



TANEY COUNTY PARTNERSHIP

City of Branson Quarterly Update, February 4, 2016

Mayor and members of the Board of Alderman: Below is a topical review of the Partnership's activities from my last update to you through August 2015. Please contact me with any questions or concerns and if you would like more information as a group or individually.

Partners: Our first new partner joining in 2016 is Paragon Architecture. Also, Arvest Bank increased their annual investment commitment in the fourth quarter of 2015 to move up to the executive committee level. This brings the total number of Business Sector Partners to 28 with an annual investment total of \$134,000.

Projects: We are currently tracking and assisting 22 active projects and 5 inactive (no activity within last 90 days) projects. Out of those 27, 13 are within the city limits of Branson. The industry breakdowns are as follows:

Manufacturing	3
Financial/Business Service	2
Medical Research & Services	1
Supply Chain Management	0
Technology Innovation	1
Tourism/Retail/Lodging	17
Agriculture/Forestry	2
Non-Disclosure Agreement (NDA)	1

Marketing Strategy and Development: Along with an increased digital presence and print advertising in 2015, several editorials were published in the following trade magazines: Trade & Industry Development, Business Xpansion Journal, Business Facilities, and Site Selection. Some of the highlights were the Data Center, Biosolids, and Smart City pieces. Please see 2016 Annual Report for more info.

CWRC: The Certified Work Ready Communities Steering Committee is meeting on a quarterly basis and will not be submitting the county's application to the state before the fall of 2016. Goals and progress (total National Career Readiness Certificates, NCRC, issued in Taney County) can be seen below and more information accessed at <http://www.workreadycommunities.org/MO/213>.

Workforce	Goals	Actual NCRC
Emerging (<i>students, recent graduates</i>)	160	132
Current (<i>those employed</i>)	51	54
Transitioning (<i>unemployed</i>)	345	129
Totals	556	315
Total NCRC		315

	Goals	Actual
Employers Supporting ¹	97	102 ¹

Website: We now have access to more information and data due to our relationship with Chmura Economics and their JobsEQ platform. Starting in 2016, this will allow us run our own economic impact studies and economic overview reports while having access to much more and richer data on workforce demographics. Under Jennifer Langford’s direction, the TCP website continues to be improved and updated with community information and resources for new and existing business. The functionality and use of LocationOne continues to improve and increase. Web traffic is also trending up.

Site Selectors/Consultants & Familiarization Tour: In 2015 we met with a total of 109 site selection consultants representing 51 agencies with contacts in Chicago, Philadelphia, Washington DC, New York/New Jersey, Dallas, and Orlando in conjunction with Missouri Partnership and the Springfield Regional Economic Partnership. The objectives are to maintain dialogue and to expand the consultant’s awareness and knowledge of our communities while fostering relationships with the agencies and consultants. Plans are well on their way for the 2016 Lakeside with the Locators event in which the TCP will continue to have a leadership role.

Workforce Development: This topic continues to be a top priority for the Partnership, Chamber and many community stakeholders and businesses. We continue to experience a shortage of available and qualified labor to meet the demands of existing employers within the county, region and state. This will become more noticeable with new employers opening for business in 2016 (Menards, LaQuinta, Fritz’, Bigfoot and others). We are not alone in this as the labor shortage or “skills gap” challenges are being experienced in the majority of the United States. We will continue to monitor, research, and frame the issue while attempting to identify potential programs or successful efforts to assist local employers. New tools and services will be introduced throughout 2016.

Thank you for your continued support and participation!

Jonas Arjes, EDFP
Executive Director
Taney County Partnership

ANNUAL REPORT 2015

Year Ending December 31, 2015

SMART

PEOPLE

SMART

LOCATION

SMART

CHOICE

...the SMART place to be



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2015 Annual Report

Taney County Partnership



Taney County Partnership

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key areas of focus...



Business Retention & Expansion

Facilitating the expansion and retention of existing business and industry is the backbone of every successful economic development program. With more than 80 percent of all new jobs traditionally created by existing companies, this continues to be a high priority for the Taney County Partnership.



Small Business & Entrepreneurial Development

Promoting and supporting the development of local ventures seeks to create new jobs, identify new leaders, and brings innovation to the region. Taney County succeeds by looking inward, seeking to capitalize on the entrepreneurial strengths and passions of local residents and businesses while finding new economic engines to complement the legacy of Missouri's Ozark Region.



Workforce Development

All businesses depend on the quality of their personnel for their productivity and profitability. A common strategy in economic and workforce development is to strengthen the local talent pool of workers to match the needs of local and regional employers now and in the future.



Business/Industry Attraction & Marketing

The decision to establish or relocate a business to a community often depends on the speed and accuracy of information provided. Successful communities must have an effective, on-going marketing and recruitment program backed by thorough follow-up mechanisms. The availability of industrial and business sites/buildings is a critical determining factor for companies seeking to locate in Taney County.



Project Management

We provide local assistance, expertise and collaboration to any business, entity or individual looking to invest capital or create jobs in Taney County, which can take many forms during the project lifecycle, so we help to identify and coordinate the resources necessary to meet business goals.

Jonas Arjes, EDFP

Executive Director



Partners:

As the Taney County Partnership puts the finishing touches on 2015, the positive momentum shows no sign of letting up as we head into 2016. With each passing year, our public/private partnership continues to grow with new members, funding and staff experience in fundamental economic development. It would not be possible without the commitment and dedication of time and resources of each individual organization that chooses to invest and support the efforts and objectives of the TCP. I want to express my gratitude to all partners and thank each of you for another year of “moving the needle” in Taney County!

The TCP set new benchmarks in 2015 with the number of new and announced projects as the opportunities for job creation and capital investment increase in Taney County. To be able to capitalize on these opportunities, we must be diligent in our attention to the ongoing concerns of labor supply and talent for existing and new employers while seeking ideas and tools to assist all employers. We are not alone in this as “skills gap” and “labor shortage” issues are experienced throughout the region, state and nation. We will continue to advocate for, and stress, the importance of improving and expanding infrastructure. Transportation infrastructure in the form of roads, bridges, rail and air service are critical in our ability to expand existing business and attract new business. Development breeds development and future success will depend on the quality of our infrastructure.

I said it last year and I’ll say it again, we’ve come a long way in the last four years and we still have a long way to go as the competition for projects and jobs will become tougher and tougher. I do feel confident the TCP has the ability to field multiple teams to meet the challenges of that competition. Thank you again to the 38 members of Taney County Partnership for providing the depth and talent to field those teams.

Looking forward to even more “wins” in 2016!

Thank you!

Jonas Arjes, EDFP
Executive Director
Taney County Partnership



Shawn Pingleton

2015 Chairman of the Board



To our Partners:

I am honored and proud to have served as your 2015 Chairman of the Board, and am proud to be a part of continuing strides being made to important economic development objectives.

We are very fortunate to have such a strong board of directors both in numbers and in expertise each bring to the table with regard to workforce development, air service development, business attraction, planning and zoning regulations, and business retention and expansion. These items, along with many others, require commitment and “one voice” from each of us working toward those common goals. I thank you, the partners, again for seeing that bigger picture.

I also want to welcome those partners who joined the Board of Directors in 2015, recognizing the added value their contributions have brought to the Partnership and to Taney County.

Lastly, I want to extend a heartfelt thank you to both Jonas and Jennifer for their professionalism and dedication to our organization, to Chrystal Irons for her service as Secretary/Treasurer, to Angela Leist as the Chairman-Elect, and would like to be among the first to welcome Mike Booth as the 2016 Chairman of the Board.

Here's to another banner year!

Sincerely,

Shawn Pingleton
Empire District Electric



highlights & achievements

Partners: The Taney County Partnership now consists of 38 investors with the addition of 8 new partners in 2015 including Metropolitan National Bank, Big Cedar Lodge, CFS Engineers, Taney County Regional Sewer District, Olsson Associates, DeWitt & Associates, Earls Family Broadcasting and All-Tech Energy. Arvest Bank increased its investment to the Executive Committee level in Q4, bringing annual investment commitments to \$131,500 by 27 business sector partners. The remaining revenues are generated by the investments of the Branson/Lakes Area Chamber of Commerce and 10 public sector partners.

Site Selection Consultants: Site selection consultant outreach missions and relationship building efforts resulted in 109 consultant contacts representing 51 agencies through YE2015, for an increase of 57 new contacts and 20 agencies over those reported in 2014.

Vote YES! OTC: Voters in the Branson R-IV School District voted YES! to invest in the future and growth of our educational infrastructure with the annexation of the Branson R-IV School District into the Ozarks Technical Community College District. The majority of the work by many in this organization took place in the first quarter with the results of that effort realized on April 7. The passage of this ballot initiative allows an expansion of facilities and current campus offerings to include curriculum for its RN, Medical Laboratory Technician, and other technical programs in 2016.

Workforce Development Initiative: The TCP focused much attention on workforce development as it became evident that more job openings were posted in 2015 than talent available to fill them locally, regionally and nationally. The TCP launched the “Have Your Say” employer survey and hosted a moderated panel to discuss workforce challenges and needs of area businesses. An ongoing effort to work with Taney County professionals and statewide workforce development agencies began to address gaps existing between employer demand and labor supply.

GO CAPS Pilot: The TCP participated in the launch of the Greater Ozarks Center for Advanced Professional Studies to offer learning experiences in Engineering/Manufacturing and Medicine/Healthcare by immersing high school juniors and seniors in business environments to gain real-life project experience in partnership with regional businesses. Branson R-IV School District is one of 10 participating schools allowing 11 of its students to meet for 2.5 hour blocks at participating business locations and receive both high school and college credit while working with partner businesses around the region. This will have a positive impact on talent development by preparing the next generation of workers to gain valuable skills and exposure to diversified opportunities throughout the region.

OTC Table Rock Campus Developments: The OTC Table Rock campus expanded its curriculum to allow students to obtain a Bachelors degree from MSU at the OTC Table Rock Campus in Communications and Professional/Technical Writing. In addition, Hollister juniors and seniors with qualifying GPAs are attending classes at the OTC Table Rock campus to earn a head start on their post-secondary educational pursuits through its newly launched Dual Track Program. This will allow students to receive an associates degree from OTC along with their high school diploma at graduation, enabling them to immediately enter the workforce or complete the remainder of a 4-year degree in only two years.



Vote YES APRIL 7

A YES vote will extend the OTC District to the Branson School District

Reduce Tuition by **\$48** per credit hour

- Offer new **Technical Education** and **Allied Health** curriculum
- Customize **Workforce Development** training programs supporting local business
- Partner with 4-year universities so you can earn both an **associate** and **bachelor** degree at the **OTC Table Rock** campus

5



January 1 thru December 31, 2015

Certified Work Ready Communities: In 2015, the TCP made significant progress toward goals in CWRC testing with 132 of 160 in the Emerging category, 54 of 51 in Current, and 129 of 345 in Transitioning, bringing total testing to 315 of 556 required for ACT certification. Collaboration with the Missouri Career Center and the “Chasing Platinum, Ready to Work” initiative provided a \$40K JP Morgan Chase grant enabling all Taney and Stone County high school seniors to take the ACT WorkKeys Assessment tests over a two year period. Currently, Hollister School District has coordinated the testing of its entire senior class at the OTC Table Rock Campus where proctors have been certified to administer the WorkKeys Assessment exams.

Legends of Golf: This was one of the biggest events of the year and the TCP participated again with an event sponsorship. The significance of this five-year event will continue to grow and the Partnership looks forward to the potential opportunities the event might serve for economic development and hosting possibilities.

Inaugural TCP Economic Impact Award: The TCP announced the inaugural Economic Impact Award, a recognition to be presented at the discretion of the TCP Executive Committee to individuals, organizations, businesses, or events that have a significant economic impact on Taney County. The three main criteria considered for this honor are capital investment, job creation, and increased community awareness or exposure. The award was presented to the 2014 Big Cedar Lodge Legends of Golf presented to Kirk Elmquist on behalf of Johnny Morris at the Branson/Lakes Area Chamber of Commerce 68th Annual Black Tie Gala in February of 2015.

Air Service Development Committee: The Branson Airport added flights to New Orleans, Cincinnati, and Cancun via Orange Air in the first three quarters of 2015. A risk mitigation fund was then secured to attract national carrier service to BKG, with plans to offer year-round daily service with announcements anticipated in early 2016. The Taney County Commission voted to approve an intergovernmental agreement between Branson Airport Regional Transportation Development District (TDD) and Taney County, authorizing up to \$500,000 in risk abatement funds to be leveraged by TDD in attracting airlines to the community. MoDOT also awarded a grant to BKG to provide assistance in advertising and marketing new destinations as they become available. In the meantime, the ASDC has begun work to foster stronger ties and collaboration between BKG and M. Graham Clark Downtown Airport.

Project Announcements & FAM Tours: 6 projects were announced in 2015 with 20 active projects in the pipeline at YE2015, 8 of those representing economic diversity outside of tourism, retail, and lodging. 7 FAM tours and site visits have taken place, with Schneider Electric returning for a second visit with Smart City experts to facilitate a visioning session with city stakeholders, elected officials, and business leaders in Taney County.



highlights & achievements (cont)

2015 Legislative Dinner: TCP hosted its third Legislative Dinner at the Branson Convention Center welcoming state delegates representing Taney County in the Missouri Senate and House of Representatives. As in years past, this event provided an opportunity for partners to network and get to know our state elected officials.

Legislative Efforts: The TCP continues to monitor issues impacting Taney County in Jefferson City and regularly visits the state capitol to maintain top of mind awareness among legislators at events such as Salute to Legislators and Missouri Economic Development Council's Winter (Legislative) Conference. Legislative Breakfasts with Springfield Metro Partnership have granted additional exposure to regional and state leaders who are impacting the local efforts on business and job growth as well as education and tourism.

Hawthorn Foundation: The TCP joined the Hawthorn Foundation in 2015, expanding exposure to business and legislative leadership throughout the State, while granting access to the Governor's office to voice key issues and challenges within the region. Results of networking are beneficial in that thought leaders in various business sectors share experiences and solutions that help to address needs of the region and state.

Marketing & Promotions: In 2015, ten articles were published in industry trade magazines including Business Facilities Magazine, Business Xpansion Journal, Trade & Industry Development, and Expansion Solutions Magazine. Topics included the Cooper Creek Biosolids Facility, Mountain Data Center Complex, Hollister Farm-to-Table project, Taney County as a Sports Destination, Call Center and Backoffice/IT Operations Fit, Quality of Life, and featured site promotions for Branson Commerce Park Missouri Certified Site and the Branson Airport site. Website traffic increased in 2015 with 4894 new users vs 420 at YE2014. Traffic was generated by advertising/promotion investments with trade publications (5435 YE2015 sessions vs 555 YE2014, up 879.28%), followed by organic searches (2115 YE2015 sessions vs 482 YE2014 sessions, up 338.8%), and direct traffic sources (2001 YE2015 vs 213 YE2014, up 839.44%). Social engagement increased by 62.5% generated primarily by Twitter, LinkedIn, and Facebook.

Smart City Innovation: A new undertaking as a result of Jennifer's experience with Schneider Electric's Energy Solutions business is the Smart City initiative we are working on with CFS Engineers and several community leaders. The "Spirit of 76" complete streets project is the first point of focus to make necessary infrastructure improvements to accommodate a 21st Century digital economy. The committee is looking to the future to identify ways to secure Highway 76 as a connectivity backbone from which the entire county can evolve toward becoming the nation's first "smart county."

Smart Business Center at Branson Meadows: The new SMART Business Center, in collaboration with Commercial One Brokers, opened its doors at Branson Meadows to budding entrepreneurs and innovators in the region. Located in the former OTC Branson campus, the center offers offices, meeting rooms and research and development space for those who desire an affordable site to launch or incubate a business.



Hollister Farm to Table Project: City of Hollister was awarded a \$49,000 USDA grant to conduct a feasibility study that will identify opportunities for county and regional producers to process, market, and distribute produce and other locally harvested products such as beef and poultry to serve the needs of local institutions and extend reach to wholesale buyers.

SBJ Recognition: In December, Executive Director Jonas Arjes was named one of Springfield Business Journal's "12 People You Need to Know in 2016," publication feature profiling key Southwest Missouri leaders. There will be a breakfast event in Springfield on September 20, 2016 to which partners will have the opportunity to attend.

Economic Development Course Completion: Jonas Arjes completed and graduated from the University of Oklahoma's Economic Development Institute; Jennifer Langford completed the Heartland Economic Development course.

Kyle Petty Charity: The 21 st Annual Kyle Petty Charity Ride Across America chose Branson as its final destination on May 8. NBC Sports NASCAR analyst and former NASCAR driver Kyle Petty led 200 celebrities and corporate executive motorcyclists from Santa Cruz to Branson to raise funds and awareness for Victory Junction – a camp created to enrich the lives of children with chronic or life-threatening illnesses. City of Branson Mayor Karen Best and Jonas Arjes spoke at the welcoming ceremony. All riders were provided with the TCP marketing collateral packets.

YBN National Championships: The Youth Baseball Network National Championship Tournament was hosted at the Branson RecPlex in August where national teams came from around the country, as far away as New York, Florida, and Texas, to compete for the national title. The economic impact of the sports destination market is significant, considering the revenue generated by travel ball family investments in local economy including retail, dining, hospitality, and attractions each week from March to November.

Friends of the Partnership: Changes in leadership took place in 2015 including the election of City of Branson's new Mayor, Karen Best. Jeff Seifried was hired as President/CEO of the Branson/Lakes Area Chamber of Commerce and CVB. Patrick McKenna was appointed as the new director of MoDOT, bringing a strong background in finance which should benefit the transportation budget issues at hand. Other important networking opportunities with key relationships continue to increase legislature leadership and representation from Southwest Missouri including visits by Speaker of the House Richardson, and Hawthorn Foundation's new director Margaret Onken. Steve Johnson replaced Chris Chung at Missouri Partnership, and Jim Anderson continues to champion regionalism and economic development as demonstrated by his facilitation of the TCP 2016-18 planning session in September.



projects

The TCP was involved in 6 new project announcements in 2015 including:



LaQuinta Inns & Suites	Hollister Farm-to-Table
Fritz's Adventure	The Bank of Missouri
Old English Inn	Mountain Adventure Resort

	YTD 2015	YTD 2014
Announced Projects:	6	3
New Jobs	65+/-	215+/-
New Payroll (est.)	\$1.25M +/-	\$4.2M +/-
New Capital Investment (est.)	\$20.5M +/-	\$41.7M +/-
Current Active Projects YE2015:	20	13
TOTAL NEW PROJECTS:	14	11
Existing Business	3	3
New Business (est.)	11	8
New Capital Investment (est.)	\$1.14M	

Project Pipeline (YE2015)			
New Jobs	942 +/-	Manufacturing	3
New Payroll (est.)	\$30.5M +/-	Financial/Business Services	1
New Investment	\$660M +/-	Medical Research & Services	1
		Supply Chain Management	0
Square Footage	524K +	IT & Innovation	1
Acreage	274.3 +	Tourism/Retail/Lodging	16
		Agriculture/Forestry	2
Project Pipeline (YE2014)			
New Jobs	1279 +/-	Manufacturing	5
New Payroll (est.)	\$18M +/-	Financial Business Services	2
New Investment (est.)	\$454M +/-	Medical Research & Services	1
		Supply Chain Management	1
Square Footage	898K +	IT, Innovation	1
Acreage	259 +	Tourism/Retail/Lodging	11

Looking ahead to 2016...



Message from the 2016 Chairman, Mike Booth:

To say that 2016 will be a year of new developments and exciting announcements for the area could be quite an understatement. The Taney County Partnership has been, and is, right in the middle of it all. With the cooperation of ALL the member partners, we are working to create one of the premier economic engines in the region.

TCP is helping put deals together by acting as the liaison between business and government, assisting with financing options, putting the investors with the right local business people, and all while being the best cheerleader for the project. This doesn't happen by accident.

Jonas and Jennifer have displayed their dedication and professionalism to our area at a remarkable level. They are not afraid to jump into a project head first and look for a way to make the deal happen.

As for me, I am honored to serve as Chairman of the Taney County Partnership for 2016. However, the previous leadership of this organization has really laid the groundwork to continue down a successful path. Thanks to Rick Ziegenfuss, Craig Richards, and Shawn Pingleton for all they have done to get this organization off the ground and heading in the right direction. But most of all, I want to thank the partners for believing in our area and standing behind our partnership with financial support and confidence.

Another big thank you goes out to Angela Leist, for stepping up as your Chairman-Elect, and Chrystal Irons serving as the Secretary /Treasurer.

With that being said, let's all look forward to a great 2016! After all, it might not be God's country, but it sure has the same zip code!

Let's make it a great year!

Mike Booth
City of Branson

New 2016 Board Officers

Mike Booth, City of Branson - Chairman
Angela Leist, City of Forsyth - Chairman-Elect
Chrystal Irons, Taney County - Secretary/Treasurer

Air Service Developments

Progress is being made toward finalizing and securing major carriers to connect the Branson Tri-Lakes region to important markets that will further economic development efforts while growing the tourism market. New service announcements are expected by March 2016.

2016 board of directors

BUSINESS SECTOR

All-Tech Energy
Angel Hospitality
Arrowhead Building Supply
Arvest Bank
Bank of Missouri
Big Cedar Lodge
BKD
Branson Airport
Branson Bank
Central Bank of the Ozarks
CFS Engineers
Commercial 1 Brokers
Connell Insurance
Cox Medical Center Branson
Dewitt & Associates
Earls Family Broadcasting
Empire District Electric Company
HCW
Mercy
Metropolitan National Bank
Ollis Akers Arney
Olsson Associates
Ozarks Technical Community College
Schultz Surveying & Engineering
Tom Boyce Excavating
United Rentals
White River Valley Electric
Branson/Lakes Area Chamber of Commerce

PUBLIC SECTOR

Taney County
City of Branson
City of Hollister
City of Forsyth
City of Rockaway Beach
Village of Bull Creek
Village of Kirbyville
Village of Merriam Woods
Village of Taneyville
Taney County Regional Sewer District

PARTNER AGENCIES

Springfield Regional Economic Partnership (SREP)
Missouri Economic Development Council (MEDC)
Missouri Partnership
Missouri Department of Economic Development
Hawthorn Foundation
International Economic Development Council (IEDC)
International Council of Shopping Centers (ICSC)

SMART PEOPLE

SMART LOCATION

SMART CHOICE

2016

...the SMART place to be



**Taney County
Partnership**

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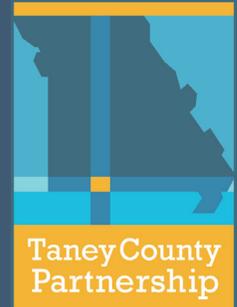
Branson • Hollister • Forsyth • Rockaway Beach
Kirbyville • Merriam Woods • Taneyville • Bull Creek

TANEY COUNTY PARTNERSHIP

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