



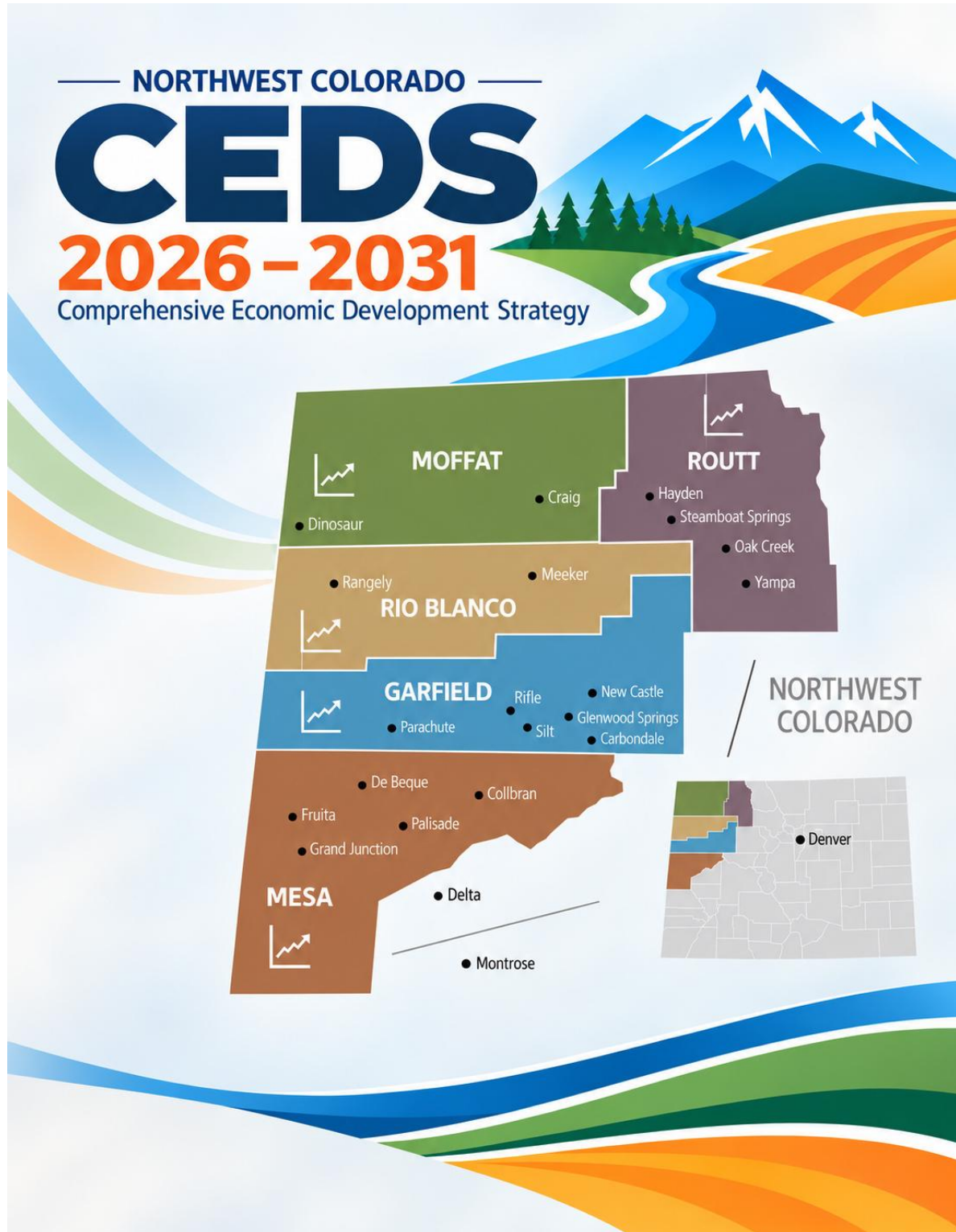
ASSOCIATED GOVERNMENTS
OF NORTHWEST COLORADO
ECONOMIC DEVELOPMENT DISTRICT

— NORTHWEST COLORADO —

CEDS

2026 – 2031

Comprehensive Economic Development Strategy



NORTHWEST COLORADO CEDS 2026–2031



Economic Development District

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1. From the Director's Desk

Dear Partners, Stakeholders, and Residents of Northwest Colorado,

In 2026, Colorado celebrates 150 years of statehood while our nation commemorates the 250th anniversary of the Declaration of Independence. These milestones offer a rare opportunity to reflect on the journey that brought us here, appreciate the communities we have built together, and consider the future we hope to create for the generations that follow.

For Northwest Colorado, this moment carries special significance. For generations, the communities of Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties have helped shape Colorado's story. Our region has long contributed to the state's prosperity while maintaining a character and identity all its own. Whether through the land that sustains us, the industries that support our economy, or the communities people are proud to call home, Northwest Colorado has played an important role in Colorado's past and continues to influence its future.

At its heart, Northwest Colorado's story is a story of people. It is the story of individuals and families who chose to build lives in a rugged and often challenging landscape. It is the story of people who believed in their communities enough to invest in them and who worked to create opportunities not only for themselves, but for those who would come after them. The communities we enjoy today are the result of generations of hard work, determination, and a shared commitment to building something lasting.

Their legacy is visible throughout the region. It can be seen in the communities they built, the institutions they established, and the infrastructure that continues to connect and support our daily lives. More importantly, it can be seen in the values that continue to define Northwest Colorado today: independence, stewardship, resilience, and a willingness to work together when challenges arise. Those values are as important today as they have ever been.

As this Comprehensive Economic Development Strategy demonstrates, Northwest Colorado is navigating a period of significant change. Communities across the region are facing new pressures



while also pursuing new opportunities. The challenges before us are real, but so are the strengths that have helped this region adapt for generations. We continue to

benefit from extraordinary natural assets, strong local leadership, entrepreneurial spirit, and communities that remain deeply invested in their future. Change, however, is not new to Northwest Colorado.

Throughout our history, communities across the region have adapted to new circumstances and evolving realities. Industries have changed, economies have shifted, and communities have been called upon to respond to challenges that previous generations could not have anticipated. What has always distinguished Northwest Colorado is not the absence of difficulty, but the ability of its people to face uncertainty with determination, creativity, and optimism.

This CEDS also marks an important milestone for Northwest Colorado. For the first time since becoming an Economic Development District, the region has completed a full implementation cycle and has the opportunity to reflect on what has been accomplished. Over the past five years, communities across Northwest Colorado have strengthened partnerships, advanced important initiatives, and built a stronger foundation for the future.

Perhaps the most important lesson from that experience is a simple one: Northwest Colorado is strongest when it works together. The relationships built during the past several years have demonstrated the value of regional collaboration and the importance of local leadership. While each community faces its own unique circumstances, we share many of the same opportunities and challenges. By working together, we are better positioned to strengthen our economy, support our communities, and prepare for the future.

One of the most encouraging aspects of this planning process was the level of engagement from people across the region. Residents, business owners, educators, healthcare professionals, elected officials, nonprofit leaders, and countless others took the time to participate in this effort. They shared their experiences, offered thoughtful ideas, and spoke candidly about both the opportunities and challenges facing their communities. Most importantly, they demonstrated a genuine commitment to Northwest Colorado's future. On behalf of AGNC, I extend my sincere appreciation to everyone who contributed to this process. This strategy is stronger because of your participation.



More importantly, the region is stronger because of your willingness to engage, collaborate, and help shape what comes next.

Ultimately, this document is about more than economic development. It is about ensuring that Northwest Colorado remains a place where people can build lives, businesses can succeed, and communities can thrive. It is about preserving the qualities that make this region special while creating new opportunities for future generations. It is about continuing the long tradition of stewardship that has helped shape Northwest Colorado for more than a century.

As Colorado enters its next 150 years and our nation begins its next quarter millennium, we are reminded that every generation inherits both a legacy and a responsibility. The communities we enjoy today were built by people who believed in the future enough to invest in it. Our responsibility is to do the same.

The next chapter of Northwest Colorado's story has not yet been written.

Together, we have the opportunity - and the duty - to forge it.

Sincerely,

Tiffany Dickenson

Executive Director

Associated Governments of

Northwest Colorado (AGNC)



Credit: Town of Parachute.
Location: Parachute, Western Garfield County.

2. Executive Summary

The 2026–2031 Comprehensive Economic Development Strategy (CEDS) represents an important milestone for Northwest Colorado. Developed by the Associated Governments of Northwest Colorado (AGNC) as the region's Economic Development District (EDD), this strategy marks the completion of the region's first full implementation cycle as an Economic Development District and establishes a framework for guiding economic development efforts during the next five years. The planning process provided an opportunity not only to assess current economic conditions, but also to evaluate what the region has learned through implementation, economic disruption, and a period of significant change.

The first implementation cycle unfolded during a uniquely challenging period. Communities across Northwest Colorado navigated the COVID-19 pandemic, workforce disruptions, supply-chain challenges, inflationary pressures, rising housing costs, energy transition, increasing infrastructure demands, and evolving policy environments. Yet despite those challenges, the region strengthened partnerships, expanded economic development capacity, improved project readiness, increased grant competitiveness, and developed stronger regional coordination. The experience reinforced the value of collaboration and demonstrated that long-term economic resilience depends as much on organizational capacity and partnerships as it does on funding and projects.

What the Data Revealed

The data portrays a region that is evolving and facing markedly different demographic conditions across its five counties. The region's total population is projected to continue growing through 2040, with growth concentrated primarily in Mesa County and continued growth pressures in Garfield County. Routt County remains comparatively stable, while Moffat and Rio Blanco Counties face greater demographic and economic contraction pressures. Across the region, population change is increasingly driven by migration rather than natural increase as the population ages. Labor force participation has steadily declined, reflecting these demographic shifts and creating workforce pressures even in communities that continue to add jobs. The region's economy has become more diversified over time, with significant growth in healthcare, professional services, recreation, tourism,



education, and logistics, while energy-producing communities continue to navigate the long-term impacts of coal transition and changing energy markets. The pressures shaping the region vary considerably from county to county. Mesa County continues to grow as the region's primary healthcare, education, transportation, and employment center, bringing increased housing, workforce, and infrastructure demands. Garfield County faces significant housing and workforce pressures associated with its resort-adjacent and Roaring Fork Valley market. Moffat and Rio Blanco Counties face the most significant pressures from energy transition, including risks to jobs, local revenues, workforce, and population. Routt County combines a strong tourism and outdoor recreation economy with acute housing affordability, workforce, and cost-of-living pressures, while its rural communities also face energy transition and diversification challenges.

Housing has emerged as one of the most significant quantitative indicators of change. Since 2017, median home values across the region have increased dramatically, outpacing income growth in many communities and creating challenges for workforce attraction, business expansion, and community stability. At the same time, employers across industries continue to report difficulty finding and retaining workers, creating a disconnect between employment opportunities and workforce availability.

The data ultimately suggest that Northwest Colorado is not a region in decline, but a region in transition. Many traditional strengths remain intact, yet the conditions supporting long-term prosperity are changing and require new approaches to economic development, workforce development, infrastructure investment, and community resilience.

What Stakeholders Told Us

Stakeholder engagement confirmed many of the trends identified in the data while providing important context on how communities are experiencing those changes. Throughout the region, participants described challenges that are becoming increasingly difficult to address independently. Housing shortages affect workforce recruitment. Workforce shortages affect healthcare providers, schools, businesses, and local governments. Infrastructure needs continue to grow while communities struggle with limited staff capacity and increasing project complexity. Participants frequently describe



situations in which communities understand their needs and opportunities but lack the personnel, funding, technical expertise, or organizational capacity required to advance solutions.

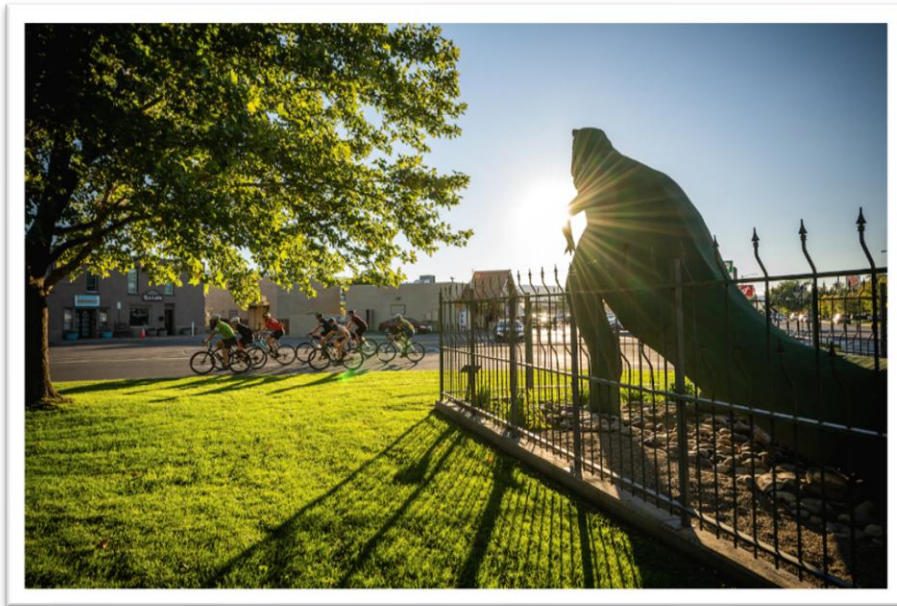
A recurring message throughout the planning process was that local capacity has become one of the region's most significant constraints. Stakeholders repeatedly expressed concerns regarding leadership succession, volunteer fatigue, staffing limitations, grant administration requirements, and implementation challenges. Many communities reported that the same individuals and organizations are repeatedly called upon to lead projects, serve on boards, pursue funding, and address community challenges. Participants consistently emphasized that capacity—not simply funding—has become a limiting factor in achieving local goals.

Stakeholders also identified growing concern regarding Colorado's policy and regulatory environment. Policy and regulation emerged as the most negatively weighted topic in the regional SWOT analysis. Participants frequently discussed the effects of permitting requirements, regulatory complexity, administrative burdens, compliance obligations, and evolving state policies affecting housing, energy, natural resources, infrastructure, business development, and community planning.

While perspectives differed on specific issues, stakeholders consistently emphasized a broader concern that many statewide initiatives are designed around metropolitan conditions and do not always align with the realities facing rural Colorado. Participants described challenges related to implementation capacity, workforce shortages, infrastructure limitations, geographic scale, and local economic conditions. Across all five counties, stakeholders emphasized the importance of local flexibility, meaningful rural participation in decision-making, and ensuring that local communities retain a meaningful role in shaping their own future.

The concerns were particularly evident in discussions related to energy transition. Stakeholders in Moffat, Rio Blanco, and Routt Counties described uncertainty associated with coal-related closures, tax-base impacts, workforce transition, industrial reuse, and economic diversification. While participants recognized significant opportunities, they consistently emphasized that the transition will require sustained investment, long-term planning, and coordinated support that extends beyond individual projects or funding cycles.

Despite these concerns, stakeholders remained optimistic. Participants consistently pointed to local leadership, entrepreneurship, educational partnerships, agricultural expertise, recreation assets, community pride, and regional collaboration as reasons for confidence. Across the region, communities said Northwest Colorado has the resources, knowledge, and people to navigate future challenges successfully.



Credit: City of Fruita. Location: Fruita, Western Mesa County.

What We Learned

As economic data, stakeholder input, implementation experience, and SWOT findings were evaluated together, one conclusion emerged consistently throughout the planning process: Northwest Colorado's challenges and opportunities are interconnected.

The planning process demonstrated that economic development cannot be understood through individual issues alone. Housing affects workforce recruitment and retention. Workforce availability influences healthcare delivery, educational systems, business growth, and community services. Infrastructure shapes economic competitiveness, public safety, and quality of life. Water influences agriculture, recreation, future development, and long-term sustainability. Leadership and

organizational capacity determine whether communities can pursue funding, implement projects, and respond to change. Policy decisions increasingly influence many of these systems simultaneously.

The region's challenges are interconnected, but so are its strengths. Strong local leadership, community identity, entrepreneurial culture, educational institutions, transportation networks, recreation assets, agricultural heritage, and regional partnerships all support one another and contribute to long-term resilience. The most successful solutions are likely to be those that recognize these relationships and strengthen multiple systems simultaneously.

Strategic Direction

The 2026 CEDS findings informed the development of a systems-based framework for regional economic development.

The Northwest CEDS strategy is organized around five interconnected goals:



GOAL 1
Healthy Communities



GOAL 2
Economic Vitality



GOAL 3
Extraordinary Infrastructure



GOAL 4
Strong Communities



GOAL 5
Future Preparedness

1. Healthy Communities

2. Economic Vitality

3. Extraordinary Infrastructure

4. Strong Communities

5. Future Preparedness



Together, these goals provide a framework for strengthening the systems that support long-term prosperity throughout Northwest Colorado. Rather than addressing individual issues in isolation, the strategy focuses on improving the conditions that allow people, businesses, institutions, and communities to succeed.

Looking Ahead

Northwest Colorado enters this planning cycle facing meaningful challenges, but also with stronger partnerships, greater regional capacity, and a clearer understanding of the conditions shaping its future. The first full implementation cycle as an Economic Development District provided valuable lessons about collaboration, resilience, and the importance of regional problem solving. This CEDS builds upon those lessons and provides a framework for helping communities navigate change, strengthen local capacity, support economic opportunity, and create a more resilient future for the people and places of Northwest Colorado.

3. Introduction

The Comprehensive Economic Development Strategy (CEDS) serves as Northwest Colorado's regional economic development roadmap, helping communities align local priorities with state and federal funding opportunities, strengthen project competitiveness, and support coordinated regional action. Developed and maintained by the Associated Governments of Northwest Colorado (AGNC) in its role as the region's Economic Development District (EDD), the CEDS establishes a framework for identifying priorities, coordinating investments, strengthening partnerships, and supporting long-term economic prosperity across Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties.

As the Economic Development District's primary planning document, the CEDS guides regional economic development by providing a shared understanding of the region's assets, challenges, opportunities, and priorities. It also serves as a tool for aligning local, regional, state, and federal resources in support of projects and initiatives that advance economic vitality and community resilience. This 2026–2031 CEDS represents an important milestone for Northwest Colorado. It marks the completion of the region's first full implementation cycle as an Economic Development District and





provides an opportunity to evaluate regional progress, identify emerging opportunities and challenges, and establish priorities for the next five years.

The strategy was developed through a comprehensive process that combined economic and demographic research, stakeholder engagement, implementation review, and regional collaboration. AGNC worked with local governments, economic development organizations, businesses, educational institutions, healthcare providers, workforce partners, nonprofit organizations, and community leaders to gather information and evaluate regional conditions.

Stakeholder input was collected through county-level SWOT analyses, surveys, interviews, workshops, committee discussions, and ongoing engagement with regional partners. This input was supplemented by the review of economic, workforce, housing, demographic, and industry data to better understand current conditions and long-term trends affecting Northwest Colorado.

The resulting strategy reflects both quantitative analysis and local experience. Together, these perspectives provide a foundation for understanding the region's current position, evaluating future opportunities, and identifying actions that will support economic resilience and long-term prosperity.

The chapters that follow provide an overview of AGNC and the Northwest Colorado Economic Development District, summarize regional conditions and trends, present the findings of the regional assessment process, and establish the goals, strategies, and actions that will guide economic development efforts over the next five years.

Ultimately, the purpose of this CEDS is to provide a practical framework for regional collaboration and action. By identifying shared priorities and establishing a common direction, the strategy is intended to support informed decision-making, strengthen regional partnerships, and help Northwest Colorado build upon its strengths while preparing for future opportunities and challenges.





4. About AGNC and the EDD

The Associated Governments of Northwest Colorado (AGNC) is a regional council of governments serving Garfield, Mesa, Moffat, and Rio Blanco Counties. Established to foster regional cooperation and address issues that extend beyond local boundaries, AGNC provides a forum for collaboration among local governments and regional partners while supporting initiatives that strengthen communities throughout Northwest Colorado.

For over 50 years, AGNC has helped communities address shared opportunities and challenges through planning, technical assistance, grant administration, regional coordination, and advocacy. The organization works closely with local governments, businesses, nonprofit organizations, all institutions, healthcare providers, economic development partners, and state and federal agencies to support sustainable economic prosperity and improve quality of life across the region.

Many of the issues facing Northwest Colorado—housing, workforce development, healthcare access, infrastructure investment, community resilience, and economic competitiveness—extend beyond any single jurisdiction. AGNC's role is to help communities work together on regional solutions while preserving local priorities, local leadership, and the unique identities of the communities it serves.

Today, AGNC serves as both a convener and a resource, helping partners identify opportunities, pursue funding, strengthen regional capacity, and advance projects that support long-term community and economic development.



Northwest Colorado's Economic Development District

In 2019, AGNC received designation from the U.S. Economic Development Administration (EDA) as the Economic Development District (EDD) for Northwest Colorado. The EDD includes Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties and provides a regional framework for economic development planning, collaboration, and investment.

While AGNC's Council of Governments membership consists of Garfield, Mesa, Moffat, and Rio Blanco Counties, the Economic Development District also includes Routt County, reflecting the broader regional economy and the shared opportunities and challenges that connect communities throughout Northwest Colorado.

The Economic Development Administration establishes Economic Development Districts to support regional economic development through planning, partnership building, and strategic investment. As an EDD, AGNC develops, maintains, and implements the region's Comprehensive Economic Development Strategy (CEDS), the district's primary economic development planning document.



The CEDS provides a framework for identifying priorities, coordinating investments, pursuing funding opportunities, and supporting projects that strengthen economic vitality and community resilience throughout the region. It also helps ensure local priorities guide regional economic development efforts and communities are positioned to take advantage of state and federal resources when opportunities arise.

The designation recognized that Northwest Colorado functions as an interconnected regional economy. Although each community possesses unique strengths, assets, and priorities, many factors that influence economic prosperity—including workforce availability, housing, infrastructure, transportation, healthcare, and economic diversification—are regional in nature and benefit from collaboration across jurisdictional boundaries.



Credit: City of Craig.
Location: Sunset over the Yampa River, Eastern Moffat County.

Garfield County

COMMUNITIES Glenwood Springs • Carbondale • New Castle • Silt • Rifle • Parachute



Glenwood Springs



Rifle



Parachute

Garfield County is a major regional corridor county along Interstate 70 and the Colorado River, connecting mountain resort economies, energy-producing areas, rural communities, and western Colorado service centers. The county's economy is shaped by natural resources, construction, tourism, outdoor recreation, healthcare, small business, and regional commuting patterns. Communities in Garfield County serve both local residents and broader workforce and visitor markets tied to the Roaring Fork Valley, Colorado River Valley, and regional public lands.

County Seat: Glenwood Springs

2024 Population Estimate: 63,167

Land Area: 2,947.43 square miles

Population Density: 20.9 people per square mile, 2020

Median Household Income: \$91,131

Per Capita Income: \$44,160

Persons in Poverty: 7.5%

Incorporated Municipalities: City of Glenwood Springs, City of Rifle, Town of Carbondale, Town of New Castle, Town of Parachute, Town of Silt

For the CEDS, Garfield County represents a key intersection of infrastructure, workforce, housing, tourism, public lands, and natural resources. The county includes established communities, fast-growing residential areas, and gateway locations connected to recreation and regional employment. Economic development priorities include housing availability, workforce retention, childcare affordability and availability, transportation connectivity, business support, infrastructure resilience, and diversification in communities historically tied to energy and resource-based industries.

Mesa County

COMMUNITIES Grand Junction • Fruita • Palisade • Collbran • De Beque



Grand Junction



Fruita



De Beque

Mesa County is the most populous county in EDD and serves as a major economic, healthcare, education, transportation, and commercial hub for western Colorado. Anchored by Grand Junction and the Grand Valley, the county supports a diverse economy that includes healthcare, higher education, logistics, aviation, manufacturing, agriculture, tourism, outdoor recreation, and professional services. Mesa County's location along Interstate 70, U.S. Highway 50, and the Colorado River strengthens its role as a regional center for employment, services, and infrastructure.

County Seat: Grand Junction

2024 Population Estimate: 161,260

Land Area: 3,328.72 square miles

Population Density: 46.8 people per square mile, 2020

Median Household Income: \$73,658

Incorporated Municipalities: City of Grand Junction, City of Fruita, Town of Palisade, Town of Collbran, Town of De Beque

For the CEDS, Mesa County is important as the region's largest population and employment center. Its assets include Colorado Mesa University, Grand Junction Regional Airport, major healthcare systems, strong transportation access, agricultural production, outdoor recreation destinations, and growing entrepreneurial activity. Key challenges include housing affordability, workforce availability, infrastructure capacity, rural service access outside the Grand Valley, and the need to ensure that regional growth benefits both urban and rural communities.

Moffat County

COMMUNITIES Craig • Dinosaur



Craig



Dinosaur



Craig / Moffat County

Moffat County is one of Colorado's largest counties by land area and is central to Northwest Colorado's energy transition, agricultural heritage, and outdoor recreation economy. Coal, power generation, ranching, public lands, and regional transportation connections have long shaped the county. Craig serves as the county seat and primary service center, while Dinosaur provides a gateway connection to Dinosaur National Monument and public lands-based tourism opportunities.

County Seat: Craig
 2024 Population Estimate: 13,142
 Land Area: 4,743.24 square miles
 Population Density: 2.8 people per square mile, 2020
 Median Household Income: \$73,849
 Per Capita Income: \$35,967
 Persons in Poverty: 10.1%
 Incorporated Municipalities: City of Craig, Town of Dinosaur

For the CEDS, Moffat County is a high-priority county for economic resilience and transition planning. Retiring coal-related assets creates significant workforce, tax base, infrastructure, and community identity considerations. At the same time, Moffat County has major assets, including industrial land, a skilled energy workforce, agricultural production, public lands, outdoor recreation, transportation access, and strong local leadership. Economic development strategies should support workforce transition, business retention and expansion, industrial reuse, entrepreneurship, tourism development, infrastructure investment, and long-term community resilience.

Rio Blanco County

COMMUNITIES Meeker • Rangely



Meeker



Rangely



Rangely / Kenney Reservoir

Rio Blanco County is a rural county with a strong identity rooted in energy, agriculture, public lands, natural resources, and open space. The county's two municipalities, Meeker and Rangely, serve as important local service centers for residents, businesses, visitors, and surrounding rural areas. Rio Blanco County's economy has historically been tied to energy production, ranching, natural resources, and outdoor recreation, with opportunities emerging around broadband, tourism, higher education partnerships, infrastructure, and small business development.

County Seat: Meeker
2024 Population Estimate: 6,607
Land Area: 3,220.97 square miles
Population Density: 2.0 people per square mile, 2020
Median Household Income: \$65,473
Per Capita Income: \$34,099
Incorporated Municipalities: Town of Meeker, Town of Rangely

For the CEDS, Rio Blanco County reflects the realities of rural economic development across large geographies with small populations. Key issues include workforce attraction, housing, business succession, access to services, infrastructure costs, energy transition impacts, and maintaining local capacity for grant and project implementation. Assets include strong community identity, public lands access, broadband investment, Colorado Northwestern Community College in Rangely, agriculture, recreation, and local leadership focused on resilience and diversification.

Routt County

COMMUNITIES Steamboat Springs • Hayden • Oak Creek • Yampa



Steamboat Springs



Hayden



South Routt / Yampa

Routt County combines a nationally recognized tourism and outdoor recreation economy with deep cultural roots, energy transition impacts, and growing housing and workforce pressures. Steamboat Springs serves as the county seat and primary economic center, while Hayden, Oak Creek, and Yampa reflect the county's rural and energy-related heritage. Tourism, recreation, small business, construction, public lands, and regional service industries strongly influence the county's economy.

County Seat: Steamboat Springs

2024 Population Estimate: 25,243

Land Area: Approximately 2,362 square miles

Population Density: 10.5 people per square mile, 2020

Median Household Income: \$106,489

Per Capita Income: \$68,776

Persons in Poverty: 6.6%

Incorporated Municipalities: City of Steamboat Springs, Town of Hayden, Town of Oak Creek, Town of Yampa

For the CEDS, Routt County is important for both its high-value visitor economy and its exposure to major regional challenges, including housing affordability, workforce availability, cost of living, energy transition, transportation access, and balancing growth with rural character. Hayden and South Routt communities are especially important in regional transition planning due to energy-related changes and the need for economic diversification. Priorities should support workforce housing, childcare availability, small business development, infrastructure, broadband, tourism management, and transition strategies that benefit both resort-adjacent and rural communities

Regional Profile for the AGNC EDD



GARFIELD



MESA



MOFFAT



RIO BLANCO



ROUTT

Northwest Colorado combines the Western Slope's largest service and employment center with mountain communities, rural economies, energy-producing areas, and nationally recognized recreation destinations. Healthcare, education, natural resources, energy, tourism, construction, professional services, transportation, and small business all contribute to the regional economy, though their importance varies significantly across the 5 counties. These distinct economic conditions create different opportunities and challenges and connect communities through shared labor markets, services, infrastructure, and commerce.

2024 POPULATION ESTIMATE 269,376	LAND AREA Approximately 16,602 square miles
PUBLIC LANDS 65.3% of regional land area	PER CAPITA PERSONAL INCOME \$70,400
LABOR FORCE PARTICIPATION 61.1%	2024 UNEMPLOYMENT RATE Approximately 4%

Assets

Northwest Colorado has substantial economic and physical assets, including regional healthcare and higher education institutions, transportation and aviation connections, energy and natural resources, extensive public lands, recreation and tourism destinations, established businesses, entrepreneurs, and strong local leadership. The region also benefits from communities that serve different economic functions, creating opportunities for regional commerce, investment, and coordination.

Key considerations

Housing affordability and availability, workforce constraints, infrastructure needs, demographic change, and limited community capacity affect communities throughout the region, although their



severity and causes vary considerably. Coal transition creates significant employment, fiscal, and economic risks in affected communities, while high housing costs and rapid appreciation create different pressures in the region's higher-demand markets. An aging population and declining labor force participation add to these challenges by limiting the workforce available to support employers and essential services.

These county profiles help establish the foundation for the CEDS by identifying the different roles each county plays in the regional economy. Together, they demonstrate why the AGNC EDD requires a coordinated strategy that supports robust local economies, healthy communities, a ready and willing workforce, and extraordinary infrastructure.

Source notes: AGNC identifies the five-county regional data focus as Garfield, Mesa, Moffat, Rio Blanco, and Routt counties and describes AGNC's EDD/COG role in regional coordination. Population and land area figures are from U.S. Census Bureau QuickFacts for Mesa, Garfield, Moffat, Rio Blanco, and Routt counties. Garfield County's official site lists its six municipalities as Glenwood Springs, Rifle, Carbondale, Silt, New Castle, and Parachute; Mesa County planning materials identify Grand Junction, Fruita, Palisade, Collbran, and De Beque; AGNC's municipal member page also confirms several EDD municipal communities including Collbran, Craig, De Beque, Dinosaur, Fruita, Hayden, Meeker, New Castle, Oak Creek, Parachute, Rangely, Rifle, Silt, and Yampa. Routt County's official demographics page lists the county area at about 2,362 square miles and identifies Steamboat Springs, Hayden, Oak Creek, and Yampa.

5. Summary Background for the AGNC 5-County EDD Region

Overview from the State of Colorado's Demography Office regarding the AGNC EDD

The region's economic base is very diverse. Traditional base sectors include strong agribusiness in Moffat and Rio Blanco counties, major mining activities and federal and state government presence, and a significant manufacturing sector in Mesa. Mesa County also provides business and professional services to the wider region, while a number of the counties provide construction services outside their boundaries. Tourism constitutes 42.5 percent of the base in Routt County and is significant in Garfield (16.5 percent), Rio Blanco (13.5 percent) and Mesa (7.6 percent) counties as well. Retirees constitute 13.2 percent of Mesa County's economic base and a significant percent of the overall region.



Agriculture is a significant industry in this region and varies from sheep, cattle and hay in Moffat and Rio Blanco Counties to orchards and vineyards in Mesa and Garfield Counties. Agriculture makes up 12-13% of the base industry jobs in Moffat and Rio Blanco Counties and is a smaller share (around 5%) in Routt, Garfield and Mesa Counties. Farmland in Moffat County makes up approximately 27% of the county land area.

Together, the AGNC EDD counties represent a large and diverse regional economy shaped by agriculture, energy, tourism, outdoor recreation, healthcare, education, logistics, manufacturing, public lands, and small business development. The region includes both larger service hubs and deeply rural communities, with economic conditions varying significantly by county, geography, workforce base, housing market, and industry mix.



Credit: Town of Meeker.
Location: Meeker, Eastern Rio Blanco County.

A. DEMOGRAPHIC AND SOCIOECONOMIC DATA

The AGNC region had a population of approximately 269,000 in 2024 across five counties. Mesa County anchors the region with about 60% of total population. The remaining four counties (Garfield, Moffat, Rio Blanco, and Routt) span a wide range of economic conditions, from energy-dependent rural counties to the high-income tourism economy of Steamboat Springs.

Education

Table 1: Regional Education Data

Education Level	Population	% of Region	Cumulative %
Less than 9th grade	5,434	2.9%	2.9%
9th-12th, no diploma	9,576	5.2%	8.1%
High school graduate	49,884	27.0%	35.1%
Some college, no degree	42,750	23.1%	58.2%
Associate's degree	16,439	8.9%	67.1%
Bachelor's degree	40,189	21.7%	88.9%
Graduate or professional	20,600	11.1%	100.0%
Total	184,872	100.0%	

Source: U.S. Census Bureau

The AGNC region has a college-attainment gap relative to Colorado. Roughly 33% of the region's adults aged 25 and older hold a bachelor's degree or higher (21.7% bachelor's plus 11.1% graduate or professional), compared to 44.8% statewide. The region also has a higher share of adults whose highest credential is a high school diploma (27.0% vs. 20.1%

statewide), reflecting historic reliance on skilled trades and extractive industries that do not require a four-year degree.

Table 2: Regional Educational Attainment by County

County	Less than 9th grade	9th-12th, no diploma	High school graduate	Some college, no degree	Associate's degree	Bachelor's degree	Graduate or professional
Mesa	2.0%	5.6%	28.5%	24.9%	8.4%	20.7%	9.9%
Garfield	6.6%	4.9%	24.5%	21.3%	9.3%	21.0%	12.4%
Moffat	1.0%	7.5%	37.8%	21.2%	11.5%	15.6%	5.4%
Rio Blanco	2.3%	4.5%	30.5%	25.9%	10.3%	18.5%	8.1%
Routt	1.2%	2.3%	17.7%	17.2%	9.5%	33.1%	19.0%
AGNC Region	2.9%	5.2%	27.0%	23.1%	8.9%	21.7%	11.1%
Colorado (state)	3.1%	4.1%	20.1%	19.6%	8.3%	27.7%	17.1%

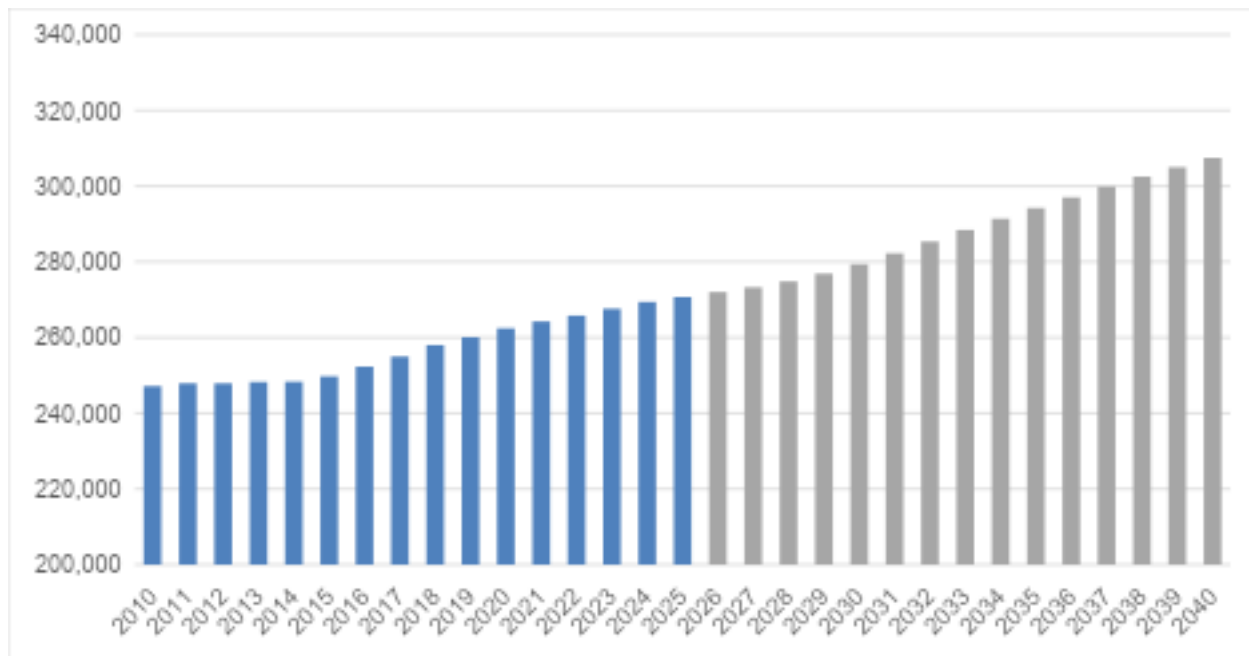
Source: U.S. Census Bureau

Routt County leads the region with 52.1% of adults holding a bachelor's degree or higher, exceeding the Colorado average of 44.8%. Garfield and Mesa cluster around 30% to 33%, Rio Blanco at 26.6%, and Moffat trails at 21.0%, roughly half the state average. This distribution mirrors industry composition: counties with higher concentrations of tourism, healthcare, and professional services have higher attainment, while counties dominated by mining and energy have lower attainment.

Population

The AGNC region's total population has grown steadily over the past decade and is projected to continue expanding through 2040, reaching roughly 308,000 residents according to Colorado State Demography Office forecasts.

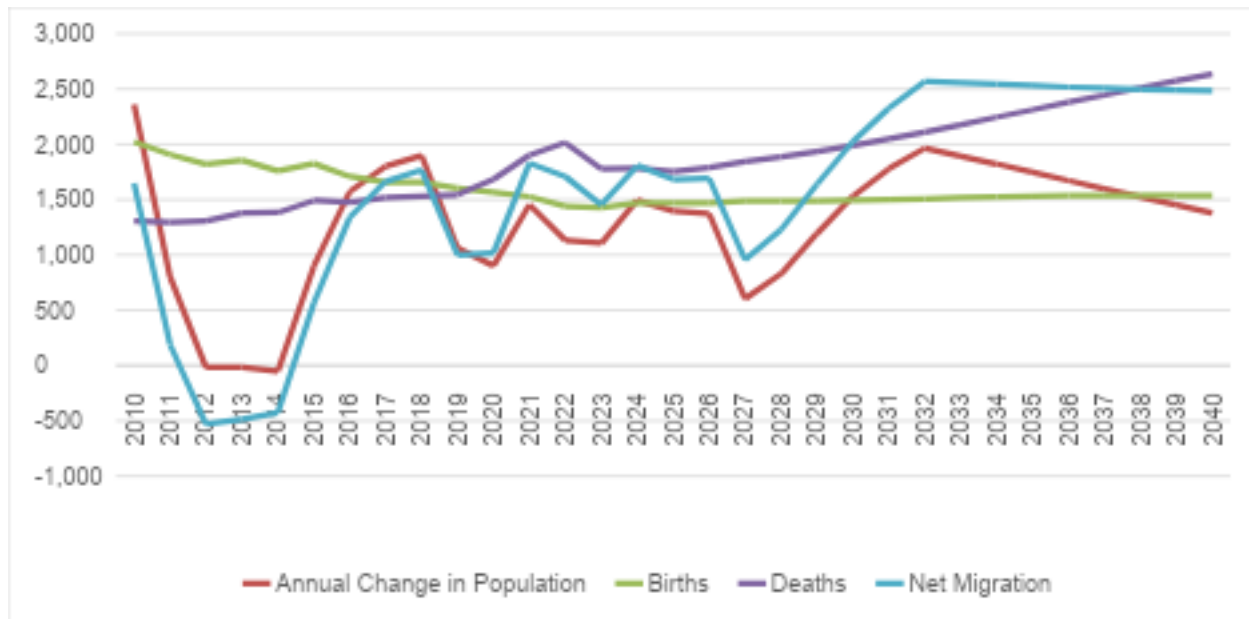
Figure 1: Population Forecast



Source: Colorado State Demography Office

The drivers of this growth have changed over time. Through the early 2010s, the region added population through a mix of births over deaths and modest net migration. That pattern reversed by the early 2020s, when deaths first exceeded births, and the gap began widening as the population ages. Net migration is now the dominant force, projected to add roughly 2,500 residents per year by the early 2030s. The region's growth therefore depends increasingly on attracting and retaining new residents rather than natural increase.

Figure 2: Population Components of Change



Source: Colorado State Demography Office

Age structure also varies by county. The aging that has pushed regional deaths past births shows up unevenly across the AGNC region, with implications for workforce supply, school enrollment, and healthcare demand. Tables 3 and 4 lay out the 2024 distribution by count and by share.

Table 3: Population by Age Cohort (2024), Source: Colorado State Demography Office

County	0-4	5-17	18-24	25-44	45-64	65+	Total
Mesa	7,527	24,488	14,261	40,536	35,929	38,433	161,174
Garfield	3,707	11,287	5,056	18,128	14,968	10,027	63,173
Moffat	716	2,518	1,147	3,439	3,105	2,258	13,183
Rio Blanco	295	1,292	605	1,766	1,430	1,228	6,616

Routt	1,015	3,510	1,451	7,592	6,693	4,969	25,230
AGNC Region (Total)	13,260	43,095	22,520	71,461	62,125	56,915	269,376

Table 4: Cohort Share of County Population, 2024 (%)

County	0-4	5-17	18-24	25-44	45-64	65+
Mesa	4.7 %	15.2 %	8.8%	25.2 %	22.3 %	23.8 %
Garfield	5.9 %	17.9 %	8.0%	28.7 %	23.7 %	15.9 %
Moffat	5.4 %	19.1 %	8.7%	26.1 %	23.6 %	17.1 %
Rio Blanco	4.5 %	19.5 %	9.1%	26.7 %	21.6 %	18.6 %
Routt	4.0 %	13.9 %	5.8%	30.1 %	26.5 %	19.7 %
AGNC Region	4.9 %	16.0 %	8.4%	26.5 %	23.1 %	21.1 %

Source: Colorado State Demography Office

The AGNC region is older than Colorado as a whole. The 65+ cohort represents 21.1% of the regional population, versus approximately 16% statewide. Mesa County skews oldest, with 23.8% of its population over 65. The 25 to 44 cohort, the prime working-age band, represents 26.5% of the region. The age structure has direct implications for labor force availability, discussed in the Employment chapter below.

Race and Ethnicity

The AGNC region is less racially and ethnically diverse than Colorado as a whole. Non-Hispanic White residents account for 75.4% of the regional population, about 10 percentage points above the state share of 65.7%. The Hispanic or Latino population is 18.5% of the region, compared with 22.2% statewide. Black and Asian residents together account for about 1.3% of the region, well below state shares of 3.8% and 3.2%.

Table 5: AGNC Race and Ethnicity

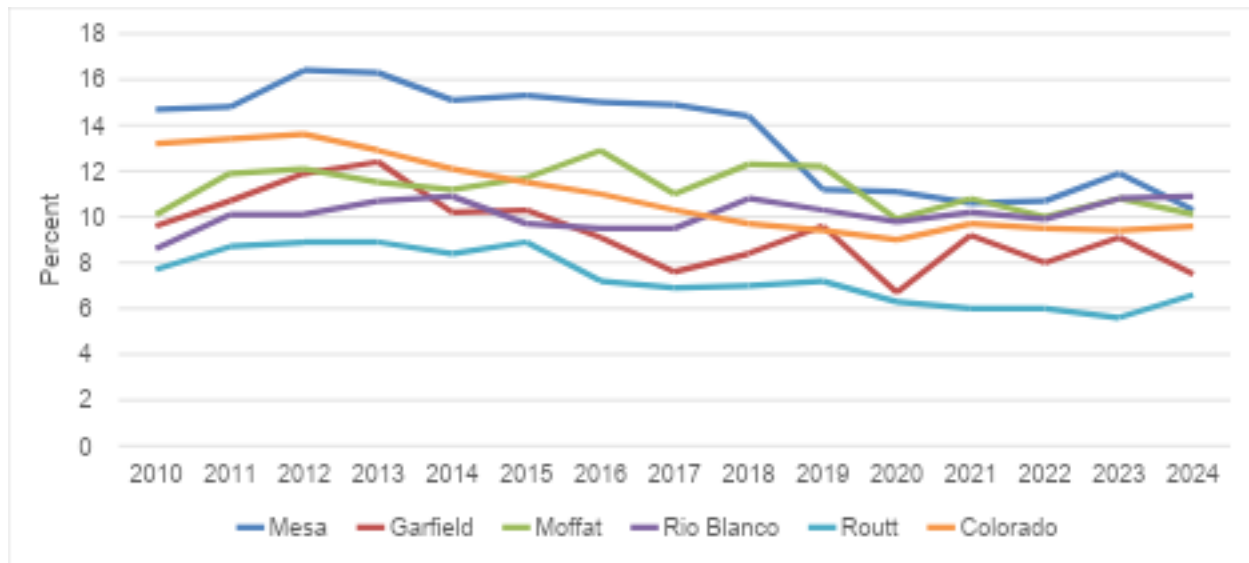
Race / Ethnicity	Population	% of AGNC Total	Colorado %
Hispanic or Latino (any race)	48,867	18.5%	22.2%
White alone, not Hispanic	199,047	75.4%	65.7%
Black or African American alone, not Hispanic	1,222	0.5%	3.8%
American Indian and Alaska Native alone, not Hispanic	1,009	0.4%	0.4%
Asian alone, not Hispanic	2,232	0.8%	3.2%
Native Hawaiian and Other Pacific Islander alone, not Hispanic	229	0.1%	0.1%
Some other race alone, not Hispanic	1,415	0.5%	0.4%
Two or more races, not Hispanic	10,095	3.8%	4.2%
Total	264,116	100.0%	100.0%

Source: U.S. Census Bureau

Poverty and Income

Poverty rates across the AGNC region generally cluster around the Colorado average. Routt remains the consistent low at 6.6% in 2024, three points below the state, and Garfield (7.5%) also sits well below. Mesa, Moffat, and Rio Blanco hover slightly above the state rate, though Mesa's has fallen sharply since 2010, from 14.7% to 10.3%.

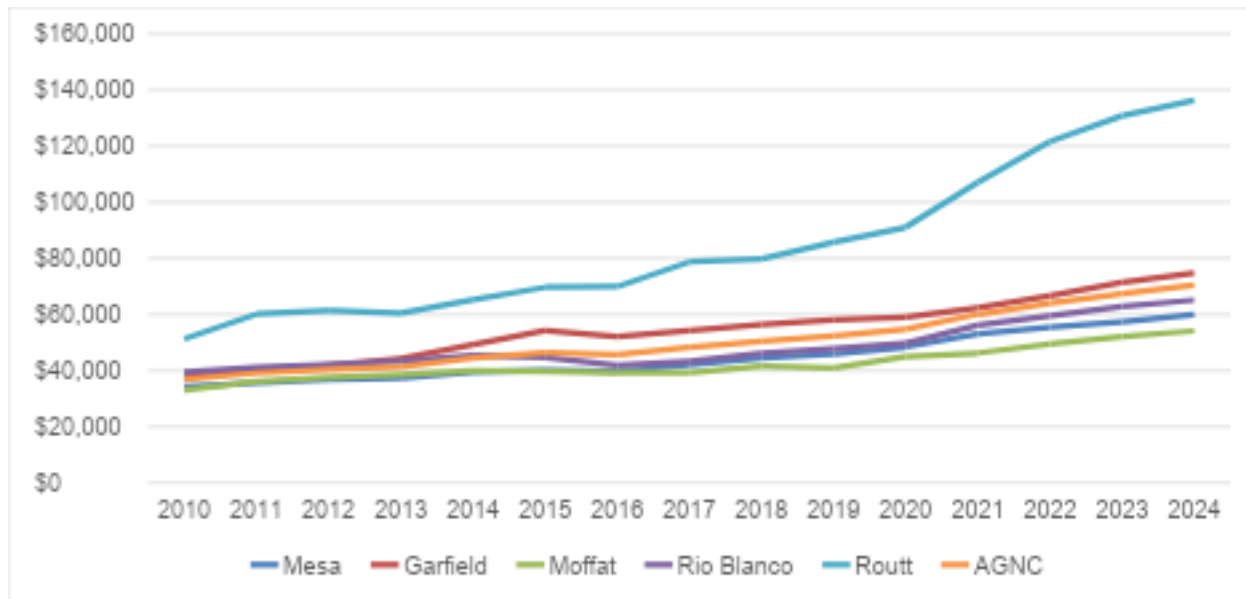
Figure 3: Poverty Rate by County (SAIPE)



Source: U.S. Census Bureau, SAIPE

Per capita personal income shows the same regional variation, only sharper. Routt is the outlier by a wide margin, with 2024 PCPI of \$136,239, roughly double the AGNC regional average of \$70,400, reflecting the concentration of high-income households, investment income, and second-home wealth around Steamboat Springs. Garfield comes in second at \$74,757. Mesa, Moffat, and Rio Blanco range from \$54,000 to \$65,000. The income gap has widened over time: Routt's PCPI grew 166% from 2010 to 2024, roughly double the regional pace.

Figure 4: Per Capita Personal Income, 2010-2024



Source: U.S. Bureau of Economic Analysis

B. ENVIRONMENTAL, GEOGRAPHIC, AND NATURAL RESOURCE PROFILES

Public Lands and Land Use

The AGNC region is defined as much by its constrained private land base as by its open space. Headwaters Economics' Economic Profile System, using USGS PAD-US 4.1 land ownership data, shows that federal lands account for approximately 62.2% of the five-county land base. When state and local public lands are included, approximately 65.3% of the region is publicly owned. The federal share ranges from 43.9% in Routt County to 73.3% in Rio Blanco County, with Mesa at 72.7%, Garfield at 62.2%, and Moffat at 56.5%.[1]

The mix of federal land differs sharply by county. Rio Blanco and Mesa are dominated by Bureau of Land Management acreage, reflecting the role of energy leasing, grazing, mineral activity, and dispersed recreation. Moffat is also heavily BLM oriented, with BLM lands accounting for nearly half of the county's total acreage and National Park Service lands adding another large public-land presence through Dinosaur National Monument. Routt follows the opposite pattern. Forest Service



lands make up most of its federal footprint, while BLM lands are relatively limited. Garfield sits between, with BLM and Forest Service lands splitting the federal land base more evenly.[2]

The same land base is also one of the region's core economic assets. BLM lands support energy development, grazing, mineral activity, transmission corridors, hunting, and dispersed recreation. Forest Service lands anchor major recreation, tourism, watershed, wildlife, and quality-of-life assets, particularly in Garfield, Mesa, and Routt counties. The White River National Forest, with its supervisor's office in Glenwood Springs, is a major recreation anchor for the broader region.

Public lands are not the only form of constrained land. Private conservation easements further restrict the developable acreage. Routt has 9.1% of its total land under easement; Moffat, 4.1%. These lands are not public ownership, but they still matter for land-use planning, working landscapes, habitat, viewsheds, and the long-term development footprint.[3]

Public and protected lands create both opportunities and constraints for the AGNC region. They limit the amount of private land available for housing, industrial sites, infrastructure, and local tax-base growth. At the same time, they support energy development, grazing, recreation, tourism, hunting, and the outdoor quality-of-life economy. This creates a fiscal challenge for local governments. Counties and municipalities provide roads, emergency response, land-use coordination, search and rescue, and community services across large areas where much of the land is tax-exempt or restricted from development. For that reason, public-land coordination is a core economic development issue for the region.

Agriculture

Agriculture remains a meaningful component of the AGNC regional economy and a defining element of its working landscape. As of the 2022 Census of Agriculture, the five counties contained 4,654 farms covering 2.8 million acres, ranging from large Moffat County livestock ranches that average more than 2,000 acres per operation to small Mesa County orchards averaging just over 100 acres. Cattle remain the dominant livestock category region-wide, while Mesa County ranks first in the state for fruit, tree nut, and berry sales, anchored by the Grand Valley wine and peach industry.





Most operations are small. Between 43 and 60 percent of farms in each AGNC county report less than \$2,500 in annual sales, reflecting a large base of part-time and lifestyle operators alongside a smaller number of larger commercial ranches. Producer demographics skew older across the region. Between 35 and 43 percent of producers in each county are aged 65 or older, while fewer than 11 percent are under 35, raising long-term succession concerns highlighted in recent regional studies. [4]

Perry (2026) estimates that the broader Western Slope agricultural sector supports 9,123 jobs, \$107.7 million in labor income, and \$281.7 million in regional GDP through direct, indirect, and induced effects modeled in IMPLAN. That study covers a five-county area that includes three AGNC counties (Mesa, Garfield, and Rio Blanco) plus Delta and Montrose counties, which lie outside the AGNC region. Moffat and Routt are not included in the model, so a full AGNC-wide contribution estimate would require additional modeling. Given their farm-sales totals, Moffat and Routt would meaningfully add to the regional contribution but are unlikely to exceed Mesa County's share.

Table 6: AGNC 5-County Agricultural Profile, 2022 Census

County	Number of Farms	Land in Farms (acres)	Avg. Farm Size (acres)	Market Value Sold (\$1,000)	Net Cash Farm Income (\$1,000)
Garfield	601	402,741	670	\$25,052	\$3,838
Mesa	2,353	268,323	114	\$90,764	\$4,469
Moffat	461	994,625	2,158	\$39,943	\$9,437
Rio Blanco	321	466,136	1,452	\$23,193	\$1,489
Routt	918	669,742	730	\$47,869	\$7,573
AGNC Total	4,654	2,801,567	602	\$226,821	\$26,806

Source: USDA, 2022 Census of Agriculture, County Profiles.





Recreation and Cultural Assets

Recreation and cultural assets are a major part of the AGNC economy. They support tourism and visitor spending, but they also help communities attract workers, retain residents, support small businesses, and strengthen downtowns. The AGNC region contains three overlapping recreation economies. The first is a destination ski and mountain economy centered in Routt County, anchored by Steamboat Resort and supported by lodging, commercial air service, hot springs, and a year-round trail system. The second is a gateway and corridor economy along I-70, U.S. 50, and the Colorado River. It includes Glenwood Springs, Grand Junction, Fruita, and Palisade, along with Colorado National Monument, Grand Mesa, and the region's wine and agritourism assets. The third is a public-lands amenity economy in Moffat, Rio Blanco, and the rural edges of Mesa and Garfield counties, where hunting, fishing, OHV use, river access, wildlife viewing, Dinosaur National Monument, and dispersed recreation are important but less fully converted into local lodging, retail, and visitor-service activity.

Each economy carries distinct pressures. Routt's year-round visitor base intensifies workforce housing, second-home demand, seasonal labor needs, and service costs, pressures that extend into Garfield through its Roaring Fork Valley connection. The corridor economy benefits from pass-through traffic but depends on continued investment in wayfinding, downtowns, river access, water security, and visitor-service capacity. The public-lands economy faces the opposite problem: dispersed recreation does not automatically translate into local capture.

Two National Park Service units anchor the region. In 2024, Colorado National Monument recorded 488,038 recreation visits, generating an estimated \$37.1 million in nearby visitor spending and supporting 348 jobs. Dinosaur National Monument recorded 322,113 visits, \$24.2 million in spending, and 243 jobs.[5]

State parks extend the recreation system. James M. Robb Colorado River State Park operates as a five-section "string of pearls" along the Colorado River corridor. Yampa River State Park provides 13 access points across a 134-mile stretch from Hayden toward Dinosaur National Monument. Stagecoach, Steamboat Lake, Rifle Falls, Rifle Gap, and Harvey Gap round out the CPW-managed assets that serve both visitors and residents.[6]





Cultural assets reinforce the recreation economy. The region includes certified creative districts in Carbondale, Downtown Grand Junction, and Steamboat Springs, concentrating galleries, public art, events, historic buildings, and small businesses in walkable downtowns. Palisade combines food, wine, and agritourism around more than 500,000 peach trees, 1,000 acres of vineyards, 30 wineries, and 90% of the grapes used in making Colorado wines. Moffat, Rio Blanco, and Routt rely more heavily on ranching heritage, county fairs, rodeos, hunting culture, and working landscapes, which should be treated as part of the region’s recreation and cultural economy.[7]

Water Resources

Water shapes the AGNC economy. The region sits within the upper Colorado River system, where snowpack, runoff, rivers, reservoirs, and irrigation networks influence local communities and downstream water debates. The Colorado River mainstem runs through Garfield and Mesa counties, joined by the Roaring Fork at Glenwood Springs. The Yampa, White, and Green river systems shape much of Routt, Moffat, and Rio Blanco counties. These watersheds support municipal growth, agriculture, energy production, outdoor recreation, tourism, and the region’s quality of life.[8]

Two CWCB basin-planning frameworks cover the region: the Colorado Basin and the Yampa-White-Green Basin. The 2023 Colorado Water Plan is organized around four action areas: Vibrant Communities, Robust Agriculture, Thriving Watersheds, and Resilient Planning. The Basin Implementation Plans translate those statewide goals into basin-level priorities and project lists. Garfield and Mesa are most directly tied to the Colorado Basin framework; Routt, Moffat, and Rio Blanco are primarily tied to the Yampa-White-Green framework.[9]

The Colorado Basin Implementation Plan identifies compact compliance, agricultural sustainability, watershed health, water quality, trans basin diversions, drought, aridification, and recreation and environmental flows as key challenges. The Yampa-White-Green framework emphasizes protection from curtailment, agricultural water uses, municipal and industrial shortages, non-consumptive environmental and recreational uses, water quality, and modernization of storage and distribution infrastructure. Drought, aridification, compact risk, and aging infrastructure cut across both.[10]



Water systems are foundational for economic development in Northwest Colorado. Reliable water, wastewater, stormwater, raw water, and storage systems determine where housing can be built, where businesses can expand, how agriculture remains viable, and how recreation assets function. The prior AGNC CEDS treated water as an infrastructure priority, including local water and wastewater upgrades, stormwater work, raw water and storage projects, and coordination with CDPHE, conservation districts, water providers, basin roundtables, and CWCB.[11]

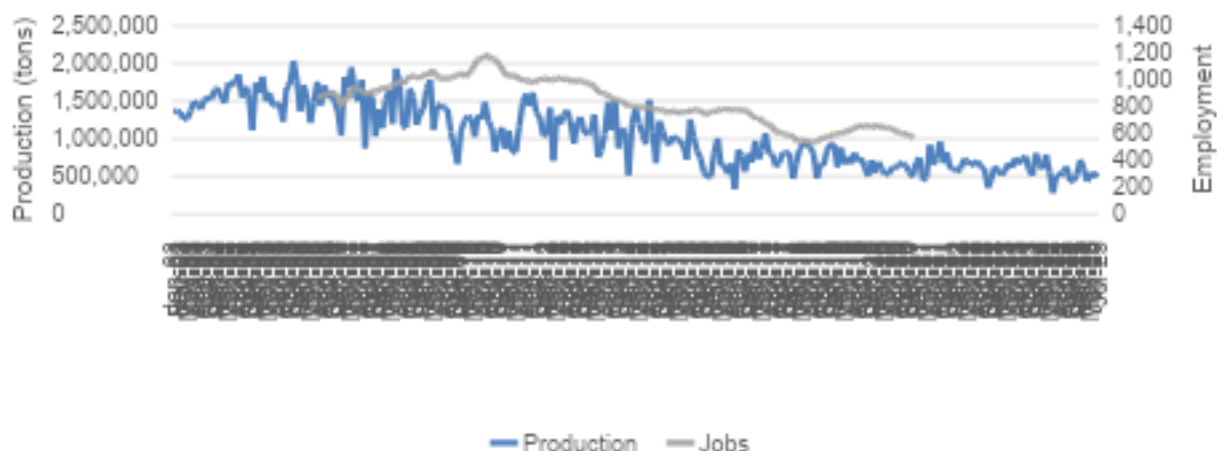
Energy and Coal Transition

Coal

Coal has anchored the northern AGNC economy for decades, concentrated in Moffat, Routt, and Rio Blanco counties around the Craig and Hayden generating stations and the mines that supply them. That role is now contracting on a defined schedule.

The transition is not only a future closure event. It is already visible in the data. Regional coal production and employment peaked well before scheduled retirements and have trended down over the past decade. The production and employment figure shows output falling from more than one million tons per month through much of the 2000s and early 2010s to roughly half that by 2024 and 2025, with employment dropping from more than 1,000 workers at the late-2000s peak to fewer than 600 by mid-2025.

Figure 5: Moffat, Routt, and Rio Blanco Coal Production and Jobs



Source: Colorado Division of Reclamation, Mining and Safety

Figure 6: Coal Jobs Per Mine



Source: Colorado Division of Reclamation, Mining and Safety

What makes the coal transition different from an ordinary downturn is that the end dates are largely known, which makes planning both more urgent and more actionable. Colorado created the Office of Just Transition to support coal workers and coal-dependent communities, and it identifies the Yampa Valley (Moffat and Routt counties) as a Tier One coal transition community affected by Hayden Station, Craig Station, Trapper Mine, Colowyo Mine, and Twentymile Mine. The Office’s stated purpose is to help these communities create family-sustaining jobs, broaden the property tax base, and build economic diversity.[12]

The central question is replacement. The plants and mines support high-wage employment, property tax base, supply-chain spending, and public revenues. The strategy therefore needs to address both direct energy-site reuse and broader economic diversification.

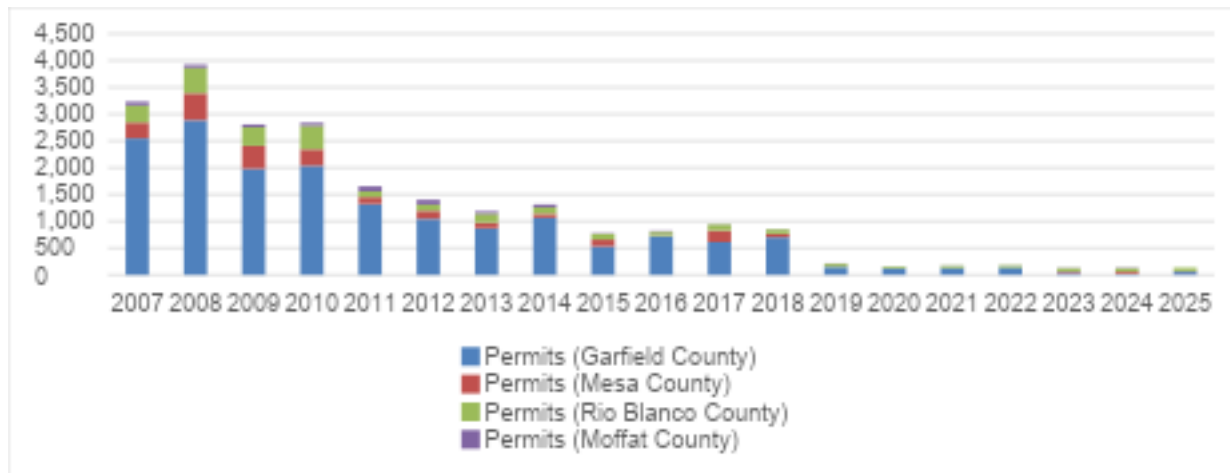
Oil and Gas

Oil and gas is the region’s other major energy industry, concentrated in the Piceance Basin, especially Garfield, Rio Blanco, and Mesa counties, with Moffat playing a smaller role. Unlike coal, its challenge is not a fixed closure schedule but market volatility and state rulemaking. Activity responds

quickly to prices, drilling economics, regulation, and operator decisions, and those swings move through local employment, severance tax receipts, federal mineral lease payments, school finance, and local budgets.

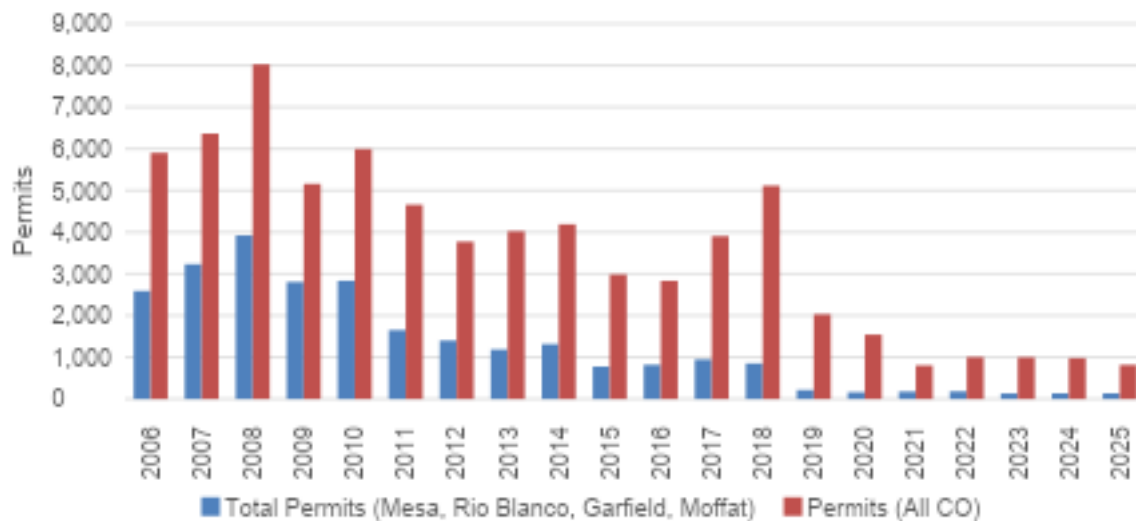
The drilling permit figures make that volatility clear. Across the four AGNC energy counties, permits peaked at nearly 4,000 in 2008 and fell to roughly 135 by 2025, with Garfield driving the early activity and Rio Blanco a smaller but persistent source. The statewide comparison adds an important point. Colorado permitting also fell sharply, but the Western Slope declined faster and lost share: the four counties were roughly half of state permits in 2008 (about 3,900 of 8,000) and only about one-sixth by 2025 (about 135 of 800). The decline reflects not just a statewide slowdown but a shift in where drilling occurs, increasingly outside the Western Slope.

Figure 7: AGNC Drilling Permits



Source: Colorado Energy and Carbon Management Commission

Figure 8: Total Drilling Permits Western Slope Compared to Colorado



Source: Colorado Energy and Carbon Management Commission

The planning problem is volatility. Energy revenues can be large in strong years but are hard to sustain through downturns, which reinforces the same diversification theme that runs through the coal transition. The region should preserve the value of its energy assets while reducing exposure to commodity cycles, using strong years to build infrastructure, workforce capacity, housing, business sites, and fiscal resilience rather than assuming the next cycle will permanently restore the tax base.

C. INFRASTRUCTURE

Infrastructure in the AGNC region is shaped by one basic problem: the region must serve a large, sparsely populated geography with a relatively small population and revenue base. Roads, broadband networks, utility systems, and public facilities stretch across long distances to reach relatively few people. That raises construction and maintenance costs. It also makes each major corridor or network more important when wildfire, flooding, weather, or economic disruption occurs.

Transportation

Transportation depends on a small number of corridors. Interstate 70 carries traffic and freight through Garfield and Mesa counties. U.S. 40 is the spine across the northern tier in Routt and Moffat counties. State highways 13, 139, and 64 connect the interior. That concentration is also the main

NORTHWEST COLORADO CEDS 2026–2031



Economic Development District



vulnerability. Interstate 70 through Glenwood Canyon is the clearest example: mudslides from the 2020 Grizzly Creek Fire burn scar closed the canyon repeatedly in 2021 and disrupted the region's primary east-west route. Air service is anchored by Grand Junction Regional Airport, the commercial hub for the central Western Slope, and Yampa Valley Regional Airport in Hayden, which links Steamboat Springs and the northern counties to major hubs and carries heavy winter tourism traffic. Freight rail follows the Union Pacific central corridor, where coal traffic is declining as the generating stations retire.[13]

Broadband

Broadband is uneven, with strong service in larger towns and persistent gaps in rural and outlying areas. The most important regional asset is Project THOR, an open-access middle-mile fiber network built through the Northwest Colorado Council of Governments to provide carrier-class connectivity across Northwest Colorado. THOR provides backbone capacity and redundancy; the remaining challenge is last-mile service to homes, businesses, schools, health providers, and public facilities. Federal funding is the main near-term lever. Reliable broadband is also one of the region's clearest diversification tools, supporting remote work, telehealth, online education, business attraction, and service delivery as the coal and gas economy contracts.[14]

Energy and Utilities

Electricity reaches the region through a patchwork of rural electric cooperatives, municipal utilities, and investor-owned utilities. White River Electric, Yampa Valley Electric, Grand Valley Power, Holy Cross Energy, Glenwood Springs Electric, Xcel Energy, and Black Hills Energy all serve parts of the region. Transmission capacity, redundancy, wildfire exposure, and long-distance reliability across difficult terrain all matter for the regional grid. Natural gas distribution is similarly uneven, with service concentrated in larger communities and more limited options in rural areas.[15]

Across all of these systems, the common constraint is cost. Serving a large, low-density region carries a high per-capita price, and responsibility is fragmented across counties, municipalities, special districts, utilities, state agencies, and federal partners. The region's infrastructure strategy could use available funding, including DOLA grants, CDOT programs, federal broadband funds, and other



infrastructure dollars, to build durable capacity rather than defer maintenance and replacement. Strong energy years should be treated as windows to reinvest in roads, broadband, utilities, water systems, and public facilities. Water and wastewater systems, a core element of the region's infrastructure, are addressed in the Water Resources section.

D. FACTORS AFFECTING ECONOMIC PERFORMANCE

Commuting and Worker Flows

The five-county region functions as a labor market on the western edge of Colorado, with commuting flows tying counties together internally and to neighbors outside the region. Table 7 summarizes worker flow patterns for each county using the U.S. Census Bureau's LODES 2023 data. Mesa County anchors regional employment, while Moffat and Garfield are the region's largest net exporters of labor and Routt and Rio Blanco are net importers.

Table 7: Worker Flow Summary by County, 2023 (LODES)

Flow Category	Mesa	Garfield	Moffat	Rio Blanco	Routt	AGNC Total
Internal (live & work in area)	51,657	15,618	3,123	1,871	9,153	88,066
Inflow from other CO counties	11,515	7,216	1,030	727	4,839	18,683
Inflow from outside Colorado	2,222	817	205	241	1,009	4,494
Total Inflow	13,737	8,033	1,235	968	5,848	23,177
Outflow to other CO counties	14,095	15,390	3,657	906	4,469	31,873

Net Balance (Inflow - Outflow)	-358	-7,357	-2,422	62	1,379	-8,696
Total Jobs in Area (Internal + Total Inflow)	65,394	23,651	4,358	2,839	15,001	111,243

Source: U.S. Census Bureau, LEHD/LODES

Regional Fiscal and Activity

The AGNC region's economic activity and property tax base have both grown since 2017, but at different paces. Table 8 below summarizes annual Net Taxable Sales alongside the region's total assessed property value, and the AGNC region's share of Colorado's statewide assessed value.

Table 8: AGNC Regional Fiscal and Activity Snapshot, 2017–2024

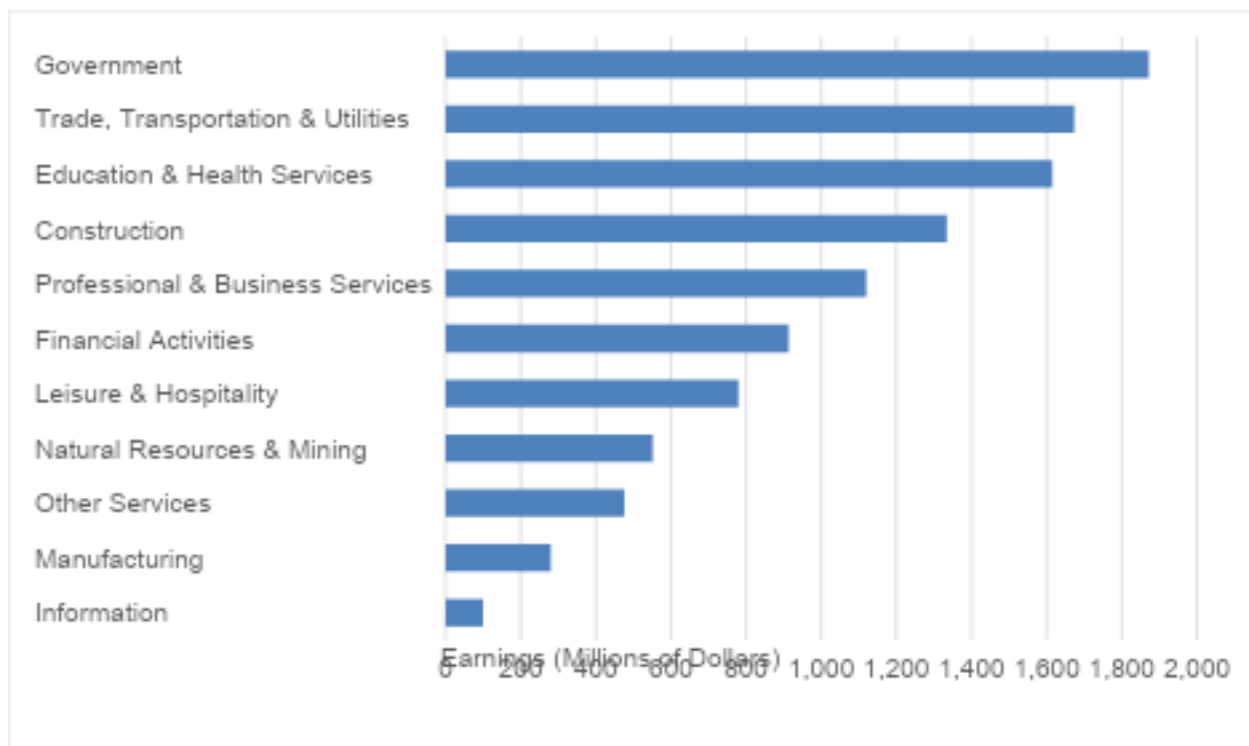
Year	Net Taxable Sales (\$M)	YoY % Net Taxable Sales	Assessed Value (\$B)	YoY % Assessed Value	AGNC Assessed Value as % of CO
2017	4,762.9		6.37		5.71%
2018	5,062.9	+6.3%	6.66	+4.5%	5.74%
2019	5,437.4	+7.4%	7.24	+8.7%	5.34%
2020	5,382.2	-1.0%	6.93	-4.2%	5.09%
2021	6,440.7	+19.7%	6.96	+0.4%	4.89%
2022	7,287.2	+13.1%	7.94	+14.1%	5.29%
2023	7,574.5	+3.9%	10.30	+29.7%	5.52%
2024	7,627.6	+0.7%	9.09	-11.8%	4.99%

Source: Colorado Department of Revenue; Colorado Division of Property Taxation

Industry Earnings

Industry earnings in the AGNC region are spread across a handful of major sectors. Government leads in 2024 at \$1.87 billion, followed by Trade, Transportation & Utilities (\$1.67B), Education & Health Services (\$1.62B), Construction (\$1.33B), and Professional & Business Services (\$1.12B), together accounting for roughly 71% of regional earnings. Natural Resources & Mining, despite its prominence in the region's identity, generates only \$552 million, well behind the broader service economy.

Figure 9: AGNC Region 2024 Earnings by Industry



Source: U.S. Bureau of Economic Analysis

Earnings per job have nearly doubled across the AGNC region since 2001 and converged across counties in the process. The 2024 figures cluster within a roughly \$8,000 band: Garfield \$79,298, Rio Blanco \$79,242, Routt \$77,204, Moffat \$72,081, and Mesa \$70,989, with the regional average at \$74,110. Rio Blanco's trajectory stands out. It had the region's lowest earnings per job in



2001 at \$35,417 and has roughly tied Garfield by 2024, a 124% gain over the period. Routt has grown the slowest at 56%, reflecting the lower wages of its tourism and hospitality mix.

Table 9: Earnings Per Job

County	2001	2010	2020	2024
Mesa	\$36,377	\$47,686	\$60,714	\$70,989
Garfield	\$40,747	\$51,792	\$65,120	\$79,298
Moffat	\$41,107	\$54,380	\$70,447	\$72,081
Rio Blanco	\$35,417	\$60,082	\$62,337	\$79,242
Routt	\$49,490	\$52,324	\$63,551	\$77,204
AGNC Total	\$39,446	\$49,940	\$62,595	\$74,110

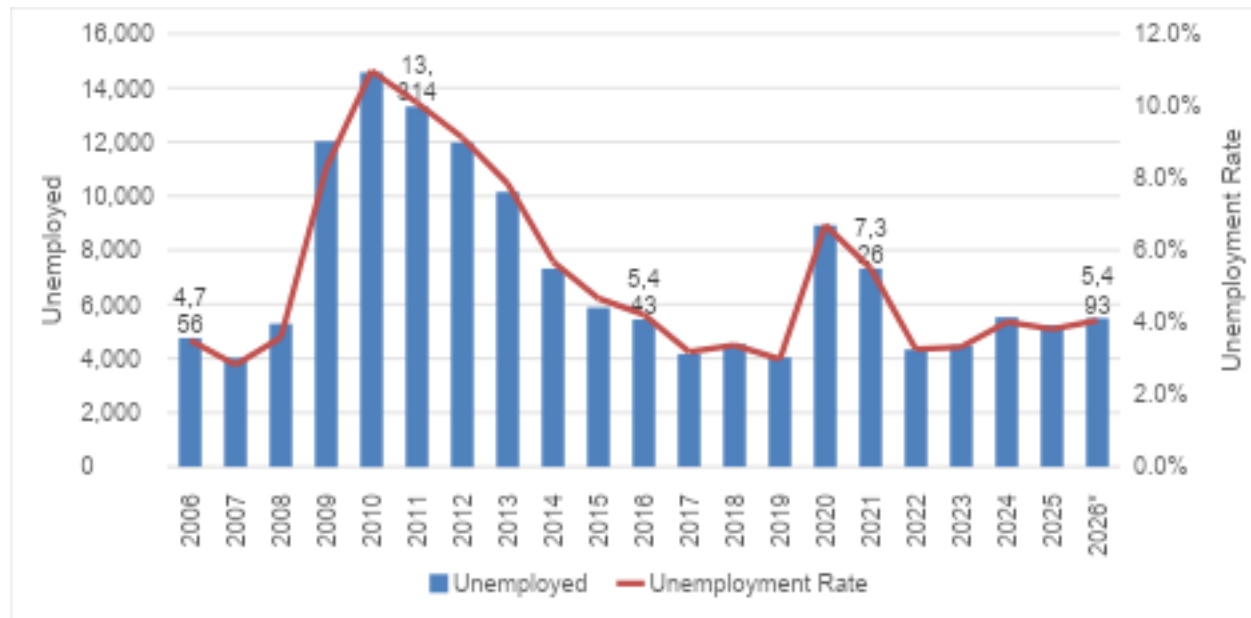
Source: U.S. Bureau of Economic Analysis; Colorado State Demography Office

Labor Market

The region's labor market looks tight on the surface but the underlying drivers tell a different story. Headline unemployment has fallen from a post-recession peak near 11% in 2010 to roughly 4% by 2024. Total employment, however, has barely grown: the region had 130,585 employed in 2006 and 132,315 in 2024, an 18-year gain of less than 2%. Labor force participation has fallen sharply over the same window, from 69.3% in 2010 to 61.1% in 2024. The tightening isn't being driven by more people working. It's being driven by fewer people looking, as the population ages and working-age cohorts shrink.

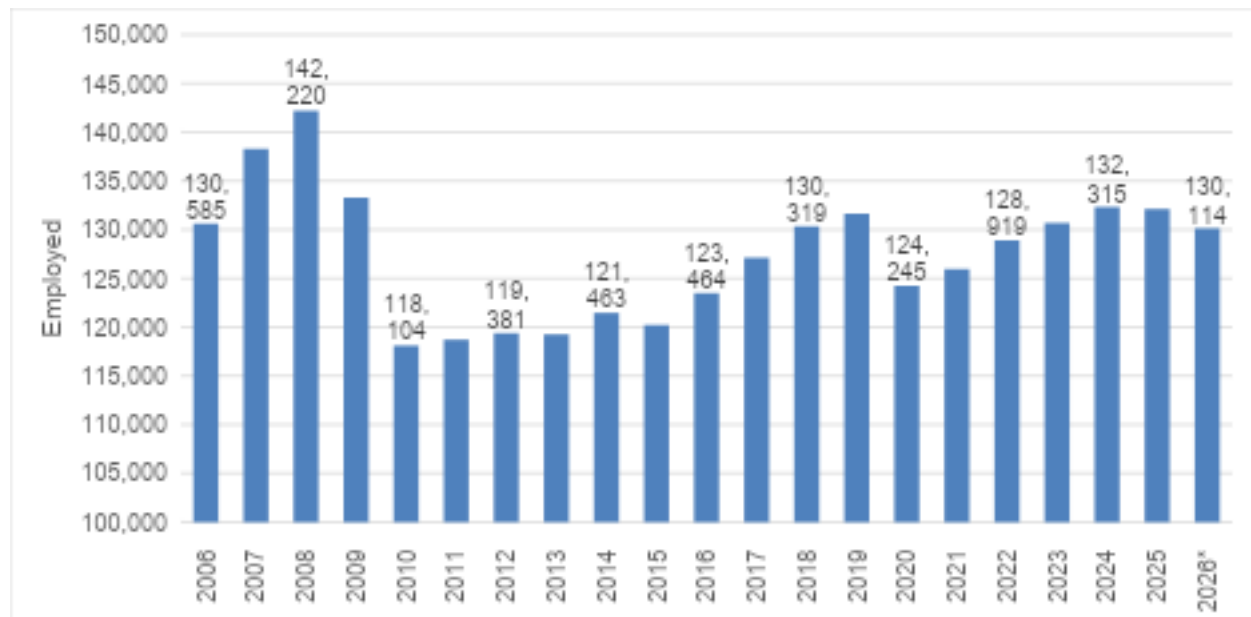


Figure 10: AGNC Unemployed and Unemployment Rate



Source: Colorado Department of Labor and Employment

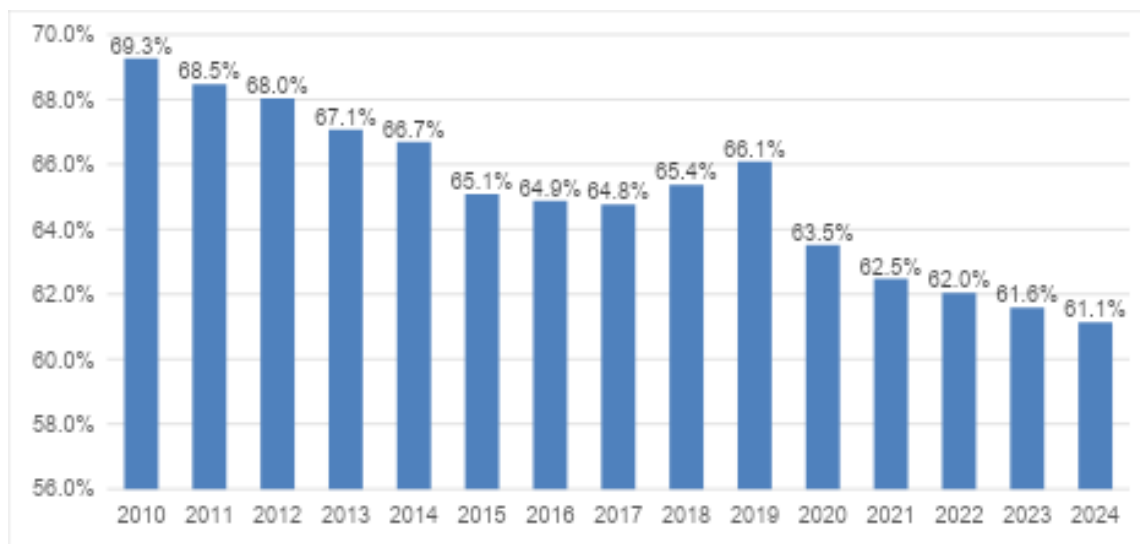
Figure 11: AGNC Region Employed (2006-2026)



Source: Colorado Department of Labor and Employment

Regional labor force participation has fallen from 69.3% in 2010 to 61.1% in 2024, but the decline is largely compositional. Prime working-age cohorts (25 to 54) still participate at 80% to 82%, in line with Colorado, while participation drops to 69.3% in the 55 to 64 cohort and 31.9% for ages 65 to 74. Given the region's older than average age structure, the aggregate rate trends below Colorado as more residents age. The Colorado State Demography Office projects that statewide labor force participation will continue to decline through 2050, with rural and frontier regions facing the steepest decreases. The regional labor force itself is projected to grow only marginally over the period even as total population continues to rise. The AGNC region is positioned for a faster-than-average decline given its older population profile, the in-progress coal transition in Moffat and Routt, and net out-migration of working-age cohorts from energy-dependent counties.

Figure 12: Labor Force Participation Rate, AGNC Total



Source: Colorado Department of Labor and Employment

Table 10: Labor Force Participation Rate by Age Cohort

Age Group	Total LFPR	Male LFPR	Female LFPR	Labor Force	Pop 16+
16 to 19	36.2%	43.1%	29.1%	5,461	15,071
20 to 24	74.0%	82.0%	65.6%	10,790	14,577

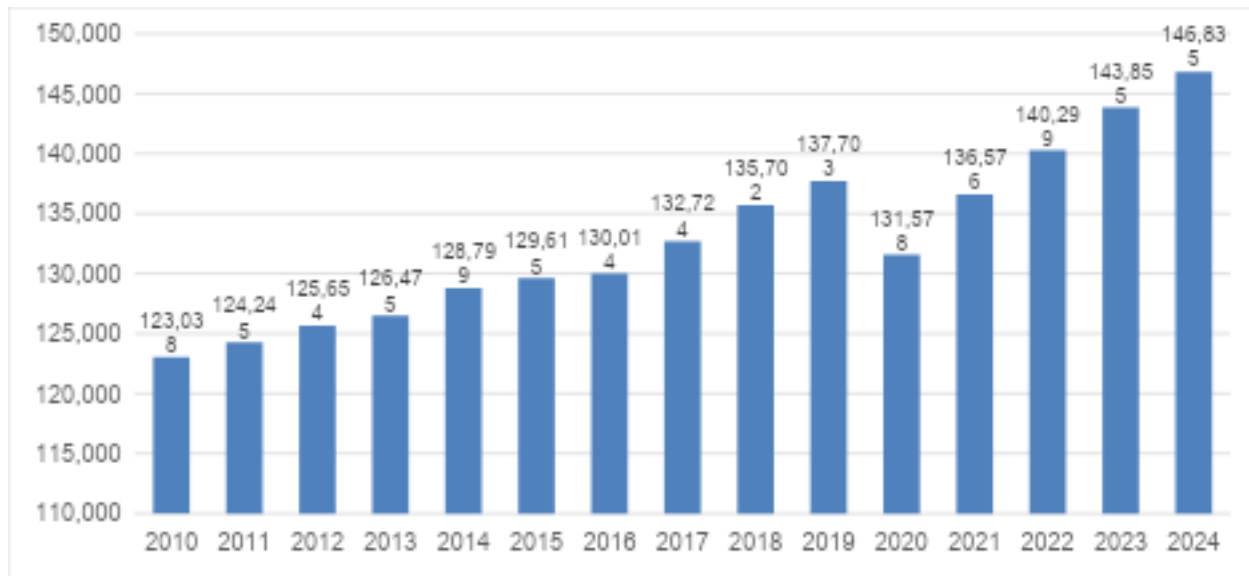
25 to 34	81.3%	84.7%	77.8%	28,187	34,660
35 to 44	82.2%	89.7%	74.6%	29,715	36,137
45 to 54	80.1%	86.4%	73.6%	24,123	30,108
55 to 64	69.3%	71.2%	67.5%	21,996	31,745
65 to 74	31.9%	38.1%	26.1%	10,860	34,046
75 and over	9.9%	13.3%	7.0%	2,152	21,686

Source: U.S. Census Bureau, ACS

Jobs and Industry Composition

Total covered jobs in the AGNC region have grown substantially over the past decade and a half. Figure 13 plots regional jobs, which rose from 123,038 in 2010 to 146,835 by 2024, a 19% gain. This series counts jobs by workplace location, which differs from the resident-based employment count in Figure 11. The two diverge meaningfully here: in 2024 the region had roughly 14,500 more jobs than employed residents, up from about 5,000 in 2010. The widening gap reflects net in-commuting, multiple job holding, or both, and is most pronounced in Routt and Garfield where resort and energy operations draw workers from outside the resident base.

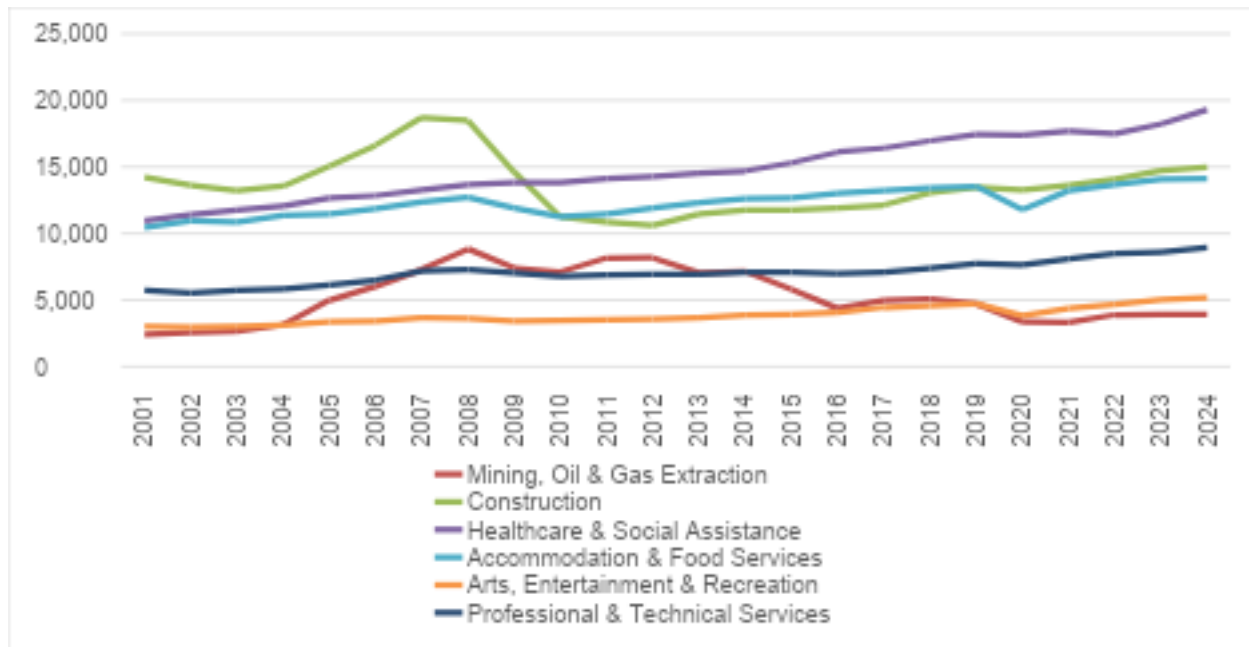
Figure 13: AGNC Jobs Total



Source: Colorado State Demography Office

Industry composition has shifted alongside that overall growth. Healthcare & Social Assistance has been the largest mover, expanding from 10,952 jobs in 2001 to 19,297 in 2024 and overtaking every other tracked industry. Tourism sectors have also grown substantially: Accommodation & Food Services up 35% and Arts, Entertainment & Recreation up 73% since 2001. Mining, Oil & Gas Extraction tells the opposite story, peaking at 7,109 jobs in 2010 during the Piceance natural-gas boom before falling to 3,896 by 2024, less than half its peak. Construction has cycled with the broader economy but ended 2024 essentially where it started in 2001.

Figure 14: AGNC Jobs by Industry 2001-2024



Source: Colorado State Demography Office

County-level job growth has been uneven. Mesa added the most jobs in absolute terms, gaining 19,439 from 2001 to 2024, and now anchors the region with 81,349 jobs. Garfield posted the largest percentage gain at 44.7%, growing from 24,375 to 35,262. Routt grew 29.1% to 20,868 jobs, with most of that gain coming after 2010. Moffat and Rio Blanco have been essentially flat: Moffat added just 536 jobs over 24 years for a 10.1% gain, while Rio Blanco added 243 jobs and actually lost ground from 2010 to 2020 before partially recovering.

Table 11: Job Change by County

County	Jobs 2001	Jobs 2010	Jobs 2020	Jobs 2024
Mesa	61,910	68,620	73,209	81,349
Garfield	24,375	28,802	31,459	35,262
Moffat	5,313	5,719	5,255	5,849
Rio Blanco	3,264	3,675	3,372	3,507
Routt	16,165	16,222	18,283	20,868
AGNC Total	111,027	123,038	131,578	146,835



Source: Colorado State Demography Office

A handful of expanding sectors account for most of the region's job growth since 2001. Healthcare & Social Assistance leads, growing 76% and now accounting for 13.1% of regional jobs in 2024. Tourism-related sectors (Arts, Entertainment & Recreation up 73%, Accommodation & Food Services up 35%) and Professional & Technical Services (+56%) have grown substantially. Manufacturing, Information, and Finance & Insurance have contracted modestly, consistent with national trends. Mining, Oil & Gas Extraction is the most volatile of the group, growing 60% from 2001 to 2024 in net terms but falling 45% from its 2010 peak.

Table 12: AGNC Percentage Change in Jobs by Industry

Industry Sector	2001-2024	2010-2024	2020-2024	% of Total
Agriculture, Forestry, Fishing	-0.2%	+0.6%	-22.2%	0.8%
Mining, Oil & Gas Extraction	+60.5%	-45.2%	+15.7%	2.7%
Utilities	+64.2%	+86.2%	+34.3%	0.6%
Construction	+5.4%	+33.3%	+13.0%	10.2%
Manufacturing	-10.4%	+23.6%	+6.5%	2.9%
Wholesale Trade	+13.4%	+0.2%	+5.9%	2.6%
Retail Trade	+10.2%	+10.6%	+5.9%	11.3%
Transportation & Warehousing	+76.4%	+30.0%	+19.6%	3.6%
Information	-21.1%	-16.6%	+14.3%	0.8%
Finance & Insurance	-6.7%	-5.8%	-8.7%	2.1%
Real Estate, Rental & Leasing	+35.4%	+10.3%	-2.5%	4.2%
Professional & Technical Services	+55.7%	+31.3%	+16.6%	6.1%
Management of Companies	+260.3%	+58.4%	+38.4%	0.4%
Administrative & Support	+32.7%	+26.8%	+5.1%	5.1%
Educational Services	+221.8%	+168.0%	+66.2%	1.7%
Healthcare & Social Assistance	+76.2%	+39.6%	+11.0%	13.1%
Arts, Entertainment & Recreation	+72.9%	+49.6%	+36.2%	3.5%
Accommodation & Food Services	+35.1%	+25.2%	+19.9%	9.6%
Other Services	+13.2%	+5.8%	+14.2%	4.2%
Unclassified			+116.7%	0.0%



Federal Government	+38.7%	+8.4%	+8.6%	1.7%
State Government	+46.6%	+38.4%	+1.1%	2.6%
Local Government	+41.9%	+15.6%	+13.2%	10.3%
Total All Sectors	+32.3%	+19.3%	+11.6%	

Source: Colorado State Demography Office

Regional Workforce Development Implications

The regional labor-market findings demonstrate that Northwest Colorado’s workforce challenge is not limited to unemployment or the number of available jobs. The region faces an aging population, declining labor-force participation, uneven educational attainment, shortages in critical occupations, energy-related worker displacement, and barriers that prevent residents from entering or remaining in employment. Housing, childcare, healthcare, transportation, broadband access, and the cost of living directly affect whether workers can participate in training, accept employment, and remain in the region.

Northwest Colorado also has substantial workforce-development assets. Colorado Mesa University, CMU Tech, Colorado Mountain College, Colorado Northwestern Community College, K-12 school districts, workforce centers, employers, economic development organizations, and community partners provide a foundation for career and technical education, apprenticeships, internships, incumbent-worker training, industry credentials, and worker transition.

Future workforce efforts should be employer-led and place-based. Employers in priority industries should help identify critical occupations, validate required skills, shape training and career pathways, provide work-based learning opportunities, and evaluate whether programs are producing qualified workers. Workforce investments should connect residents to quality jobs while addressing the wraparound supports necessary for participation and retention.

Priority workforce needs include healthcare and behavioral health, childcare and education, construction and skilled trades, energy and utilities, transportation and logistics, agriculture, manufacturing, tourism and hospitality, public safety, and local government. These needs should be





reviewed regularly using labor-market information, employer input, worker outcomes, and changing regional economic conditions.

Northwest Colorado functions as an interconnected labor market, with workers commuting both into and out of the five-county region for employment, while overall outbound commuting exceeds inbound commuting and highlights the importance of housing, transportation, and job alignment.

For a detailed report on workflow in Northwest Colorado, visit agnc.org

[AGNC_2023_Workforce_Commuting_Flows.docx - Google Docs](#)

Worker Inflow and Outflow by County, 2023

County	Inbound Workers (Employed in County, Live Outside)	Outbound Workers (Live in County, Employed Outside)	Live and Work in County	Net Worker Flow (Inbound - Outbound)
Garfield	8,033	16,053	15,618	-8,020
Mesa	13,737	15,647	51,657	-1,910
Moffat	1,235	3,833	3,123	-2,598
Rio Blanco	968	1,013	1,871	-45
Routt	5,848	4,843	9,153	+1,005
Five-County Total	29,821	41,389	81,422	-11,568

Note: Inbound workers are employed in the county but live outside it. Outbound workers live in the county but are employed outside it. Net worker flow equals inbound workers minus outbound workers; a negative value indicates more workers leave the county for work than enter it. **Source:** U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES), OnTheMap, 2023.



EDA Economic Distress Assessment

Combining the unemployment and income measures yields a clearer picture of which counties qualify as economically distressed under EDA’s definition. Table 13 summarizes the distress criteria for each AGNC county and the region as a whole.

Table 13: AGNC EDA Economic Distress Criteria, February 2026[16]

County	Population	24-mo Unemployment	BEA PCPI (% of US)	ACS PCMI (% of US)	EDA Distress?	Triggering Criterion / Notes
Garfield	62,479	3.43%	100.6%	98.9%	No	Adjacent to Uintah and Ouray
Mesa	158,601	4.45%	83.4%	89.7%	No	Watch (PCPI near threshold)
Moffat	13,207	4.31%	74.4%	80.5%	YES	PCPI
Rio Blanco	6,544	4.11%	90.9%	76.3%	YES	PCMI; Adjacent to Uintah and Ouray
Routt	25,084	3.56%	184.1%	154.0%	No	—
AGNC Region (pop-wt)	265,915	4.11%	96.7%	97.1%	No	Aggregate masks county-level distress
United States	—	4.20%	100.0%	100.0%	—	Benchmark

Source: Argonne National Laboratory NERDE; U.S. Bureau of Economic Analysis; U.S. Census Bureau ACS

Note: Cells shaded red meet an EDA distress threshold; cells shaded yellow are within 5 percentage points of a threshold (watch). The AGNC region and U.S. rows are reference only.



EDA's two headline thresholds are 24-month unemployment at least one percentage point above the national average, and per capita income at or below 80 percent of the national average. Moffat triggers on per capita personal income at 74.4 percent of the U.S. Rio Blanco triggers on per capita money income at 76.3 percent. The other three counties clear both thresholds.

Two additional factors are worth flagging on top of the headline tests. Garfield and Rio Blanco are flagged in EDA's NERDE data as adjacent to the Uintah and Ouray Off-Reservation Trust Land. Moffat, Rio Blanco, and Routt all host operating coal mines or the Craig and Hayden coal plants, which are scheduled for retirement. Coal-transition exposure of this kind could support a Special Need argument under EDA's distress framework, subject to EDA's case-specific determination.

Four of the five AGNC counties have a credible distress argument under either the headline thresholds or the Special Need framework. Mesa is the exception. Counties that qualify can pursue EDA's Public Works and Economic Adjustment Assistance programs, and projects in Special Need areas may qualify for higher EDA investment rates, generally up to 80 percent.[17]

E. INDUSTRY CLUSTER ANALYSIS

Industry cluster analysis identifies sectors where AGNC employment concentration runs significantly above the national average. The two tables that follow show the regional cluster snapshot and the county-by-county detail.

Natural Resources is the AGNC region's most pronounced specialization. Mining, Oil & Gas Extraction registers a location quotient of 8.27, more than eight times the national share. This concentration is the source of the region's traditional economic strength and also the central focus of its transition risk. Tourism & Hospitality (NAICS 71 at 1.81 and NAICS 72 at 1.28) and Construction (NAICS 23 at 1.79) are the other meaningful regional specializations. A location quotient above 1.0 indicates concentration above the national average.



Table 14: 2024 Industry Cluster Snapshot

Industry Sector	AGNC Jobs	% of AGNC	AGNC LQ
Mining, Oil & Gas Extraction	3,896	2.7%	8.27
Arts, Entertainment & Recreation	5,193	3.5%	1.81
Construction	14,971	10.2%	1.79
Utilities	834	0.6%	1.41
Real Estate, Rental & Leasing	6,186	4.2%	1.38
Retail Trade	16,536	11.3%	1.30
Accommodation & Food Services	14,111	9.6%	1.28
Other Services	6,168	4.2%	1.04
Healthcare & Social Assistance	19,297	13.1%	1.01
Wholesale Trade	3,776	2.6%	0.77
Transportation & Warehousing	5,248	3.6%	0.73
Agriculture, Forestry, Fishing	1,159	0.8%	0.72
Administrative & Support	7,467	5.1%	0.72
Educational Services	2,500	1.7%	0.63
Professional & Technical Services	8,924	6.1%	0.62
Finance & Insurance	3,146	2.1%	0.56
Information	1,215	0.8%	0.44
Manufacturing	4,252	2.9%	0.40
Management of Companies	526	0.4%	0.28
Unclassified	13	0.0%	0.08
Federal Government	2,550	1.7%	—
State Government	3,748	2.6%	—
Local Government	15,119	10.3%	—
Total AGNC Region	146,835	100.0%	1.00

Source: Colorado State Demography Office; BLS Quarterly Census of Employment and Wages

Table 15 breaks the regional cluster snapshot down by county, showing where each industry's concentration is anchored within the AGNC region. Within the region, the Natural Resources concentration is highly uneven. Rio Blanco's Mining LQ of 46.31, Moffat's of 20.00, and Garfield's of 9.16 reflect the energy economy's dominance in those three counties. Routt's specialization tilts

toward Tourism (Accommodation & Food Services LQ of 1.79, with Arts/Entertainment/Recreation also elevated) and Real Estate. Mesa is the most diversified of the five counties, with no extreme specialization but moderate strength across construction, retail, and healthcare.

Table 15: Industry Cluster Detail by County, 2024

Industry Sector	Mesa Jobs	Mesa LQ	Garfield Jobs	Garfield LQ	Moffat Jobs	Moffat LQ	Rio Blanco Jobs	Rio Blanco LQ	Routt Jobs	Routt LQ
Agriculture, Forestry, Fishing	313	0.58	168	0.75	28	0.74	43	1.84	116	0.85
Mining, Oil & Gas Extraction	1,526	6.03	962	9.16	356	20.00	506	46.31	230	3.63
Utilities	223	0.88	214	2.03	0	0.00	36	3.28	140	2.20
Construction	5,122	1.46	3,755	2.58	345	1.40	0	0.00	1,502	1.71
Manufacturing	3,097	0.56	379	0.17	90	0.23	0	0.00	200	0.15
Wholesale Trade	2,411	0.92	514	0.47	151	0.81	18	0.16	341	0.52
Retail Trade	8,843	1.32	3,140	1.13	803	1.71	228	0.79	1,835	1.10
Transportation & Warehousing	2,620	0.93	543	0.46	0	0.00	46	0.38	290	0.41
Information	575	0.46	206	0.40	31	0.35	0	0.00	129	0.41
Finance & Insurance	1,609	0.59	537	0.48	73	0.38	44	0.38	355	0.52



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Industry Sector	Mesa Jobs	Mesa LQ	Garfield Jobs	Garfield LQ	Moffat Jobs	Moffat LQ	Rio Blanco Jobs	Rio Blanco LQ	Routt Jobs	Routt LQ
Real Estate, Rental & Leasing	1,033	1.00	698	1.62	30	0.41	0	0.00	674	2.59
Professional & Technical Services	2,585	0.56	1,449	0.75	110	0.34	0	0.00	744	0.64
Management of Companies	201	0.18	196	0.42	0	0.00	0	0.00	130	0.46
Administrative & Support	2,689	0.68	1,183	0.72	0	0.00	111	0.65	877	0.89
Educational Services	739	0.53	425	0.74	0	0.00	0	0.00	328	0.95
Healthcare & Social Assistance	12,228	1.28	3,139	0.79	0	0.00	0	0.00	1,200	0.50
Arts, Entertainment & Recreation	1,100	0.98	774	1.66	65	0.82	0	0.00	1,527	5.42
Accommodation & Food Services	7,141	1.17	3,092	1.22	439	1.03	0	0.00	2,735	1.79
Other Services	2,011	1.00	866	1.04	130	0.92	0	0.00	561	1.11
Public Administration	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00

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Industry Sector	Mesa Jobs	Mesa LQ	Garfield Jobs	Garfield LQ	Moffat Jobs	Moffat LQ	Rio Blanco Jobs	Rio Blanco LQ	Routt Jobs	Routt LQ
Unclassified	9	0.10	2	0.05	0	0.00	0	0.00	2	0.09
AGNC Region (Total)	56,075	—	22,242	—	2,651	—	1,032	—	13,916	—

Source: Colorado State Demography Office; BLS Quarterly Census of Employment and Wages

F. OTHER FACTORS

Other factors shape regional economic performance alongside the industry, labor, and demographic dynamics already covered. Housing is the most rapidly changing of these. Tables 16 and 17 summarize the AGNC housing market.

Housing

Table 16: Median Sales Price AGNC vs. Colorado (Single Family)

Area	2025 Avg Median Sales Price	% of Colorado	Months covered
Mesa	\$418,633	70.2%	12
Garfield	\$668,522	112.1%	12
Moffat	\$306,270	51.4%	12
Rio Blanco	\$283,549	47.6%	12
Routt	\$1,503,993	252.3%	12
AGNC Total	\$537,967	90.2%	12
Colorado	\$596,128	100.0%	12

Source: Colorado Association of REALTORS

Table 17: Median Home Value Trend, 2017-2025

Year	Mesa	Garfield	Moffat	Rio Blanco	Routt	AGNC Total	Colorado
2017 baseline	\$210,975	\$363,673	\$164,149	\$183,270	\$530,263	\$254,760	\$354,422
2018 YoY	6.7%	2.9%	1.2%	-4.2%	5.8%	6.4%	7.5%
2019 YoY	8.7%	3.4%	9.4%	-2.8%	11.7%	7.8%	5.0%
2020 YoY	9.5%	5.3%	4.7%	17.3%	8.7%	8.2%	9.3%
2021 YoY	11.2%	18.6%	8.3%	6.4%	19.2%	16.6%	17.2%
2022 YoY	16.2%	15.1%	20.0%	11.9%	25.0%	16.9%	10.1%
2023 YoY	16.0%	11.0%	6.1%	7.5%	25.0%	14.4%	-0.3%
2024 YoY	0.2%	3.3%	16.1%	-3.3%	-1.9%	8.1%	4.6%
2025 YoY	4.0%	4.7%	0.6%	14.4%	20.8%	0.9%	1.4%
2017 to 2025	98.4%	83.8%	86.6%	54.7%	183.6%	111.2%	68.2%
CAGR 2017 to 2025	8.9%	7.9%	8.1%	5.6%	13.9%	9.8%	6.7%

Source: Colorado Association of REALTORS

Housing prices in the AGNC region have risen sharply since 2017. The regional median home value increased 111.2% from 2017 to 2025, a compound annual growth rate of 9.8%, compared with 6.7% statewide. The 2025 median single-family sales price across the region was approximately \$538,000, or 90.2% of the Colorado median. That regional average, however, masks large differences across counties. Routt County is the clear outlier, with a 2025 median sales price of roughly \$1.50 million, or 252.3% of the statewide median, reflecting the influence of Steamboat Springs, resort demand, second-home ownership, and high income migration. Garfield County also sits above the statewide median at approximately \$669,000, consistent with its position as a resort-adjacent and Roaring Fork Valley housing market. Mesa, Moffat, and Rio Blanco remain below the statewide median, but each has still experienced substantial price growth since 2017.

Housing cost is becoming a major problem and connects to workforce, business expansion, and other community issues. High cost markets such as Routt and Garfield face direct workforce housing constraints, with workers pushed into longer commutes or out of the local labor market entirely. Mesa remains more affordable than the state as a whole, but rapid appreciation still affects recruitment, retention, and the ability of younger households to enter the market. Moffat and Rio Blanco remain the region's most affordable counties, but affordability there reflects weaker demand conditions and energy-transition uncertainty as much as housing-market strength. Across all five



counties, the constraint is the same. Without enough housing at the wages the regional economy actually pays, the local labor force shrinks and employers struggle to recruit.

Health Services

Healthcare employs nearly one in seven workers in the AGNC region. Access to care is also one of the factors families weigh in deciding where to live. Healthcare and Social Assistance accounted for 19,297 jobs in 2024, or 13.1% of regional employment, making it one of the region's largest employment sectors. The system is anchored by a small network of rural hospitals and medical centers. Memorial Regional Health in Craig, Pioneers Medical Center in Meeker, Grand River Health in Rifle, Family Health West in Fruita, and UCHealth Yampa Valley Medical Center in Steamboat Springs provide local access to emergency care, primary care, inpatient and outpatient services, and specialty or referral connections. Mesa County is comparatively well-served, with Intermountain Health St. Mary's Regional Hospital and Community Hospital in Grand Junction. St. Mary's functions as the region's largest higher-acuity hospital and referral hub for much of the Western Slope. For residents in smaller communities, access often depends on long-distance travel to Grand Junction, the Front Range, or other regional centers, which makes transportation infrastructure, telehealth capacity, and provider recruitment especially important.

Beyond the hospitals, primary care is supplemented by community health centers and FQHCs (PrimeHealth+ in Mesa, Mountain Family Health Centers across Garfield and the Roaring Fork Valley, and Northwest Colorado Health in Routt and Moffat), along with county public health departments.

Mental health and substance-use services remain a persistent regional gap. Behavioral-health capacity depends on regional providers, community health centers, telehealth, local hospital partnerships, and county-level systems, while workforce shortages in psychiatry, psychology, counseling, and addiction medicine continue to constrain access across rural counties. Colorado behavioral-health workforce research projects a statewide shortage of more than 4,400 behavioral-health workers by 2026, with rural and frontier communities facing the sharpest access barriers.[18]

CDPHE data quantify the suicide picture. The 2015–2019 age-adjusted suicide mortality rate was 31.2 per 100,000 in Mesa, 29.8 in Rio Blanco, 27.1 in Moffat, 21.9 in Garfield, and 12.1 in Routt,





compared with a Colorado state rate of 20.7 and a U.S. rate of approximately 14. Mesa was statistically above the state average, and four of the five AGNC counties were above the national figure, with Routt the regional exception.[19]

Education

Education sits at the center of the region's workforce and population dynamics. K-12 enrollment tracks where working-age families are landing. Higher education determines whether the regional workforce has the skills its employers need. The K-12 system spans twelve public school districts across the five counties, anchored by Mesa County Valley School District 51 in Grand Junction. Regional K-12 enrollment declined from approximately 40,500 students in 2014-2015 to 38,400 in 2024-2025, a 5.2% contraction over the decade. The pattern varies by county. Garfield was the only AGNC county to grow over the period, led by Roaring Fork RE-1 and Garfield 16. Routt was essentially flat. Mesa declined 8.8%, with Mesa County Valley 51 alone down by roughly 1,800 students. Moffat County RE-1 lost 16.0% of its enrollment, consistent with the contraction of the coal economy and broader demographic pressure in Craig. Rio Blanco declined 6.2% across Meeker and Rangely. These enrollment shifts are early indicators of where working-age families are consolidating, and where school districts may face long-term pressure from slower population growth, smaller cohorts, and a narrowing local labor force.[20]

Higher education is one of the region's stronger assets. Colorado Mesa University in Grand Junction is the region's four-year university anchor, offering undergraduate, graduate, professional, and technical programs. Colorado Mountain College provides a multi-campus higher-education footprint across Garfield County and the Roaring Fork Valley, including Glenwood Springs, Spring Valley at Glenwood Springs, Rifle, and Carbondale.



Colorado Northwestern Community College serves the northern and western portions of the region through its Rangely and Craig campuses, providing two-year, certificate, workforce, and retraining pathways in counties with otherwise limited access to higher education. Together, CMU, CMU Tech, CMC, and CNCC give the AGNC region a strong higher-education footprint for a five-county

rural region, with programs that align to the region's diversification priorities.

Credit: Colorado
Northwest Community
College.
Location: Rangely, Rio
Blanco County (L), Craig,
Moffat County (R).



The region has an educational attainment gap, with roughly 33% of AGNC adults holding a bachelor's degree or higher compared with 44.8% statewide. County differences are large: Routt is above the state average, while Moffat, Rio Blanco, Mesa, and Garfield are lower. The CMU, CMU Tech, CMC, and CNCC footprint gives the region the institutional capacity to close part of that gap.[21]

Public Safety

Public safety in the AGNC region is delivered through five county sheriff's offices, municipal police departments in the larger communities, fire departments, fire-protection districts, emergency medical services, dispatch centers, and volunteer search-and-rescue teams. The central challenge is geography. Agencies must cover a large rural region with long travel distances, difficult terrain, major highway corridors, public-land recreation areas, and a relatively small population and revenue base.



Wildfire is one of the region’s defining public-safety risks, especially in the wildland-urban interface and along key transportation corridors. The 2020 Grizzly Creek Fire and the 2021 burn-scar mudslides that repeatedly closed Interstate 70 through Glenwood Canyon show how disaster events can create cascading economic impacts when public safety, transportation, tourism, and public lands intersect. Search and rescue is also a regional capacity issue because recreation activity on public lands creates demand that often falls on sheriff-led volunteer teams. Whether the region’s public safety system can keep pace with growing visitor activity, wildfire risk, and rural geography is itself a workforce and economic development question.[22]

Special thanks to Dr. Nathan Perry for his expertise on the Summary Background.

6. SWOT Purpose and Approach

The regional Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis provides the foundation for the AGNC EDD Comprehensive Economic Development Strategy. It identifies the assets the region can build upon, the internal conditions limiting economic performance, the external opportunities available to the region, and the outside forces that could disrupt future prosperity.

The analysis combines input gathered through county-level engagement in Garfield, Mesa, Moffat, Rio Blanco, and Routt counties with responses to the regional CEDS survey. County discussions preserved the distinct conditions and priorities of individual communities, while the survey gave residents, businesses, local governments, economic development organizations, educators, service providers, and other stakeholders an additional opportunity to contribute.

Individual responses were organized into ten recurring regional themes. Strengths and opportunities were grouped as positive observations, while weaknesses and threats were grouped as negative observations. The resulting counts are not intended to rank one county or community against another. Instead, they show the frequency, balance, and regional significance of the issues raised.



This approach supports the Economic Development Administration’s expectation that a CEDS SWOT identify the region’s competitive advantages, limitations, internal capacities, and external forces and use those findings to shape the strategic direction and action plan.

Regional Findings at a Glance

The analysis organized 902 observations into 11 regional themes. Of those, 452 represented strengths or opportunities, and 450 represented weaknesses or threats. This nearly even division demonstrates that Northwest Colorado possesses substantial economic assets while also facing significant barriers to fully using them.

Regional SWOT Theme Summary

Counts below reflect the approximate number of SWOT bullets that reference each theme across all five counties. Positive mentions are Strengths plus Opportunities. Negative mentions are Weaknesses plus Threats. A single bullet may count under more than one theme when it clearly addresses multiple issues.

Regional Theme	Positive Mentions (Strengths + Opportunities)	Negative Mentions (Weaknesses + Threats)	Total Mentions
Business development, entrepreneurship, and capital	105	98	203
Community engagement, leadership, and capacity	75	100	175
Workforce, education, and talent pipelines	79	66	145
Tourism, outdoor recreation, and public lands	105	30	135
State/federal policy, regulation, and funding	25	94	119
Infrastructure, transportation, and connectivity	64	52	116

NORTHWEST COLORADO CEDS 2026–2031



Economic Development District

Healthcare, childcare, and essential services	31	73	104
Water, drought, wildfire, and natural hazards	42	46	88
Housing, affordability, and cost of living	18	64	82
Energy transition and natural-resource economy	44	25	69
Agriculture, working lands, and local food systems	19	21	40

How to Read the Counts

These counts are intended to show recurring regional emphasis, not the number of people who made a comment or the number of survey respondents. They are theme counts from SWOT bullets. For example, a bullet about unmanaged tourism pressure on roads may count once under tourism and once under infrastructure.

Key Takeaways

- Tourism, outdoor recreation, and public lands are primarily framed as regional assets and opportunities, but unmanaged growth, recreation pressure, and visitor impacts also appear as threats.
- State and federal policy, regulation, and funding are primarily framed as challenges, especially where rural communities feel policy is not designed for local conditions.
- Business development and entrepreneurship are nearly evenly split between positive and negative mentions, showing both strong opportunity and significant barriers around capital, succession, and support systems.
- Housing, affordability, healthcare, childcare, water, wildfire, and workforce capacity show stronger negative pressure across the SWOT and should be carried forward into strategy and resilience planning.
- Business and entrepreneurship was the most frequently mentioned theme, but it was almost evenly divided between positive potential and ongoing barriers.

- Tourism and outdoor recreation was the region’s clearest strength and opportunity, although participants also raised concerns about infrastructure, stewardship, crowding, and impacts on traditional industries.
- Workforce and education showed strong regional assets, but shortages, skills gaps, worker recruitment, and retention remained significant concerns.
- Policy and regulation was overwhelmingly negative, reflecting concerns about state mandates, regulatory burdens, permitting, uncertainty, and limited local control.
- Infrastructure and connectivity was nearly evenly split, recognizing transportation, broadband, utilities, airports, and rail as both regional assets and continuing needs.
- Healthcare, childcare, housing, water, and natural hazards leaned negative and represented some of the region’s most persistent quality-of-life and growth constraints.
- Energy transition leaned positive because of opportunities involving diversification, redevelopment, new energy technologies, industrial reuse, and transition funding, while still recognizing substantial job and revenue risks.

The overall framing was that Northwest Colorado has substantial economic assets, but many of those same assets are under pressure. The region’s natural resources, outdoor economy, entrepreneurial activity, workforce institutions, infrastructure, and community identity provide a strong foundation. However, housing affordability, workforce shortages, healthcare and childcare access,

regulatory pressures, infrastructure gaps, water uncertainty, natural hazards, and economic transition could limit the region’s ability to capitalize on those strengths.

Credit: Town of Dinosaur.

Location: Outside of Dinosaur, Western Moffat County.





ASSOCIATED GOVERNMENTS
OF NORTHWEST COLORADO
ECONOMIC DEVELOPMENT DISTRICT

Regional SWOT Themes



**Business and
Entrepreneurship**



**Community
Capacity**



**Workforce and
Education**



**Tourism and
Outdoor Recreation**



**Policy and
Regulation**



**Infrastructure and
Connectivity**



**Healthcare and
Childcare**



**Water and
Natural Hazards**



**Housing and
Cost of Living**



**Energy
Transition**



**Agriculture and
Working Lands**

NORTHWEST COLORADO CEDS 2026–2031



Economic Development District

Theme 1: Business and Entrepreneurships



Business and entrepreneurship was the most frequently mentioned theme, with 143 observations. Its nearly even division—71 positive and 72 negative—shows that the region has substantial entrepreneurial potential but also significant barriers to business creation, retention, and expansion.

Strengths and Opportunities

Northwest Colorado has a strong base of locally owned businesses, entrepreneurs, chambers of commerce, economic development organizations, small-business support providers, lenders, higher education institutions, and community partners. Participants identified opportunities to expand entrepreneurship, support business succession, grow locally owned companies, retain more spending within the region, and connect businesses to technical assistance and capital.

The region's communities offer quality-of-life advantages that can attract entrepreneurs and location-flexible workers. Participants also identified opportunities to build upon agriculture, energy, tourism, outdoor recreation, manufacturing, healthcare, professional services, and emerging technologies.

Business succession represents both a need and an opportunity. Helping local owners transfer viable businesses to employees, family members, or new entrepreneurs could preserve jobs, services, and community wealth.

Weaknesses and Threats

Small businesses face rising operating costs, workforce shortages, limited access to capital, regulatory complexity, uneven technical capacity, and small local markets. Some communities lack sufficient staff or economic development capacity to consistently support business recruitment, retention, expansion, and succession.

The loss of established businesses could leave communities without essential services and increase the amount of local spending that leaves the region. Economic uncertainty and dependence on a limited number of major employers or industries also increase vulnerability to downturns and closures.

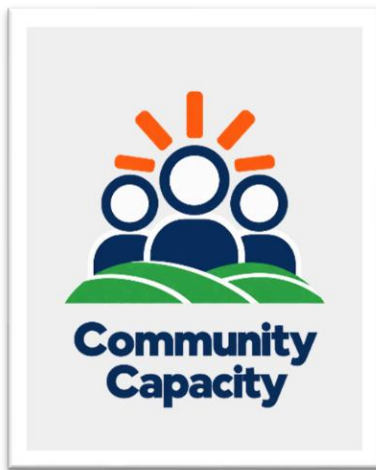
Strategic Implication

The CEDS should prioritize business retention and expansion, entrepreneurial support, succession planning, access to capital, regional resource navigation, local supply-chain development, and industry diversification.



Credit: Align Multimedia/Ryan Mackley.
Location: Rislende, small business, Colorado River Valley, Western Garfield County.

Theme 2: Community Capacity



Community capacity received 109 observations, with 56 positive and 53 negative. The results recognize strong local relationships and commitment while showing that limited staff, funding, leadership pipelines, and organizational capacity can prevent communities from pursuing opportunities.

Strengths and Opportunities

The region benefits from active local governments, economic development organizations, chambers, nonprofit organizations, educational institutions, healthcare providers, special districts, civic groups, and community volunteers. Longstanding relationships and a willingness to collaborate provide a foundation for regional action.

Participants identified opportunities to strengthen regional coordination, share expertise, pursue joint projects, improve grant readiness, develop future leaders, and connect smaller communities to state and federal resources. AGNC's role as the Economic Development District provides an existing platform for convening partners and advancing projects that cross jurisdictional boundaries.

Weaknesses and Threats

Smaller and rural communities often depend on a limited number of staff and volunteers. The same individuals may serve in multiple leadership roles, creating burnout and reducing the time available for planning, grant administration, project management, and implementation.

Leadership turnover, limited succession planning, competition for funding, and uneven organizational capacity can delay projects. Communities may identify strong ideas but lack the staff, technical expertise, matching funds, or project readiness needed to carry them forward.

Strategic Implication

The CEDS should support leadership development, regional coordination, grant navigation, shared technical assistance, project development, organizational succession, and stronger partnerships among local governments, businesses, education, nonprofits, and state and federal agencies.

Theme 3: Tourism and Outdoor Recreation



Tourism and outdoor recreation received 108 observations, including 87 positive and only 21 negative. It was the most positively viewed theme in the regional analysis and represents one of Northwest Colorado's clearest competitive advantages.

Strengths and Opportunities

The region's public lands, rivers, mountains, trails, wildlife, open spaces, scenic landscapes, agricultural heritage, historic communities, cultural resources, and year-round recreation opportunities contribute substantially to quality of life and economic activity.

Opportunities exist to strengthen destination management, outdoor recreation businesses, hospitality, heritage tourism, agritourism, events, wayfinding, trail connections, visitor education, and community branding. The region can also use these amenities to support workforce attraction and retention.

Weaknesses and Threats

Tourism activity is not distributed evenly across the region. Some communities have well-developed destinations and visitor infrastructure, while others lack signage, lodging, restrooms, trailhead improvements, marketing capacity, or connections between recreation assets and local businesses.

Participants also raised concerns about crowding, maintenance costs, wildlife impacts, conflicts among users, pressure on housing, private-property conflicts, and impacts on agriculture and traditional land uses. Seasonal employment and lower tourism wages may limit tourism’s ability to replace higher-paying jobs lost in other industries.

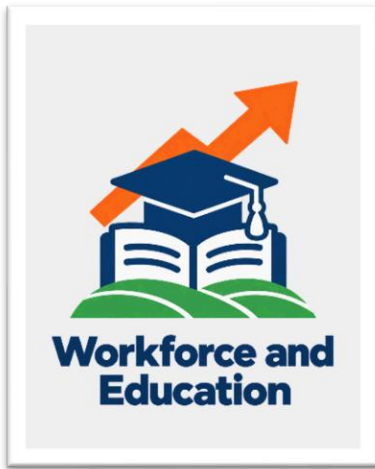
Strategic Implication

Tourism and outdoor recreation strategies should focus on improving and maintaining existing assets, connecting visitor spending to local businesses, supporting responsible use, protecting natural and agricultural resources, and complementing rather than displacing other economic sectors.



Credit: Align Multimedia/Ryan Mackley.
Location: Rifle Creek, Colorado River Valley, Western Garfield County.

Theme 4: Workforce and Education



Workforce and education received 106 observations, with 62 positive and 44 negative. The region has strong educational and workforce assets, but participants consistently identified labor availability, skills alignment, recruitment, and retention as barriers to economic growth.

Strengths and Opportunities

Northwest Colorado is served by Colorado Mesa University, Colorado Mountain College, Colorado Northwestern Community College, school districts, workforce centers, career and technical education programs, apprenticeship partners, and employer-led training initiatives.

Opportunities include expanding career pathways, internships, apprenticeships, industry-recognized credentials, trades training, healthcare education, energy-transition training, entrepreneurship education, and stronger coordination between employers and education providers.

The existing skills of workers in agriculture, mining, construction, energy, utilities, transportation, and manufacturing provide a valuable foundation for emerging and evolving industries.

Weaknesses and Threats

Employers report difficulty recruiting and retaining workers. Housing, childcare, transportation, healthcare costs, wages, and limited employment opportunities for accompanying family members all influence workforce availability.

The region also faces an aging population, retirements, outmigration of younger residents, limited succession planning, and potential displacement associated with energy transition. Training programs may not always be available in the right place, at the right time, or in a format accessible to working adults.

Strategic Implication

The CEDS should connect workforce strategies to business needs while addressing the quality-of-life conditions that influence whether workers can remain in the region. Priorities should include employer-driven training, career and technical education, apprenticeships, youth retention, worker transition, leadership succession, and coordinated talent attraction.

Workforce implementation should be organized around employer-led sector partnerships that bring together a critical mass of employers with school districts, colleges, workforce organizations, economic development organizations, community-based organizations, labor and worker representatives where applicable, and public-sector partners. These partnerships should identify priority occupations, validate skills and credentials, expand paid work-based learning, and connect workers to quality jobs with opportunities for economic stability and career advancement. Workforce partners should also coordinate wraparound support, including childcare, housing, transportation, healthcare, broadband access, and financial assistance, when those barriers prevent participation in training or employment.

Theme 5: Policy and Regulation



Policy and regulation received 91 observations, of which 70 were negative. This was the most negatively weighted regional theme.

Strengths and Opportunities

Local governments and regional organizations have established relationships with state and federal agencies, elected officials, public land managers, and program partners. These relationships create opportunities to improve communication, advocate for rural needs, coordinate regulatory processes, and identify state or federal resources.

Regional collaboration can give Northwest Colorado a stronger voice than individual communities acting alone. It can also help communities share information, understand changing requirements, and develop coordinated responses.

Weaknesses and Threats

Participants expressed concern about state mandates, changing regulations, permitting processes, limited local control, unfunded requirements, public-land decisions, and policies that do not adequately account for rural conditions.

Regulatory uncertainty can delay investment, increase project costs, limit housing and infrastructure development, and place additional burdens on small businesses and local governments. Small communities may not have the staff or technical expertise needed to monitor, interpret, and respond to frequent policy changes.

Strategic Implication

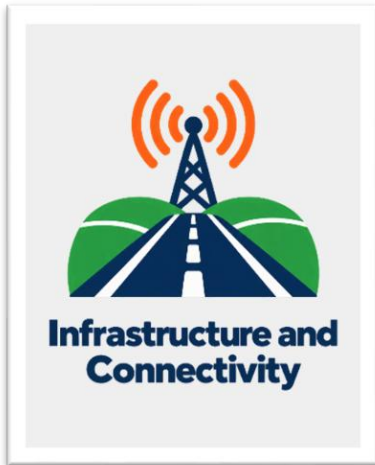
Policy and regulation should be treated as a cross-cutting implementation condition. The CEDS should support regional advocacy, regulatory navigation, intergovernmental communication, technical



assistance, and early coordination with permitting and funding agencies.

Credit: Town of De Beque.
Location: Mesa County.

Theme 6: Infrastructure and Connectivity



Infrastructure and connectivity received 83 observations, with 43 positive and 40 negative. This balance reflects the presence of major regional assets alongside continuing gaps in reliability, condition, capacity, and access.

Strengths and Opportunities

The region includes interstate and highway connections, rail corridors, commercial and general aviation airports, broadband networks, energy infrastructure, water and wastewater systems, industrial sites, healthcare facilities, educational facilities, and community amenities.

These assets provide opportunities for industrial development, freight movement, tourism, remote work, telehealth, education, energy innovation, and regional market access. Existing energy and industrial infrastructure may also support redevelopment and new investment.



Credit: Yampa Valley Regional Airport.
Location: Hayden, Western Routt County.

Weaknesses and Threats

The region's size, terrain, dispersed population, and distance from major markets increase the cost of construction, maintenance, service delivery, and transportation. Broadband and cellular access remain uneven, particularly in rural areas and along transportation corridors.

Aging water, wastewater, transportation, and public facilities require substantial investment. Small communities may struggle to complete planning, engineering, permitting, financing, and grant administration. Infrastructure failures or closures can have disproportionate effects when alternative routes or systems are limited.

Strategic Implication

The CEDS should prioritize reliable and redundant broadband, transportation, water, wastewater, utility, aviation, rail, and industrial infrastructure. It should also strengthen local capacity to move projects from concept through planning, funding, construction, and long-term maintenance.

Theme 7: Healthcare and Childcare



Healthcare and childcare received 79 observations, with 28 positive and 51 negative. These services were consistently described as both quality-of-life necessities and economic infrastructure.

Strengths and Opportunities

The region has hospitals, clinics, public health agencies, behavioral health providers, educational partners, childcare providers, and community organizations that can support

coordinated solutions.

Opportunities include expanding healthcare training, telehealth, behavioral health services, employer-supported childcare, childcare business development, shared-service models, and partnerships among providers, schools, employers, and local governments.

Weaknesses and Threats

Access, affordability, provider shortages, behavioral health capacity, childcare availability, and long travel distances remain significant concerns. Rural facilities and service providers face workforce, reimbursement, and financial pressures.

Insufficient childcare reduces workforce participation and can prevent parents from accepting employment or training opportunities. Limited healthcare access can affect worker retention, older residents, families, and business recruitment.

Strategic Implication

Healthcare and childcare should be treated as essential components of the regional economy. Actions should focus on provider recruitment and retention, workforce pipelines, service sustainability, behavioral health, telehealth, childcare capacity, and employer-community partnerships.

Theme 8: Water and Natural Hazards



Water and natural hazards received 69 observations, with 30 positive and 39 negative. The findings reflect both the value of the region's natural resources and increasing concern about long-term reliability and disruption.

Strengths and Opportunities

Northwest Colorado has strong water, agricultural, conservation, land-management, emergency-response, and natural-resource expertise. Existing relationships among local governments, water providers, conservation districts, agricultural producers, land managers, emergency managers, and watershed organizations create a foundation for coordinated planning.

Opportunities include watershed protection, water storage and conservation, wildfire mitigation, forest health, drought planning, hazard mitigation, emergency communication, infrastructure hardening, and business continuity planning.

Weaknesses and Threats

Drought, wildfire, flooding, water availability, extreme weather, and changing environmental conditions can affect agriculture, tourism, housing, infrastructure, energy production, public health, and community services.

The cost of mitigation and infrastructure improvements can exceed the financial and staffing capacity of smaller communities. A major disruption can also affect transportation, utilities, communications, businesses, employment, and local government revenue at the same time.

Strategic Implication

These findings directly support the Preparedness pillar. The CEDS should improve regional readiness, hazard mitigation, water security, continuity planning, emergency communication, infrastructure

protection, and post-disaster economic recovery capacity.



Credit: Middle Colorado Watershed.
Location: Glenwood Canyon, Colorado River during drought, I-70, Eastern Garfield County.

Theme 9: Housing and Cost of Living



Housing and cost of living received 57 observations, with 16 positive and 41 negative. Although it received fewer total comments than some other themes, its negative balance and connection to workforce, business growth, healthcare, and community stability make it a regional priority.

Strengths and Opportunities

Communities throughout the region recognize the importance of housing and are exploring local, regional, public, nonprofit, and private-sector solutions. Opportunities include infrastructure-supported development, infill, rehabilitation, adaptive reuse, employer-assisted housing, regulatory improvements, land partnerships, and construction-workforce development.

The region can also improve coordination among local governments, housing authorities, developers, employers, lenders, and state and federal housing programs.

Weaknesses and Threats

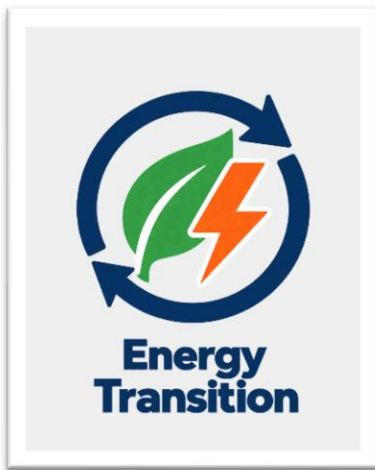
Housing availability and affordability vary across the region, but every county experiences some combination of high costs, limited inventory, aging units, construction constraints, seasonal demand, second-home pressure, infrastructure limitations, and shortages of attainable workforce housing.

The gap between wages and housing costs makes it difficult for employers to recruit and retain workers. It can also contribute to longer commutes, overcrowding, displacement, and reduced community stability.

Strategic Implication

Housing should be treated as economic infrastructure. The action plan should support housing data, project readiness, infrastructure investment, regulatory tools, construction workforce development, rehabilitation, and partnerships that expand housing choices across income levels.

Theme 10: Energy Transition



Energy transition received 57 observations, including 38 positive and 19 negative. The positive balance reflects substantial interest in new investment and redevelopment, while the negative observations recognize the scale and urgency of potential economic disruption.

Strengths and Opportunities

Northwest Colorado has an experienced energy workforce, industrial infrastructure, transmission assets, natural resources, technical knowledge, educational partners, and communities with long histories of supporting energy production.

Opportunities include reuse of industrial sites, energy innovation, geothermal development, advanced manufacturing, alternative uses of natural resources, grid and transmission investment, workforce retraining, and alignment with state and federal transition resources.

Weaknesses and Threats

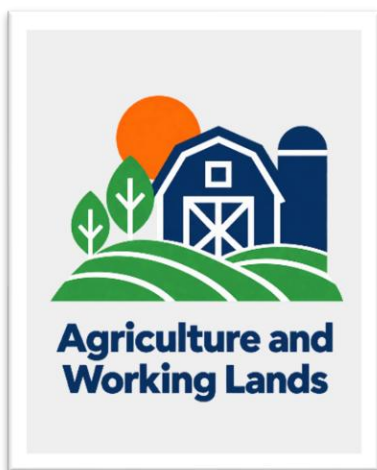
Coal mine and power plant closures threaten high-wage employment, household income, local business activity, property-tax revenue, school funding, and the financial stability of affected communities. The impacts will be concentrated in particular communities but will extend through regional supply chains and public services.

Replacement activity may not occur quickly enough or provide jobs and revenues comparable to those being lost. Uncertainty can also discourage private investment and accelerate worker outmigration.

Strategic Implication

The region should prioritize transition planning, worker retention, industrial reuse, tax-base diversification, entrepreneurship, infrastructure investment, employer attraction, and implementation-ready projects in affected communities.

Theme 11: Agriculture and Working Lands



Agriculture is a foundational component of Northwest Colorado's economy, culture, land base, and regional identity. The region includes livestock operations, farms, orchards, vineyards, value-added producers, agritourism businesses, and extensive working lands. Agriculture also supports related businesses and employment involving transportation, equipment, veterinary services, food production, water management, and regional supply chains.

Strengths and Opportunities

Northwest Colorado benefits from multigenerational agricultural knowledge, established livestock and crop production, nationally recognized agricultural products, strong producer organizations, productive working lands, and close connections among agriculture, tourism, conservation, and community identity.

Opportunities include value-added production and processing, local and regional food systems, agritourism, farm and ranch succession planning, agricultural workforce development, new markets, direct-to-consumer sales, water-efficiency improvements, and expanded access to capital and technical assistance.



Partnerships among producers, local governments, conservation organizations, economic development organizations, and public land managers can help maintain working lands while reducing conflicts involving recreation, livestock, public access, and private property.

Weaknesses and Threats

Agricultural producers face rising land, labor, equipment, transportation, and operating costs. Other concerns include water uncertainty, drought, wildfire, development pressure, workforce shortages, regulatory requirements, market volatility, aging producers, and succession challenges.

Conflicts involving recreation, public access, open-range livestock, private property, and land-management decisions can place additional pressure on producers. Loss of agricultural land and operations would affect more than farm and ranch income. It would also weaken local supply chains, food production, community identity, open space, wildlife habitat, and the region's traditional economic base.

Strategic Implication

The CEDS should support the long-term viability of agriculture and working lands through business retention, succession planning, value-added production, market development, water security, workforce development, infrastructure investment, regulatory coordination, and partnerships that respect agricultural operations and private property.

Overall Regional Interpretation

The results portray a region with strong natural, institutional, economic, and community assets but limited capacity to fully leverage them. Northwest Colorado benefits from established businesses, entrepreneurial activity, higher education and workforce institutions, public lands, agriculture, energy resources, transportation connections, healthcare providers, community organizations, and a strong sense of place. Tourism and outdoor recreation emerged as the clearest regional strength, while business and entrepreneurship received the greatest overall number of comments.



At the same time, the region faces interconnected pressures involving workforce availability, housing costs, healthcare, childcare, infrastructure, regulatory uncertainty, water, natural hazards, and energy transition. Several themes cannot be addressed independently. Housing and childcare affect workforce recruitment. Workforce constraints limit business growth and community services.

Infrastructure affects business attraction, healthcare delivery, education, remote work, tourism, and emergency response. Water availability and natural hazards influence agriculture, housing, recreation, infrastructure, and long-term investment. The findings support a strategy that builds upon regional

assets while addressing the underlying conditions that constrain economic opportunity.



Credit: Town of Rangely. Location: Rangely, Western Rio Blanco County.

Brief County Reviews

County	Brief Review
Garfield County	Garfield County's input emphasizes entrepreneurship, small-business succession, workforce housing, trades capacity, western Garfield/Roaring Fork differences, and the need for practical regional coordination.
Mesa County	Mesa County's input reflects its role as a Western Slope hub for healthcare, higher education, transportation, agriculture, outdoor recreation, manufacturing, and small business growth, while also identifying housing, state mandates, infrastructure, and long-term resilience pressures.
Moffat County	Moffat County's input centers on the urgency of coal transition, energy and industrial reuse opportunities, public lands and tourism assets, airport/rail/highway connectivity, civic capacity, water, higher education, and the need to replace lost jobs and revenue before transition impacts deepen.
Rio Blanco County	Rio Blanco County combines the Meeker and Rangely SWOT materials into one county-level chart. The points reflect public lands, energy, agriculture, water, recreation, housing, workforce, civic engagement, and infrastructure concerns across both communities.
Routt County	Routt County's input highlights a strong outdoor recreation and tourism economy, airports, nonprofit and philanthropic capacity, entrepreneurial energy, food systems, workforce and housing pressures, and risks tied to affordability, workforce loss, climate, water, and community character.

7. Vision, Goals, Objectives

Vision: Honoring Northwest Colorado's pioneering spirit, AGNC facilitates collaboration and champions resilient economies for long-term prosperity.

The region will build upon its natural resources, agricultural heritage, skilled workforce, infrastructure, and quality of life to support a diverse and resilient economy. Through regional collaboration and locally driven solutions, the AGNC EDD will create opportunities for businesses, workers, families, and future generations.

Strategic Direction

The SWOT findings support the following five-pillar framework:

Healthy Communities

Economic Vitality

Extraordinary Infrastructure

Strong Communities

Future Preparedness



GOAL 1
 Healthy Communities



GOAL 2
 Economic Vitality



GOAL 3
 Extraordinary
 Infrastructure



GOAL 4
 Strong Communities



GOAL 5
 Future Preparedness

8. Strategic Direction/Action Plan

The action plan should convert the strategy framework, aka the Five Pillars, into practical implementation steps. It should be easy for AGNC, counties, municipalities, and partners to update annually or as conditions require. The pillars evolve into the five goals of this CEDS document.

Goal 1: Healthy Communities



GOAL 1

Healthy Communities

People are the foundation of economic prosperity. Northwest Colorado's ability to retain residents, attract workers, support businesses, and sustain its communities depends on whether people can build a good life in the region. Workforce challenges cannot be addressed separately from housing, healthcare, childcare, education, affordability, and overall community wellbeing. This goal combines the Healthy Communities and Ready & Willing Workforce goals from the 2021 CEDS. It recognizes that workforce development must be coordinated with the services, amenities, and living conditions that allow people to participate in the economy.

Objectives

1. Expand the availability, diversity, and affordability of housing for workers, families, seniors, and residents at different income levels.
2. Improve access to healthcare, behavioral health, emergency medical services, senior care, childcare, early childhood education, and other essential rural services.
3. Build a skilled and adaptable workforce through employer-led, place-based strategies that respond to current industry needs and prepare workers for future economic opportunities.



4. Establish and strengthen employer-led sector partnerships among businesses, the workforce board, educational institutions, workforce centers, local governments, economic development organizations, and other implementation partners.
5. Expand career and technical education, Registered Apprenticeships, pre-apprenticeships, paid internships, clinical placements, cooperative education, incumbent-worker training, and other earn-and-learn pathways leading to stackable, industry-recognized credentials.
6. Support quality jobs and skills-first hiring practices that recognize demonstrated competencies, prior learning, military experience, industry credentials, apprenticeships, and transferable work experience.
7. Improve public access to information about priority occupations, training programs, credentials, career pathways, program costs, completion timeframes, financial assistance, and supportive services.
8. Support workforce recruitment, participation, retention, and advancement by addressing housing, childcare, healthcare, transportation, broadband, affordability, and other barriers to employment.
9. Connect workers affected by economic and energy transitions with skills assessment, retraining, education, credentials, and new employment opportunities, while creating pathways for young people to remain in or return to Northwest Colorado.
10. Strengthen community amenities, cultural institutions, recreation assets, downtowns, essential services, rural character, agricultural heritage, and sense of place that help attract and retain residents, workers, families, businesses, and healthcare professionals.

Strategies

- Support locally appropriate housing solutions, including infrastructure development, rehabilitation, infill, employer-assisted housing, senior housing, and a range of rental and ownership opportunities.
- Encourage regional and local partnerships that increase childcare capacity and improve the long-term sustainability of childcare providers.





- Support recruitment and retention programs for physicians, nurses, emergency medical personnel, behavioral health professionals, childcare providers, educators, and other essential workers.
- Align education and training programs with regional employer needs and emerging industries.
- Expand work-based learning, apprenticeships, career exploration, technical education, and employer-supported training.
- Support programs that help displaced and transitioning workers transfer their existing skills into new industries.
- Invest in community facilities, recreation assets, museums, cultural institutions, historic resources, and downtown improvements.
- Promote Northwest Colorado's quality of life and career opportunities as part of regional resident and workforce attraction efforts.
- Improve access to services in rural and geographically isolated communities through regional coordination, mobile services, technology, and transportation solutions.
- Support community-led efforts that build belonging, civic participation, cultural identity, and long-term population stability.

Suggested Implementation Partners: AGNC; counties and municipalities; regional workforce board and workforce centers; Colorado Mesa University and CMU Tech; Colorado Mountain College; Colorado Northwestern Community College; school districts; employers and industry associations; chambers of commerce and economic development organizations; housing authorities and housing organizations; healthcare systems, hospitals, clinics, public health agencies, and behavioral health providers; childcare and early childhood organizations; transportation providers; broadband providers; nonprofit and community-based organizations; Colorado Department of Labor and Employment; Colorado Department of Local Affairs; Colorado Housing and Finance Authority; Colorado Department of Education; and applicable state and federal agencies.



Goal 2: Economic Vitality



GOAL 2 Economic Vitality

Supporting a diverse, resilient, and opportunity-rich economy. Northwest Colorado's economy is built upon agriculture, energy, small businesses, natural resources, tourism, healthcare, and generations of entrepreneurship. These industries remain foundational to the region's identity and prosperity. At the same time, long-term economic vitality will require diversification, innovation, business succession, access to capital, new energy opportunities, and readiness for emerging industries. Economic strength will not come from a single industry but from a broad base of businesses, workers, institutions, and partnerships.

Objectives

1. Support the retention, expansion, modernization, and succession of existing businesses throughout the region.
2. Strengthen entrepreneurship and small-business development by improving access to capital, technical assistance, mentorship, business services, and other forms of entrepreneurial support.
3. Encourage economic diversification while supporting agriculture, energy, manufacturing, healthcare, tourism, outdoor recreation, construction, aviation, logistics, and other established and emerging industries.
4. Support traditional energy industries while advancing responsible opportunities in new energy technologies, infrastructure, workforce development, and related business activity.
5. Help energy-transition communities create jobs, reuse industrial and energy assets, replace lost revenue, diversify their economies, and strengthen long-term community resilience.



6. Protect and strengthen agriculture and working lands by supporting producer succession, beginning producers, agricultural workforce development, water access, infrastructure, value-added production, local food systems, agritourism, and expanded market access.
7. Strengthen responsible tourism, heritage tourism, outdoor recreation, and public-land economies while balancing visitor use with community needs, agricultural operations, and natural-resource stewardship.
8. Support innovation, applied research, technology adoption, remote work, and emerging industries that are compatible with regional assets and community priorities.
9. Strengthen regional supply chains and increase opportunities for local purchasing, production, processing, distribution, and business-to-business activity.
10. Improve access to suitable land, buildings, utilities, infrastructure, and site-ready locations while coordinating business recruitment, expansion, project development, and investment efforts across jurisdictions.

Strategies

- Expand business retention and expansion outreach to identify employer needs, barriers, investment opportunities, and succession risks.
- Connect businesses and entrepreneurs with financing, grants, revolving loan funds, tax incentives, technical assistance, and professional services.
- Support incubators, innovation centers, coworking spaces, maker spaces, business accelerators, and other entrepreneurial infrastructure.
- Develop sector-based strategies for agriculture, energy, manufacturing, healthcare, tourism, recreation, aviation, logistics, and other regional industries.
- Support the reuse of energy, industrial, commercial, and public facilities for new economic purposes.
- Advance new and emerging energy opportunities that build upon the region's workforce, infrastructure, natural resources, and technical expertise.
- Support agricultural processing, distribution, storage, marketing, local food networks, and value-added production.





- Promote succession planning for farms, ranches, and locally owned businesses.
- Coordinate tourism and recreation development with public-land managers, agricultural producers, local governments, conservation partners, and residents.
- Invest in museums, historic sites, cultural attractions, downtowns, scenic assets, and heritage resources that support visitor spending and community identity.
- Develop regional marketing, industry recruitment, and investment strategies tied to the region's competitive advantages.
- Reduce regulatory, financial, infrastructure, and organizational barriers that limit business creation and expansion.
- Build partnerships among businesses, educational institutions, local governments, utilities, economic development organizations, and state and federal agencies.

Suggested Implementation Partners: AGNC; counties and municipalities; Northwest Colorado Development Council; Routt County Economic Development Partnership; Garfield County Economic Partners; Grand Junction Economic Partnership; Colorado River Valley Economic Development Partnership; local economic development departments and authorities; chambers of commerce; Small Business Development Centers; Grand Junction Business Incubator Center (BIC); Northwest Colorado Innovation Center, and entrepreneurial support organizations; employers and industry associations; agricultural producers and producer organizations; conservation districts; tourism organizations and destination-management organizations; public-land managers; utilities and energy companies; colleges and workforce partners; financial institutions, community-development financial institutions, revolving loan funds, and investors; Colorado Office of Economic Development and International Trade, including the Rural Opportunity Office; Colorado Office of Just Transition; Colorado Department of Agriculture; U.S. Economic Development Administration; U.S. Department of Agriculture; and other state and federal funding partners.



Goal 3: Extraordinary Infrastructure



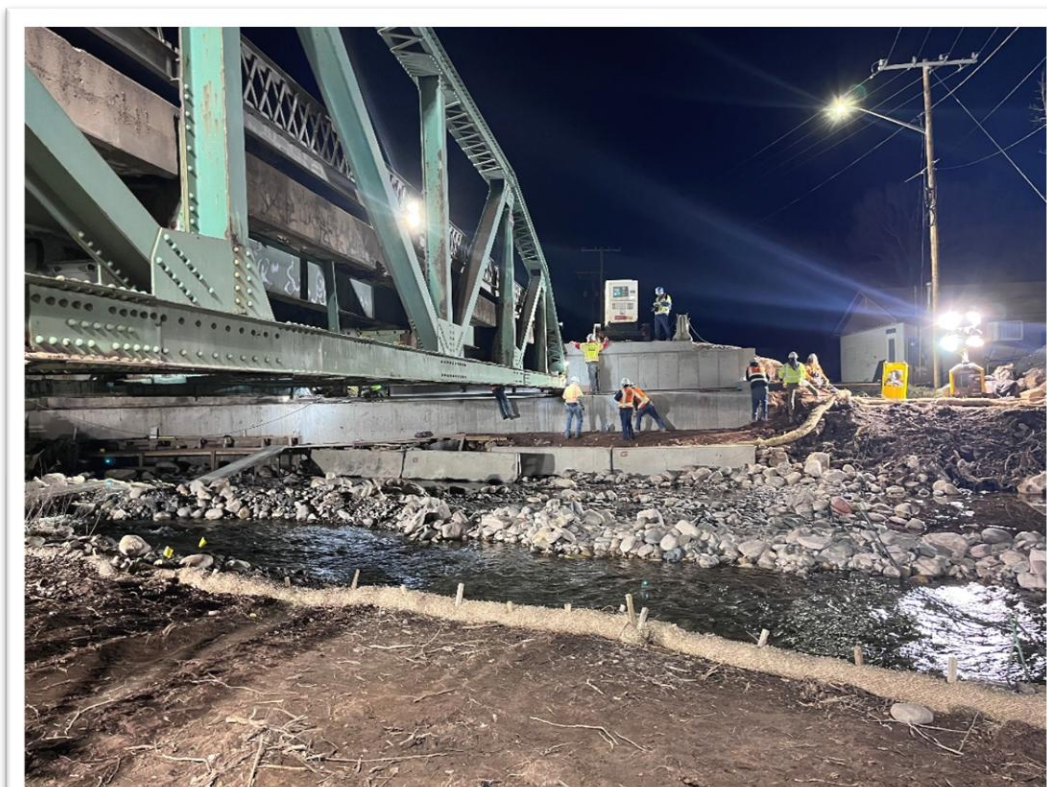
GOAL 3
**Extraordinary
Infrastructure**

Infrastructure is the backbone of regional prosperity. Infrastructure does more than support economic activity, it determines where housing can be built, whether businesses can expand, how patients reach healthcare, whether workers can participate in the economy, and whether communities can grow safely and responsibly. The 2021 CEDS and the 2026 regional SWOT both identified transportation, broadband, water, utilities, public facilities, energy systems, and site readiness as continuing regional priorities.

Objectives

1. Improve the safety, condition, reliability, and connectivity of highways, local roads, bridges, transit systems, rail, trails, airports, and other aviation facilities.
2. Expand reliable, affordable, and high-speed broadband and cellular service throughout the region.
3. Protect, improve, and expand drinking water, wastewater, stormwater, irrigation, water-storage, and water-delivery systems that support residents, agriculture, businesses, industry, recreation, housing, and future economic development.
4. Strengthen traditional and emerging energy infrastructure to provide reliable and affordable service, improve system capacity, and support economic opportunity.
5. Maintain, modernize, and expand hospitals, emergency service facilities, schools, childcare facilities, community centers, libraries, museums, and other essential public facilities.
6. Improve infrastructure and utility capacity needed to support housing development, community growth, and site-ready commercial and industrial locations.

7. Maintain and improve recreation infrastructure, including trailheads, river access, parks, wayfinding, signage, visitor facilities, and responsible access to public lands while protecting private property, agricultural operations, wildlife, and natural resources.
8. Strengthen infrastructure redundancy, backup systems, and continuity to reduce the effects of disasters, system failures, transportation disruptions, and economic shocks.
9. Coordinate infrastructure planning, investment, and implementation across counties, municipalities, special districts, utilities, transportation providers, land-management agencies, and regional partners.
10. Help communities develop infrastructure plans, engineering documents, feasibility studies, cost estimates, funding strategies, and grant-ready projects.



Credit: Town of New Castle.
Location: New Castle, Central Garfield County.

Strategies

- Maintain a regional inventory and pipeline of infrastructure projects.
- Coordinate transportation priorities among local governments, transit providers, the Colorado Department of Transportation, airports, rail partners, and federal agencies.
- Support middle-mile and last-mile broadband projects and improved cellular coverage in underserved areas.
- Advance regional and local water planning, conservation, storage, treatment, irrigation, and system-replacement projects.
- Coordinate infrastructure investments with housing, healthcare, workforce, agricultural, industrial, and economic development needs.
- Support modernization of hospitals, clinics, emergency services, community facilities, museums, and educational facilities.
- Prepare commercial and industrial sites through planning, land-use coordination, infrastructure investment, and environmental review.
- Support recreation infrastructure that improves safety, visitor management, accessibility, stewardship, and community benefits.
- Work with public-land managers and local stakeholders to improve access, signage, wayfinding, and resource protection.
- Develop capital improvement plans, engineering studies, feasibility analyses, and other documents needed to compete for funding.
- Promote resilient design, infrastructure redundancy, backup systems, and long-term maintenance planning.
- Pursue regional purchasing, shared services, and joint funding applications where collaboration improves project feasibility.

Suggested Implementation Partners: AGNC; counties and municipalities; special districts; water and sanitation districts; irrigation districts; utilities and energy providers; broadband and telecommunications providers; Colorado Department of Transportation; transit providers; airports and aviation partners; rail and freight partners; healthcare and educational institutions; housing

organizations and developers; public-land management agencies; Colorado Parks and Wildlife; Colorado Water Conservation Board; Colorado Department of Local Affairs; Colorado Department of Public Health and Environment; U.S. Department of Agriculture Rural Development; U.S. Economic Development Administration; Federal Highway Administration; Federal Aviation Administration; and other infrastructure funding and technical-assistance partners.

Goal 4: Strong Communities



GOAL 4 Strong Communities

Building local leadership, capacity, and civic strength. The region's ability to implement projects depends on the strength of its local governments, organizations, leaders, and partnerships. Communities with sufficient staff capacity, trusted leadership, strong institutions, and grant-ready projects are better positioned to attract investment and respond to change. Community capacity and regional collaboration emerged as one of the most frequently identified themes in the 2026 SWOT analysis. This goal elevates implementation capacity from a supporting activity to a regional priority.

Objectives

1. Strengthen the administrative, financial, planning, governance, and project-management capacity of local governments, regional organizations, nonprofits, and community-based organizations.
2. Expand leadership development, continuity, and succession planning for elected officials, local government staff, nonprofit leaders, business owners, board members, and community volunteers.
3. Increase community readiness to identify, plan, fund, manage, complete, and evaluate priority projects.



4. Improve access to grant navigation, technical assistance, project development, data, funding resources, and other tools that strengthen local implementation capacity.
5. Strengthen regional collaboration among counties, municipalities, special districts, economic development organizations, educational institutions, businesses, nonprofits, and state and federal partners.
6. Improve coordination between local priorities and regional, state, and federal programs, policies, funding opportunities, and technical resources.
7. Help rural and smaller communities participate fully in regional initiatives, partnerships, planning processes, and funding opportunities.
8. Support meaningful civic engagement, broad public participation, and transparent community and economic development decision-making.
9. Strengthen communication, trust, and working relationships among residents, businesses, public agencies, land managers, community organizations, and regional partners.
10. Maintain a regional pipeline of priority projects with identified partners, responsible parties, costs, timelines, funding needs, readiness status, and measures of success.

Strategies

- Provide grant navigation, technical assistance, project scoping, funding research, and application support.
- Develop shared templates, tools, data resources, and project-readiness standards that reduce administrative burdens.
- Expand training for elected officials, staff, nonprofit leaders, board members, and community volunteers.
- Support organizational planning, board development, financial management, succession planning, and staff retention.
- Convene regional working groups around shared economic, infrastructure, housing, workforce, water, energy, and community priorities.
- Encourage multi-jurisdictional projects and joint funding applications where regional collaboration adds value.



- Maintain relationships with state and federal agencies, foundations, educational institutions, and technical-assistance providers.
- Improve public communication and create accessible opportunities for residents and businesses to participate.
- Support local planning processes that identify realistic priorities, responsible parties, timelines, and funding strategies.
- Track community needs and connect smaller communities with regional partners that can provide specialized capacity.
- Recognize and build upon local knowledge, volunteer leadership, cultural identity, and community initiative.
- Use the CEDS as a practical tool for project alignment, partnership development, grant support, and regional advocacy.

Suggested Implementation Partners: AGNC; counties and municipalities; special districts; Northwest Colorado Development Council; Routt County Economic Development Partnership; Garfield County Economic Partnership; Grand Junction Economic Partnership; Colorado River Valley Economic Development Partnership; other local economic development organizations and authorities; chambers of commerce; nonprofit and community-based organizations; foundations and philanthropic partners; educational institutions; workforce organizations; the Colorado Office of Economic Development and International Trade, including the Rural Opportunity Office; state and federal agencies; technical-assistance providers; residents; volunteers; and community leaders. Credit: Michelle Cox Photography. Location: White River, Meeker, Eastern Rio Blanco County.



Goal 5: Future Preparedness



GOAL 5

Future Preparedness

Preparing Northwest Colorado for whatever comes next. Every generation in Northwest Colorado has faced economic, environmental, technological, and demographic change. The region cannot predict every future challenge or opportunity, but it can strengthen the systems, partnerships, and capacity needed to adapt successfully. Future Preparedness addresses proactive planning for change. The EDA-required Economic Resilience section will remain a separate section of the CEDS and will explain how the region prepares for, withstands, and recovers from economic disruptions.

Objectives

1. Prepare communities for economic transitions, industry changes, employer closures, market disruptions, and changes in public policy.
2. Support the evolution of the regional energy economy while protecting workers, communities, infrastructure, public services, and local revenue.
3. Strengthen water security through long-term planning, conservation, storage, infrastructure investment, drought preparation, and regional coordination.
4. Improve readiness for wildfire, drought, flooding, severe weather, public health emergencies, and other natural or human-caused hazards.
5. Strengthen continuity planning for businesses, local governments, hospitals, utilities, critical infrastructure, and essential community services.
6. Prepare for population growth, decline, aging, migration, and changing demands for housing, healthcare, education, workforce, and public services.
7. Monitor emerging industries, technologies, workforce needs, economic conditions, and new opportunities that may affect the region.



8. Protect agricultural operations, working lands, water resources, energy systems, transportation networks, communications, supply chains, and other critical regional assets.
9. Strengthen infrastructure redundancy, backup systems, emergency communications, access to essential goods and services, and regional recovery coordination.
10. Incorporate long-term risk, changing conditions, and future opportunities into local and regional planning while maintaining project plans and funding strategies that allow communities to act when transition, emergency, recovery, or economic-adjustment resources become available.

Strategies

- Develop and regularly update economic transition and industry-response plans.
- Coordinate with energy companies, workers, educational institutions, local governments, and economic development organizations.
- Plan for the reuse of industrial sites, energy infrastructure, facilities, and workforce skills.
- Support water planning and drought preparedness across municipal, agricultural, industrial, recreational, and environmental needs.
- Coordinate hazard mitigation, emergency management, public health, business continuity, and economic recovery planning.
- Develop continuity-of-operations plans for essential public services and critical institutions.
- Identify vulnerabilities in transportation, broadband, energy, healthcare, water, and regional supply chains.
- Maintain current emergency contacts, communication protocols, resource directories, and recovery partnerships.
- Track demographic, economic, technological, environmental, and policy changes affecting the region.
- Develop scenario-based plans for major employer closures, population changes, natural disasters, infrastructure failures, and funding shifts.
- Prepare projects in advance through feasibility studies, engineering, environmental review, cost estimates, and partnership agreements.





- Coordinate with state and federal agencies before, during, and after economic or disaster-related disruptions.
- Conduct regular reviews of regional risks, opportunities, and implementation readiness.

Suggested Implementation Partners: AGNC; counties and municipalities; local and regional economic development organizations; chambers of commerce; the regional workforce board, workforce centers, employers, and educational institutions; energy companies and transition-affected employers; agricultural producers, conservation districts, watershed organizations, water conservancy districts, and basin roundtables; hospitals, public health agencies, behavioral health providers, and other essential-service organizations; emergency management agencies; fire protection districts; law enforcement; emergency medical services; search-and-rescue organizations; utilities and critical-infrastructure operators; transportation, broadband, and communications providers; public-land management agencies; Colorado Parks and Wildlife; the Colorado Department of Local Affairs; the Colorado Office of Economic Development and International Trade, including the Rural Opportunity Office; the Colorado Office of Just Transition; the Colorado Division of Homeland Security and Emergency Management; the Colorado Water Conservation Board; the Colorado Department of Public Health and Environment; the Colorado Department of Transportation; the U.S. Economic Development Administration; the Federal Emergency Management Agency; the U.S. Department of Agriculture; and other state, federal, philanthropic, recovery, mitigation, and technical-assistance partners.

9. Evaluation, Implementation and Governance

Successful implementation of the AGNC EDD CEDS will depend on sustained collaboration among AGNC, the CEDS Strategy Committee, counties, municipalities, economic development organizations, educational institutions, businesses, nonprofits, and state and federal partners. The CEDS is intended to function as a practical and adaptable regional roadmap—not solely as a planning document. It will guide project development, partnerships, funding decisions, and regional advocacy while allowing individual communities to pursue priorities that reflect their distinct needs and way of life.





AGNC Implementation Role

As the federally designated Economic Development District for this five-county region, AGNC will serve as the primary coordinator and steward of the CEDS. AGNC will:

- Coordinate implementation across Mesa, Garfield, Moffat, Rio Blanco, and Routt counties.
- Maintain the regional action plan and track progress toward its goals and objectives.
- Convene the CEDS Strategy Committee and other partners as needed.
- Assist communities and organizations with project development, grant navigation, funding identification, and letters of support.
- Encourage partnerships across jurisdictions and connect local priorities with regional, state, and federal opportunities.
- Support business development, workforce initiatives, infrastructure investment, economic transition, and community preparedness.
- Maintain a regional inventory of priority projects and emerging needs.
- Collect implementation data and prepare required reports and CEDS updates for the U.S. Economic Development Administration.
- Communicate regional accomplishments, challenges, and funding needs to decision-makers and partner organizations.

AGNC will provide regional leadership and coordination but will not be solely responsible for completing every action identified in the CEDS. Implementation will rely on the participation and leadership of partners throughout Northwest Colorado.

CEDS Strategy Committee Role

The CEDS Strategy Committee provided ongoing regional guidance and oversight. Its members represent the geographic, economic, and organizational diversity of Northwest Colorado and help ensure that the CEDS remains grounded in local conditions.





The Committee has:

- Review progress toward the CEDS vision, goals, and objectives.
- Monitor changing economic conditions, emerging opportunities, and regional challenges.
- Recommend updates to strategies, actions, performance measures, and priority projects.
- Identify opportunities for regional partnerships and shared initiatives.
- Help connect AGNC with local governments, businesses, community organizations, educational institutions, and other stakeholders.
- Provide input on the annual review and required CEDS updates.
- Support communication and engagement within members' respective communities and sectors.
- Help maintain broad-based participation in the regional economic development process.

During CEDS development, the Committee met monthly. Following EDA approval, it will transition to quarterly meetings to review implementation, monitor progress, and guide updates.

County and Municipal Partner Roles

Counties and municipalities are central to implementing the CEDS because many projects and policies are developed and carried out locally. Local governments will determine which strategies and projects fit their communities.

County and municipal partners are encouraged to:

- Identify and advance local economic and community development priorities.
- Keep AGNC informed of changing conditions, project needs, and funding opportunities.
- Participate in regional planning, coordination, and data collection.
- Lead or support projects that align with the CEDS goals and objectives.
- Maintain project information, cost estimates, timelines, partnerships, and readiness documentation.





- Coordinate with neighboring jurisdictions when needs and opportunities cross community or county boundaries.
- Align local plans and capital improvement priorities with the CEDS when appropriate.
- Report project progress, outcomes, and barriers to AGNC.
- Engage residents, businesses, agricultural producers, and community organizations in local implementation.

CEDS inclusion does not obligate a county or municipality to undertake or fund a project. Each jurisdiction retains authority over its own plans, policies, budgets, and implementation decisions.

Roles of Regional Partners

Implementation will also require the participation of economic development organizations, chambers of commerce, educational institutions, workforce organizations, healthcare providers, utilities, special districts, nonprofits, businesses, agricultural organizations, and state and federal agencies.

Depending on the action, regional partners may:

- Serve as the lead or supporting organization for a project.
- Provide specialized knowledge, data, technical assistance, or training.
- Assist with community engagement and stakeholder coordination.
- Contribute funding, staff capacity, facilities, equipment, or other resources.
- Help develop grant applications and meet matching requirements.
- Track and report project outcomes.
- Identify emerging industry, workforce, infrastructure, and community needs.
- Support regional advocacy and communication.

Lead and supporting partners will be identified within the action plan when responsibilities can be reasonably assigned. Partner roles may be updated as projects advance and funding becomes available.



Evaluation/Annual Review Process

AGNC facilitates an annual review to ensure the CEDS remains current, useful, and responsive to changing regional conditions. The review will draw from quarterly Strategy Committee discussions, partner updates, project tracking, economic data, and community input.

The annual review will include:

1. Reviewing progress toward the five CEDS goals.
2. Updating the status of strategies, actions, and priority projects.
3. Recording completed projects, funding awards, and measurable outcomes.
4. Identifying barriers, delays, and unmet needs.
5. Reviewing changes in economic conditions, industries, workforce, housing, infrastructure, and community services.
6. Adding, revising, or removing actions and projects as appropriate.
7. Confirming lead and supporting partner responsibilities.
8. Establishing implementation priorities for the coming year.

AGNC will document the results of the review and incorporate approved updates into the action plan for the region and EDA. Major changes to the regional vision or strategic direction may require broader engagement and formal approval by the AGNC Board.

EDA Reporting Alignment

AGNC will align CEDS implementation and reporting with current EDA requirements. Performance information will be organized around the goals, objectives, actions, and measures established in the CEDS.

10. Economic Resilience

Northwest Colorado's resilience strategy is the region's coordinated approach to anticipating, withstanding, adapting to, and recovering from economic shocks and long-term stresses while preserving opportunity for businesses, workers, and communities. Resilience is not treated as a separate program. It is embedded across the CEDS goals and implemented through regional partnerships, project development, investment, and annual evaluation.

This section addresses the four core elements of economic resilience: planning for and implementing resilience, establishing information networks, pre-disaster recovery planning, and measuring resilience. The Northwest Colorado Economic Resilience Framework at the end of the section connects each major shock or stress to its regional impacts, supporting CEDS goals, and response strategy.

Planning for and Implementing Resilience

The regional SWOT, public survey, community engagement meetings, and partner discussions identified a set of interrelated economic risks affecting Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties. These risks do not occur independently. Housing availability affects workforce recruitment; childcare and healthcare affect labor-force participation; water conditions influence agriculture, energy, recreation, and community growth; and local capacity determines whether communities can secure funding and move projects from planning to implementation.

The region's approach is therefore systems-based. Northwest Colorado will strengthen the underlying conditions that allow communities to absorb disruption, adapt to changing markets, and pursue new opportunities. The five CEDS goals collectively serve as the regional resilience strategy: Healthy Communities supports the people and services required for economic participation; Economic Vitality advances diversification and business strength; Extraordinary Infrastructure supports reliable systems and connectivity; Strong Communities builds leadership and implementation capacity; and Future Preparedness supports readiness for hazards, transition, and changing conditions.

Credit: AGNC.
Location: Craig Power
Station.



Business development, entrepreneurship, and capital: Small businesses remain a central source of employment, community identity, and local wealth. However, limited capital, uneven access to technical assistance, and the retirement of long-standing business owners create risks of closure rather than ownership transition. Building resilience requires stronger succession planning, mentorship, business navigation, revolving loan tools, and connections between entrepreneurs, lenders, investors, and technical-assistance providers.

Community engagement, leadership, and organizational capacity: Many communities rely on a small pool of elected officials, staff, nonprofit leaders, and volunteers to advance projects. Volunteer burnout, leadership vacancies, weak succession planning, and siloed organizations can delay implementation even when funding is available. Leadership development, youth civic engagement,



shared services, grant navigation, and regional coordination are therefore economic development strategies, not secondary activities.

Workforce, housing, healthcare, and childcare: Workforce shortages are closely tied to the conditions that allow people to build and sustain a life in the region. Employers struggle to recruit and retain workers when housing is unavailable, childcare has long waitlists, or specialized healthcare requires extensive travel. Resilience requires coordinated action across workforce training, attainable housing, childcare capacity, provider recruitment, behavioral health, telehealth, and quality-of-life investments.

Infrastructure, transportation, and connectivity: Northwest Colorado's large geography increases the importance and cost of roads, bridges, airports, utilities, broadband, and cellular service. Closures on I-70, U.S. 40, and rural highways can interrupt freight, commuting, tourism, and access to services. Aging water, wastewater, and public facilities can also limit growth. Resilient infrastructure investment must improve reliability, redundancy, access, and the region's ability to compete for new economic activity.

Tourism, outdoor recreation, public lands, and agriculture: Public lands, natural amenities, working lands, and agriculture are foundational to the regional economy and identity. At the same time, visitor pressure, seasonal dependence, water constraints, development pressure, and changing land-management conditions create long-term vulnerability. Destination management, recreation stewardship, agricultural succession, local processing, water planning, and coordinated land-management partnerships can protect these assets while supporting economic opportunity.

Energy transition and the natural-resource economy: Coal mine and power plant closures, oil and gas volatility, and changing energy policy affect jobs, household income, local government revenue, schools, and special districts. Resilience requires support for existing industries alongside an all-of-the-above diversification strategy, reuse of industrial sites and transmission assets, workforce transition, advanced manufacturing, emerging energy opportunities, entrepreneurship, and continued advocacy for impacted workers and communities.

Natural hazards, drought, and water availability: Wildfire, drought, flood, rockfall, and water-supply constraints can disrupt transportation, agriculture, recreation, utilities, and local commerce. Water is a cross-sector economic resource supporting households, ranching, industry, energy,





recreation, and wildfire response. Economic resilience therefore depends on hazard mitigation, watershed and water planning, resilient infrastructure, emergency communications, and the ability to mobilize recovery resources quickly.

Establishing Information Networks

Economic resilience depends on trusted relationships and timely information before a disruption occurs. As the Economic Development District, AGNC serves as a regional convener and information hub. These networks support routine information sharing and can be activated when conditions change. AGNC's existing mechanisms—including board and committee meetings, regional planning processes, grant assistance, project-pipeline development, the Grants Roundup, Enterprise Zone administration, partner calls, and direct coordination with funding agencies—allow communities to identify emerging risks, share economic data, align priorities, avoid duplication, and prepare coordinated funding requests.

The information network is strengthened by regional colleges, workforce partners, economists, business-support organizations, public land agencies, and local governments that provide specialized data and on-the-ground knowledge. During an economic disruption, these partners can help distinguish immediate needs from longer-term impacts, identify affected workers and businesses, communicate available resources, and coordinate implementation across jurisdictional boundaries.

Pre-Disaster Recovery Planning

Northwest Colorado recognizes that economic recovery begins before a closure, natural disaster, infrastructure failure, or market disruption occurs. Pre-disaster recovery planning focuses on maintaining relationships, information, projects, and implementation capacity needed to move quickly after a shock. This includes maintaining a regional project pipeline, advancing projects to grant-ready status, identifying redevelopment opportunities, documenting funding and match requirements, and preparing workforce and business-support strategies that can be activated as conditions change.

Following a significant economic disruption, AGNC and regional partners will use the established information network to organize a coordinated economic response. Depending on the event, the response may include:





- Assessing impacts to employers, workers, local government revenue, infrastructure, housing, and essential services;
- Connecting affected businesses and workers to technical assistance, financing, benefits, retraining, and employment opportunities;
- Identifying state and federal recovery programs and coordinating competitive regional applications;
- Accelerating infrastructure, redevelopment, and diversification projects that are already in the regional pipeline;
- Coordinating clear communication among local governments, businesses, service providers, and residents; and
- Revising priorities, timelines, and performance measures based on the scale and duration of the disruption.

This approach complements local emergency management and hazard-mitigation plans but remains focused on economic continuity and recovery: retaining businesses and workers, restoring economic activity, replacing lost revenue and employment, and positioning affected communities for long-term competitiveness.

Regional Resiliency Resources

Northwest Colorado has a substantial base of assets and partners that can support resilience implementation. Rather than operating as a static directory, these resources form the delivery system for the strategies identified in this CEDS.

Economic development, business, and capital: AGNC, regional economic development organizations, the Small Business Development Center, Startup Colorado, Grand Junction Business Incubator Center (BIC), local lenders, First Southwest Community Fund, revolving loan programs, including the Northwest Colorado Innovation Center, and the Northwest Enterprise Zone provide business assistance, entrepreneurship support, capital access, and investment tools.

Education, workforce, and research: Colorado Mesa University, Colorado Northwestern Community College, Colorado Mountain College, school districts, workforce centers, employers, and



regional economists support workforce pipelines, applied research, economic data, apprenticeships, technical training, and transition planning.



Credit: Colorado Mountain College.
Location: CMC Graduation

Natural resources and public lands: The Bureau of Land Management, U.S. Forest Service, Colorado Parks and Wildlife, conservation districts, watershed organizations, water conservancy districts, agricultural organizations, and Northwest Colorado Outdoors support land stewardship, water planning, recreation management, wildfire mitigation, and the long-term viability of working lands.

State and federal implementation partners: EDA, USDA, DOE, DOLA, OEDIT, the Colorado Office of Just Transition, CHFA, and other state and federal agencies provide funding, policy coordination, technical assistance, and specialized recovery or transition resources.

Local government and infrastructure partners: Counties, municipalities, special districts, utilities, broadband providers, transportation agencies, healthcare systems, and emergency-management partners identify local needs, operate essential systems, and implement projects that directly improve resilience.

Measuring Resilience

Resilience will be measured through the broader CEDS Evaluation Framework rather than through a separate reporting system. AGNC and the CEDS Strategy Committee will review economic conditions and implementation progress annually, using both outcome measures and indicators of regional capacity. The purpose is not to predict every disruption, but to determine whether the region is becoming more diversified, connected, prepared, and capable of implementing its priorities.

Measures may include businesses assisted, retained, started, expanded, or transitioned; jobs created or retained; workforce participation and training outcomes; housing and childcare capacity; healthcare access; infrastructure and broadband projects advanced; outside funding secured and leveraged; redevelopment and energy-transition milestones; agricultural and natural-resource investments; communities receiving technical assistance; and progress toward the five CEDS goals.

AGNC will use the annual review to identify new risks, document changes in regional conditions, evaluate whether strategies are producing the intended results, and update the resilience framework when needed. A major disruption may trigger an interim review so that priorities, partners, and implementation actions can be adjusted before the next annual cycle.

Northwest Colorado Economic Resilience Framework

The framework below translates the region’s principal economic shocks and chronic stresses into actionable strategies connected to the CEDS goals. It will be reviewed annually and updated as conditions change.

Potential Shock or Stress	Potential Regional Impacts	Supporting CEDS Goal(s)	Regional Resilience Strategy
Business Development, Entrepreneurship, and Capital	Business closures; loss of long-standing firms without succession plans; slower entrepreneurship and recovery when capital is limited.	Economic Vitality	Expand mentorship, succession planning, business valuation and navigation support; grow revolving loan and local capital tools; strengthen SBDC, lender, investor, BIC and economic development partnerships.
Community Engagement,	Volunteer burnout, leadership vacancies, stalled projects, and	Strong Communities	Build leadership and civic education programs; support succession planning for

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Leadership, and Capacity	reduced ability to pursue funding or respond to opportunities.		public, nonprofit, and business leadership; expand youth engagement, shared services, grant navigation, and regional collaboration.
Tourism, Outdoor Recreation, and Public Lands	Seasonal dependence, visitor pressure, infrastructure strain, rising costs, resource conflicts, and vulnerability to low-snow years or changing travel patterns.	Economic Vitality; Extraordinary Infrastructure	Advance destination management and shoulder-season strategies; invest in recreation infrastructure, stewardship, wayfinding, and public-land coordination; support community-scaled tourism and cultural-economy diversification.
Workforce Availability and Skills Gap	Critical vacancies, slower business growth, reduced service capacity, and difficulty replacing retiring workers.	Healthy Communities; Economic Vitality	Expand apprenticeships, internships, technical training, and career pathways tied to employer demand; strengthen partnerships with colleges, schools, workforce centers, and employers.
State and Federal Policy, Regulation, and Funding	Funding uncertainty, compliance costs, permitting delays, unfunded mandates, and disruption to local planning and budgeting.	Strong Communities; Future Preparedness	Maintain active agency relationships; monitor policy changes; coordinate regional advocacy; provide technical assistance; and maintain grant-ready projects that can move when funding becomes available.
Infrastructure, Transportation, and Connectivity	Highway closures, disrupted freight and commuting, aging utility systems, and reduced competitiveness from broadband or cellular gaps.	Extraordinary Infrastructure	Invest in corridor resilience, bridges, airports, water and wastewater systems, broadband, cellular coverage, energy systems, and public facilities; coordinate regional infrastructure planning and funding.
Healthcare Access	Provider shortages, long travel distances, reduced quality of life, and difficulty attracting and retaining residents, workers, and employers.	Healthy Communities	Support provider recruitment and retention; expand behavioral health, specialty care, telehealth, and regional coordination among healthcare systems and community partners.
Childcare Access	Reduced workforce participation, particularly among parents of infants and toddlers; recruitment and	Healthy Communities; Economic Vitality	Expand provider, staffing, and facility capacity; support non-traditional-hours care, employer partnerships, scholarships, and childcare infrastructure investment.

	retention challenges for employers.		
Natural Hazards and Water Availability	Wildfire damage, transportation closures, drought-related agricultural loss, water-supply constraints, and strain on utilities and emergency response.	Future Preparedness; Extraordinary Infrastructure	Coordinate hazard mitigation, watershed and water planning, forest health, defensible space, emergency communications, and resilient infrastructure; strengthen regional wildfire training and recovery capacity.
Housing Affordability and Availability	Workforce outmigration, reduced employer recruitment and retention, overcrowding, and pressure on schools and community services.	Healthy Communities; Extraordinary Infrastructure	Expand workforce and attainable housing partnerships; prepare infrastructure and development-ready sites; reduce avoidable barriers; and pursue housing, utility, and community-facility funding.
Energy Transition and the Natural-Resource Economy	Loss of high-wage jobs, declining local and school revenue, vacant industrial assets, population loss, and volatility in energy markets.	Economic Vitality; Future Preparedness	Support an all-of-the-above energy strategy; reuse power plant, mine, transmission, and industrial assets; expand workforce transition, entrepreneurship, advanced manufacturing, and emerging energy opportunities; partner with BIC; and pursue transition funding.
Agriculture, Working Lands, and Local Food Systems	Loss of agricultural production, succession challenges, water constraints, limited processing capacity, conversion of working lands, and reduced food security.	Economic Vitality; Healthy Communities	Support agricultural succession, irrigation modernization, value-added production, local processing and food systems, agribusiness development, and protection of working lands through coordinated planning.

11. Appendices, upon request

- [CEDS Strategy Committee members](#)
- **Attendees of in-person SWOT meetings**
- **Public engagement materials**
- **Survey results**
- **County data profiles - can be viewed by clicking each individual hyperlink below.**
 - [Garfield County Data Profile](#)
 - [Mesa County Data Profile](#)
 - [Moffat County Data Profile](#)
 - [Rio Blanco County Data Profile](#)
 - [Routt County Data Profile](#)
- [The AGNC Board of Directors](#)
- [The AGNC EDD Board of Directors](#)
- [The AGNC Team](#)

[1] Headwaters Economics, 2026. A Profile of Land Use: Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties, Available at <https://headwaterseconomics.org/apps/economic-profile-system>. AGNC regional figures are author calculations.

[2] Headwaters Economics, 2026. A Profile of Land Use, EPS reports for Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties, CO. Land Ownership table, p. 4.

[3] Headwaters Economics, 2026. A Profile of Land Use: Moffat County, CO and Routt County, CO. Economic Profile System (EPS), Land Ownership table, p. 4. See footnote 2.

[4] USDA, 2022 Census of Agriculture, County Profiles for Garfield, Mesa, Moffat, Rio Blanco, and Routt Counties. Succession and aging-producer concerns also documented in Perry, N. (2026). The Economics of Agriculture in Western Colorado. Colorado Mesa University, Davis School of Business / Business Incubator Center.

[5] National Park Service, 2025. 2024 National Park Visitor Spending Effects. Park-level tables for Colorado National Monument and Dinosaur National Monument.

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[7] Colorado Office of Economic Development and International Trade (Colorado Creative Industries), n.d. Colorado Creative Districts. Carbondale Arts, n.d. Carbondale Creative District. GJ Creates, n.d. Downtown Grand Junction Creative District. Steamboat Creates, n.d. Steamboat Springs Creative District. Palisade Chamber of Commerce, n.d. About Palisade.

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Economic Development District



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On behalf of the team at AGNC - Thank You

