
- Biotechnology
- Business, Government, and Technical Communications
- Computer Information Technology
- Computer Science
- Economics
- Electronics and Advanced Technologies
- Mathematics
- Medical Lab Technology
- Nursing
- Physics
- Surgical Technology
- Welding Technology

More information is available at:

<http://www.austincc.edu/locations/campuses/round-rock-campus>



EAST WILLIAMSON COUNTY HIGHER EDUCATION CENTER (EWCHEC)



The East Williamson County Higher Education Center (EWCHEC) is a teaching center with locations in Hutto and Taylor. Courses at EWCHEC are taught in collaboration between Temple College, Texas State Technical College Waco, and Texas A&M University–Central Texas. This partnership provides numerous college degrees and workforce training programs at an affordable tuition for both in and out of district students.

A sample of programs relevant to Pflugerville’s economic development include:

From Temple:

- Biotechnology
- Computer-Aided Design
- Computer Information Systems
- EMS Professions
- Geographic Information Systems
- Health Professions
- Math & Science
- Nursing

From TSTC:

- Computer Tech Support
- Cyber Security
- Database Administration Programming
- Industrial Electrical Systems
- Industrial Maintenance
- Precision Machining Technology
- Welding Technology

From Texas A&M – Central Texas:

- Business Management/Business Administration
- Marketing

More information is available at <http://ewchec.net>

UNIVERSITY OF TEXAS – AUSTIN



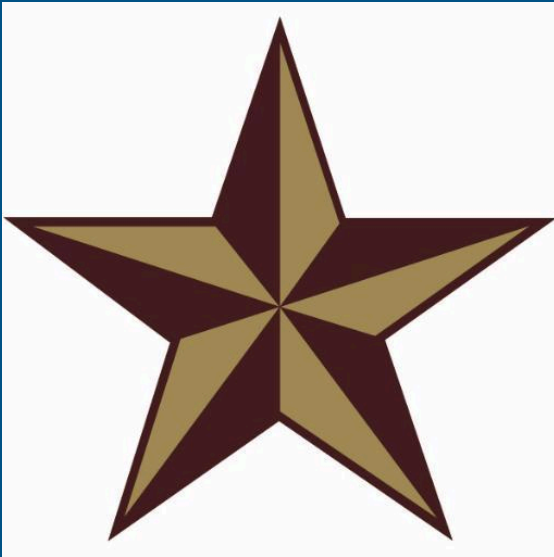
The University of Texas at Austin is public research university with over 50,000 enrolled students at its campus in central Austin. The university contains eighteen colleges & schools, with numerous programs that have direct application to Pflugerville's target industries:

- Aerospace Engineering and Engineering Mechanics
- Biomedical Engineering
- Business Administration
- Chemistry
- Computer Science
- Computational Engineering & Sciences
- Electrical and Computer Engineering
- Information Sciences & Security
- Integrative Biology
- Materials Science and Engineering
- Mathematics
- Mechanical Engineering
- Molecular Biosciences
- Operations Research and Industrial Engineering
- Physics
- Statistics and Data Sciences

<http://www.utexas.edu/academics/areas-of-study>



TEXAS STATE UNIVERSITY – ROUND ROCK CAMPUS



The Texas State University Round Rock Campus was opened in 2005 and offers majors for junior- and senior-level undergraduates and graduate students. The campus was started after the Avery family donated 101 acres to the Round Rock Higher Education Center (RRHEC) to build a permanent campus. The campus consists of the 125,000sf Avery Building, with its classrooms, labs, offices and library. The 80,000sf St. David's School of Nursing was opened in 2010. A new Health Professions Building broke ground in 2016.

A sample of programs relevant to Pflugerville's economic development include:

Bachelor's level:

- Applied Arts & Sciences (BAAS)
- Computer Science (BA/BS)
- Management (BBA)
- Mass Communication (BA)
- Nursing (BSN)

Master's level:

- Business Administration (MBA)
- Computer Science (MA/MS)
- Public Administration (MPA)
- Software Engineering (MS)

Certificates are available in Healthcare Administration, Teacher Education, and Certified Public Manager.

<http://www.rrc.txstate.edu/about/programs.html>

TEXAS A&M HEALTH SCIENCE CENTER COLLEGE OF MEDICINE



Texas A&M University operates a medical school campus in Round Rock to direct the students' rotations in Emergency Medicine, Family Medicine, Internal Medicine, Obstetrics/Gynecology, Pediatrics, Psychiatry and Surgery at sites across Williamson County. Additional community physicians serve as clerkship faculty in these and other clinical areas.

The Round Rock campus was opened in 2009 through a \$9 million appropriation by the state legislature. The Avery family donated 15 acres and the purchase of an additional 35 acres to form a 50-acre campus.

The 134,000-square-foot facility will be used for clinical teaching and includes a simulation center equipped with computer-programmed mannequins, student life and student service support, administrative offices, and clinical research space for the Texas A&M Health Science Center/Scott & White Diabetes Institute. The first floor lecture hall is named the “St. David’s Foundation Lecture Hall” in honor of a St. David’s Foundation \$250,000 pledge to support the campus.

Programs are available in:

- Emergency Medicine
- Family Medicine
- Internal Medicine
- Obstetrics & Gynecology
- Pediatrics
- Psychiatry
- Surgery

<https://medicine.tamhsc.edu/campuses/rr/>



STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
M&C-1		Ensure that there are open lines of communication among PCDC, the CITY, PFISD, the CHAMBER, Pflugerville Pforward, and other organizations whose activities impact Pflugerville’s economic development opportunities.							
Ongoing	2018 - Q1	A	Participate in the CHAMBER roundtable meetings between the CITY, PFISD, PCDC, ESD2 to ensure consistent communication is taking place.	CHAMBER	PCDC,CITY, ESD2	2017	2020	2018-Q1	62000
Ongoing	2018 - Q1	B	Adopt MOUs between entities as needed to streamline coordination of economic development activities.	PCDC, CITY	CHAMBER, PfISD, other organizations who impact economic development	2017	2020	2018-Q1	62000,61130
Ongoing	2018 - Q1	C	Hold quarterly meetings between PCDC and the CITY to review implementation tables to ensure goals are aligned, tasks assigned, and efforts are not duplicated. Include debrief sessions on progress and new developments.	PCDC, CITY	n/a	2017	2020	2018-Q1	62000
I-1		Continue long-term planning and preparation for growth – investing in roads, securing water, and protecting the natural environment.							
Ongoing	2017-Q4	A	Work with the CITY to develop ways the PCDC can strategically revise their media mix for use with real estate and site selectors to keep them posted on the new developments.	PCDC, CITY	n/a	2017	2020	2017-Q4	62000,64210, 64230,64200
NA		B	Support the continuation of currently planned parks and trails, protection of sensitive natural resources, and maintenance of water quality as the city expands. Conduct water and wastewater utility rate studies to ensure adequate revenues for operations and capital improvements.	CITY	CAMPO, TCEQ	2017	2020	NA	NA
NA		C	Continue working with commercial and residential customers about best practices for water conservation. Actively participate in state-level advocacy for water conservation programs and funding.	CITY	Utilities Companies	2017	2020	NA	NA
Ongoing	2018- Q1	D	Consider a Transit Development Plan that coordinates with CAMPO, TXDOT, Travis County, and adjacent jurisdictions regarding transit and facilities. Continue to implement the existing Master Transportation Plan and identify and apply for private and outside funds for construction, expansion, and maintenance or the transportation network.	CITY	PCDC, CAMPO, TXDOT, TCEQ	2017	2020	2019-Q1	NA
NA		E	Continue to encourage private employers and citizens to assist with traffic reduction and environmental conservation efforts. Provide educational resources to improve mobility and protect the environment. Work with the PCDC to introduce the City water conservation program to new recruitment projects prior to development.	CITY	Private Partners, CAMPO, TCEQ	2017	2020	NA	NA
NA		F	Continue being involved in bold, long-term discussions regarding regional and statewide transit infrastructure networks.	CITY	CAMPO, TXDOT, TCEQ	2017	2020	NA	NA

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
BC-1 Strengthen and expand programs that address the needs of Pflugerville's existing businesses, including an expanded business development and retention program.									
Ongoing	2017-Q4	A	Strengthen the Business Pfirst program within PCDC by scheduling two company visits a week that encourage free discussion and provide opportunities to learn about needs, successes and to respond to concerns.	PCDC	CHAMBER	2017	2017	2017-Q4	2017
Complete	2017-Q4	A	Provide a shared Resource Partner Directory of information for businesses on the PCDC website. Inform local businesses about support resources available and provide examples of ways that PCDC, the CITY and CHAMBER address local businesses needs.	PCDC	CHAMBER	2017	2018	2017-Q4	62000, 65000, 64170, 64200
Complete	2018 - Q1	B	Require formal training for PCDC staff and CHAMBER staff who conduct confidential surveys, questionnaires and use the BRE information management system.	PCDC	CHAMBER	2017	2018	2018-Q2	62000, 61120
Complete	2018 - Q1	C	Require that all team members involved in BR&E visits maintain confidentiality and provide reports through the PCDC information management system. Added NDA	PCDC	CHAMBER	2017	20108	2018-Q2	62000, 61121, 65200
Complete	2018 - Q1	D	Formalize the BusinessPfirst program (with Chamber) by scheduling annual meetings with Pflugerville businesses to provide updates about ongoing community activities, programs, and identify businesses for PCDC that require follow-up, confidential visits. Schedule a minimum of two company visits a week with trained PCDC-CHAMBER participants.	PCDC	CHAMBER	2017	2018		65000, 62000
Ongoing	2018 - Q1	E	Inform local businesses about support resources available and provide examples of ways that PCDC, the CITY and CHAMBER address local businesses needs. Board/Chamber joint meeting.	PCDC	CHAMBER	2017	2017	2018 - Q1	2017
Ongoing	2018 - Q1	E	Support the CHAMBER's continued efforts to develop events and programs that offer educational and networking opportunities to local business people and entrepreneurs.	PCDC	CHAMBER	2017	2018	2018 - Q1	62000, 65400, 64090
M&C -2 Build awareness of Pflugerville's assets and points of pride among residents and businesses.									
Complete	2018-Q3	A	Develop a toolkit of materials and messages for Steering Committee members and other stakeholders (EcoDev Squad)	PCDC	EcoDev Squad, media	2017	2020	2018-Q3	62000, 64170, 64200, 64040
Complete	2017-Q3	1	Post this Implementation Plan, Community Assessment, Target Industry Report, and Workforce Analysis online.	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000, 64200
Complete	2017-Q3	2	Post progress reports online (e.g., every 6-12 months) and send the link to EcoDev Squad #ConnectPF	PCDC	EcoDev Squad, media	2017	2020	2018-Q3	62000
Complete	2017-Q3	3	Re-convene Steering Committee members and share an executive summary, talking points, and PowerPoint presentation with them.	PCDC	EcoDev Squad, media	2017	2020	2017-Q3	62000
Complete	2017-Q3	4	Charge Steering Committee members with distributing information on the Strategic Plan within their own networks. (e.g. EcoDev Squad)	PCDC	EcoDev Squad, media	2017	2020	2017-Q3	62000
Complete	2017-Q3	5	Develop a hashtag related to this Strategic Plan and encourage Steering Committee members to use it in social media posts (e.g., #ConnectPF)	PCDC	EcoDev Squad, media	2017	2020	2017-Q3; 2017-Q4	62000
Complete	2017-Q3	B	Host a launch event (in-person "summit," webinar, or combo) that shares the Strategic Plan with the larger community.	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000
Complete	2017-Q3	1	Invite local media or stage a press conference as part of the launch event	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000,
Complete	2017-Q3	2	Provide an overview of the strategic plan process and showcase the broad diversity of stakeholders participating	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000
Complete	2017-Q3	3	Have sign-up forms for attendees to receive Strategic Plan updates and become EcoDev Squad	PCDC	EcoDev Squad, media	2017	2020	2018-Q2	62000

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Complete	2017-Q3	4	Unveil the hashtag #ConnectPF and give tips for using the hashtag in social media.	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000
Ongoing	2017-Q3	5	Consider an annual event to celebrate progress.	PCDC	EcoDev Squad, media	2017	2020	2017-Q3	62000, 64060
Ongoing	2017-Q4	C	Invest in a longer-term internal communications and branding campaign.	PCDC, CITY	EcoDev Squad, media	2017	2020	2019-Q1	62000, 64170, 64200, 64040, 64225
Complete	2017-Q4	1	Engage a professional agency to develop a unified brand strategy for Pflugerville for use by the PCDC and other partners involved in economic development.	PCDC	EcoDev Squad, media	2017	2020	2018-Q4	62000, 64170, 64200, 64040, 64225
Complete	2017-Q4	2	Develop a concise expression of Pflugerville's brand essence, descriptor words and suggested images, and creative execution (e.g, logo refresh and design standards if needed)	PCDC	EcoDev Squad, media	2017	2020	2018-Q3	62000, 64170, 64200, 64040, 64226

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Ongoing	2017-Q4	3	Develop a strategy for building brand awareness among residents and external audiences (e.g., communications channel plan, suggested marketing tools, public relations).	PCDC	EcoDev Squad, media	2017	2020	2019-Q1	62000, 64170, 64200, 64040, 64227
Complete	2017-Q4	4	Provide the agency with the reports that comprise this Strategic Plan as background brand research and content.	PCDC	EcoDev Squad, media	2017	2020	2018-Q3	62000, 64170, 64200, 64040, 64228
Complete	2017-Q4	5	If needed, place an agency on retainer to assist with implementing the brand strategy.	PCDC	EcoDev Squad, media	2017	2020	2018-Q3	62000, 64170, 64200, 64040, 64229
Complete	2017-Q4	6	Launch the brand internally first and rally EcoDev Squad, residents, and local businesses.	PCDC	EcoDev Squad, media	2017	2020	2018-Q4	62000, 64170, 64200, 64040, 64230
Ongoing	2017-Q4	D	Keep area media informed about economic development progress.	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000, 64170, 64200, 64040, 64231
Ongoing	2017-Q4	1	Distribute press releases on ED announcements or progress related to this strategic plan and engage Steering Committee members to contribute editorials to the local paper championing Pflugerville's economic development efforts.	PCDC	EcoDev Squad, media	2017	2020	2017-Q4	62000, 64170, 64200, 64040, 64232
M&C-3			Engage in targeted marketing outreach to build relationships with external audiences such as target industries, site consultants, and other influencers.						
Ongoing	2017-Q4	A	Attend select events at which PCDC can build relationships with decision makers at target industry companies, site selectors, and real estate professionals.	PCDC	OA, Team Texas, Texas One	2017	2020	2017-Q3; 2017-Q4	62000, 64080, 64090, 64100
Ongoing	2017-Q4	1	Continue to attend high-ROI conferences such as IAMC, SelectUSA, Site Selectors Guild. Seek out additional opportunities to attend events with regional or state partners that are related to target industries and plan social and media outreach to coincide with the events.	PCDC	OA, Team Texas, Texas One	2017	2020	2017-Q3; 2017-Q4	62000, 64080, 64090, 64100
Ongoing	2018 - Q1	2	Participate in mission trips to target geographies and schedule one-on-one meetings with industry executives, brokers, and developers in each location. Ask local executives in target industries to facilitate introductions with their peers and suppliers.	PCDC	OA, Team Texas, Texas One	2017	2020	2018 - Q1	62000, 64080, 64090, 64100, 65000
Ongoing	2017-Q4	B	Participate in familiarization tours and inbound events with OA.	PCDC	OA, Team Texas, Texas One	2017	2020	2017-Q3; 2017-Q4	62000, 64080, 64090, 64100, 64130,
Ongoing	2018-Q1	1	Schedule one-on-one meetings to showcase the community to target audiences.	PCDC	OA, Team Texas, Texas One	2017	2020	2018-Q1	62000, 65000
Ongoing	2018 - Q2	C	Have an active presence at Austin-area conferences that draw target audience representatives and try to participate in key target industry and real estate events.	PCDC	OA, Team Texas, Texas One	2017	2020	2018 - Q2	62000, 64090, 64080, 64100
Ongoing	2017-Q4	D	Continue to develop an annual marketing calendar for PCDC based on target industries and specific geographies.	PCDC	OA, Team Texas, Texas One	2017	2020	2017-Q4	62000, 64040, 64060, 64080, 64170
Ongoing	2018-Q3	E	Develop social media campaigns for each of Pflugerville's target industries.	PCDC	OA, Team Texas, Texas One	2017	2020	2019 - Q1	62000, 64200
Ongoing	2018-Q4	1	Continue to actively post and engage with target industry leaders, journalists, and influencers on channels like Twitter and LinkedIn.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64210
Ongoing	2018-Q5	2	Develop a monthly social media calendar that coordinates with PCDC's other marketing and business development activities.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64210
Ongoing	2018-Q6	3	Coordinate PCDC's social media calendar with other partners' calendars to amplify Pflugerville's voice. For example, Team Texas has six, month-long social media campaigns scheduled in 2017, (e.g., February is Logistics, Manufacturing & Distribution; March is Aviation, Aerospace & Corporate Headquarters). Build on their messaging by re-tweeting, replying to, and using the #TeamTexas #ConnectPF for Pflugerville-specific messages.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64210
Complete	2018-Q2	4	Ensure that Pflugerville is featured in the Team Texas #GoTeamTexas campaign.	PCDC	OA, Team Texas, Texas One	2017	2020	2018-Q3	62000, 64200, 64210

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Ongoing	2018-Q2	5	Incorporate photos and videos into social media posts.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64230, 64210

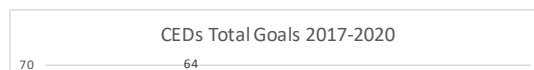
STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Complete	2017-Q4	F	Invest in robust, sophisticated marketing tools: websites, social media, digital media relations, video, polished presentations, and digital advertising (to a limited degree).	PCDC	OA, Team Texas, Texas One	2017	2020	2018 Q4	62000, 64200, 64225
Completed	2017-Q4	1	Improve site selection tools and update website content related to target audiences. (See the Target Industry report for specific sales messages for each industry cluster.) Showcase testimonials of PF businesses in target industries.	PCDC	OA, Team Texas, Texas One	2017	2020	2018 Q4	62000, 64200, 64170, 64225
Completed	2017-Q4	2	Establish website pages for Retail and Business Pfirst Program.	PCDC	OA, Team Texas, Texas One	2017	2020	2018 Q4	62000, 64200, 65400, 65200
Ongoing	2017-Q4	3	Continue to invest in multimedia tools, such as the recently produced Workforce and Retail Opportunities videos.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64230, 64225
Completed	2017-Q4	4	Invest in original photography that captures real scenes, businesses and people in Pflugerville.	PCDC	OA, Team Texas, Texas One	2017	2020	2018 Q4	62000, 64200, 64230, 64225
Complete	2018 - Q1	5	Consider limiting printed materials to a one-page brochure for each target industry cluster.	PCDC	OA, Team Texas, Texas One	2017	2020	2018-Q3	62000, 64170, 64225
Ongoing	2018 - Q1	6	Limit print advertising to Site Selection Magazine and other nationwide media publications. Focus on digital advertising in industry-related publications (Area Development's newsletter, business journals)where a high concentration of target industry companies and/or site consultants are located.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64060, 64225, 64090
Ongoing	2018-Q1	G	Integrate the new Pflugerville brand into all marketing tools used for both internal and external audiences.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64055, 64225, 64170, 64200, 64210
Ongoing	2017-Q4	H	Assist in recruiting events and meetings at the new Pflugerville conference center.	PCDC	OA, Team Texas, Texas One	2017	2020	2017-Q3; 2017-Q4	62000, 65400, 64060, 64200, 64210
Ongoing	2017-Q4	I	Distribute an e-newsletter to target industry executives, brokers, developers, and site selectors to keep stakeholders informed about economic development opportunities in Pflugerville.	PCDC	OA, Team Texas, Texas One	2017	2020	2019-Q1	62000, 64200, 64170, 64225
		E&W-1	Become actively involved and promote the East Williamson County Higher Education Center (EWCHEC) to align programs with the needs of Pflugerville's target industries. Provide scholarships to local students to attend programs at EWCHEC.						
Complete	2018 - Q1	A	Meet with EWCHEC administrators and faculty to discuss areas for collaboration. Identify employers in Pflugerville who could benefit from existing and potential education programs at EWCHEC. Invite them to participate in a roundtable discussion about their workforce training needs and EWCHEC's capacity to meet these needs.	PFISD/EWCHEC	PCDC, CHAMBER, Private Employers	2017	2020	2018-Q3	62000, 65000, 69150
Complete	2018 - Q1	B	Identify any barriers preventing Pflugerville students from enrolling in EWCHEC programs. Consider whether cost of attendance, transportation to the facility, or other factors stand in their way, and explore ways that community partners might address these barriers through scholarships, subsidies, transportation, and other avenues.	PFISD/EWCHEC	PCDC, CHAMBER, Private Employers	2017	2020	2018-Q4	62000, 64170, 69150
Complete	2018 - Q1	C	Raise local awareness of programs at EWCHEC and the career pathways they present to students at PFISD and adults seeking ongoing education in Pflugerville.	PFISD/EWCHEC	PCDC, CHAMBER, Private Employers	2017	2020	2018-Q5	62000, 65000, 64060, 64200, 69150
Complete	2018-Q3	D	Link Pflugerville and surrounding communities and institutions through an informal "SH-130 Education Corridor" that emerges from the SH-130 Economic Summit recommended in the Marketing and Communications section of this Strategy. Utilize the inventory of educational assets and programs to assist marketing of opportunities and identify areas for collaboration between educational institutions and employers.	PFISD/EWCHEC	PCDC, CHAMBER, Private Employers	2017	2020	2018-Q6	62000
		BC-2	Develop guidelines for determining incentives offered to new and existing companies in Pflugerville.						
Ongoing	2017-Q4	A	Maintain an inventory of PCDC, City, State and other incentive tools that are available.	PCDC	CITY	2017	2018	2017-Q4	62000, 64200
Complete	2017-Q4	B	Develop clear guidelines for evaluating incentives based on economic goals and objectives.	PCDC	CITY, Regional Partners	2017	2017	2019-Q1	62000, 64170
Ongoing	2017-Q4	C	Develop and utilize clear standards for the types of businesses that qualify for incentives.	PCDC	CITY	2017	2017	2019-Q1	62000, 64170, 68100

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Ongoing	2017-Q4	D	Maintain flexibility within the incentive policy that allows creative options when determining incentives for unique and catalyst projects.	PCDC	CITY	2017	2017	2019-Q1	62000, 64170, 68100
I - 2 Expand Pflugerville's real estate offerings for light industrial, flex and office space.									
Complete	2017-Q4	A	Complete a flex industrial and office market assessment for the SH130 & SH45 Corridors	PCDC	CITY, Pflugerville Pforward, Private Partners	2017	2018	2018-Q3	62000, 64170, 64060, 64090
Ongoing	2017-Q4	B	Working with Pflugerville Pforward and other public and private partners, identify infrastructure funding for catalyst projects and identified geographic areas including the east side of SH 130 across from 130 Commerce Center.	PCDC	CITY, Pflugerville Pforward, Private Partners	2017	2020	2018-Q2	62000, 66000,
Ongoing	2018 - Q1	C	Collaborate with the CITY to ensure existing zoning and design standards are consistent with economic development policies of the CITY and PCDC and promote current industry best practices – accounting for high standards without compromising functional needs of users.	PCDC, CITY	Private Developers and Land Owners, Pflugerville Pforward	2017	2020	2018 - Q1	62000, 64170, 64060, 64090
Ongoing	2017-Q4	D	Develop, assist or otherwise support new "shovel-ready" properties within the CITY limits.	PCDC	CITY, Pflugerville Pforward, Private Partners	2017	2020	2018-Q2	62000, 64060, 66000
Ongoing	2018 - Q1	E	Advocate for inclusion of industrial, office, and flex zoned properties as high priorities in the CITY's Capital Improvement Program for implementation and funding.	PCDC	CITY, Pflugerville Pforward, Private Partners	2017	2020	2018 - Q1	62000, 64170
Ongoing	2018 - Q1	F	Support the CITY's Comprehensive Plan with infrastructure projects that promote ecoddev opportunities. Support the CITY funding and updates of CIP - including a joint PCDC-CITY review of Pflugerville's target clusters. Support locations and zoning for light industrial, office, logistics, and other target cluster business uses.	PCDC	CITY, Private Developers and Land Owners, Pflugerville Pforward	2017	2020	2018 - Q1	62000, 64200, 66000
Complete	2018 Q1	G	Work with 130 Commerce Center owners to form a property owners association for administration and maintenance of commonly held property.	PCDC	130 Commerce Center Owners	2017	2020	2018 - Q1	62000, 61130, 66000
Complete	2017-Q4	H	Retain the remaining 20 acres available at 130 Commerce Center for the location of a large, primary employer.	PCDC	PCDC	2017	2020	2017-Q4	62000, 61130, 66000
M&C-4 Position PCDC as a leader among economic development organizations in the region and state of Texas.									
Complete	2017-Q4	A	Participate in OA, Team Texas, and Texas One activities as business development and marketing platforms.	PCDC	Regional Partners	2017	2020	2017-Q3; 2017-Q4	62000, 64090, 61070, 64080, 64100
Completed	2018-Q3	B	Meet with the DoD's new Defense Innovation Unit Experimental (DIUx)'s Engagement Team in Austin to discuss Pflugerville's high concentration of veterans, patent holders, and align Pflugerville as a location for DIUx research and development spin offs.	PCDC	Regional Partners	2017	2020	2018Q4	62000, 64080
Underway	2018-Q1	C	Host a SH130 Corridor Economic Development Summit, comprised of economic development organizations, public sector entities, chambers, educators, utility providers	PCDC	Regional Partners	2017	2020		62000, 64060, 64090, 61120
Underway	2018 - Q1	1	Convene a meeting of SH130 Corridor public and private stakeholders to explore an Alliance for the corridor that would include establishing vision, goals and core activities that do not duplicate other regional efforts.	PCDC	Regional Partners	2017	2020		62000
Underway	2018-Q2	2	Focus the summit on activities such as (1) advocating for continued SH130 infrastructure investments, (2) mapping SH130 economic development and education assets, and (3) using shared marketing messages when talking about SH130 with prospects and other business influencers.	PCDC	Regional Partners	2017	2020		62000
Ongoing	2018-Q3	D	Build relationships and engage in regional dialogue with the Dell Medical Center and Innovation Zone to align Pflugerville as a location for medical device and advanced materials manufacturing.	PCDC	Regional Partners	2017	2020	2019-Q`	62000, 64080
Ongoing	2018-Q2	E	Participate in real estate associations and regularly schedule meetings with commercial brokers and developers in Austin, Houston and Dallas to build relationships and create awareness of Pflugerville.	PCDC	Regional Partners	2017	2020	2019-Q1	62000, 64080, 61070

STATUS	Date Started	GOAL	YEAR 1	LEAD	PARTNERS	START	END	Date Completed	ACCT
Ongoing	2018 - Q1	F	Raise awareness among State of Texas' Government Departments that Pflugerville is an affordable and friendly alternative location for their facilities.	PCDC	Regional Partners	2017	2020	2019-Q1	62000, 61070, 64055
Ongoing	2019 Q1	G	Consider hosting an annual broker tour of Pflugerville.	PCDC		2017	2020	2019-Q1	62000, 64060
Ongoing	2017-Q4	H	Work with the PFCHAMBER to establish stronger relationships with other chambers of commerce in the region, such as the Greater Austin Black Chamber and Greater Austin Asian Chamber.	PCDC, CHAMBER	Regional Partners	2017	2020	2017-Q4	62000, 65000
Ongoing	2018-Q4	I	Consider membership in the Austin Area Research Organization (AARO) and approach them about participating in a committee meeting relevant to Pflugerville and the region (e.g., Transportation or Social Equity).	PCDC	Regional Partners	2017	2020		61070
QoL-1 Encourage the development of unique retail and dining experiences that reflect Pflugerville's identity and offer more diverse options.									
Complete	2018 - Q1	A	Provide resources and data for retail recruitment on the PCDC website	PCDC, CITY	CHAMBER	2017	2020	2018-Q2	62000, 62400
Ongoing	2017-Q4	B	Direct start up retailers to small business loans and other assistance programs.	PCDC	CHAMBER	2017	2020	2017-Q4	62000, 65000
Ongoing	2017-Q4	C	Incentivize large, high catalyst retail projects with direct economic impacts that significantly outweigh incentive costs.	CITY	PCDC, CHAMBER	2017	2020	2017-Q4	62000, 68000, 64080, 61130
NA	NA	D	Continue to include zoned commercial areas in the Comprehensive Land Use Plan that allow for diverse retail uses such as food trucks, breweries, and other local non-chain establishments.	CITY	CHAMBER, PCDC	2017	2020	NA	NA
QoL-2 Continue to invest in family-friendly recreation amenities like the planned improvements to Lake Pflugerville, 1849 Park, trail networks, sporting facilities and fields, and inclusive community events.									
NA	NA	A	Support the CITY's implementation of currently planned improvements for Lake Pflugerville and other parks through already-approved bonds. Upon completion of projects, encourage regular event programming at the Lake Pflugerville amphitheater that appeals to all ages.	PCDC, CITY		2017	2020	NA	NA
Complete	2017-Q4	B	Support the development and identification of new funds for the 1849 Park and its various facilities.	PCDC	CITY, Travis County, Private developers	2017	2020	2018-Q3	NA
NA	NA	C	Support ongoing cultural events and meet with regional non-profits, cultural organizations, and other groups to develop and host new local events that reflect the character of Pflugerville and are inclusive of the city's diverse population.	CITY	Regional Parts, Arts Organizations	2017	2020	NA	NA
NA	NA	D	Meet with live music production companies in Central Texas, local property owners, and developers to explore the possibility of constructing a live music venue in Pflugerville. Consider including an outdoor venue, rehabilitation of existing historic structure, or new building construction.	PCDC	CITY, Private Developers, Property Owners, Music Production Companies	2017	2020	NA	62000, 65000
E&W-2 Continue to raise awareness of Pflugerville ISD's many successful educational training programs. Explore possibilities for internships, training									
Ongoing	2018 - Q1	A	Working with the PCDC, identify and meet with local employers in Pflugerville's target clusters to identify specific training programs and partnership opportunities.	PfISD	PCDC, CHAMBER, Private Employers	2017	2018	2018 - Q1	62000, 69150, 64080, 65000
Ongoing	2018 - Q1	B	Provide information to employers about how to establish an internship program. Share a how-to guide, employer benefits and responsibilities, and other key information to take the guesswork out of implementation.	PfISD	PCDC, CHAMBER, Private Employers	2017	2018	2018 - Q1	62000, 69150, 64080, 65000
		C	Host an Internship Fair in high schools that can connect students with employers.	PfISD	PCDC, CHAMBER, Private Employers	2017	2018		62000, 69150, 64080, 65000
Ongoing	2018 - Q1	D	Celebrate the academic success of Pflugerville ISD and its students at events, on social media, in local newsletters, and through other publications.	PfISD	PCDC, CHAMBER, Private Employers	2017	2018	2018 - Q1	62000, 69150, 64080, 65000

99 Total Goals

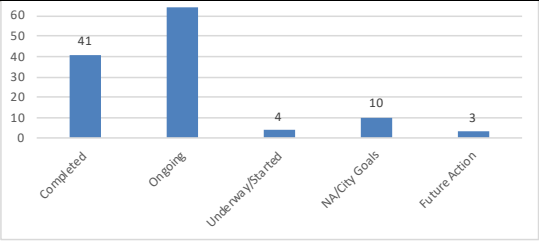
Completed 38
Ongoing 49



STATUS	Date Started	GOAL	YEAR 1			LEAD	PARTNERS	START	END	Date Completed	ACCT
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Underway	3
Not Applicable	8
Future Action	1
	99

Completed	41
Ongoing	64
Underway/Started	4
NA/City Goals	10
Future Action	3



STATUS		DATE STARTED		GOAL	YEAR 2	LEAD	PARTNERS	START	END	DATE COMPLETED
				BC-3	Invest in entrepreneurial infrastructure that attracts and supports business creation, product innovation, and R&D in Pflugerville and connect to the region's entrepreneurial ecosystem.					
Ongoing		2018-Q1	A	Continue to engage with Opportunity Austin, The University of Texas, Capital Factory, Austin Technology Incubator, and other regional organizations to highlight innovation opportunities in Pflugerville.		PCDC	Regional Partners, Private Patners	2018	2020	2019-Q1
Underway		2018-Q4	B	Meet with partners in the Austin Innovation Zone – centered on I-35 in central Austin. Consider opportunities to connect Pflugerville as an affordable, and business-friendly location for startup businesses from the Zone to grow.		PCDC	Regional Partners, Private Patners	2018	2020	
Ongoing		2018-Q3	C	Explore opportunities to develop a low-cost, but not free shared office and resource center in Pflugerville. shared office space and resource center for self-employed individuals. Consider public-private partnerships, lease subsidies or other tools.		PCDC, CHAMBER	CITY,Regional & Private Partners	2018	2020	2019-Q1
				BC-4	Celebrate entrepreneurs and inventors in Pflugerville that shares their stories – building pride and encouraging other entrepreneurs to locate businesses in the community.					
Ongoing		2018-Q3	A	Incorporate "Pfrom Pflugerville" into the PCDC website, with a specific landing page to showcase local businesses, entrepreneurs, and events.		PCDC	PfISD, CHAMBER, CITY	2018	2020	2019-Q1
Ongoing		2018-Q4	B	Develop "Pfrom Pflugerville" campaign and include local entrepreneurs in a video testimonial series why they chose Pflugerville. Ask local entrepreneurs to become brand ambassadors.		PCDC	PfISD, CHAMBER, CITY	2018	2020	2019-Q1
Ongoing		2018-Q4	C	Consider a "Twitter Takeover" campaign that allows Pflugerville entrepreneurs to take over the PCDC Twitter account. Ask them to share more about Pflugerville as a location for entrepreneurs and generate pride among Pflugerville's startup scene using the hashtag #PfromPflugerville.		PCDC	PfISD, CHAMBER, CITY	2018	2020	2019-Q1
				E&W-3	Foster a new generation of innovators in Pflugerville by building courses at Pflugerville ISD that teach entrepreneurship and expose students to success stories.					
Ongoing		2018-Q1	A	Establish an Entrepreneurial Education committee composed of local entrepreneurs and representatives from PFISD to review existing programming at the ISD and discuss curriculum, internships, and training that could benefit local students.		PfISD	PCDC, CHAMBER, Private Employers	2018	2020	2019-Q1
Ongoing		2018-Q2	B	Explore and adopt regional, state, and national young entrepreneur programs and competitions, such as Pflugerville's successful Big Step. Encourage students to participate in these programs as extracurricular activities.		PfISD	PCDC, CHAMBER, Pflugerville Pforward	2018	2020	2019-Q1
Ongoing		2018-Q2	C	Develop recommendations for Pflugerville ISD to create and brand an entrepreneurship course of study. If possible, assign or recruit a faculty member to lead these programs. Work with Pflugerville Pforward, PCDC, and private businesses to identify funding to sponsor scholarships, faculty, and programs.		PfISD	PCDC, Pflugerville Pforward, Private Employers	2018	2020	2019-Q1

STATUS	DATE STARTED	GOAL	YEAR 2	LEAD	PARTNERS	START	END	DATE COMPLETED
E&W-4 Celebrate veterans in Pflugerville and identify resources to support continued education and training for veterans.								
Ongoing	2018-Q3	A	Identify state and federal educational programs and other incentives to facilitate hiring and skills development for veterans. Develop a matching program to connect unemployed and underemployed veterans with local employers.	PCDC	Office of Veterans Affairs, TWC	2018	2020	2019-Q1
Ongoing	2018-Q3	B	Conduct a survey of Pflugerville veterans to determine employment characteristics – e.g. type of industry, education levels, training, certificates, career goals. Attempt to identify other special needs among veterans – transportation, healthcare, etc.	PCDC	Office of Veterans Affairs, TWC	2018	2020	2019-Q1
Ongoing	2018-Q3	C	Meet with the Office of Veterans Affairs and Texas Workforce Commission to collect information on the veteran population in Pflugerville – including the number of veterans, their skillsets, and other relevant statistics.	PCDC	Office of Veterans Affairs, TWC	2018	2020	2019-Q1
Complete	2018-Q3	D	Include information about Pflugerville's sizable veteran population in marketing materials.	PCDC	Office of Veterans Affairs, TWC	2018	2020	2019-Q1
I-4 Encourage more diverse housing in Pflugerville – including condominiums, multifamily, mixed-use developments, and executive homes.								
Complete	2018-Q3	A	Conduct an independent housing study to determine supply and demand for housing that will serve all current and future residents of Pflugerville. This study should take special consideration of the needs of retirees (Pflugerville's fastest growing demographic group), young professionals, and lower-income residents.	PCDC	CITY, CHAMBER	2018	2020	2018 - Q3
Ongoing	2018 Q4	B	Through PCDC's Business Retention and the CHAMBER's Business Development programs, meet with existing medical center human resources departments and leadership to identify workforce, infrastructure, and other concerns that may be addressed through partnerships with the City, PFISD, and other organizations.	PCDC	CITY, CHAMBER, PFISD	2018	2020	2019-Q1
QoL-3 Ensure Pflugerville offers a full array of human care options – including top-notch and affordable childcare services, physicians' offices, a hospital, and services for elderly residents.								
Ongoing	2018-Q2	A	Encourage the City to include locations for denser, planned developments for in the Comprehensive Plan Update. Convene regular meetings between PCDC, the City, and property owners to explore ideas, discuss plans, and facilitate housing development when necessary and appropriate.	PCDC, CITY	Property Owners, CHAMBER	2018	2020	2019-Q1
QoL-4 Ensure Pflugerville offers a full array of human care options – including top-notch and affordable childcare services, physicians' offices, a hospital, and services for elderly residents.								
Complete	2017-Q3	A	Through partnership between the City and PCDC, continue efforts to attract a full-service hospital to Pflugerville.	PCDC, CITY	CHAMBER	2018	2020	2018-Q1
QoL-5 Ensure Pflugerville offers a full array of human care options – including top-notch and affordable childcare services, physicians' offices, a hospital, and services for elderly residents.								
NA		A	Conduct a childcare resources study to assess the capacity of existing establishments to supply services to the entire Pflugerville community. Work with the business community through the CHAMBER of Commerce and Pflugerville Pforward to identify potential funding for the study. Develop recommendations to address gaps in service and encourage new operators to open in the city.	PCDC, CITY	CHAMBER, Pflugerville Pforward	2018	2020	
QoL-6 Explore the development of a Pflugerville City Center – a mixed use development that includes retail, residential, entertainment and event space, and office.								
Ongoing	2018-Q3	A	Encourage the City to discuss options for relocating City Hall to a new Pflugerville City Center while preparing the City Facilities Master Plan.	CITY	PCDC, CHAMBER, Private developers and land owners	2018	2020	2019-Q1
NA		B	Convene a meeting including the City, PCDC, property owners, and local developers to explore locations and options for development of a Pflugerville City Center – ideally along SH-130.	CITY	PCDC, CHAMBER, Private developers and land owners	2018	2020	

STATUS		DATE STARTED		GOAL	YEAR 3	LEAD	PARTNERS	START	STATUS	DATE COMPLETE
E&W-5				Establish a post-secondary educational presence in Pflugerville – exploring options for classrooms, research institutes, apprenticeship programs, and other partnership opportunities.						
Ongoing	2019-Q1	A	Coordinate with the Texas Workforce Commission, Opportunity Austin, and other regional training and entrepreneurial organizations to raise outside awareness of Pflugerville’s readiness for a post-secondary educational presence.			PCDC	Pflugerville ISD, City, TWC	2019	2020+	2019-Q1
		B	Meet with local target cluster employers to identify universities and colleges conducting specialized research and training related to their field. Assess whether partnering with these institutions or bringing a satellite location to Pflugerville would benefit local business and grow the cluster in Pflugerville.			PCDC	Pflugerville ISD, City, TWC	2019	2020+	
		C	Identify Pflugerville leaders with personal contacts at post-secondary educational institutions. Initiate conversations with schools to explore whether they are considering expansions or new programs and whether they could fit in Pflugerville.			PCDC	Pflugerville ISD, City, TWC	2019	2020+	
3 total										
Complete		0								
Ongoing		1								
Underway		0								
Future Action		2								
NA		0								

Pflugerville Implementation Tables

FIVE GOALS

BUSINESS CLIMATE
EDUCATION WORKFORCE
INFRASTRUCTURE
QUALITY OF LIFE
MARKETING & COMM

COLOR CODE

BC
E&W
I
QoL
M&C

LEAD ORGANIZATION

PCDC & PCDC/CHAMBER
PCDC & CITY
CITY
PFISD
EWCHEC

COLOR CODE
