CAPITAL CROSSROADS
A VISION FORWARD



REGIONAL ASSESSMENT
CAPITAL CROSSROADS 2.0

Submitted by Market Street Services, Inc.
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OVERVIEW

Five years ago, leaders from throughout Central Iowa engaged in a dynamic strategic planning process that would become known as Capital Crossroads. Supported by funding from the Greater Des Moines Partnership, Community Foundation of Greater Des Moines; United Way of Central Iowa; Prairie Meadows; the Des Moines Area Metropolitan Planning Organization; and Iowa State University, Capital Crossroads was the culmination of an intensive research study that included feedback from thousands of Central Iowa citizens and the hard work of a very thoughtful and exacting Steering Committee of top regional leaders.

Since project launch, Capital Crossroads has experienced hundreds of laudable implementation successes and received consistent attention in the local press, social media, and the words and actions of regional public and private leadership. National rankings and accolades for Greater Des Moines and Central Iowa have become a regular occurrence, declaring the region best in class for overall business climate as well as for constituencies ranging from entrepreneurs to families, young professionals to retirees, summer interns, and foodies.

Central Iowa is a region with serious momentum. As Market Street has shared with others around the country, initial Capital Crossroads implementation has been the most ambitious, aggressive, comprehensive, and effective we have seen in our nearly 20-year history. However, communities must not become complacent in their success as the competition for jobs and investment has never been more intense than right now. Central Iowa leaders understand this and have positioned Capital Crossroads 2.0 as the initiative that will take the region to even greater levels of achievement. Because of the success of the first strategy, the bar is raised for Capital Crossroads 2.0, with opportunities for "next level" strategies to complement the work that has been done for decades to make Central Iowa a top destination for companies and talent.

CAPITAL CROSSROADS 2.0 PROCESS

STEERING COMMITTEE

Similar to Capital Crossroads 1.0, a diverse Steering Committee of public and private leaders from across Central Iowa will oversee the process, discuss and approve all deliverables, and ensure that the Capital

Crossroads 2.0 strategy addresses the region's most critical issues and seeks to capture its highest value opportunities for the next five years.

STAKEHOLDER INPUT

Talking directly with leaders, partner organizations, business owners, and other stakeholders throughout the region will provide a solid foundation for Capital Crossroads 2.0 strategic recommendations. While more streamlined than the 2011 process, stakeholder perspectives were gathered through three days' worth of interviews and focus groups and an online survey that garnered over 2,800 responses. Hundreds more weighed in on the process during a public town hall meeting in late July. The goal of the input component was to identify new and/or emerging issues, concerns, and opportunities that need to be addressed during this process, as well as update implementation perspectives since the Capital Crossroads Mid-Course review process in 2014.

REGIONAL ASSESSMENT

This Assessment presents a narrative examination of the trends and issues facing Central Iowa seen through the lens of Capital Crossroads' ten strategic Capitals. Quantitative and qualitative research combines to paint a picture of Capital implementation, regional issues, and inform the development of the Capital Crossroads 2.0 strategy. Central Iowa is compared to the regions of **Indianapolis, Indiana, Kansas City, Missouri,** and **Nashville, Tennessee** to provide perspective on Capital trends against these very strong benchmark communities.

CAPITAL CROSSROADS 2.0 STRATEGY

The Capital Crossroads 2.0 strategy will be the culmination of all the research and input to date. It will renew the 2011 plan and ongoing work of the Capital Crossroads Capital Committees and their organizational partners. The report will begin with a **review of key research findings.** Essentially, the basis of Capital Crossroads 2.0 will emerge from quantitative analysis, qualitative input, and feedback from the Steering Committee, staff, and implementation partners. Because the ten Capitals have become embedded in established implementation frameworks and continue to have strong validity, the Capital Crossroads 1.0 structure will be perpetuated in the 2.0 plan. Ongoing and planned Capital activities will be captured in the 2.0 blueprint, in addition to any new efforts suggested by research and confirmed by the Steering Committee.

EXECUTIVE SUMMARY

Implementation to date of Capital Crossroads 1.0 has been an overwhelming success. However, as one regional leader said, "We have to be careful about declaring victory." Indeed, while the hundreds of implementation "wins" secured by Capital Crossroads have made an undeniably positive impact on regional competitiveness, job creation, and wealth-building, the fight for top jobs and talent has never been more intense than in the current economy.

CAPITAL CORE

- Downtown Des Moines continues to be a locus of influential, transformational investment and a draw for young professionals.
    - With thousands of new housing units coming online or under development, retail amenities like downtown's first full-service supermarket are slowly emerging.
    - Feedback noted that the provision of affordable housing remains an issue in the Des Moines core for young professionals and those earning less than the city's median income.
- Efforts continue to extend the momentum of downtown to adjacent neighborhoods. The Viva East Bank! initiative has shown promise and can serve as a model for other intown neighborhoods.
- Poverty rates remain persistently high in the City of Des Moines and, though still comparatively low, violent crime rates have increased at faster rates than the comparison communities.

BUSINESS CAPITAL

- Central Iowa job growth has outperformed Midwest rivals, while performance in the target industries marketed by the Greater Des Moines Partnership has excelled.
    - Sector councils and targeted marketing have proven effective.
    - The Global DSM export and foreign direct investment (FDI) plan promises to provide a roadmap for opening up new foreign markets for regional businesses.
    - Workforce issues were cited as regional businesses' top competitive concerns.
- With new programs and networking spaces coming online, Central Iowa's entrepreneurial ecosystem features greater capacity than before the launch of Capital Crossroads.
    - Stakeholders said the entrepreneurial sector is making progress, but must continue to identify opportunities to build assets to best support entrepreneurship.
    - Performance of the Global Insurance Accelerator has been a notable early success.

CULTIVATION CORRIDOR

- Since launch, Cultivation Corridor staff and volunteer leadership have focused on awareness building, economic development, strategic innovation, and policy leadership to facilitate job growth and embed the brand regionally and externally.
    - A recently completed strategic review will establish the future direction for the initiative.
- The Corridor has seen a number of large investments and expansions, but some stakeholders feel the program must secure a relocation "win" to renew momentum and be sustainable.

WELLNESS CAPITAL

- Wellness Capital has primarily focused on creating a toolkit for businesses to implement wellness programs, conducting a Wellness and Community Study with 900 participating businesses, and facilitating the development, collection, analysis, and reporting of a regional Community Health Needs Assessment.
- Across the board, residents in Central Iowa experienced better health outcomes than individuals in the comparison communities.
- Stakeholders identified a focus on mental health and emotional wellbeing as a "significant gap" in regional wellness programming that will be addressed through partnerships at the state level.

HUMAN CAPITAL

- Talent trends in Central Iowa are largely positive, with robust population growth, continuing inmigration, upward-trending public school performance, rising incomes, low poverty, and educational attainment higher than all comparison areas.
    - However, talent availability was the most pressing concern identified through public input.
    - There are also clear performance and wealth disparities between Central Iowa and the City of Des Moines, which are affecting student performance in Des Moines Public Schools.
- EDGE (Education Drives our Greater Economy), the principal program seeking to optimize Central Iowa's training capacity from "cradle to career," recently announced its signature initiative, the 75x25 Campaign, which seeks to ensure that 75 percent of Central Iowans have post-secondary certificates, credentials or degrees aligning with workforce needs by 2025.
    - Results will be achieved by leveraging and aligning EDGE with initiatives from multiple partner organizations and institutions.
    - Talent development is supplemented by aggressive talent attraction strategies, including new online tools and multiple out-of-market visits to college campuses.
- Stakeholders are hopeful that a proposed Regents Campus in Greater Des Moines will enhance the region's already strong higher education capacity.

SOCIAL CAPITAL

- Diversity and inclusion efforts continue to advance, though face challenges to achieve stronger participation and integration of minority leaders in regional networks and circles of influence.
    - Central Iowa remains less diverse than its comparison areas, with minority percentages actually declining in Central Iowa, though they increased slightly in the Des Moines MSA.
    - The recently announced Des Moines Immigration Initiative and emergence of the Refugee Planning Alliance Des Moines will seek to better support and coordinate the inclusion of immigrants and refugees in Central Iowa's workforce and community networks.
- Strong progress has been made to enhance Central Iowa's leadership capacity and better engage and connect graduates of leadership development and young professional programs.
    - Concern remains among legacy leaders and philanthropists that the "next generation" of leaders requires more nurturing and mentoring before they can assume positions as community stalwarts.
- Data show that Greater Des Moines' nonprofit revenue per capita far exceeds all comparison areas.

CULTURAL CAPITAL

- Arts and culture continues to exert a strong economic and social benefit for Greater Des Moines and Central Iowa, with multiple existing and new amenities supporting a $120 million economic impact on the Central Iowa economy and the employment of thousands of local residents.
- Cultural Capital was said to be the focus area that most struggled to build positive implementation momentum, possibly due to a finite market for funding and patrons that fosters inherent competition among arts entities.
    - Even so, arts leaders are passionate about exploring opportunities to work better together and feel that alignment behind a regional arts blueprint is possible.

PHYSCIAL CAPITAL

- Data and public input feedback show that Central Iowa is effectively managing the effects of the region's strong population growth and proactively ensuring that this growth is sustainable.
    - From the outset, Physical Capital efforts were coordinated with The Tomorrow Plan and multiple other projects and processes.
- Commute times in Central Iowa and the Des Moines MSA are less of a burden than the comparison regions, complicating efforts to enhance DART's public transit capacity.
- Development of a new passenger terminal at Des Moines International Airport is progressing, and will be a boon to the regional economy when a final location and site plans are confirmed.
- Stakeholders feel that the region's most notable progress has been achieved in stormwater and watershed management, which complements efforts to plan trails, greenways, and a regional water trails initiative and lays the groundwork for implementation of recommendations from the Iowa Soil and Water Future Task Force.

GOVERNANCE CAPITAL

- Initiatives such as the Local Government Collaboration Project and Central Iowa Code Consortium are national best practices and are true testaments to the spirit of regionalism in the Des Moines metro area.
    - Expansion of efforts was said to be contingent on identification of enhanced capacity to implement the initiatives.
- Efforts to reinvigorate and expand the Metro Advisory Council have been an ongoing challenge
    - Volunteers have again raised the question of the potential need for a regional council of governments in metro Des Moines.

NATURAL CAPITAL

- Natural Capital has moved forward on multiple fronts in its four areas of focus: land use, zoning, and climate; outdoor recreation and trails; air/water/soil; and marketing and education.
    - The highest profile efforts are centered on soil and water quality, partially because of an ongoing Des Moines Water Works lawsuit against three Northeast Iowa communities and the work of the Iowa Soil and Water Future Task Force.
    - Interestingly, EPA data show the Des Moines MSA outperforms all the comparisons regions except Nashville for water quality.
- Efforts to enhance the capacity and connectivity of region's parks and trails have included the opening of multiple new trail segments, new master plans for Des Moines Water Works Park and Jester Park, and a recently released Water Trails plan.
- Marketing and education were said to be critical because, without public support of environmental policies, projects, and legislation, their likelihood of implementation is compromised.

REGIONAL FINDINGS

✓ Central Iowa is a top performing metro area, not only in the Midwestern U.S. but against any measurable regional criteria. But persistent and deeply rooted challenges in the City of Des Moines and certain rural counties continue to limit these areas' capacity to enjoy the same level of success and wealth-building as other local cities and counties. These trends often do not show up in regional data.

✓ While Central Iowa's population growth continues to increase at a healthy rate and most local school districts are seeing positive performance trends, workforce availability remains the region's top competitive challenge. Consensus has not been reached on whether these are issues of talent availability or a mismatch between worker skills and those required by regional employers.

✓ For issues including prioritization of regional transit expansion, development of a bus rapid transit line, construction of a skate park next to the Des Moines River, adoption of policies supporting food trucks, triumphing positive rankings versus building assets that make greater Des Moines "cooler," and others,

Millennials in Central Iowa are frustrated by the region's pace of change. Young leaders would like to see greater Des Moines mentioned in the same breath as talent magnets such as Portland, Oregon and Austin, Texas.

- ✓ Though issues of sustainable growth related to transportation, land use, public services, and housing affordability are key stakeholder concerns, water and soil quality has emerged as a top-tier issue for Central Iowa residents. This is in contrast to a lower profile in Capital Crossroads 1.0 and the mid-course review process.

- ✓ Despite Central Iowa stakeholders' concerns about aspects of the community's future, by far the most common sentiment is that the region continues its ascent as a top-tier metro area in the Midwest and nation as a whole. When asked what qualities differentiate Central Iowa in this regard, survey respondents feel the region's people, sense of community, and the opportunities it provides to residents are its most compelling assets.

REGIONAL ASSESSMENT

One of the enhancements to the Greater Des Moines Partnership's marketing and communications program has been the development of a robust, interactive, user-friendly, and regularly updated data portal called Des Moines Regional Research, Stats, and Data Hub (http://www.desmoinesmetrodata.com/). The site is managed by The Partnership with support from the Des Moines Area Metropolitan Planning Organization (MPO), The Tomorrow Plan, MidAmerican Energy, Capital Crossroads, and Cultivation Corridor. Because of the presence of the data hub, which offers updated information on dozens of statistical indicators for all potential Central Iowa geographies, including the Des Moines Metropolitan Statistical Area (MSA), The Partnership's service area, The Tomorrow Plan, Capital Crossroads, and Cultivation Corridor regions, and all component Central Iowa counties, Market Street felt the Regional Assessment's greatest value was, 1) assessing Central Iowa data in the context of top peer metro areas, and 2) reporting trends for certain statistical indicators not captured by the data hub.

As such, the Assessment contains targeted groupings of data measurements for each strategic Capital area, married with implementation reports and stakeholder feedback to present narratives of trends and accomplishments in all ten Capitals.

Report Format

Each Capital is profiled through the below headings. A **Regional Findings** section at the end of the report will coalesce the Capital profiles into a breakdown of key issues for Central Iowa as a whole.

THE STORY

This section summarizes inputs from implementation activities, data, and stakeholder feedback to communicate "big picture" narratives from each strategic Capital.

WHAT THE DATA SAY

It is not feasible to claim that a collection of indicators can accurately summarize performance of each Capital. Instead, Market Street will profile key data points that can speak more generally to Capital trends.

WHAT PEOPLE SAY

Participants in focus groups, interviews, an online survey, and two town hall meetings provided important perspectives on local and regional issues, Capital activities, and operational realities.

Capital Core

THE STORY

Downtown Des Moines continues to be a locus of massive, transformational investment. With thousands of new housing units coming online or under development, retail amenities like downtown's first full-service supermarket are slowly but surely emerging. Even so, retail density continues to be an issue in the city's core. Headquarters construction for Kum and Go and Principal, along with groundbreaking for a long-awaited convention hotel, eventual completion of the Wellmark YMCA, a new courthouse, and other projects should make investment in downtown retail an even more compelling proposition. Even with multiple residential projects coming onto the market, feedback noted that the provision of affordable housing remains an issue in the Des Moines core for young professionals and those earning less than the city's median income.

Efforts continue to extend the development momentum of downtown Des Moines beyond the city core to adjacent neighborhoods and corridors. These include the City of Des Moines Neighborhood Improvement Plan, corridor plans for 6th Avenue and SW 9th Street, and a Des Moines land bank in the development stages Of the neighborhood-focused efforts, the Viva East Bank! initiative has shown the most promise and was said to potentially serve as a revitalization model for other intown neighborhoods.

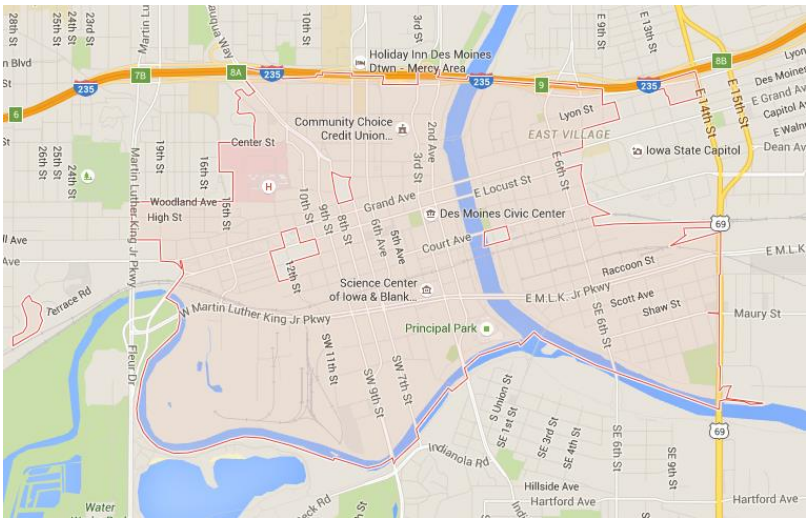
Issues of poverty and rising crime levels emerged from research in the Capital Crossroads 1.0 and mid-course assessment processes. Data show that total and youth poverty in the City of Des Moines continue to be comparatively high, though youth poverty has declined in recent years. The City of Des Moines is safer than the comparison metros, though violent crime is rising faster than the benchmarked cities, Iowa, and the U.S. Property crime, however, has dropped in Des Moines faster than all cities except Nashville. Efforts through Capital Crossroads to implement an Urban Core Initiative in Des Moines' core neighborhoods have been absorbed into the Capital Core and Social Capital strategies. A new United Way of Central Iowa initiative called OpportUNITY seeking to lower poverty rates by 10 percent has stakeholders hopeful for positive future results.

WHAT THE DATA SAY

To understand downtown dynamics, this report uses ZIP code 50309 as a proxy for downtown Des Moines, shaded pink in the following image. This enabled proprietary data to be sourced from Economic Modeling Specialists, Inc. (EMSI).

The downtown geography utilized by the Greater Des Moines Partnership to report employment and population data is slightly larger. Therefore, data figures in this Assessment will likely be below levels regularly reported for downtown Des Moines' resident and job totals.

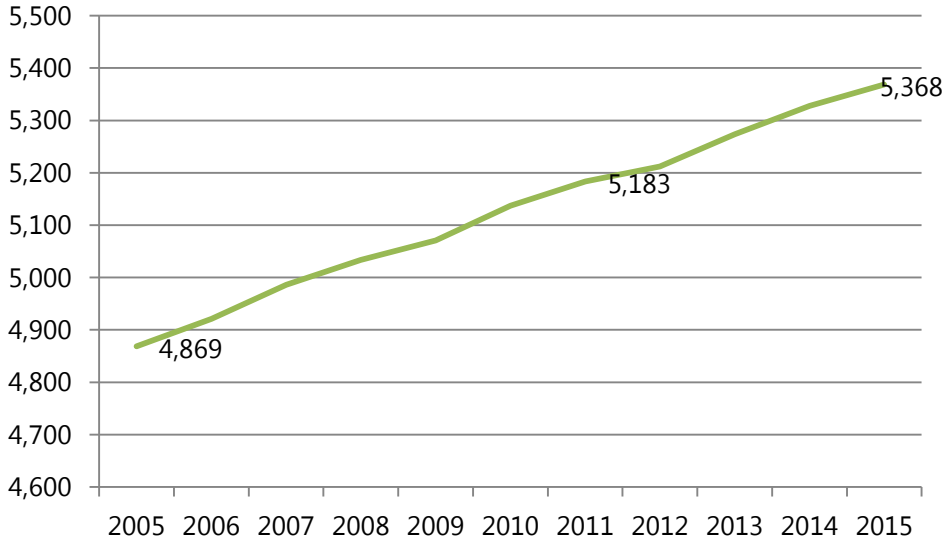
MAP OF ZIP CODE 50309



Source: Google Maps

Downtown living in the profiled zip code has steadily increased over time, adding 185 residents from 2011 to 2015. The rate of residential growth downtown is approximately 3.6 percent, slightly slower than the overall population growth of 5.8 percent.[1] According to CBRE/Hubbell Commercial, demand for downtown rental housing units is high, with low vacancy rates throughout downtown.[2] With significant residential product coming online in 2016 and in years to come, this number will likely increase.

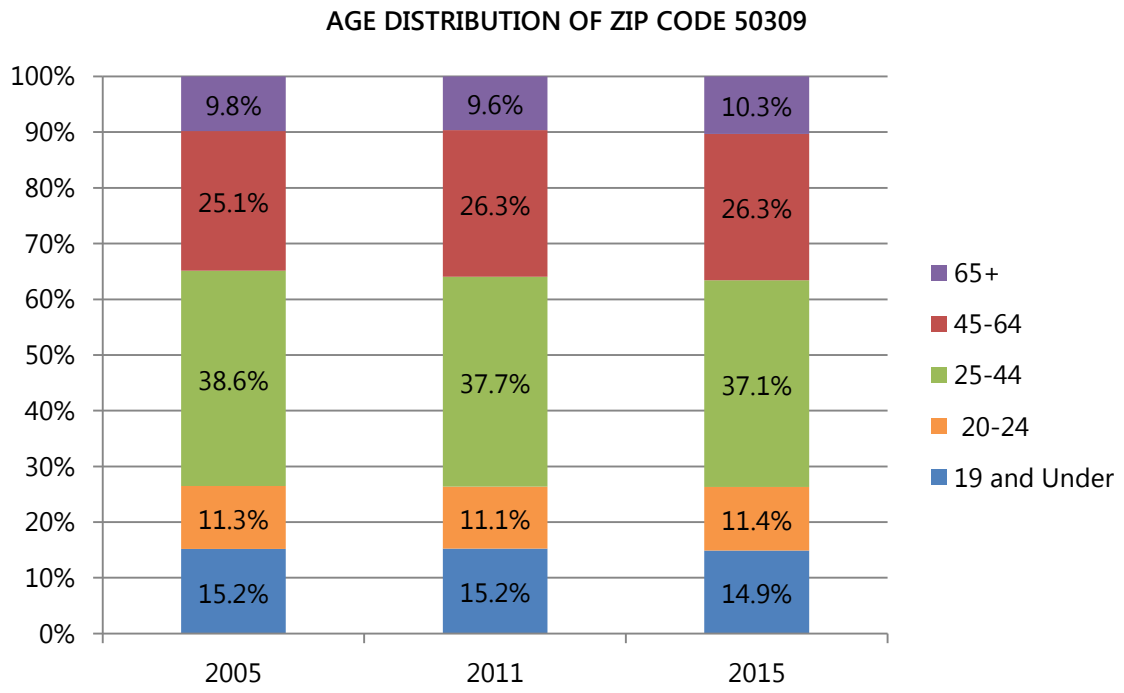
RESIDENTIAL POPULATION OF ZIP CODE 50309



Source: Economic Modeling Specialists Intl.

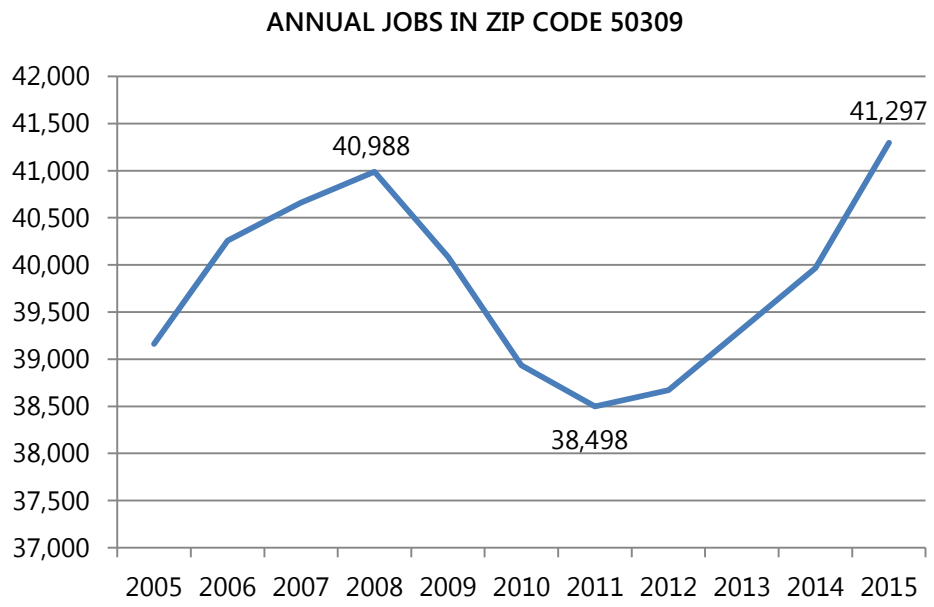
[1] This is not an apples to apples comparison—the sources differ and use varying methods of estimating demographics.
[2] CBRE/Hubbell Commercial. *Des Moines Metro Apartment Survey 2016.* January 2016.

When age dynamics are examined, it is clear that young professionals are drawn to downtown, where walkability, restaurants, and other amenities are available. Over 37 percent of the residents who live in ZIP code 50309 are between the ages of 25 and 44. The second largest age group is experienced professionals between the ages of 45 and 64.



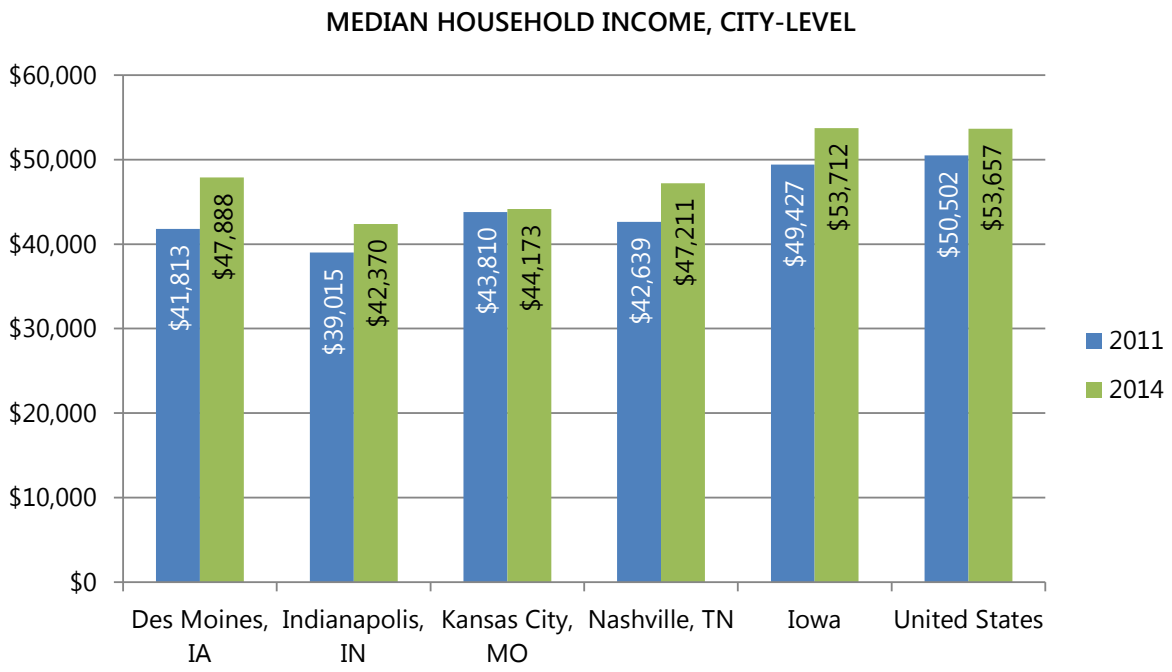
Source: Economic Modeling Specialists Intl.

Employment growth in downtown Des Moines is favorable. The district has fully recovered from the Great Recession, surpassing its 2008 employment peak of 40,988. From 2011 to 2015, employment has increased by 7.3 percent, slightly slower than Central Iowa, which experienced 9.6 percent employment gains over the four-year period.



Source: Economic Modeling Specialists Intl.

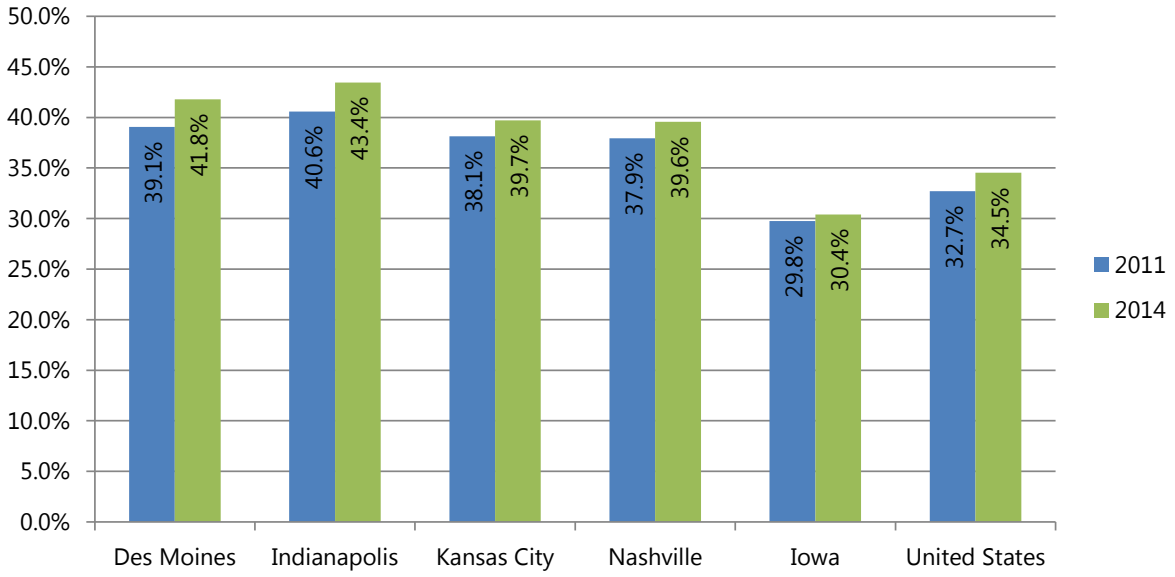
In terms of median house household income, the City of Des Moines surpasses all three comparison cities, though it lags behind state and national medians. Experiencing an increase of 14.5 percent over the four-year period examined, Des Moines has outperformed all comparison geographies in the improvement of median household incomes.



Source: U.S. Census Bureau

The federal poverty threshold for a family of four with two children was $24,008 in 2014, the most recent year for which poverty data are available. For the purposes of this report, data regarding the percentage of individuals at or below *200 percent* of the federal poverty level is utilized to provide additional insight regarding financial insecurity. While the 100 percent threshold of poverty is the official federal definition, the 200 percent figure identifies residents who may not be "poverty-stricken" but are not financially secure, meaning that they have trouble making ends meet and are at risk of falling into poverty if an unexpected expense arises.

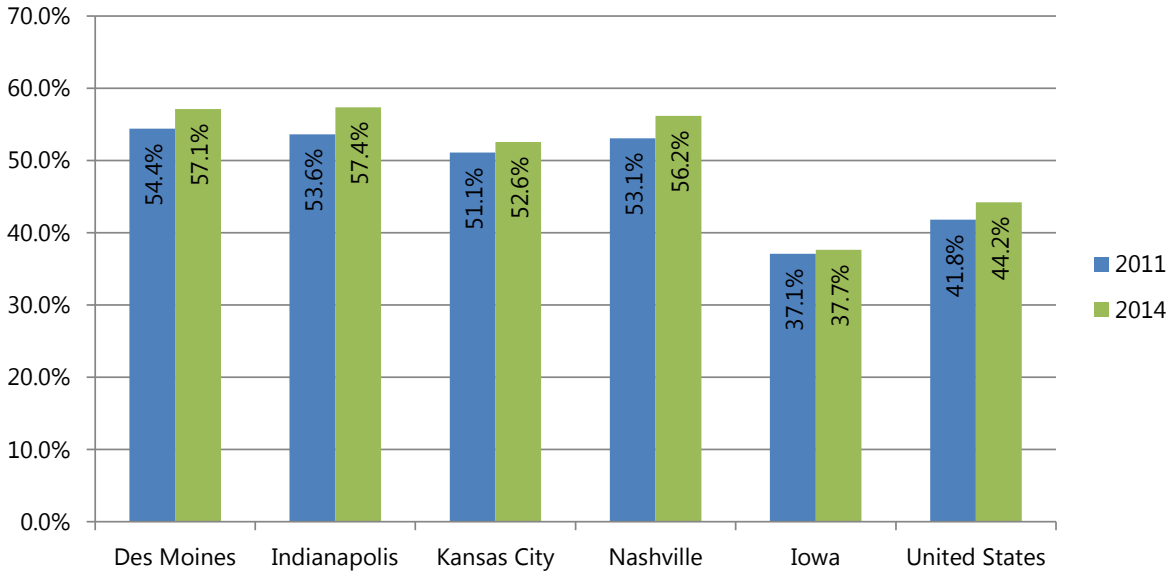
TOTAL POVERTY (200% THRESHOLD), CITY-LEVEL



Source: U.S. Census Bureau, 5-Year Estimates

Data show that, at the 200 percent poverty threshold, over 41 percent of City of Des Moines residents are in poverty or at risk of meeting the federal designation for poverty if they experience an unexpected income loss. Only the City of Indianapolis has a higher figure at 43.4 percent. Poverty at the 200 percent threshold increased for all the comparison geographies, though only incrementally in the State of Iowa.

CHILD POVERTY (200% THRESHOLD), CITY-LEVEL



Source: U.S. Census Bureau, 5-Year Estimates

At the 200 percent threshold, slightly over 57 percent of children in the City of Des Moines meet this criterion for poverty. Again, the City of Indianapolis is the only comparison area with a higher rate, although Nashville barely trails Des Moines at 56.2 percent. Poverty data at the regional level will be discussed in the Human Capital section; however, the wide spread between poverty rates in the City of Des Moines versus Central Iowa and the state as a whole are of great concern to regional leaders. The United Way of Central Iowa reports poverty for its three-county service geography at 250 percent of the U.S. average. This threshold is also the metric that will be utilized to measure poverty-reduction strategies for the OpportUNITY initiative.

In 2014, the most recent data available, City of Des Moines' crime rates were higher than the state and nation but lower than the comparison cities.

CRIME PER 100,000 RESIDENTS, CITY-LEVEL

	Violent Crime, 2014	Change, 2011-2014	Property Crime, 2014	Change, 2011-2014
Des Moines, IA	600.2	14.8%	4,245.4	-19.1%
Indianapolis, IN*	1254.7	NA	4,823.1	NA
Kansas City, MO	1251.4	4.3%	4,835.0	-12.7%
Nashville, TN	1122.5	-5.0%	3,630.6	-24.0%
Iowa	273.5	7.0%	2,093.8	-10.1%
United States	365.5	-5.4%	2,596.1	-10.7%

Source: Federal Bureau of Investigation
*Because of changes in the state/local agency's reporting practices, figures are not comparable to previous years' data.

WHAT PEOPLE SAY

Stakeholders engaged in Capital Core efforts feel that the initiative has expanded awareness of central Des Moines issues to the broader region and brought together a diverse cross-section of leaders to collaborate on solutions. "New faces" have come to the table, according to one input participant. The establishment of a "common framework and language" has created not only a context to support existing initiatives, but also has taken people out of silos in the pursuit of shared goals.

Key neighborhood issues cited by input respondents including the need for more affordable housing and homeownership assistance and rehabilitation programs, integration of refugees into the life of the city, addressing homelessness and food insecurity, and improved mobility options for transit-dependent populations. Input participants were particularly encouraged by the Viva East Bank! initiative, calling it a "new model for addressing distressed neighborhoods" that provided a way to build on the development of downtown Des Moines and expand it outwards. Stakeholders noted that Des Moines Public Schools has become an important partner, with one participant claiming that "this is the most the school district, city, and nonprofits have ever worked together." They praised the grassroots, neighborhood scale of Viva East Bank! and felt it can serve as a useful template for neighborhood renewal in the city.

Participants in the Wellness Capital focus group spoke of the need to view all strategic activities through an "equity lens." While the city has tremendous assets, there are also significant disparities among residents' experiences, assets, and opportunities. Stakeholders would like to see health and wellness as critical implementation components of the City of Des Moines' approved PlanDSM code update to ensure that homes are properly inspected for health criteria, code enforcement is equitable, and the city's built environment is supportive of wellness outcomes.

Emerging Professional focus group participants were concerned about a mismatch between the supply and demand of housing in downtown Des Moines and other intown neighborhoods. Their perception is that there is a lack of residential product in the price point between federally subsidized units and higher end condominiums. This feedback was confirmed by online survey participants identifying as young professionals, who cited unaffordable housing as a challenge. Competition for affordably priced, quality-built units is therefore intense. They noted the three main choices for Millennial home buying include, "renting in downtown, rehabbing in Des Moines, or buying in the suburbs." They noted that they city is "not at a point where you can raise a family downtown." While excited about the pedestrian improvements on Walnut Street, they were not fans of the downtown Skywalk system, feeling it takes activity off the street.

The following "word cloud" represents the views of emerging professionals who have taken the Capital Crossroads 2.0 survey at time of publication. The size of the words reflects the frequency of their usage in open-ended survey questions. As shown in the graphic, it can be inferred that emerging professionals feel housing issues – both affordability and location – are they key issues for retention and attraction of their generation in Central Iowa.

IF YOU FEEL THAT IT'S A CHALLENGE, WHAT NEEDS TO BE DONE IN CENTRAL IOWA TO MORE EFFECTIVELY RETAIN AND ATTRACT YOUNG PROFESSIONALS?

Some of these concerns were also echoed by the Human Capital focus group, which noted that the lack of affordable housing for recent college graduates and summer interns has been a key barrier to attracting non-local hires and interns to the city.

Business Capital

THE STORY

Central Iowa continues to be one of the nation's strongest economies. Job growth has steadily outperformed Midwest rivals, while performance in the target industries marketed by the Greater Des Moines Partnership has excelled. Key expansions of existing employers have included AATI, Accumold, American Enterprise Group, American Packaging, Barilla, Boehringer Ingelheim Vetmedica, Inc., Cognizant Technology Solutions, DuPont, EMC, Facebook, Kemin Industries, LightEdge, Mercer, Merchants Bonding, Microsoft, Principal, Vermeer, and Wells Fargo. With data showing that spending continues to "leak" out of the regional economy, Central Iowa leaders have promoted a Look Local First campaign that encourages companies to purchase from local suppliers if available. Volunteer committees empaneled around Central Iowa's targeted business sectors continue to serve as valuable tools to inform and optimize growth strategies in these industries.

Despite robust job growth, there is a divergence in average incomes between Central Iowa and Greater Des Moines. The former features incomes lower than most comparison areas, while the opposite is true for the latter. While this is likely a result of a different job mix in rural versus urban and suburban communities, the availability of different cost options for employers could be an asset from a business attraction perspective. However, the disparity does make attracting skilled talent more difficult in counties paying less competitive wages.

The Global DSM export and foreign direct investment plan, recently completed as part of Greater Des Moines' participation in the Global Cities Initiative, promises to provide a roadmap for opening up new foreign markets for regional businesses and increasing foreign-direct investment opportunities in Central Iowa. The initiative strives to leverage regional strengths in agriculture bioscience and insurance and financial services to support international and export growth, optimize the global competitiveness of existing employers, and address labor needs through recruitment of foreign talent and training of existing workers to meet the needs of global firms.

With new programs and networking spaces coming online, Central Iowa's entrepreneurial ecosystem features greater capacity than before the launch of Capital Crossroads. Among notable additions are the Square One DSM incubator, Gravitate co-working space, Global Insurance Accelerator, Plains Angels funding network, The Forge, 1 Million Cups, VentureNet Iowa, and Startup Factory, CYstarters, and Ag Startup Engine at Iowa State. A Student Innovation Center is in development at the university, which also celebrated the opening of an Economic Development Hub building dedicated to stimulating employment from university-based and affiliated research. A statewide economic gardening network called Advance Iowa was launched to support businesses that have emerged from the startup phase but have yet to achieve next-level success.

These resources form a strong base to leverage for further capacity building in the entrepreneurial ecosystem. Beginning in fall 2015, four members of Des Moines' startup scene took the lead on a plan

designed to assess where the city's entrepreneurial community is headed for the next ten years. Results and recommendations from this analysis are forthcoming.

WHAT THE DATA SAY

The Des Moines metro outperformed all comparison geographies in employment growth from 2005 to 2010 and is second to only Nashville in the four years since the start of implementation of Capital Crossroads 1.0. When the geography is expanded to the larger region, Central Iowa was also a strong performer.

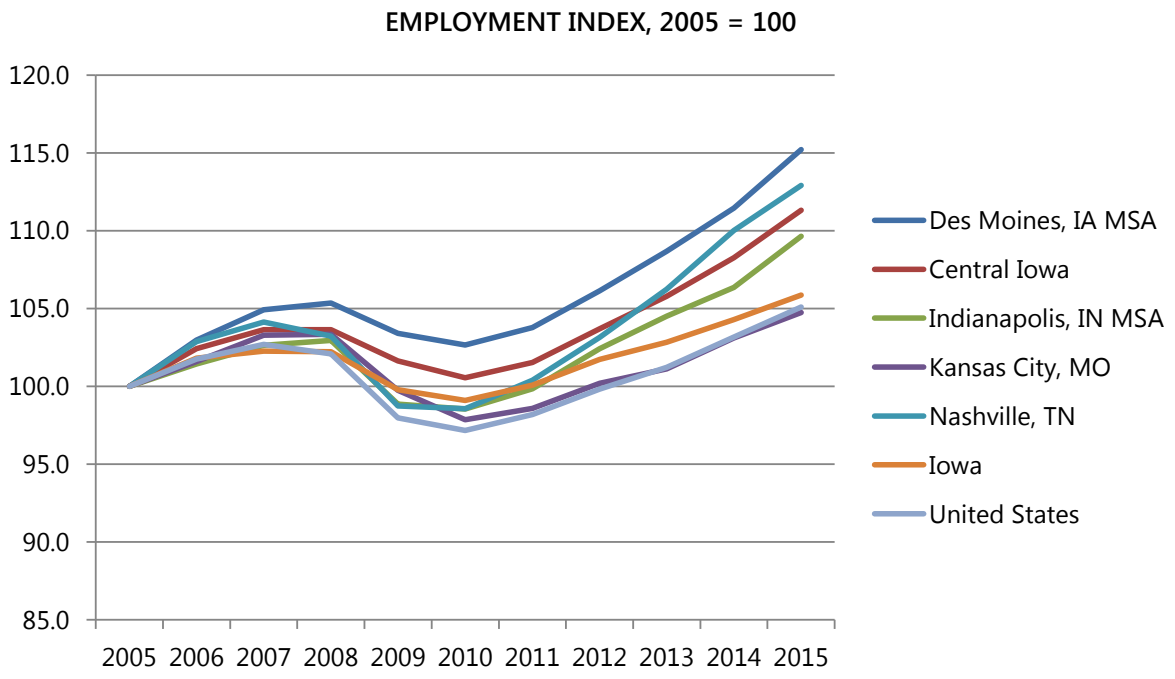
The fastest growing sectors during the 2011-2015 time period were management of companies and enterprises (44 percent), professional, scientific, and technical services (42 percent), and construction (32 percent). The impact of the state capital in Des Moines is seen in Central Iowa's largest employment sector, government, with 73,040 employees. The next largest sectors are health care and social assistance (56,100), finance and insurance (55,677), and retail trade (50,415).

The region's reputation as an insurance capital is borne out by the sector's location quotient (LQ) of 2.77, making it Central Iowa's most concentrated employment sector.

TOTAL ANNUAL EMPLOYMENT

	2005	2011	2015	4-Year Change	10-Year Change
Des Moines, IA MSA	336,606	349,339	387,847	11.0%	15.2%
Central Iowa	452,864	459,810	504,132	9.6%	11.3%
Indianapolis, IN MSA	971,741	970,213	1,065,550	9.8%	9.7%
Kansas City, MO MSA	1,051,825	1,036,869	1,101,808	6.3%	4.8%
Nashville, TN MSA	864,967	868,431	976,737	12.5%	12.9%
Iowa	1,644,967	1,646,220	1,741,418	5.8%	5.9%
United States	148,660,331	145,974,874	156,237,788	7.0%	5.1%

Source: Economic Modeling Specialists Intl.



Source: Economic Modeling Specialists Intl.

Central Iowa's average annual earnings are competitive from a talent perspective compared to the state and Indianapolis but lag the other geographies. However, from a business cost perspective, this is often cited as an advantage. Conversely, the Des Moines metro boasts average annual earnings that are on par with the nation and greater than all the remaining comparison geographies—an advantage when attracting and retaining talent since the cost of living in the metro is significantly lower than the nation. According to C2ER, the cost of living index in the Des Moines MSA is 88.8 compared to the national average of 100.

AVERAGE ANNUAL EARNINGS

	2005	2011	2015	4-Year Change	10-Year Change
Des Moines, IA MSA	$38,597	$45,114	$49,169	9.0%	27.4%
Central Iowa	$36,744	$43,100	$47,137	9.4%	28.3%
Indianapolis, IN MSA	$38,340	$43,055	$45,337	5.3%	18.2%
Kansas City, MO MSA	$38,800	$44,685	$48,332	8.2%	24.6%
Nashville, TN MSA	$37,588	$43,853	$48,176	9.9%	28.2%
Iowa	$31,774	$37,564	$41,192	9.7%	29.6%
United States	$39,164	$45,887	$49,615	8.1%	26.7%

Source: Economic Modeling Specialists Intl.

Capital Crossroads Target Industries

Finance and Insurance is a natural target for Central Iowa because of the presence of large financial services and insurance firms. Using the target definition from the 2011 Capital Crossroads Target Cluster Analysis, there are nearly 61,000 jobs in this industry, distributed among over 2,000 firms. Since 2011, the target has experienced employment growth of 6.8 percent, just under than the national growth of 8.4 percent. The average earnings for this target area are significantly higher than the regional average and have increased at a competitive rate compared to the nation. Central Iowa's strengths are in mortgage and nonmortgage loan brokers (location quotient = 8.24), sales financing (7.57), pension funds (6.82), and direct life, health, and medical insurance carriers (6.36). These subsectors are true drivers of the regional economy.

FINANCE AND INSURANCE PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Finance and Insurance-Related Sectors	*60,773*	*1.10*	*2,371*	*6.8%*	*8.4%*	*$76,937*	*14.0%*	*10.5%*
52	Finance & Insurance	55,677	2.77	1,884	6.7%	3.0%	$79,486	13.6%	12.1%
52211	Commercial Banking	14,020	3.4	328	13.5%	-2.8%	$66,070	12.9%	18.1%
52411	Direct Life, Health, & Medical Insurance Carriers	13,786	6.36	91	3.5%	1.9%	$97,192	16.5%	9.3%
52412	Direct Insurance (except Life, Health, & Medical) Carriers	6,887	3.67	86	7.1%	2.5%	$77,518	9.3%	11.3%
52421	Insurance Agencies & Brokerages	5,592	1.73	588	-8.6%	8.8%	$65,900	10.8%	10.0%
52429	Other Insurance Related Activities	2,711	2.39	143	98.0%	19.4%	$60,996	-21.0%	8.6%
52222	Sales Financing	2,308	7.57	26	-11.1%	16.6%	$98,509	30.8%	4.0%
52231	Mortgage & Nonmortgage Loan Brokers	2,091	8.24	47	-3.6%	22.2%	$56,193	16.4%	26.6%
52232	Fin. Transactions Processing, Reserve, & Clearinghouse Activities	1,137	2.73	31	14.6%	14.6%	$63,048	15.2%	19.1%
52312	Securities Brokerage	707	0.77	69	10.8%	-0.9%	$115,965	16.2%	6.8%
52213	Credit Unions	677	0.84	66	7.4%	10.6%	$47,058	18.6%	12.9%
52393	Investment Advice	568	0.85	144	0.3%	15.6%	$105,939	24.3%	19.0%
52392	Portfolio Management	330	0.47	46	-7.3%	33.7%	$120,207	5.0%	7.6%
52314	Commodity Contracts Brokerage	152	4	14	47.7%	-13.9%	$114,582	-9.3%	4.6%
52212	Savings Institutions	108	0.22	10	-60.7%	-14.0%	$47,708	-5.2%	15.2%
52311	Investment Banking & Securities Dealing	85	0.18	21	-18.9%	-5.3%	$166,642	2.2%	9.1%
52511	Pension Funds	14	6.82	2	-76.8%	-96.2%	$105,317	75.5%	-15.5%
54121	Accounting, Tax Preparation, Bookkeeping, & Payroll Services	2,633	0.69	341	23.7%	12.4%	$60,633	14.4%	11.9%
5614	Business Support Services	2,463	0.78	146	-5.1%	9.5%	$36,740	22.5%	7.2%

Source: Economic Modeling Specialists Intl.

Much like the Finance and Insurance target, the **Information Solutions** target is a knowledge-driven sector that benefits from the region's competitive educational attainment statistics, which will be discussed in the Human Capital chapter. There are over 30,000 jobs related to this target and employment growth has been rapid (50.3 percent) compared to the nation (8.6 percent). This growth has been primarily fueled by other scientific and technical consulting services, computer systems design and related services, management consulting services, and graphic design services. This target also provides earnings greater than the regional average.

INFORMATION SOLUTIONS PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Information Solutions-Related Sectors	*23,102*	*1.23*	*3,148*	*50.3%*	*8.6%*	*$65,681*	*21.5%*	*44.1%*
	Data Storage and Support								
54151	Computer Systems Design and Related Services	6,601	1.00	1,080	74.1%	-4.1%	$72,625	106.5%	12.2%
5614	Business Support Services	2,463	0.78	146	-5.0%	18.7%	$36,740	-23.1%	14.2%
5182	Data Processing, Hosting, and Related Services	2,221	2.33	86	-14.4%	9.5%	$51,546	71.9%	7.2%
54169	Other Scientific and Technical Consulting Services	502	0.60	82	75.7%	21.2%	$52,092	-27.2%	10.0%
54199	All Other Professional, Scientific, and Technical Services	338	0.49	61	11.3%	18.6%	$53,988	7.4%	8.9%
3344	Semiconductor and Other Electronic Component Mfg	239	0.20	7	-21.3%	24.6%	$47,570	29.1%	10.4%
	E-Commerce								
54151	Computer Systems Design and Related Services	6,601	1.00	1,080	74.1%	21.2%	$72,625	1.5%	10.0%
4251	Wholesale Electronic Markets and Agents and Brokers	3,872	1.31	1,077	45.0%	7.2%	$91,495	10.8%	11.4%
54161	Management Consulting Services	2,847	0.72	444	71.1%	19.6%	$63,508	10.1%	6.1%
5111	Newspaper, Periodical, Book, and Directory Publishers	2,195	1.55	83	-13.7%	-15.9%	$64,189	10.7%	10.7%
5171	Wired Telecommunications Carriers	1,785	0.91	91	-15.7%	3.9%	$56,414	7.5%	7.5%
54169	Other Scientific and Technical Consulting Services	502	0.60	82	75.7%	18.6%	$52,092	3.6%	8.9%
54143	Graphic Design Services	405	0.93	39	67.7%	5.7%	$27,206	-20.5%	4.8%
54199	All Other Professional, Scientific, and Technical Services	338	0.49	61	11.3%	24.6%	$53,988	46.5%	10.4%
45411	Electronic Shopping and Mail-Order Houses	297	0.23	52	28.2%	34.6%	$34,923	22.7%	14.0%
51121	Software Publishers	213	0.20	31	15.3%	19.2%	$97,496	21.3%	10.9%
5172	Wireless Telecommunications Carriers (except Satellite)	204	0.41	20	-27.5%	-9.3%	$69,687	26.6%	10.1%

Source: Economic Modeling Specialists Intl.

Central Iowa has a number of health-related major employers, including Wellmark, UnityPoint Health and Mercy Medical Center, which made **Health and Wellness** another natural target for the region. The focus of the target was to build on patient care and wellness with biomedical research and health sciences. There are nearly 80,000 health and wellness-related jobs in Central Iowa, over 56,000 alone in traditional health care and social awareness hospitals and offices. The region's employment growth in the sector is 19.8 percent, significantly higher than national growth of 12.7 percent. Health and Wellness average earnings are $52,980, which is higher than the regional average, and provide opportunities across the skill spectrum for regional residents.

HEALTH AND WELLNESS PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Health and Wellness-Related Sectors	*79,191*	*0.90*	*4,722*	*19.8%*	*12.7%*	*$52,980*	*10.7%*	*26.7%*
	Patient Care and Wellness								
62	Health Care and Social Assistance	56,100	0.89	2,373	11.5%	11.7%	$44,507	5.2%	4.0%
6221	General Medical and Surgical Hospitals	10,073	0.68	48	6.9%	5.0%	$49,457	-4.2%	9.0%
62111	Offices of Physicians	8,365	0.99	445	7.5%	8.4%	$95,489	6.3%	7.0%
62311	Nursing Care Facilities (Skilled Nursing Facilities)	5,077	0.94	64	8.4%	-0.2%	$30,007	11.9%	5.9%
62331	Continuing Care Retirement Communities and Assisted Living Fac	4,200	1.49	72	9.0%	13.3%	$27,589	10.8%	7.2%
62412	Services for the Elderly and Persons with Disabilities	3,073	0.60	174	49.0%	104.3%	$17,986	-1.5%	-13.4%
62161	Home Health Care Services	3,052	0.68	78	26.3%	15.0%	$39,982	23.3%	4.3%
6213	Offices of Other Health Practitioners	2,805	0.92	496	36.1%	16.4%	$44,685	10.0%	3.5%
62134	Offices of Physical, Occupational and Speech Therapists, and Auc	1,062	0.90	137	33.9%	19.5%	$47,749	6.8%	3.0%
62131	Offices of Chiropractors	648	1.30	194	27.8%	8.1%	$38,197	19.5%	3.9%
62132	Offices of Optometrists	560	1.26	73	37.2%	14.6%	$51,591	18.1%	5.8%
62139	Offices of All Other Health Practitioners	339	0.58	62	39.8%	19.8%	$35,450	-13.4%	2.1%
62133	Offices of Mental Health Practitioners (except Physicians)	196	0.58	31	78.2%	16.0%	$45,783	17.2%	1.7%
62121	Offices of Dentists	2,535	0.82	287	12.3%	8.1%	$63,810	10.2%	2.1%
62419	Other Individual and Family Services	2,374	1.61	143	18.5%	7.4%	$28,031	2.0%	7.9%
62431	Vocational Rehabilitation Services	1,163	1.03	40	-11.1%	1.2%	$29,497	25.5%	5.0%
62199	All Other Ambulatory Health Care Services	1,124	2.40	38	27.6%	13.0%	$57,006	20.1%	8.7%
62322	Residential Mental Health and Substance Abuse Facilities	736	1.05	15	47.5%	13.0%	$26,355	-4.8%	8.5%
62142	Outpatient Mental Health and Substance Abuse Centers	407	0.57	25	0.6%	15.7%	$46,278	8.2%	6.5%
62151	Medical and Diagnostic Laboratories	308	0.35	34	26.0%	10.9%	$76,992	-15.5%	2.7%
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	182	0.26	4	118.2%	4.8%	$43,961	31.7%	4.6%
62191	Ambulance Services	171	0.30	8	6.4%	7.9%	$26,795	-8.9%	7.3%
62141	Family Planning Centers	59	0.75	7	-8.3%	2.3%	$35,439	-24.4%	-9.2%
6222	Psychiatric and Substance Abuse Hospitals	17	0.05	3	NA	8.3%	$57,281	NA	5.5%
	Biomedical Research								
3254	Pharmaceutical and Medicine Mfg	444	0.48	25	2.4%	5.2%	$63,970	5.7%	18.9%
3391	Medical Equipment and Supplies Mfg	178	0.17	25	-19.6%	2.1%	$40,437	3.2%	12.2%
5417	Scientific Research and Development Services	1,635	0.76	85	29.2%	2.9%	$74,209	17.9%	23.8%
62151	Medical and Diagnostic Laboratories	308	0.35	34	26.0%	10.9%	$76,992	-15.5%	2.7%
	Health Sciences								
55111	Management of Companies and Enterprises	9,182	1.29	384	43.8%	15.4%	$85,642	14.1%	11.9%
54151	Computer Systems Design and Related Services	6,601	1.00	1,080	74.1%	21.2%	$72,625	1.5%	10.0%
54161	Management Consulting Services	2,847	0.72	444	71.1%	19.6%	$63,508	10.1%	6.1%
5419	Other Professional, Scientific, and Technical Services	1,992	0.79	277	8.2%	11.5%	$37,409	18.6%	10.7%
51121	Software Publishers	213	0.20	31	15.3%	19.2%	$97,496	21.3%	10.9%

Source: Economic Modeling Specialists Intl.

The **Advanced Manufacturing** target has also performed well over the four-year period since the start of implementation of Capital Crossroads 1.0. With over 25,000 jobs and nearly 1,500 firms related to the target, regional employment growth has far exceeded that of the nation. The major strengths within the target are farm machinery and equipment manufacturing (location quotient = 11.04), farm supplies merchant wholesalers (7.56), and agriculture, construction, and mining machinery manufacturing (6.36). Average earnings of the target surpass the regional average, but it is important to note that earnings growth lags the national rate.

ADVANCED MANUFACTURING PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Advanced Manufacturing-Related Sectors	*25,027*	*1.26*	*1,469*	*16.4%*	*9.0%*	*$68,038*	*4.9%*	*29.7%*
	Farm Equipment								
3331	Agriculture, Construction, & Mining Machinery Mfg	4,894	6.36	31	-0.8%	5.6%	$58,591	-9.8%	3.7%
333111	Farm Machinery & Equipment Manufacturing	2,289	11.04	23	-13.8%	7.8%	$58,967	-18.1%	-1.9%
424910	Farm Supplies Merchant Wholesalers	2,865	7.56	107	-7.8%	6.3%	$108,664	10.4%	11.1%
4238	Machinery, Equipment, & Supplies Merchant Wholesalers	2,596	1.17	212	-0.5%	8.7%	$63,397	11.1%	8.8%
423820	Farm & Garden Machinery & Equipment Merchant Wholesalers	891	2.62	63	-7.4%	8.2%	$56,464	7.3%	9.0%
3332	Industrial Machinery Mfg	364	1.02	8	2.7%	5.7%	$62,463	11.1%	4.7%
	Components Manufacturing and Installation								
3331	Agriculture, Construction, & Mining Machinery Mfg	4,894	6.36	31	-0.8%	5.6%	$58,591	-9.8%	3.7%
5416	Management, Scientific, & Technical Consulting Services	3,512	0.68	553	66.6%	18.7%	$61,250	9.2%	6.5%
54133	Engineering Services	2,692	0.85	198	87.9%	7.2%	$87,077	23.4%	8.0%
3329	Other Fabricated Metal Product Mfg	1,366	1.54	16	-0.4%	7.2%	$69,870	14.5%	5.0%
81131	Commercial & Industrial Machinery & Equipment (except Automotive & Electronic) Repair & Maintenance	1,108	1.37	120	19.7%	11.2%	$54,158	4.5%	10.0%
23713	Power & Communication Line & Related Structures Construction	1,053	1.82	40	51.0%	22.4%	$78,166	3.9%	8.7%
33231	Plate Work & Fabricated Structural Product Mfg	958	1.76	20	45.9%	9.8%	$53,443	8.9%	7.7%
3336	Engine, Turbine, & Power Transmission Equipment Mfg	900	2.87	3	30.4%	-1.7%	$44,391	29.6%	3.6%
33451	Navigational, Measuring, Electromedical, & Control Instruments I	822	0.64	15	20.3%	-2.9%	$40,034	-29.8%	6.3%
33232	Ornamental & Architectural Metal Products Mfg	455	0.72	21	4.9%	10.5%	$41,656	5.4%	7.9%
32611	Plastics Packaging Materials & Unlaminated Film & Sheet Mfg	382	1.34	7	24.1%	8.2%	$80,154	12.1%	7.3%
81121	Electronic & Precision Equipment Repair & Maintenance	342	0.81	72	-25.2%	0.2%	$63,335	-1.6%	8.9%
3335	Metalworking Machinery Mfg	294	0.50	10	-16.9%	8.7%	$54,125	0.3%	6.6%
3344	Semiconductor & Other Electronic Component Mfg	239	0.20	7	-5.8%	-4.1%	$47,570	35.3%	12.2%
54135	Building Inspection Services	126	1.46	19	41.5%	13.3%	$36,148	1.5%	15.2%
54137	Surveying & Mapping (except Geophysical) Services	61	0.38	13	50.4%	12.4%	$50,869	44.9%	13.9%

Source: Economic Modeling Specialists Intl.

The **Logistics** target captures Central Iowa's strengths in truck transportation and wholesale trade related to farming. There are over 33,000 jobs and over 2,300 firms related to this target. From 2011 to 2015, the target's employment growth was 4.6 percent, nearly half of national growth. Additionally, earnings have increased at a rate half of the national rate.

LOGISTICS PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Logistics-Related Sectors	*33,223*	*0.93*	*2,370*	*4.6%*	*8.9%*	*$59,984*	*8.5%*	*17.1%*
	Transportation and Logistics Management								
484	Truck Transportation	6,595	1.24	412	10.8%	8.7%	$48,611	12.4%	10.4%
5416	Management, Scientific, and Technical Consulting Services	3,512	0.68	553	66.6%	18.7%	$61,250	9.2%	6.5%
493	Warehousing and Storage	1,972	0.77	65	23.4%	21.3%	$51,583	15.0%	3.6%
49211	Couriers and Express Delivery Services	1,738	1.01	35	-14.5%	7.8%	$39,452	5.5%	2.5%
488	Support Activities for Transportation	924	0.42	96	4.6%	13.3%	$41,406	7.6%	6.9%
48211	Rail Transportation	692	0.93	0	-7.7%	0.5%	$94,833	21.5%	20.1%
48111	Scheduled Air Transportation	90	0.07	7	-56.7%	0.5%	$56,760	51.7%	18.9%
48121	Nonscheduled Air Transportation	45	0.33	5	27.3%	-2.8%	$56,218	13.1%	14.7%
49111	Postal Service	11	0.36	2	-39.4%	90.4%	$20,608	-30.3%	8.9%
	Merchant Wholesalers								
423	Merchant Wholesalers, Durable Goods	9,593	0.99	757	0.0%	5.7%	$60,473	7.1%	7.9%
4238	Machinery, Equipment, & Supplies M.W.	2,596	1.17	212	-0.5%	8.7%	$63,397	11.1%	8.8%
42382	Farm & Garden Machinery & Equipment M.W.	891	2.62	63	-7.4%	8.2%	$56,464	7.3%	9.0%
4231	Motor Vehicle & Motor Vehicle Parts & Supplies M.W.	2,071	1.85	88	9.9%	6.3%	$48,466	7.1%	12.7%
4234	Professional & Commercial Equipment & Supplies M.W.	1,485	0.73	154	-24.9%	0.6%	$76,532	7.8%	8.9%
4239	Miscellaneous Durable Goods M.W.	763	0.73	67	-4.1%	0.6%	$42,953	6.8%	5.5%
4237	Hardware, & Plumbing & Heating Equipment & Supplies M.W.	752	0.96	75	2.5%	8.8%	$67,735	9.1%	8.5%
4236	Household Appliances & Electrical & Electronic Goods M.W.	743	0.69	64	12.1%	4.8%	$66,112	8.1%	6.4%
4233	Lumber & Other Construction Materials M.W.	719	1.06	58	12.5%	12.1%	$56,455	12.4%	11.6%
4232	Furniture & Home Furnishing M.W.	266	0.76	26	57.4%	11.0%	$60,384	10.6%	9.5%
424	Merchant Wholesalers, Nondurable Goods	8,051	1.19	440	-6.3%	4.9%	$73,904	7.9%	9.6%
4249	Miscellaneous Nondurable Goods M.W.	3,191	2.84	129	-7.2%	2.0%	$103,091	11.0%	8.6%
42491	Farm Supplies M.W.	2,865	7.56	107	-7.8%	6.3%	$108,664	10.4%	11.1%
4244	Grocery & Related Product M.W.	2,326	0.94	86	-7.2%	3.9%	$47,139	12.7%	10.3%
4245	Farm Product Raw Material M.W.	840	3.37	97	3.1%	1.3%	$49,511	5.2%	5.0%
4248	Beer, Wine, & Distilled Alcoholic Beverage M.W.	573	0.93	11	4.8%	13.5%	$54,775	5.7%	8.5%
4242	Drugs & Druggists' Sundries M.W.	370	0.56	31	-18.8%	7.7%	$89,519	-9.3%	13.0%
4246	Chemical & Allied Products M.W.	330	0.76	35	-11.3%	6.3%	$66,825	0.2%	8.2%
4241	Paper & Paper Product M.W.	258	0.64	28	-4.1%	0.7%	$70,558	11.3%	7.2%
4247	Petroleum & Petroleum Products M.W.	133	0.40	17	-18.0%	7.2%	$61,044	11.1%	16.2%

Source: Economic Modeling Specialists Intl.

It is also illustrative to examine dynamics of Central Iowa's economy by "stage" of employment. Seen through this lens, Central Iowa's small business community is thriving at the stage 2 level, which includes businesses with 10 to 99 employees. The Des Moines metro has increased employment in stage 2 firms by 8.4 percent, more rapid than all comparison geographies except Indianapolis, which grew at 8.6 percent. Central Iowa experienced growth of 7.9 percent during the same time period, greater than Nashville, the state, and the nation. While the Des Moines metro has lost employment in stage 1 companies with less than 10 employees, the rate of decrease is on par with the nation. The Central Iowa region fared slightly better with employment loss of 6.6 percent.

EMPLOYMENT BY BUSINESS SIZE

	Small Businesses (1-9 employees)		Stage 2 Businesses (10-99 employees)	
	2013	Change, 2011-2013	2013	Change, 2011-2013
Des Moines, IA MSA	96,331	-7.1%	148,164	8.4%
Central Iowa	131,573	-6.6%	196,264	7.9%
Indianapolis, IN MSA	263,727	-7.0%	412,302	8.6%
Kansas City, MO	312,999	-2.6%	479,447	8.2%
Nashville, TN	250,943	-14.1%	363,978	7.6%
Iowa	542,577	-8.0%	735,180	7.5%
United States	49,156,142	-7.1%	64,929,469	7.5%

Source: YourEconomy.org

While patent rates are an imperfect indicator of technology-driven economic growth, it nevertheless speaks to a region's relative innovation capacity at the individual, corporate, and institutional levels. Data in the following table show that Greater Des Moines – less so Central Iowa – is very competitive for the issuance of patents per capita. That said, three-year growth rates in per capita patent awards in Central Iowa and the Des Moines MSA are less robust than Kansas City's growth, and to a lesser extent, Indianapolis.

PATENTS PER CAPITA (PER 100,000 IN POPULATION)

	2011	2012	2013
Des Moines, IA MSA	**40.11**	**42.23**	**45.98**
Central Iowa	**28.79**	**30.41**	**33.21**
Boone County	26.58	26.68	22.76
Dallas County	35.81	29.08	44.12
Guthrie County	607.46	779.58	768.08
Jasper County	8.19	19.15	8.16
Madison County	31.77	19.18	6.46
Marion County	54.04	57.04	51.41
Marshall County	51.23	53.54	60.85
Polk County	30.15	28.15	30.32
Story County	63.77	69.67	82.24
Warren County	12.85	36.19	48.48
Indianapolis, IN MSA	**26.02**	**31.78**	**33.94**
Kansas City, MO	**31.41**	**44.72**	**44.57**
Nashville, TN	**12.48**	**12.16**	**13.59**

Source: US PTO

TOTAL ANNUAL UNIVERSITY FUNDED RESEARCH

	2014 Research Expenditures	% Change, 2011-2014	2014 Startups	# Change, 2011-2014	2014 Patents Issued	% Change, 2011-2014	2014 New Patent Apps	% Change, 2011-2014	2014 Licenses and Options Executed	% Change, 2011-2014
Iowa State University	$355,087,455	18.2%	3	1	33	32.0%	37	-11.9%	59	28.3%
Indiana University Res. & Technology Corp.(IURTC)	$422,264,681	-7.0%	10	3	32	77.8%	79	-19.4%	36	-7.7%
Purdue Research Foundation	$582,146,000	-3.1%	24	17	100	75.4%	161	-8.0%	120	87.5%
University of Missouri, all campuses	$324,114,939	0.1%	5	0	52	57.6%	84	42.4%	67	-39.1%
Vanderbilt University	$651,825,119	20.0%	6	6	47	51.6%	102	22.9%	101	110.4%

Source: AUTM

It is also not an "apples to apples" comparison to assess the dynamics of university-funded research at Iowa State University against the benchmark regions because most multi-campus university systems – including Indiana, Purdue, and the University of Missouri– do not separate out these data by campus. So the comparison research institutions of IUPUI in Indianapolis and the University of Missouri, Kansas City do not have disaggregated research data to analyze. Even so, measured outputs at Iowa State are greater than the entire University of Missouri system and close to the totals for all Indiana University campuses. ISU trails Vanderbilt University in Nashville, but has seen comparatively high increases in research expenditures from 2011 to 2014. The number of startups, patents issued, and licenses and options executed at Iowa State are comparatively lower than Vanderbilt, the only other individual campus in the profile.

WHAT PEOPLE SAY

Business Capital implementation volunteers have seen a new unity and collaboration among Central Iowa cities and a comprehensive approach on becoming more "sticky" for talent. With fewer silos and greater demonstrated leadership, Central Iowa has been able to achieve numerous strategic goals and continues to be recognized on a "multi-faceted" list of rankings. Creation of the Cultivation Corridor was also cited by focus group participants as a key outcome of Capital Crossroads.

As it relates to business climate, respondents spoke of burdensome corporate income taxes in Iowa as an issue that affects Central Iowa's competitive position. However, by far the most common competitive issue cited by business leaders was Central Iowa's supply of available workers. Talent-related issues will be addressed in great detail in the Human Capital section, but it is worth noting the concerns that top employers have about effectively filling open positions. When asked about the biggest challenge facing Central Iowa's economy, online survey respondents who self-identified as business executives cited workforce as they top issue. Over 45 percent of respondents disagreed or strongly disagreed to the statement, "I have no trouble finding quality employees for my business." That sentiment was also echoed by the following word cloud showing the most frequently used words in response to a question on challenges to the regional economy.

IN YOUR OPINION, WHAT IS THE BIGGEST CHALLENGE(S) FACING CENTRAL IOWA'S ECONOMY?

Survey respondents also felt the following issues were either "neutral" for the region or "disadvantages: passenger air capacity, gigabit internet connectivity. However, over 92 percent of surveyed executives either agreed or strongly agreed that their businesses will remain in Central Iowa for the long term; this is a very strong confirmation of Central Iowa's desirability as a place of business.

With the development and success of new programs and networking spaces, Central Iowa's entrepreneurial ecosystem features greater capacity than before the launch of Capital Crossroads. Among notable additions are the Square One DSM incubator, Gravitate co-working space, Global Insurance Accelerator, Plains Angels funding network, The Forge, 1 Million Cups, VentureNet Iowa, and Startup Factory, CYstarters, and Ag Startup Engine at Iowa State University. A Student Innovation Center is in development at Iowa State University, which also celebrated the opening of an Economic Development Hub building to grow employment from university-based and affiliated research. A statewide economic gardening network called Advance Iowa has also been launched.

Stakeholders with knowledge of Central Iowa's startup "ecosystem" said the entrepreneurial sector is making progress in terms of building capacity to assist with enterprise development, with opportunities to further strengthen the network of assets, assistance, and funders. Beginning in fall 2015, four members of Des Moines' startup scene took the lead on a plan designed to assess where the city's entrepreneurial community is headed for the next ten years. Results and recommendations are forthcoming.

The Global Insurance Accelerator was called by many input participants one of the signature successes of Capital Crossroads, citing the attraction of firms from outside of Iowa to the program, the "who's who" of insurance corporations helping to capitalize the Accelerator, as well as graduate firms that have already received series funding.

Online survey respondents identifying as entrepreneurs had mixed feelings about Central Iowa's entrepreneurial climate, rating most aspects of the ecosystem as average. Availability of early-stage investment capital was a concern, as well as the facilities for business incubation.

Cultivation Corridor

THE STORY

What was originally included in the Capital Crossroads strategy as the "Capital Corridor" was branded the Cultivation Corridor in April 2014 after a comprehensive assessment and visioning process to identify Central Iowa's highest value economic opportunity. Since launch, Cultivation Corridor staff and volunteer leadership have worked to embed the brand and advance Iowa's competitiveness for value-added agriculture economic development regionally and internationally.

A Strategic Vision framework for the first three years of the Cultivation Corridor initiative focused on 1) building awareness, 2) economic development, 3) strategic innovation, 4) resource aggregation, and 5) policy leadership. While the Cultivation Corridor brand is most closely associated with Central Iowa, the intent since its launch was to also market and develop the state of Iowa's ag biosccience and ag technology industries. With the initial vision close to reaching its full term in 2016, the incoming Cultivation Corridor chairperson initiated a strategic assessment process to confirm the operational, programmatic, and personnel priorities and value propositions for the Cultivation Corridor brand and organization. A new strategic framework was approved by the board of directors on July 18 and will be rolled out in the third quarter of 2016.

Under the leadership of its executive director and influential board of directors, which includes some of the top names in Iowa's value added agricultural companies and public institutions, the Cultivation Corridor has produced a well-crafted economic development-focused website and promotional materials, developed the Iowa Ag/Biosciences Asset Database, and promoted Central Iowa and the state's agricultural innovation assets to domestic and international decision-makers at a number of industry events. A Cultivation Corridor-commissioned report, *Biobased Chemicals: The Iowa Opportunity* and subsequent intense advocacy on the part of the Corridor and its stakeholders was said to be instrumental in leading to the passage by the Iowa General Assembly of a first-in-the-nation Biorenewable Chemical Tax Credit for qualifying investors.

A number of significant corporate expansions have been announced in the Cultivation Corridor, the latest – and largest – being the $500 million dollar investment in a DowDuPont Global Business Center in Johnston, one of two global business centers for an independent agricultural company expected to be spun off following the merger of Dow and DuPont. Central Iowa leaders feel that maximizing the opportunities generated as a result of this merger will be a key Cultivation Corridor strategy in the coming months and years. In total, the Cultivation Corridor has played a direct role in securing more than $700 million in new capital investment and the creation or retention of more than 850 jobs since its 2014 inception.

Despite notable retention and expansion announcements in the region, pressure to attract more external capital investment, talent and research to the state and region is pervasive for the Corridor. A pronounced softness in the agricultural economy as a by-product of a multi-year low commodity cycle has created a dearth of major capital-scale ag project globally, creating significant competitive headwinds for ag-focused economic development groups like the Corridor to contend with. Though many leaders espoused patience

in relation to building the Cultivation Corridor brand, the tendency of large-scale investors the likes of which support the Corridor to expect regular, measurable, and immediate returns on their contributions was one of the impetuses behind the organization's strategic review.

The Corridor's 2017-19 strategic framework is built around the organization's ongoing strategic platforms in Branding/Marketing, Economic Development and Strategic Innovation and create specific guidance for opportunistic engagement on matters of public policy and small business development. The new framework calls for an expanded board engagement model to include 'Critical Initiative' ownership by board members of major projects; enhanced clarity on medium term actions and scope; a streamlined and more measurable KPI roster; alignment of a newly-seated Executive Committee and board around the path forward; and a new funding model to sustainably expand Corridor resources and influence.

WHAT THE DATA SAY

In 2011, **Agribusiness** was identified as one of the Capital Crossroads regional targets. For the purposes of this Regional Assessment, the subsectors used to define the Capital Crossroads Agribusiness target in the 2011 Target Cluster Analysis are utilized to evaluate Cultivation Corridor trends; this is with the understanding that the Cultivation Corridor did not launch until two-plus years after the regional strategy itself was rolled out to the public. ***Note:*** *this NAICS definition is not intended to comprise the full breadth of employment within the Cultivation Corridor's defined sectors, but rather serve as a proxy to communicate broad trends in ag sub-sectors since the launch of Capital Crossroads.*

In 2015, the Agribusiness target accounted for over 30,000 jobs in the Central Iowa region. Food manufacturing and crop production are the largest subsectors in terms of employment, representing 46 percent of Agribusiness jobs. Overall, the location quotient for the target is 1.07, meaning that, collectively, the target is only slightly more concentrated in Central Iowa than across the nation. However, there are several clear strengths within the target, including the aforementioned food manufacturing with an LQ of 1.62 and crop production (2.20) as well as grain and field bean merchant wholesalers (4.36), farm product raw material merchant wholesalers (3.37), livestock merchant wholesalers (2.21), pesticide, fertilizer, and other agricultural chemical manufacturing (2.09), and environment, conservation, and wildlife organizations (1.79). The Agribusiness target collectively has experienced job growth of 15.9 percent during the time period analyzed, over double the national job growth for this set of subsectors.

The Agribusiness target is beneficial to Central Iowa workers in that average earnings exceed the regional average of $47,137. Across the spectrum of Agribusiness subsectors, there are also opportunities for workers with various skill sets and educational attainment. This is particularly important in a region that is so geographically diverse.

AGRIBUSINESS PROFILE

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Yr % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Agribusiness-Related Sectors	*30,062*	*1.07*	*1,767*	*15.9%*	*7.2%*	*$51,759*	*14.7%*	*33.5%*
	Animal Science and Health								
311	Food Mfg	7,923	1.62	99	6.3%	2.9%	$50,797	11.4%	7.8%
5417	Scientific Research and Development Services	1,635	0.76	85	29.2%	2.9%	$74,209	17.9%	23.8%
112	Animal Production and Aquaculture	1,371	0.99	53	-3.1%	-0.9%	$37,826	4.4%	12.9%
3254	Pharmaceutical and Medicine Mfg	444	0.48	25	2.4%	5.2%	$63,970	5.7%	18.9%
62151	Medical and Diagnostic Laboratories	308	0.35	34	26.0%	10.9%	$76,992	-15.5%	2.7%
424520	Livestock Merchant Wholesalers	133	2.21	14	-11.6%	-3.0%	$41,881	20.6%	21.1%
1152	Support Activities for Animal Production	110	0.84	18	6.0%	1.7%	$42,748	28.3%	8.6%
	Agronomy								
111	Crop Production	6,010	2.20	146	12.4%	5.1%	$30,631	4.5%	12.4%
5416	Management, Scientific, and Technical Consulting Services	3,512	0.68	553	66.6%	18.7%	$61,250	9.2%	6.5%
54133	Engineering Services	2,692	0.85	198	87.9%	7.2%	$87,077	23.4%	8.0%
5417	Scientific Research and Development Services	1,635	0.76	85	29.2%	2.9%	$74,209	17.9%	23.8%
1151	Support Activities for Crop Production	880	0.59	49	-27.8%	6.8%	$32,694	18.9%	13.9%
4245	Farm Product Raw Material Merchant Wholesalers	840	3.37	97	3.1%	1.3%	$49,511	5.2%	5.0%
424510	Grain and Field Bean Merchant Wholesalers	702	4.36	82	11.5%	2.8%	$51,119	5.0%	2.0%
23711	Water and Sewer Line and Related Structures Construction	476	0.82	46	7.9%	11.7%	$53,137	6.5%	9.2%
5629	Remediation and Other Waste Management Services	476	1.00	40	-11.2%	10.9%	$44,953	7.1%	4.6%
3254	Pharmaceutical and Medicine Mfg	444	0.48	25	2.4%	5.2%	$63,970	5.7%	18.9%
42393	Recyclable Material Merchant Wholesalers	383	0.91	24	1.6%	-6.1%	$37,242	2.3%	1.5%
813312	Environment, Conservation and Wildlife Organizations	351	1.79	28	85.7%	16.7%	$25,356	-14.5%	10.5%
4246	Chemical and Allied Products Merchant Wholesalers	330	0.76	35	-11.3%	6.3%	$66,825	0.2%	8.2%
42469	Other Chemical and Allied Products Merchant Wholesalers	250	0.70	29	-16.3%	5.7%	$68,418	3.2%	8.4%
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Mfg	246	2.09	9	24.8%	1.5%	$55,964	27.2%	10.7%
54138	Testing Laboratories	190	0.34	28	30.1%	11.2%	$52,325	15.1%	8.4%
54162	Environmental Consulting Services	163	0.49	27	2.5%	8.9%	$49,987	0.5%	3.6%
54135	Building Inspection Services	126	1.46	19	41.5%	13.3%	$36,148	1.5%	15.2%
22131	Water Supply and Irrigation Systems	70	0.49	8	-10.6%	17.5%	$63,166	67.8%	8.7%

Source: Economic Modeling Specialists Intl.

WHAT PEOPLE SAY

Those involved with the Cultivation Corridor initiative praised the effort and noted that "we've got a good board and the right people invested." Most feel that "we're doing what we're supposed to be doing" as it relates to program implementation, adding that "but for" the advocacy by the Cultivation Corridor, the Biorenewable Chemical Tax Credit would never have passed. However, another leader noted that "we've got to get something on the business relocation side. We need a 'win.'"

Some involved with the Cultivation Corridor identified its biggest challenge as "finding the sweet spot" for a very broad-based coalition of stakeholders, many with different needs and expectations. Though noting that "a lot of things have been done and done well," one stakeholder said that the current structure of the initiative is not sustainable and hoped the Corridor's current strategic review will lead to programmatic and operational recommendations that will ensure the initiative's long-term viability and success. After the burst of attention and momentum after the launch of the brand, one leader expressed concern that the Cultivation Corridor initiative has lost some regional visibility and is now "one of many things. We can't lose sight that this is the core economic development initiative of the region."

Wellness Capital

THE STORY

Data show that Central Iowa performed very well across a broad spectrum of health indicators. While these outcomes can certainly not be wholly attributed to Wellness Capital efforts, the fact that health and wellness is a stated regional priority is no doubt reflected in a breadth of programs and initiatives that exceeds the capacities of most U.S. communities.

As an initiative, Wellness Capital has primarily focused on the creation of a toolkit for businesses to implement wellness programs, conducting a Wellness and Community Study with 900 participating businesses, and working with the Greater Des Moines Partnership to facilitate the development, collection, analysis, and reporting of a regional Community Health Needs Assessment. Wellness Capital also leveraged efforts implemented by Iowa's Healthiest State Initiative.

Ultimately, the goal of Wellness Capital volunteers is to achieve upwards of 80 percent participation of Central Iowa businesses in health assessment surveys. Volunteers would also like to determine how to better prioritize the findings of the Health Needs Assessment and implement actionable strategies to address them.

Other activities supported by or impacting Wellness Capital included development of a Livability Index by AARP, a Healthy Homes Des Moines initiative inclusive of a BUILD Health Challenge Implementation Grant, regional Complete Streets programming, a Food Insecurity Initiative, and the United Way of Central Iowa's OpportUNITY plan. Feedback noted that there are challenges to implementing Complete Streets in local communities. This impacts broader efforts to improve walkability in Central Iowa, which would support health outcomes but has similar challenges as Complete Streets to change public and governmental perceptions about the built environment and the benefits of encouraging development that supports walkability.

One Wellness plank of Capital Crossroads that was not continued as a regional initiative is the certification of all Central Iowa communities as official Blue Zones. Wellness Capital leaders feel that an alternative intervention would be needed and appropriate, and hope to "figure out what's next" related to engineering healthier local lifestyles and outcomes.

WHAT THE DATA SAY

Across the board, residents in Central Iowa experienced better health than individuals in the comparison communities. Roughly 12 percent of Central Iowans reported fair or poor health, the lowest of comparison regions. Central Iowa also boasted the lowest percentage of smokers, the lowest percentage of individuals that reported being obese, and the lowest percentage of adults aged 20 and over reporting no leisure-time physical activity, compared to Indianapolis, Kansas City, and Nashville. Nashville, as shown in the following table, had the highest percentages of the geographies examined. Of the four regions, Central Iowa also had the highest percentage of residents with access to locations for physical activity, with Indianapolis not far

behind. While better than the comparison communities, these statistics could still be improved. At the extreme end, Boulder, considered one of the fittest places in the country, has an obesity rate of approximately 12 percent.

COUNTY HEALTH RANKINGS, 2016

Name	% Fair/ Poor	% Smokers	% Obese	Food Environment Index	% Physically Inactive	% With Access
Central Iowa	**11.9%**	**17.5%**	**29.8%**	**-**	**23.3%**	**83.8%**
Boone County, Iowa	12.2%	17.9%	31.6%	8.2	26.3%	67.5%
Jasper County, Iowa	11.6%	16.8%	34.3%	7.8	30.4%	75.8%
Marion County, Iowa	10.4%	16.3%	30.9%	8.3	22.8%	71.5%
Marshall County, Iowa	14.5%	17.1%	33.2%	8.1	26.8%	70.9%
Story County, Iowa	12.8%	16.7%	25.6%	7.0	19.5%	90.3%
Dallas County, Iowa	10.8%	15.9%	31.1%	9.0	27.0%	74.5%
Guthrie County, Iowa	11.6%	16.3%	34.9%	8.3	30.6%	17.6%
Madison County, Iowa	11.8%	16.6%	33.9%	8.2	26.2%	52.1%
Polk County, Iowa	12.0%	18.5%	29.2%	7.8	21.5%	91.7%
Warren County, Iowa	10.3%	14.8%	30.5%	8.3	29.1%	69.9%
Des Moines MSA	**11.7%**	**17.8%**	**29.8%**	**-**	**23.1%**	**85.5%**
Indianapolis, IN MSA	**15.8%**	**19.5%**	**31.0%**	**-**	**26.3%**	**83.6%**
Kansas City, MO MSA	**15.6%**	**19.6%**	**35.0%**	**-**	**30.4%**	**42.2%**
Nashville, TN MSA	**19.0%**	**21.3%**	**31.9%**	**-**	**28.3%**	**74.2%**

Source: County Health Rankings

Approximately 7.3 percent of Central Iowans are uninsured compared to 14.2 percent of individuals nationwide. Central Iowa also has the lowest shared of uninsured residents out of the benchmark communities. Similarly, 3.1 percent of children are uninsured, while nationally 7.1 percent of individuals under that age of 18 do not have health insurance.

RESIDENTS WITHOUT HEALTH INSURANCE, 2014

	< 18	18-64	65+	Total % Uninsured
Central Iowa	3.1%	10.2%	0.3%	7.3%
Des Moines MSA	3.1%	10.4%	0.3%	7.4%
Indianapolis MSA	6.9%	18.2%	0.6%	13.3%
Kansas City MSA	6.5%	17.3%	0.6%	12.5%
Nashville MSA	5.7%	18.3%	0.8%	13.2%
Iowa	3.9%	11.6%	0.3%	8.1%
United States	7.1%	19.8%	1.0%	14.2%

Source: U.S. Census Bureau, ACS 5-year estimates

The most recent Community Health Needs Assessment for greater Des Moines noted that the State of Iowa has undertaken a redesign of its mental health system in recent years, but a shortage of physicians in emergency medicine, obstetrics and gynecology, psychiatry, and child and adolescent psychiatry are still an issue. Many rural communities are seeing increasing health care needs caused by aging populations, thus magnifying the shortage.

WHAT PEOPLE SAY

According to Wellness Capital volunteers, collaboration between partners existed before Capital Crossroads, but now it is more robust. The process has enabled people to network and come together around wellness, create a structure and landscape for alignment, and bring a variety of voices to the table to collectively identify priorities. With partners more collaborative and connected, reacting to issues and opportunities identified in outreach such as the Community Needs Assessment becomes more effective. Stakeholders spoke of the benefits of setting and reaching attainable goals and having accountability for reaching them. Input participants stressed the need to keep the momentum going on wellness outreach and programs.

A goal stated by multiple respondents is the need for education and outreach to build more awareness in businesses of Central Iowa's health and wellness tools and increase survey response rates. One official noted, "We need a central place to store all of this info so people are better aware of what's going on and how to connect with each other."

Addressing issues of mental and emotional wellbeing is a gap in services that is currently being addressed. Stakeholders feel Central Iowa's overall needs should be assessed, hospitals need more training, and treatments should be incorporated across the mental health spectrum. Additional issues Wellness volunteers would like to address are food insecurity, solutions for chronic health conditions, the linkages between food, housing, and mental health, and working with Natural and Physical Capital participants on walkability strategies.

Human Capital

THE STORY

Talent trends in Central Iowa are largely positive. Population growth remains robust, inmigration is continuing, public school performance for the most part is strong and trending in the right direction, incomes are rising, regional poverty rates are comparatively low, and educational attainment leads all benchmark areas. That said, the availability of trained talent was the most pressing concern identified through public input. There are also performance and wealth disparities between Central Iowa and the City of Des Moines.

The principal Capital Crossroads program seeking to optimize Central Iowa's training capacity from "cradle to career" is EDGE (Education Drives our Greater Economy). Under the leadership of the Greater Des Moines Partnership and the Business Education Alliance, EDGE is supported by private and public entities interested in helping regional businesses secure educated, skilled workers now and in the future.

EDGE recently announced its signature initiative, the 75x25 Campaign, which seeks to ensure that 75 percent of Central Iowans have post-secondary certificates, credentials, or degrees aligning with workforce needs by 2025. This will be accomplished by leveraging and aligning efforts such as the United Way of Central Iowa's Bridges to Success program, the state's Future Ready Iowa initiative, and the work of all Central Iowa stakeholder organizations and institutions from pre-K to 20. EDGE currently is meeting with the top fifty employers to deploy a survey seeking their participation in helping EDGE better understand their employees' backgrounds, interest in postsecondary attainment, and how EDGE can best support those efforts.

A multitude of programs, initiatives, tools, and facilities have been launched since Capital Crossroads implementation began in 2012. Among these are the Evelyn Davis Center for Working Families, Project IOWA, United Way's OpportUNITY plan, the Bridges to Success program that is changing the delivery system for high school equivalency for adults and the Greater Des Moines Partnership's many programs to engage and attract talent, including the CarpeDM Career Center, SeizeDesMoines.com talent portal, in the Seize the City intern program, Internships 101, and the Des Moines Embassy showcase at South-by-Southwest in Austin. The Partnership also continues its talent recruitment efforts on campus at universities across the country. United Way's OpportUNITY program is seeking systems-level change to accomplish a goal of 10 percent poverty reduction across the United Way of Central Iowa geography. Over 1000 people and 200 businesses are playing a role in the initiative.

A proposed Regents Campus in Greater Des Moines has the potential to bolster the region's already strong complement of higher education assets. In 2015, the AIB College of Business campus in Des Moines was "gifted" to the University of Iowa in hopes that AIB's tradition and mission in higher education could be perpetuated. Though the original plan was to turn the AIB campus into a satellite University of Iowa campus, the Regents instead envision the campus as a "Regents Resource Center" leveraging UI, Iowa State, and the University of Northern Iowa.

WHAT THE DATA SAY

Population growth helps speak to a region's ability to retain and attract talent. Data show that Central Iowa has experienced impressive population growth since 2011 (5.8 percent), more rapid than all of the comparison geographies except Nashville. Within the region, Dallas County experienced the greatest rate of change, 14.8 percent, adding 10,329 residents over the four-year period. Polk County grew by 6.8 percent, adding 29,851 residents. Story County is the third fastest growing in the region with a growth rate of 5.6 percent, adding 5,065 residents.

On the other end of the spectrum, Guthrie County, Marshall County, and Marion County collectively lost a total of 453 residents between 2011 and 2015. While these are not huge numbers, trends still stand in stark contrast to the rest of Central Iowa.

POPULATION

	2011	2012	2013	2014	2015	Change, 2011-2015
Central Iowa	**809,187**	**818,733**	**831,153**	**845,051**	**856,430**	**5.8%**
Boone County	26,340	26,239	26,363	26,420	26,643	1.2%
Dallas County	69,804	72,205	74,804	77,516	80,133	14.8%
Guthrie County	10,865	10,775	10,676	10,709	10,676	-1.7%
Jasper County	36,638	36,552	36,747	36,866	36,827	0.5%
Madison County	15,738	15,644	15,473	15,611	15,753	0.1%
Marion County	33,311	33,312	33,068	33,257	33,294	-0.1%
Marshall County	40,993	41,092	41,085	40,896	40,746	-0.6%
Polk County	437,860	444,069	451,866	460,341	467,711	6.8%
Story County	90,956	91,868	93,627	95,456	96,021	5.6%
Warren County	46,682	46,977	47,444	47,979	48,626	4.2%
Indianapolis, IN MSA	1,910,355	1,929,052	1,953,277	1,971,861	1,988,817	4.1%
Kansas City, MO MSA	2,025,082	2,039,356	2,055,178	2,071,283	2,087,471	3.1%
Nashville, TN MSA	1,698,475	1,727,473	1,759,034	1,793,910	1,830,345	7.8%
Iowa	3,065,389	3,076,636	3,092,224	3,109,481	3,123,899	1.9%
United States	311,718,857	314,102,623	316,427,395	318,907,401	321,418,820	3.1%

Source: U.S. Census Bureau

Over half of the Des Moines MSA's population growth (comparable data for Central Iowa is not available) can be attributed to migration. Only the Nashville MSA surpasses this, with nearly two-thirds of its growth from migration trends.

COMPONENTS OF POPULATION CHANGE, 2010-2015

	Natural Change	% due to Natural Change	Net Migration	% due to Net Migration
Des Moines, IA MSA	23,591	44.3%	29,159	54.7%
Indianapolis, IN MSA	59,449	59.0%	42,037	41.7%
Kansas City, MO MSA	60,024	76.8%	18,666	23.9%
Nashville, TN MSA	51,809	32.5%	105,958	66.5%
Iowa	56,019	72.7%	22,110	28.7%
United States	7,325,826	57.9%	5,334,889	42.1%

Source: U.S. Census Bureau

The capacity of Central Iowa's talent pipeline remains a top priority for the Human Capital. Many of the current initiatives are focused on K-12 business/education partnerships, college recruitment, internships, externships, and educational attainment efforts. The State of Iowa publicly funds two pre-K programs: Shared Visions and Statewide Voluntary Preschool Program. Through these programs, 64 percent of 4-year olds in the state are enrolled in pre-K, far surpassing Missouri, Tennessee, and Indiana, which launched its On My Way Pre-K program in August 2015 after passing legislative in 2014.

PRE-K STATISTICS, 2015

	% of Population Enrolled	Change, 2010-2015	State Spending per Child	Change, 2010-2015
Iowa	64%	26%	$2,987	-14%
Indiana	In Progress - Program created in 2014			
Missouri	6%	0%	$3,212	-6%
Tennessee	20%	-3%	$5,219	5%

Source: National Institute for Early Education

A look at Greater Des Moines' ten largest public school districts provides greater insight on trends in the pre-K to 12th grade pipeline (note: Story County schools were also not included in Capital Crossroads 1.0 analysis).

Of these districts, students at all but Des Moines Public Schools had higher proficiency rates than the state average. Similar to statewide trends, eight of the ten largest school districts examined reported that the percentage of fourth graders proficient in reading declined since the 2010-11 school year. Likewise, the percentage of eighth graders proficient in math has declined over the past four years.

READ TO SUCCEED, an initiative of the United Way of Central Iowa, is a community-wide awareness and action campaign leveraging parents and caregivers, volunteers and advocates, and businesses and organizations to help improve regional students' reading proficiency.

AYP PROFICIENCY RATES, 2014-2015

	2014-2015 AYP		11-15 Pct. Pt Chg.	
	4th Grade	8th Grade	4th Grade	8th Grade
Comm School District	% Proficient in Reading	% Proficient in Math	% Proficient in Reading	% Proficient in Math
Ankeny	89.5%	88.8%	-2.8%	-2.0%
Dallas Center-Grimes	90.7%	82.4%	-1.5%	-8.2%
Des Moines Independent	61.8%	60.2%	-7.9%	-3.1%
Indianola	84.1%	86.4%	-7.8%	0.2%
Johnston	87.9%	88.9%	-6.9%	-3.8%
Norwalk	88.3%	84.3%	5.0%	-6.3%
Southeast Polk	83.9%	77.7%	-4.6%	1.7%
Urbandale	88.9%	81.4%	0.9%	-0.9%
Waukee	88.0%	91.0%	-4.0%	2.1%
West Des Moines	80.0%	84.2%	-5.0%	-2.3%
Iowa	76.6%	76.5%	-5.8%	-1.2%

Source: Iowa Department of Education

While proficiency rates have declined over the past four years, a positive sign is the increase in the percentage of students graduating from high school in four years.

FOUR-YEAR GRADUATION RATES

District Name	2011	2015	Pct. Pt. Chg.
Ankeny	92.9%	93.5%	0.6%
Dallas Center-Grimes	93.5%	95.4%	1.8%
Des Moines Independent	75.7%	78.3%	2.6%
Indianola	93.1%	96.1%	3.0%
Johnston	96.1%	98.1%	1.9%
Southeast Polk	96.9%	97.6%	0.7%
Urbandale	96.9%	97.9%	1.0%
Waukee	99.0%	98.4%	-0.6%
West Des Moines	91.5%	94.0%	2.5%
Norwalk	96.8%	92.0%	-4.8%
Iowa	88.3%	90.8%	2.5%

Source: Iowa Department of Education

Overall, the high graduation rates in Greater Des Moines mirror statewide averages, where in 2015, the state of Iowa had the highest graduation rate in the nation. All but Des Moines Public Schools had graduation rates of more than 90 percent. It is important to note that as the region's largest school district, Des Moines Public Schools accounts for more than 31,000 students and is the most diverse.

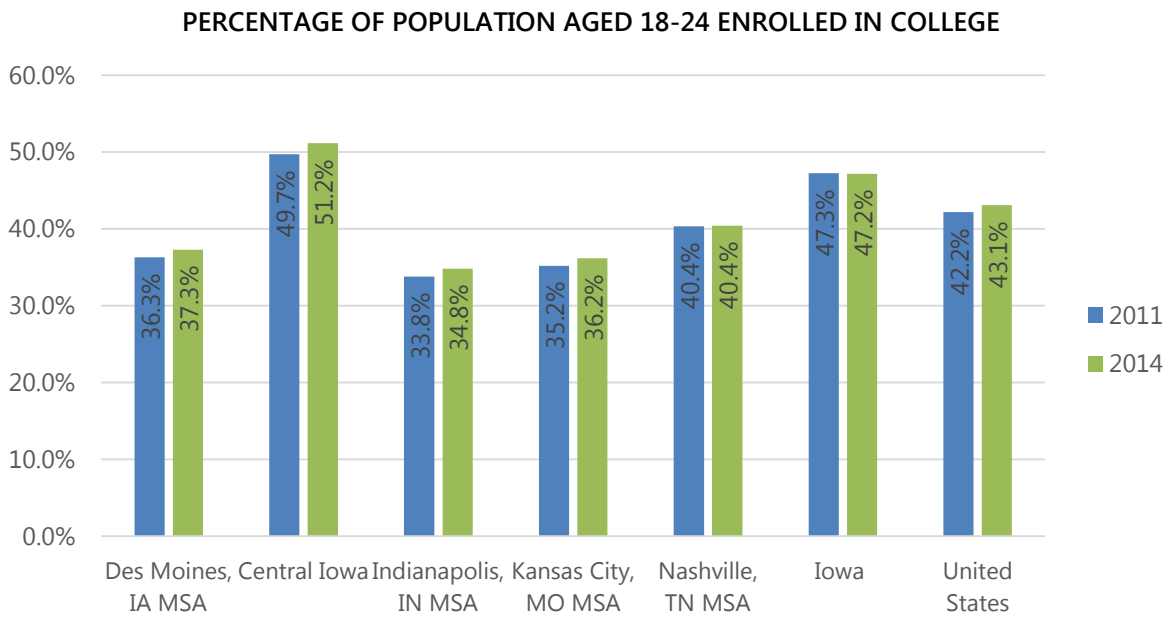
Nearly 80 percent of the 2015 high school graduates from the region's largest school districts intend to continue their education at a two- or four-year college.

HIGH SCHOOL GRADUATE INTENTIONS, 2014-15

	2014-15			11-15 Pct. Pt. Ch.g	
District	Diploma Count	4-year College	2-yr College	4-year College	2-yr College
Ankeny	596	54.7%	26.7%	1.4%	-4.7%
Dallas Center-Grimes	168	53.6%	30.4%	10.9%	-13.8%
Des Moines Independent	1739	35.6%	32.1%	1.6%	-0.1%
Indianola	258	43.8%	35.7%	-0.4%	4.5%
Johnston	489	56.9%	26.2%	2.4%	-3.7%
Norwalk	162	53.7%	34.6%	5.8%	-1.4%
Southeast Polk	462	42.2%	37.0%	3.4%	-2.7%
Urbandale	297	42.1%	38.7%	-9.5%	8.1%
Waukee	437	61.3%	21.7%	12.0%	-5.7%
West Des Moines	677	59.1%	27.9%	3.1%	0.9%
Statewide	32,748	39.9%	37.9%	1.5%	-1.3%

Source: Iowa Department of Education

The number of individuals between the ages of 18 and 24 that were enrolled in college or graduate school increased by 7.3 percent in Central Iowa and outpaced the national growth rate in student enrollment by 2.6 percentage points. In 2014, over half of residents 18- to 24-year olds in Central Iowa were enrolled in a post-secondary school.

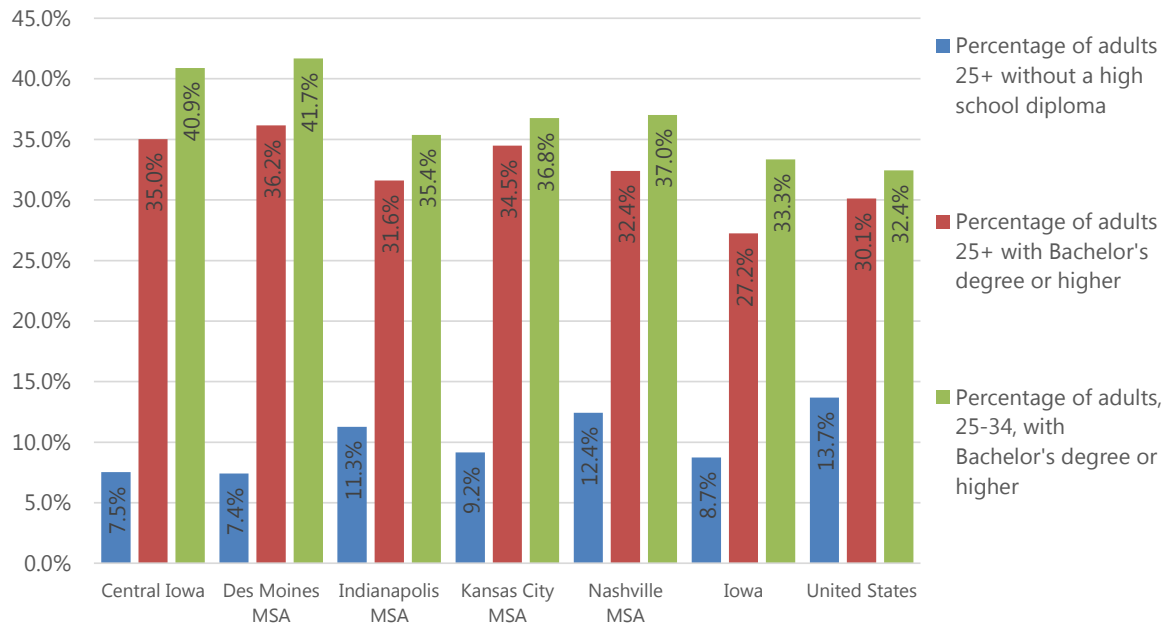


Source: U.S. Census Bureau, ACS 5-year estimates

An important indicator of the relative skill levels of a regional workforce is the adult population's level of educational attainment. Data show that Central Iowa and Greater Des Moines boast a comparatively well educated workforce. Greater Des Moines' percentage of adults with a bachelor's degree or higher, 36.5 is slightly higher than Central Iowa's average; both geographies exceed the attainment rates of all the comparison geographies. The percentage of adults with a bachelor's degree or higher in Central Iowa and Greater Des Moines increased by 1.6 and 1.8 percentage points, respectively, since 2011. The Nashville region experienced the largest increase in the share of adults with a bachelor's degree or higher – from 30.5 percent to 32.4 percent.

Data reported by the U.S. Census Bureau displayed in the following chart show that the Des Moines MSA and the Central Iowa region had the smallest share of adults with less than a high school diploma out of the comparison communities. Additionally, Des Moines and Central Iowa have made improvements over the past few years in their educational attainment rates. In 2011, roughly 8.4 percent of adults in Central Iowa had less than a high school diploma, while in 2014 the share had dropped by nearly one percentage point to only 7.5 percent. The goal of the United Way of Central Iowa's Bridges to Success program is for regional adults to receive 10,000 diplomas by the end of 2020.

EDUCATIONAL ATTAINMENT, 2014



Source: U.S. Census Bureau, ACS 5-year estimates

Central Iowa and Greater Des Moines also have the best educated cohort of 25 to 34 year olds among the comparison regions, Iowa, and the U.S. This is a very strong trend in that it portends a sustainable skills capacity in Central Iowa's workforce. As seen in the previous chart featuring U.S. Census Bureau Data, roughly 41 percent of Central Iowa individuals between the ages of 25 and 34 have attained a bachelor's degree or higher. Nationally, 32.4 percent of individuals within that age cohort have attained the same level of education. While the share of young professionals with a bachelor's degree or higher has continued to grow since 2011, Market Street's analysis of trend data[3] from the U.S. Census shows that metro Des Moines and Central Iowa's growth rate trails that of Nashville and Indianapolis.

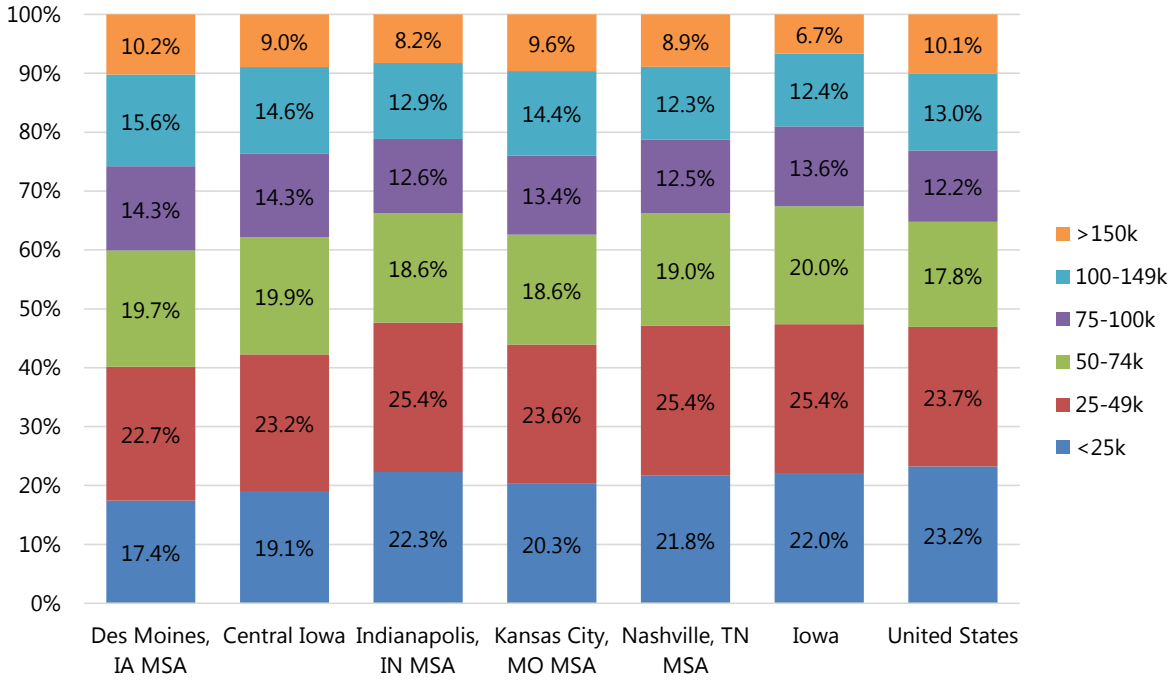
Nashville's explosive growth is largely attributed to the increase in the number of young professionals moving to the region. Between 2011 and 2014, the number of residents in Nashville between the age of 25 and 34 increased by 5.9 percent, while in Greater Des Moines there was a 4.2 percent increase. Not only are the residents in Nashville young, they are also well-educated. Over the same time period, the percentage of residents between the ages of 25 and 34 with a bachelor's degree or higher in Nashville increased 3.2 percentage points – from 33.8 percent to 37 percent.

Average income and poverty data convey the relative wealth of Central Iowa's population. While household income distribution between Central Iowa and the benchmark areas is mostly comparable, Central Iowa and Des Moines have experienced the largest increase in the share of households with incomes greater than $150,000. (The number of households increased by more than 20 percent and there was a 1.6 percentage point increase in the share of households with incomes greater than $150k.)

[3] These calculations were conducted in a spreadsheet and were not included in the report as a chart.

At the other end of the income spectrum, Greater Des Moines also experienced the greatest decline in households earning less than $25,000. Thus, trends are positive on both ends of the income spectrum in Central Iowa and Greater Des Moines. The United Way of Central Iowa's aforementioned OpportUNITY Plan seeks to leverage a diverse set of strategies to build wealth and lower poverty rates in the region.

DISTRIBUTION OF HOUSEHOLD INCOME, 2014

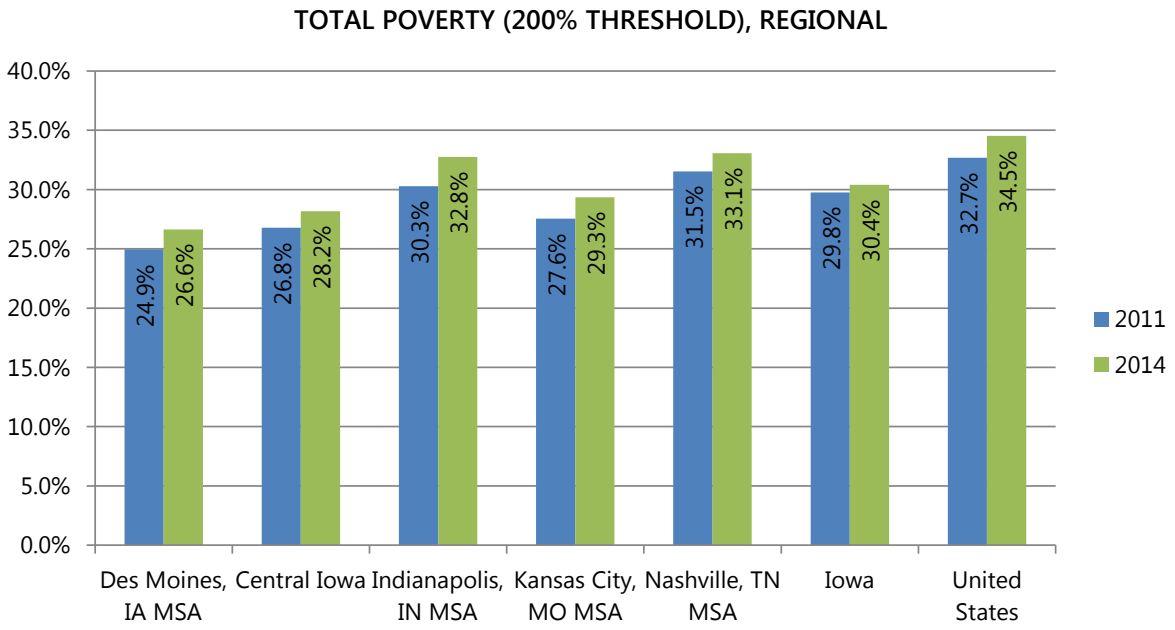


Source: U.S. Census Bureau, ACS 5-year estimates

Positive growth rates in household income, coupled with the lower poverty rates, higher PCI, and strong growth in PCI, are all positive signs that wealth and prosperity is more equitably distributed in Central Iowa than in its comparison communities.

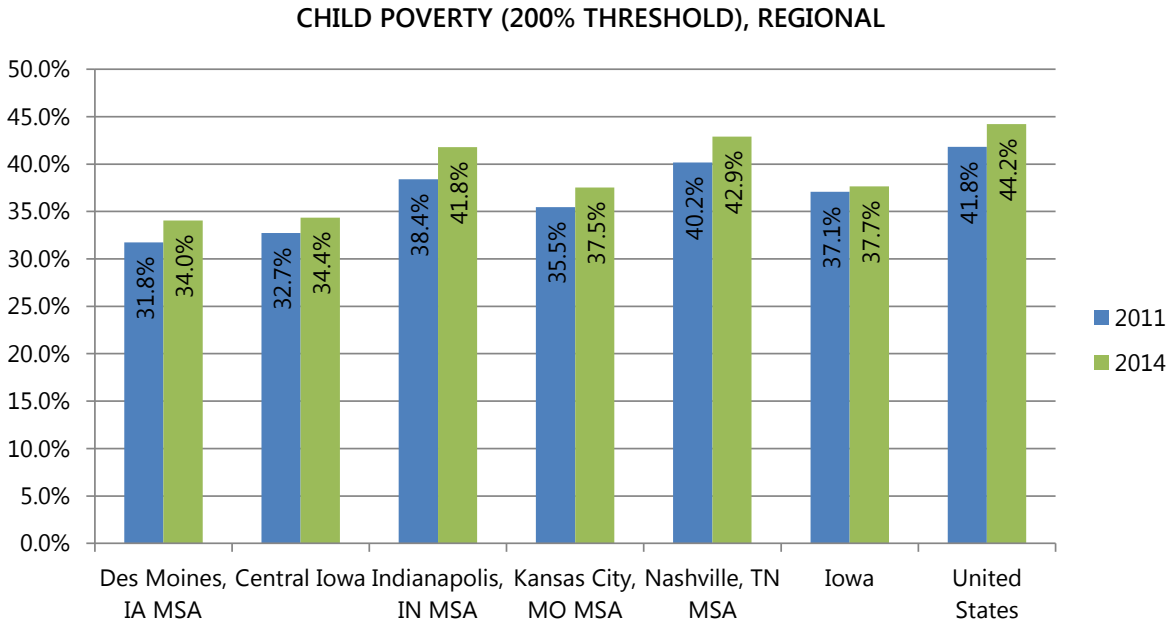
As noted in the Capital Core analysis of poverty rates, data on the percentage of individuals at or below 200% of the federal poverty level provides additional insight on this issue. This threshold allows a look at the population within a spectrum that, on the higher end, has achieved middle class status but may not yet be financially secure. In other words, this population includes those in poverty as well as working class residents who are not destitute but still qualify for various government programs and who may not have sizable savings to help them in emergencies.

As seen in the following charts, the Des Moines MSA and Central Iowa have the lowest 200 percent poverty rates of all the comparison geographies, including the state and nation. The same is true for 200 percent youth poverty rates. Just over one quarter of greater Des Moines's population and 28.2 percent of Central Iowa residents are either in poverty or at risk of falling into poverty.



Source: U.S. Census Bureau, 5-Year Estimates

As is typically the case, youth 200 percent poverty rates are higher than for the total population. Thirty-four percent of Des Moines metro children and 34.4 percent of Central Iowa youths are below the federal poverty rate or in jeopardy of falling below the line. Even so, these rates are at least 3 percentage points lower than any comparison geography.



Source: U.S. Census Bureau, 5-Year Estimates

When low regional 200 percent poverty rates in greater Des Moines and Central Iowa are contrasted with the comparatively elevated figures in the City of Des Moines described earlier in this report, the large disparity between regional and core city wealth trends become very apparent.

WHAT PEOPLE SAY

Issues of talent in Central Iowa and its component cities and counties were by far the top competitive concerns raised by input participants. Though not citing data, some interviewees and focus group participants experiencing these issues felt that there was a simple "lack of bodies" available to fill open positions in the region, while others with knowledge of the situation believed that there was a mismatch between skills required by companies and those possessed by unemployed or underemployed adults.[4] Hospitality officials cited pure talent availability as a key competitive challenge for sector companies. Other reportedly impacted occupational categories include information technology (for skills across the board), project management, "Big Data" competencies, engineering aptitudes, and advance manufacturing proficiencies. Entry level workers in claims processing and underwriting were said to be needs in the insurance industry.

Stakeholders stressed that we "need to be looking out ten to 20 years" to inform education and training priorities and programs. Businesses need to be engaged with training to inform the types of programs created; for example, "we won't need truck drivers because trucks will drive themselves and won't need as many welders because robots will do it." Another point of emphasis was increasing training outputs for "middle-skills" jobs through working with school counselors and parents to change perceptions about these occupations and promote their benefit to students.

Leaders of the EDGE campaign said the initiative has purposely tried to coordinate and align resources rather than create new capacity in order to optimize the region's training and education processes. They credit partners for "not letting politics enter into the picture." Challenges identified by participants in EDGE's recently announced 75x25 campaign included a lack of consensus on what represents a "quality" credential, no reliable data source for credentialed workers, low public visibility of the campaign, and a current lack of resources supporting its implementation.

One issue that was mentioned frequently by program practitioners and volunteers was the need to constantly ensure that EDGE and efforts of the United Way of Central Iowa through its OpportUNITY initiative are fully integrated and transparent. Representatives from both programs provided assurance that "their agenda is part of our agenda." Cited as an example was the United Way's Bridge to Success program; EDGE cannot achieve its 75x25 goal without significant progress in the Bridge to Success initiative.

A benefit of Capital Crossroads cited by input participants was the "overlap" of volunteers in the different Capital areas serving as "connective tissue" across multiple local and regional strategic efforts such as EDGE, OpportUNITY, and others. Speaking of the United Way, the Community Foundation of Greater Des

[4] Analysis of quantifiable labor shortages was not a component of the Regional Assessment or Capital Crossroads 2.0 scope of work.

Moines, and the Greater Des Moines Partnership, one leader said "it's hard to tell where one ends and the other begins."

The greatest challenge identified by many education and workforce officials was the changing demographics of the student population, primarily in Des Moines Public Schools (DMPS). The trends are affecting student performance and lead practitioners to consider how "we as a collective can help impact that." While members of the Capital Core focus group believed that the perception of DMPS as under-performing and challenged did not match the reality of the district, most input participants said perceptions of DMPS are poor, with the district under-resourced and struggling to meet the needs of its student population. Stakeholders said "suburban districts are considered better" and explained that some real estate brokers "don't even show" homes in the DMPS district. One official asked, "Is it possible to untie school income from property tax and equalize resources for all kids?"

Online survey respondents were affiliated with a broad range of schools and districts from across Central Iowa; the largest number of responses were from Polk County schools and City of Des Moines campuses. Overwhelmingly, respondents felt good about their schools, with roughly 80 percent of respondents either agreeing or strongly agreeing with the statement, "Children in our school/district receive a high-quality education." Issues of most concern to respondents were availability of pre-K programs, the level of attention given to needs of English language learners, exposure to the arts, programs for career-based education, and availability of after-school programs.

Efforts to retain graduates from local high schools and colleges were praised by focus group and interview participants. Stakeholders said that there are "huge opportunities" for the business community to connect with students and expose them to careers in the region's top industries. Participants in the Emerging Professionals focus group praised the Do More in the City intern-engagement program, saying that "interns love it" and would be more likely to consider remaining in the Des Moines area to work after graduation. Stakeholders said it was important that Central Iowa retain its talent because the Des Moines area was not as strong as other metros in terms of out-of-state migration. One stakeholder said, "We're attracting many from Iowa, but Austin and Boulder and other major metros are attracting from all over the world."

Some input participants spoke of "raising expectations" of external talent with Greater Des Moines' multiple top rankings on various national lists, but then not being able to align reality with these expectations. They feel that Central Iowa is still "missing out on branding this region in a way that makes sense to young people or people who aren't here." Those familiar with the Greater Des Moines Partnership's talent attraction efforts largely countered these perceptions, noting that Carpe DM programs like the Career Center and Seize Des Moines website were popular and growing and can sell the region "24 hours a day." They added that there is strong potential to further leverage these tools and take them to the next level. As an example, SeizeDesMoines.com would benefit from more content contributors and engagement of audiences beyond those in Iowa.

Many Des Moines area leaders are bullish on the prospects for a potential Regents Campus in Greater Des Moines as a key talent attraction and retention tool. The general sentiment is that the campus should not focus on research but rather training and retraining for the skill sets most in demand locally. Participants in

the Business Capital focus group would like to see the Campus infuse entrepreneurial thinking into its curricula and not just focus on traditional classes. They would also prefer establishment of collaborative learning spaces in an interdisciplinary "24/7 atmosphere" at the campus.

Respondents to the online survey gave high marks to nearly every higher educational institution in Central Iowa. This confirms positive feedback from focus groups and interviews on the capacity and quality of higher education in Central Iowa.

In order to access programs at a potential Regents Campus or any of the other training institutions in Central Iowa, stakeholders said that a huge barrier is the lack of affordable childcare in the region. "We're relying on grandparent infrastructure," according to one participant. Others noted that they participate in "babysitting co-ops" on nights and weekends. While one respondent was on a preschool waitlist for a year and did not get in, another spoke of spending "way more than 10 percent of my income" on childcare. Another respondent noted that in-home daycares are "way overcrowded." These realities affect talent retention, because individuals reportedly "go back home to where their support system is," often in another metro area. Among online survey participants, 66 percent felt availability of licensed child care was either average or below average.

Social Capital

THE STORY

Strong progress has been made on efforts to both enhance Central Iowa's leadership capacity and better engage and connect current and past participants in leadership development and young professional programs. Despite these gains, there is still concern among legacy leaders and philanthropists that the "next generation" of leaders could benefit from more nurturing and mentoring before they can assume positions as community stalwarts. Even so, most leaders surveyed for this Regional Assessment feel that programs like Community Connect have been strong successes and helped institutionalize the informal connections and mentorships between Greater Des Moines corporate and non-profit executives and aspiring regional leaders. Efforts continue to make Community Connect and other leadership development programs more reflective of Central Iowa's population diversity. The latter half of Capital Crossroads implementation saw Community Connect enhanced to provide more of a "curriculum feel" to the program, improved linkages made from workshop to workshop, and better understanding by participants of goals for community impact and how to develop tools to achieve results. Small group "learning teams" were also created to help better structure the meeting sessions.

The Regional Leadership Council (RLC), a gathering of directors and leaders from various regional leadership programs, has made an impact through the hosting of "Converge" events that bring together leadership program participants and alumni for networking and educational opportunities as well as the successful recruitment of an Association of Leadership Programs regional conference in 2016. However, concerns were expressed about the breadth of participation in the RLC and the program's sustainability without more capacity and engagement to support its operations. Another program bringing together leaders and members of networking groups, the Emerging Leaders Collaborative (ELC) received strong praise from participants and members of the Emerging Professionals focus group.

A focus area that continues to be unique to Central Iowa among Market Street's client communities is the emphasis on fostering civility in the region. Social Capital helped create awareness and support of the Civility Initiative on a larger community scale, and now provides resources supporting civil activities and interactions to dozens of city councils, school boards, county boards of supervisors, and chambers of commerce. The Initiative's Show Some Respect campaign was active during the run-up to and hosting of the 2015 Iowa Caucuses. More so than most Capital Crossroads' focus areas, civility continues to fly somewhat "under the radar" relative to other higher-profile activities. This has affected the Civility Initiative's ability to expand more broadly throughout the community beyond the more official confines of governmental, non-profit, and institutional meeting rooms and sessions.

Social Capital's diversity and inclusion efforts continue to advance, though still face reported challenges to realize goals of stronger understanding, participation, and integration of minority leaders in regional networks and circles of influence. Conversation lifted up the African American Leadership Forum's Leadership Academy and the Latina Leadership Initiative of Greater Des Moines as making strides in this important work to provide leadership training and experiences. Leaders would like to ensure that these

programs – and the Regional Leadership Council – do not lose momentum, especially as it relates to supporting leadership development for diverse populations. Social Capital volunteers feel that more must be done to creatively engage and sustain productive relationships with diverse groups to foster more tangible programmatic gains and positive outcomes.

The recently announced Des Moines Immigration Initiative has made volunteers hopeful that greater capacity and centralized services will be forthcoming to support and assimilate immigrants and refugees into the Central Iowa community and workforce. The recent emergence of the Refugee Planning Alliance Des Moines could also be a helpful partner in this effort.

WHAT THE DATA SAY

Social Capital in the sense of community capacity and engagement is extremely difficult to measure quantitatively. The indicators in this section used to compare Central Iowa with its benchmark geographies therefore strive to highlight high-level trends in the region's diversity and philanthropic capacity. However, locally sourced data paint a picture of Central Iowa residents' engagement levels with their community.

A 2014 Central Iowa Human Capital Survey conducted by The Partnership in collaboration with the Robert D. and Billie Ray Center and the Institute for Excellence and Ethics found that the region's residents feel a high level of connection with the community. Highlights of the survey included:

- 93 percent of respondents say they live a healthy and productive life
- 93 percent agree this is a good community in which to raise a family
- 93 percent say they are proud to be a member of the community and would recommend it to others
- 92 percent feel safe in this community
- 90 percent believe people are treated with civility and respect
- 89 percent believe they can achieve the things in life that are important to them

The survey also featured a workforce component to measure how engaged local talent is in the workplace. Highlights included:

- 89 percent of respondents agree that individuals in the workplace demonstrate ethical conscience and competence
- 88 percent agree that individuals in their workplace exhibit hard work and self-motivation.
- 88 percent agree that individuals in their workplace go beyond basic mastery of skills to enhance their performance
- 88 percent agree that individuals in their workplace act with integrity

As noted, comparison data for Central Iowa's benchmark regions, Iowa, and the U.S. were not available for these measurable.

CEOs for Cities' City Vitals 3.0 report includes a useful measurement to quantify regional volunteer rates. City Vitals research delivers performance measures for the nation's 130 largest metropolitan areas in six topic areas: Connections, Innovation, Talent, Your Distinctness, Core Vitality and Metropolitan Performances.

As seen in the following table, in 2012 the residents of the Des Moines metro area were among the most active in the country for volunteering. Kansas City and Indianapolis were in the top third of metros; Nashville finished below the national median for volunteership.

REGIONAL VOLUNTEER RATE, 2012

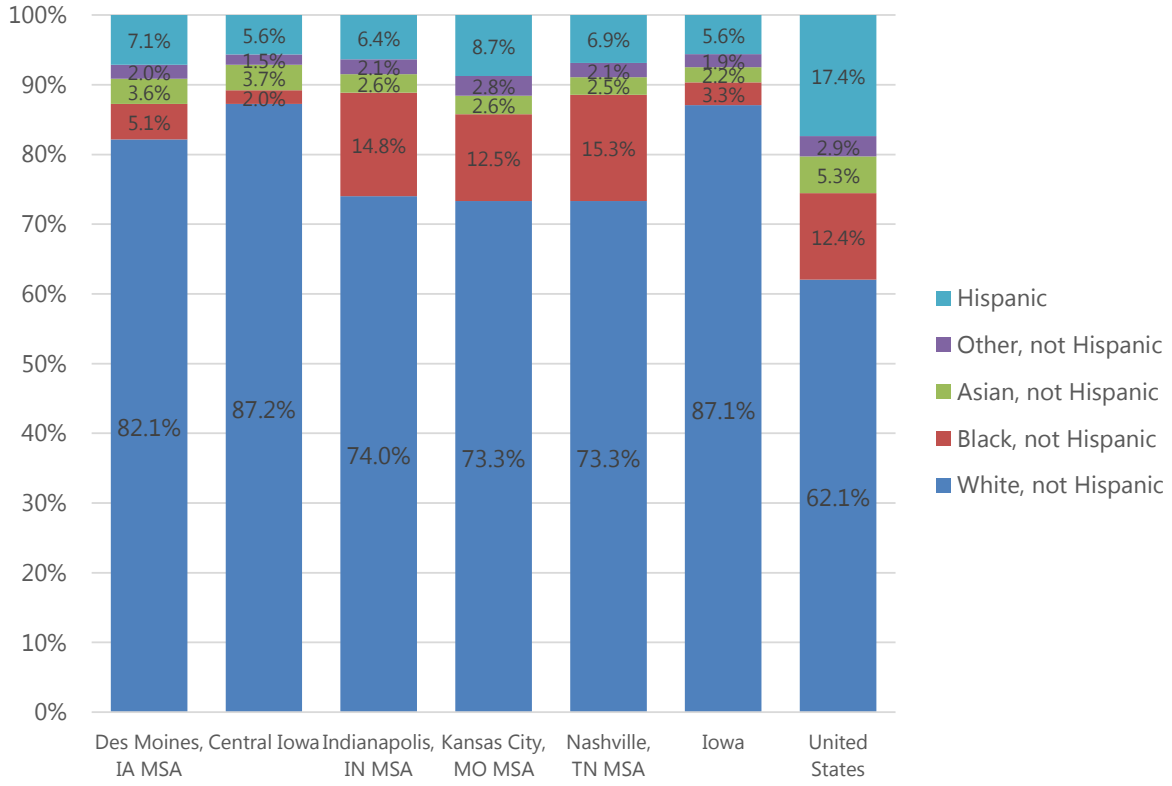
Rank	MSA	Pct
1	Ogden-Clearfield, UT	42.0%
2	Provo-Orem, UT	42.0%
3	Salt Lake City, UT	42.0%
4	Des Moines-West Des Moines, IA	34.0%
14	Kansas City, MO-KS	31.0%
28	Indianapolis-Carmel, IN	29.0%
n/a	Median/Average	27.0%
75	Nashville-Davidson-Murfreesboro-Franklin, TN	25.0%

Note: Data not available for Central Iowa
Source: CEOs for Cities, City Vitals 3.0

Because Diversity and Inclusion is one of the strategic pillars of Capital Crossroads' Social Capital component, Market Street is assessing racial and ethnic minority population trends in this section of the Regional Assessment. The population in Iowa, in general, is less diverse than the nation and racial and ethnic dynamics in Central Iowa and the Des Moines MSA reflect this. Contrasted with state and national trends, Central Iowa has actually become less diverse in recent years. The Des Moines metro area experienced different trends, becoming slightly more diverse during this period. The share of Central Iowa's population that is White, not Hispanic increased by 2.4 percentage points over the three-year period. While the region's minority population has grown since 2011, the growth in the number of minority residents trails the increase in White, non-Hispanics.

Central Iowa's fastest growing minority population is Asian, though the Hispanic population had the largest net increase with roughly 5,000 more residents than in 2011. Of the comparison regions, the Kansas City MSA is the most diverse.

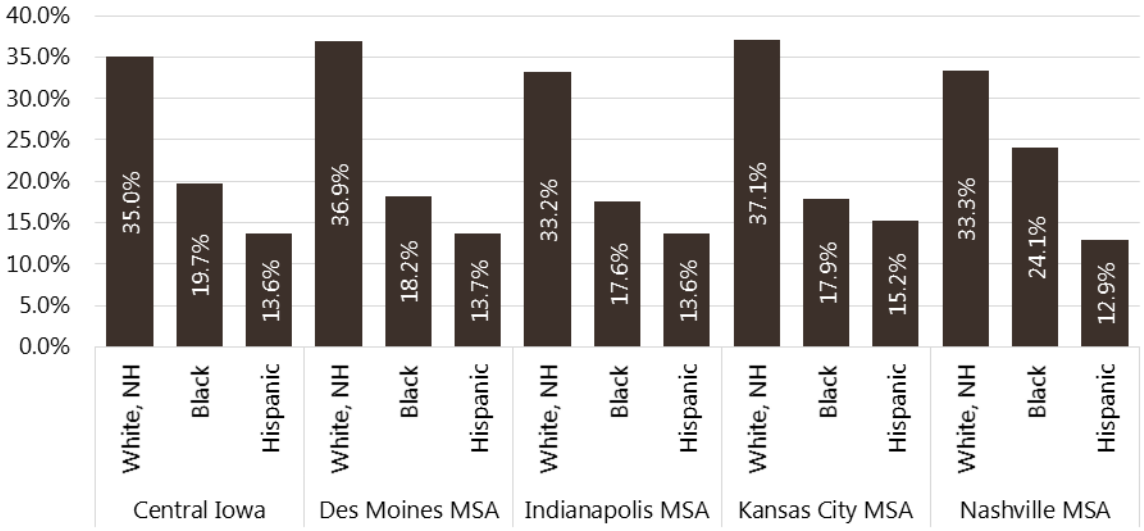
RACIAL/ETHNIC DISTRIBUTION, 2014



Source: U.S. Census Bureau

Though the racial and ethnic achievement gap is still a challenge in Central Iowa, there have been small improvements in the educational attainment of the region's minority residents. Between 2011 and 2014, the share of Hispanic and Black residents with education beyond a high school diploma increased. However, the improvements have largely been centered in Greater Des Moines. While these trends are similar to the comparison communities, more could be done to increase educational attainment rates of the region's minority populations.

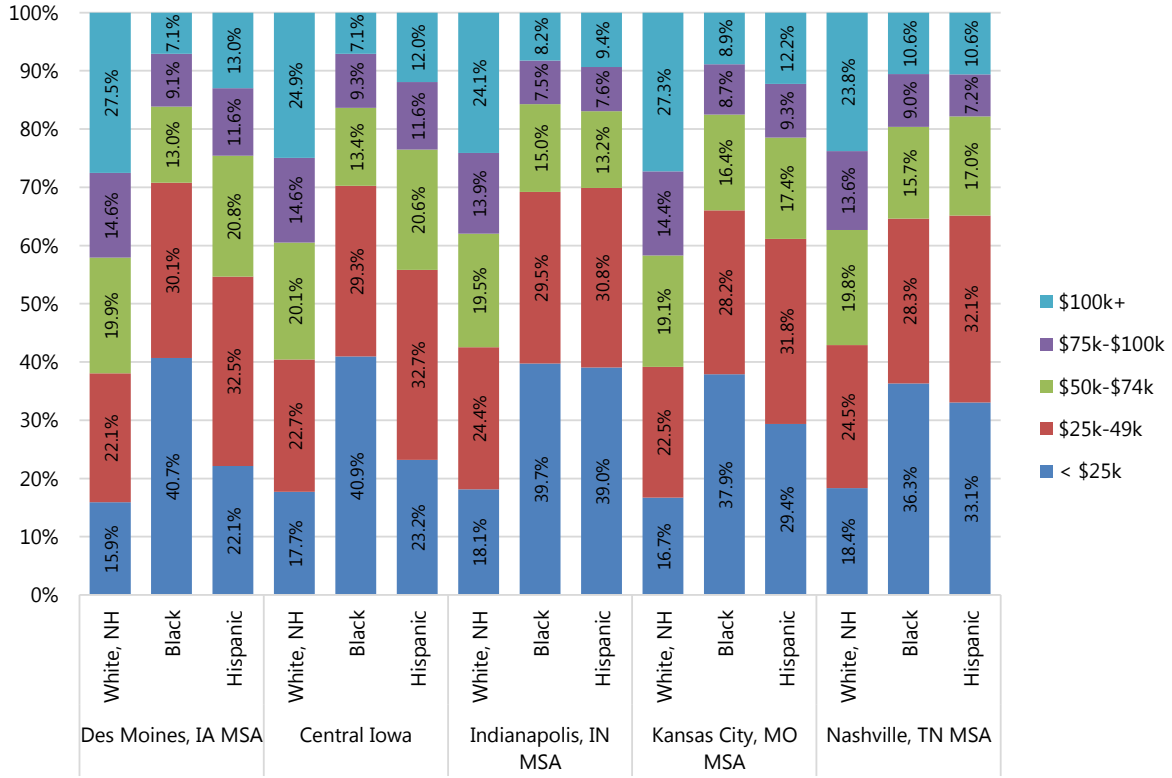
PERCENTAGE OF ADULTS WITH A BACHELOR'S DEGREE OR HIGHER BY RACIAL/ETHNIC GROUP



Source: U.S. Census Bureau

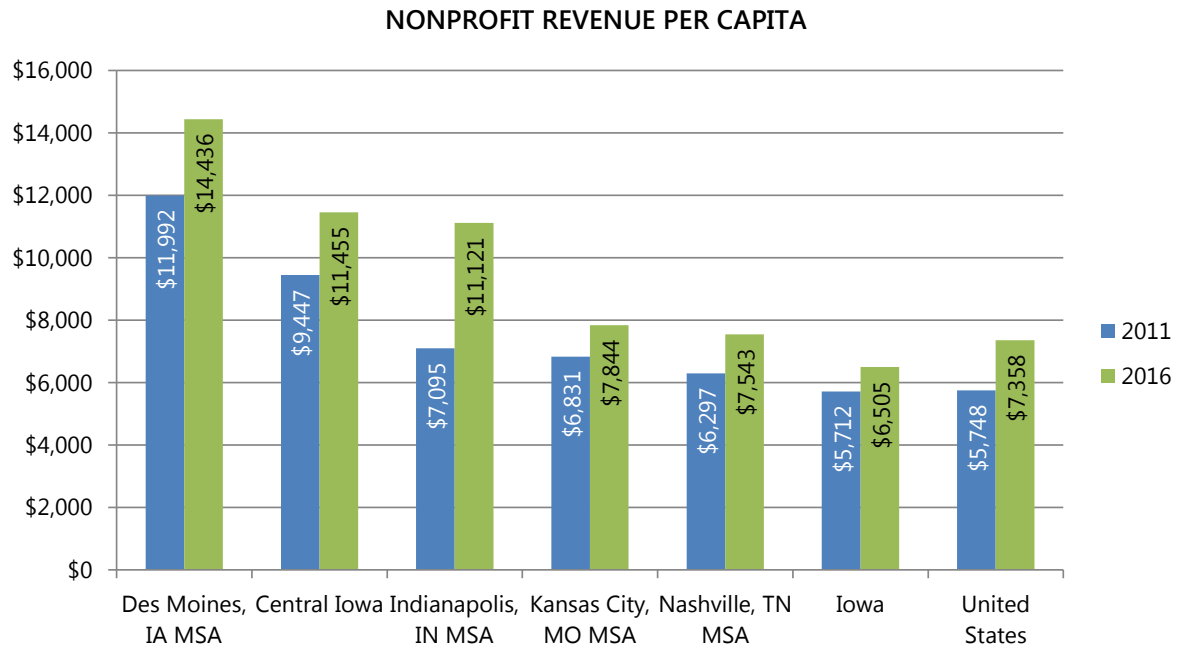
As many recent studies have shown, income dynamics are closely linked with educational attainment. Central Iowa trends are consistent with these findings, with the region's minority households earning lower incomes than White residents. Roughly 70 percent of Central Iowa's Black residents and nearly half Hispanic residents have a household income of less than $50,000. The share of residents at the lowest end of the income spectrum – those with a household income of less than $25,000 – has decreased in recent years, a positive trend suggesting improvements in the wealth and prosperity of residents. Nationally, there was little change in the household income distribution of the minority population.

HOUSEHOLD INCOME DISTRIBUTION BY RACIAL/ETHNIC GROUP, 2014



Source: U.S. Census Bureau, ACS 5-yr estimate

One Social Capital finding from the first Capital Crossroads process that is even truer today is the incredible capacity of the region's philanthropic sector. Data from the National Center for Charitable Statistics reveal that revenue from nonprofits per capita in the Des Moines metro far exceeds that of all comparison geographies. In 2016, Des Moines nonprofits received $14,436 per resident, nearly double the amount received on average nationwide. When Central Iowa counties outside of the Des Moines MSA are factored into the analysis, per capita philanthropic capacity falls notably. Clearly, the locus of Central Iowa's philanthropic giving is in the five Des Moines metro counties.



Source: National Center for Charitable Statistics

WHAT PEOPLE SAY

Stakeholders engaged in Social Capital implementation praised the role the initiative has played in better leveraging cross-community assets and connecting people to "resources and each other." Plugging the plan into existing city and county initiatives was also a goal from the start. Even though "we've done more than we recognize," the desire to increase support capacity to accomplish Social Capital goals was noted by multiple respondents. Stakeholders also feel it is important that Social Capital efforts be recognized more visibly in the press and public consciousness.

The "human development component" of the Social Capital strategies was said to be a key outcome of sustained efforts. Results serve as a "holistic testament to how the city has pulled together." Stakeholders spoke of a "resurgence of pride" among young professionals to be from the Des Moines area, and the benefits of "development of up and coming leaders."

Social Capital implementers purposefully focused on diversity and inclusion from "the very beginning" of strategic launch, and strove to "bring the right people together" to make the community better. Partners have consistently asked "who's not at the table" and who could benefit from leadership in mentoring. One participant noted, "If you want to be involved in Des Moines, all you have to do is raise your hand and you'll be plugged in." Despite these efforts for greater inclusion, some stakeholders still spoke of a lingering "who you know" dynamic in certain contexts. To address this, implementers are focused on efforts to target more diverse candidates.

Though applicants to regional leadership and mentorship programs have become more diverse, implementers are still concerned about "getting more people in the room" that would benefit from the programs. More broadly, participants are interested in making inclusion a more purposeful component of

efforts. "If people are uncomfortable, you have to find ways to make them feel comfortable." "Breaking down barriers" and getting people talking to each other were said to be key ongoing focus areas. Stakeholders would also like to "create a vehicle" to reach more communities, and utilize outreach to "navigate differences" between constituencies and not only listen to program participants but strive to integrate them into personal and leadership networks.

One leader said volunteers will need to "get outside our comfort zones" and make "very intentional" efforts to engage minority populations on their terms and in their communities. Stakeholders also feel it will be important to build leadership capacity among minority groups and make visible investments in their neighborhoods. The Multicultural Reception was said to be one way the business community is reaching out, but engaging more minority participation at these events is desired. Social Capital stakeholders are hopeful that the new Des Moines Immigration Initiative will provide actionable strategies to help move the bar on many of these issues as well as the Refugee Planning Alliance Des Moines.

Online survey respondents had differing opinions on the diversity and openness of Central Iowa. Most either agreed or were neutral on the strength of the region's diversity. While they felt opportunities were available for diverse populations to participate in communities and networks – and most either agreed or strongly agreed that Central Iowa is welcoming – fewer respondents believed that the region was an inclusive place.

Survey participants identifying as African-American, Latino, Asian-American, or Other expressed more hesitance as to Central Iowa's desirability for minority residents. Differences with opinions of all survey takers were most prevalent on questions of overall regional diversity, openness of communities and networks, and Central Iowa's inclusivity. Nevertheless, over 70 percent of minority respondents still feel that Central Iowa is a welcoming place.

Participants in the Regional Leadership Council expressed some frustration that participation has lagged after a strong launch. The program has "admirable goals, but it's hard to execute," according to a stakeholder. This reality leads some participants to acknowledge that the initiative has to be "realistic about our goals" to ensure they are achievable with appropriate resources.

As with feedback from Capital Crossroads 1.0, input participants are still concerned that the "next generation" of transformational regional leaders has yet to be identified in Central Iowa. Many would like to see a more focused effort on pairing current leaders as mentors with aspiring philanthropists under age 40. One leader said, "We have to find a way to engage the C-level" and match them with people with "high potential" for community involvement.

One issue cited by an input participant was the lack of transition from the Young Professionals Connection to the "next stage" of personal development. The respondent noted, "There's nowhere to go after YPC. I've had friends leave the community because they feel like they're blocked or 'lost' on the ladder."

Cultural Capital

THE STORY

Arts and culture continues to exert a strong economic and social benefit for Greater Des Moines and Central Iowa, with top-line Broadway shows and concert performers including Des Moines on their tours, the Des Moines Arts Festival remaining one of the nation's most well attended and highly regarded, the 80/35 festival and other music events growing every year, the Des Moines Social Club being featured in national publications such as *Politico Magazine* as a model for mixed-use event, performing, and community space, and multiple independent theater companies, arts facilities, museums, and galleries providing Central Iowa with a high per capita complement of arts and culture assets and amenities. Economic analysis sponsored by Bravo as well as data in this report show that the arts has more than a $120 million dollar impact on the Central Iowa economy and employs thousands of local residents. Comparatively, however, these impacts cannot approach the scale of entertainment-driven economies like Nashville, Los Angeles, New York, Atlanta, or even Austin, Texas.

Since Capital Crossroads was launched, Cultural Capital has celebrated a number of successes including the launch of a new culture-specific website for the region, hosting one of ten National Endowment for the Arts Creativity Connects roundtables with NEA Chairman Jane Chu, and increasing stable grant funding for the arts through Bravo Greater Des Moines and the Iowa Arts Council. That said, the Cultural Capital has struggled to build positive momentum. Leadership changes at key organizations as well as a dynamic and evolving cultural landscape may have contributed to lack of traction. However, stakeholders also feel that the dynamics of the arts community itself – ultra-competitive for funding and patrons, small companies constantly fighting for a finite amount of market share, and limited resources to promote shows and to engage with the public – strongly contribute to the challenges of implementing a shared vision and strategy.

That said, arts leaders are passionate about the continuing opportunities to work better together and feel that alignment behind a regional arts blueprint is possible if the proper priorities are implemented in a way that focuses employers, communities, organizations, leaders, funders, entrepreneurs, artists, and advocates on ways to further leverage the arts to enhance regional objectives.

WHAT THE DATA SAY

The arts sector is an important component of the Central Iowa economy. A recent Bravo-commissioned study, Economic Value of Arts, Culture and Heritage Organizations to the Central Iowa, found that the combined regional output of Bravo-funded organizations reached $120.9 million in 2015. Over 2,300 people are directly or indirectly employed in the arts, with over 3.7 million attendees and participants engaged in arts events, nearly 765,000 of which were non-regional visitors.

To assess Central Iowa's arts economy, Market Street used an abridged version of the Creative Industries definition by Americans for the Arts; the following table illustrated exports derived by arts-related subsectors in the region. In 2013, nearly $100 million of exports were generated by the arts. The top three

arts-related subsectors for exports were museums, historical sites, and similar institutions; and promoters of arts, sports, and similar events; and portrait photography studios.

ARTS EXPORTS, 2013

NAICS	Sector	Exports
	Total, All Sectors in Central Iowa	**$58,837,100,718**
	Total, Arts-Related Sectors in Central Iowa	***$99,061,300***
7121	Museums, Historical Sites, and Similar Institutions	$23,428,337
7113	Promoters of Performing Arts, Sports, and Similar Events	$18,480,621
541921	Photography Studios, Portrait	$10,836,924
541922	Commercial Photography	$7,533,172
541430	Graphic Design Services	$7,317,439
512110	Motion Picture and Video Production	$6,945,773
339910	Jewelry and Silverware Manufacturing	$5,030,139
451140	Musical Instrument and Supplies Stores	$4,942,642
7111	Performing Arts Companies	$4,020,506
339992	Musical Instrument Manufacturing	$3,914,352
7115	Independent Artists, Writers, and Performers	$3,829,755
512240	Sound Recording Studios	$1,043,858
611610	Fine Arts Schools	$709,450
512220	Integrated Record Production/Distribution	$415,353
512290	Other Sound Recording Industries	$296,983
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	$149,929
327212	Other Pressed and Blown Glass and Glassware Manufacturing	$133,840
327110	Pottery, Ceramics, and Plumbing Fixture Manufacturing	$24,726
512230	Music Publishers	$7,503

Source: Economic Modeling Specialists Intl.

Nearly 4,000 jobs in Central Iowa can be attributed to the arts sector. The most concentrated subsectors in the region are promoters of performing arts, sports, and similar events (1.36), commercial photography (1.17), museums, historical sites, and similar institutions (1.14), fine arts schools (1.13), and performing arts companies (1.12). One important finding is that growth in the arts sector in Central Iowa is competitive compared to the nation; these sectors collectively added jobs by 15.0 percent regionally, compared to 8.8 percent nationally.

ARTS EMPLOYMENT, 2011-2015

NAICS	Business Sector	2015 Employment	2015 Location Quotient	2015 Establish-ments	4-Year % Change	US 4-Year % Change	2015 Earnings	4-Year Earnings % Change	US 4-Year Earnings % Change
	Total Across Arts-Related Sectors	***3,612***	***0.73***	***334***	***15.0%***	***8.8%***	***$22,041***	***0.01%***	***7.9%***
7113	Promoters of Performing Arts, Sports, and Similar Events	630	1.36	35	21.1%	27.7%	$23,532	9.2%	6.7%
7121	Museums, Historical Sites, and Similar Institutions	565	1.14	27	33.2%	13.3%	$24,510	8.3%	5.6%
7111	Performing Arts Companies	528	1.12	23	32.6%	11.8%	$16,513	-6.4%	4.5%
611610	Fine Arts Schools	475	1.13	49	40.6%	12.5%	$10,308	20.0%	3.7%
7115	Independent Artists, Writers, and Performers	432	0.45	45	-10.7%	5.0%	$16,141	-11.7%	6.6%
541430	Graphic Design Services	405	0.93	39	67.7%	5.7%	$27,206	-20.5%	4.8%
541921	Photography Studios, Portrait	199	1.00	37	-34.8%	-12.5%	$19,435	-4.4%	3.6%
512110	Motion Picture and Video Production	142	0.16	36	-19.4%	13.0%	$49,827	11.3%	9.8%
451140	Musical Instrument and Supplies Stores	107	0.96	11	-30.1%	-3.5%	$39,924	32.8%	3.7%
541922	Commercial Photography	53	1.17	18	58.6%	14.5%	$41,366	6.8%	4.7%
512240	Sound Recording Studios	27	0.89	3	61.6%	-5.9%	$23,868	-26.9%	-3.8%
7114	Agents and Managers for Artists, Athletes, Entertainers, and Oth	14	0.13	5	-37.6%	5.7%	$15,518	-21.0%	14.7%
512290	Other Sound Recording Industries	<10	0.37	2	NA	6.2%	Insf. Data	NA	-1.7%
339992	Musical Instrument Manufacturing	<10	0.22	1	NA	6.8%	Insf. Data	NA	6.6%
327110	Pottery, Ceramics, and Plumbing Fixture Manufacturing	<10	0.12	3	NA	-3.7%	Insf. Data	NA	6.6%
512230	Music Publishers	<10	0.12	0	NA	-6.1%	Insf. Data	NA	2.9%
327212	Other Pressed and Blown Glass and Glassware Manufacturing	<10	0.12	0	NA	1.8%	Insf. Data	NA	6.7%
512220	Integrated Record Production/Distribution	<10	0.07	0	NA	2.3%	Insf. Data	NA	-2.2%
339910	Jewelry and Silverware Manufacturing	<10	0.04	1	NA	-3.5%	Insf. Data	NA	8.3%

Source: Economic Modeling Specialists Intl.

Another perspective on the relative number of creative professionals in a region comes from CEOs for Cities' most recent City Vitals report. They define a "creative" professional as one employed as a mathematician, scientist, artist, engineer, architect, designer or entertainer. This is consistent with Richard Florida's definition of the "creative class." Per the City Vitals data, metro Des Moines ranks last among the benchmarks for these jobs and below the national median.

PERCENTAGE OF CREATIVE PROFESSIONALS, 2010-2012

Rank	MSA	Pct
1	San Jose-Sunnyvale-Santa Clara, CA	8.5%
2	Huntsville, AL	7.7%
3	San Francisco-Oakland-Fremont, CA	5.9%
4	San Diego-Carlsbad-San Marcos, CA	5.6%
5	Palm Bay-Melbourne-Titusville, FL	5.5%
49	Nashville-Davidson-Murfreesboro-Franklin, TN	3.7%
53	Indianapolis-Carmel, IN	3.6%
n/a	Median	3.5%
75	Kansas City, MO-KS	3.2%
84	Des Moines-West Des Moines, IA	3.0%

Note: Data not available for Central Iowa
Source: CEOs for Cities, City Vitals 3.0

Another interesting indicator from the City Vitals report measures a different aspect of a community's "creativity" quotient. The report's "culture/internet" figure reflects the ratio of persons attending a cultural event to the number of people who use the internet as their primary source of entertainment. This rating speaks to patronage of live events versus online entertainment, a ratio in which greater Des Moines finishes stronger than its benchmarks (from the perspective of those who value live entertainment over online engagement).

CULTURE/INTERNET RATIO, 2012-2014

Rank	MSA	Ratio
1	Santa Barbara-Santa Maria-Goleta, CA	11.76
2	Bridgeport-Stamford-Norwalk, CT	11.44
2	Hartford-West Hartford-East Hartford, CT	11.44
2	New Haven-Milford, CT	11.44
5	Washington-Arlington-Alexandria, DC-VA, MD-WV	11.38
40	Kansas City, MO-KS	10.03
48	Des Moines-West Des Moines, IA	9.84
n/a	Median	9.66
89	Indianapolis-Carmel, IN	9.19
111	Nashville-Davidson-Murfreesboro-Franklin, TN	8.75

Note: Data not available for Central Iowa
Source: CEOs for Cities, City Vitals 3.0

The following data speaks to, at least in theory, regional capacity to create opportunities for experiencing art. For this measure, the Des Moines MSA invests less per capita on arts philanthropy than the comparison geographies. Because this data is a subset of overall philanthropic spending in which metro Des Moines leads the competitors, it can be concluded that philanthropic contributions to the arts are less robust than other categories in the Des Moines region.

ARTS PHILANTHROPY PER CAPITA, 2016

	2011	2016	Change, 2011-2016
Des Moines, IA MSA	$91	$108	19.0%
Central Iowa	$74	$86	16.4%
Indianapolis, IN MSA	$92	$135	46.6%
Kansas City, MO MSA	$101	$136	34.4%
Nashville, TN MSA	$117	$139	19.3%
Iowa	$66	$67	2.6%
United States	$120	$127	5.7%

Source: National Center for Charitable Statistics

The amount of philanthropic funding for the arts in Central Iowa is important because the State of Iowa funds the arts at a lower per capita rate than nearly every other U.S. state. According to 2016 data from the National Assembly of State Arts Agencies, Iowa ranks 41st out of the 50 U.S. states in per capita appropriations for the arts. Among the benchmark states, Indiana is roughly comparable to Iowa at 36, but Missouri (13th) and Tennessee (15th) rank much higher in annual per capita arts investment.

WHAT PEOPLE SAY

Opinions varied among participants in the Cultural Capital focus group about the key issues facing the region's arts and culture sector. Many felt that a lack of "infrastructure" for artists, primarily workspace was lacking, though the forthcoming Mainframe Studios project was said to be a step in the right direction. Others noted that Greater Des Moines must cultivate a more compelling reputation as a destination for arts and artists in order to attract top talent to the region. The community needs a better "brand" and "identity" as a place where artists go, similar to the city of Portland. This is consistent with feedback from Capital Crossroads 1.0. Stakeholders would also like to see more aggressive efforts to engage the region's students and more diverse constituencies in the arts.

Participants said that the region continues to expand its arts and cultural offerings, but that more could be done to explore opportunities for arts entities to work together, share resources, and coordinate infrastructure to reach "economies of scale." There is simply a finite amount of available funding for the arts, many said, so it compels us to slice up the pie more effectively. Cultural Capital volunteers feel that the arts sector needs "clearer regional goals" and would benefit from a comprehensive regional arts development strategy and, ultimately, an umbrella entity to coordinate and implement it. A process like this is in the works, to be coordinated by Bravo Greater Des Moines. This will coincide with ongoing internal discussions about how Bravo's function may evolve to meet changing community dynamics.

Participants in the Emerging Professionals focus group acknowledged that Greater Des Moines would "never be a New York City or Chicago," but feel that the Des Moines area punches above its weight in terms of arts and entertainment amenities. They singled out the region's multiple festivals, events, programs, and facilities as real assets.

Online survey respondents expressed positive assessments of Central Iowa's arts, culture, and entertainment amenities. Nearly 65 percent of respondents rated arts and cultural facilities and programs as above average or excellent, while 63 percent praised shopping and dining opportunities. Sentiments on nightlife opportunities were slightly less positive, with 38.4 percent calling them average and 11.6 percent labeling them below average.

Physical Capital

THE STORY

Data and public input feedback show that Central Iowa and the Des Moines MSA are effectively managing the effects of the region's strong population growth and proactively ensuring that this growth is sustainable from an infrastructure standpoint.

From the outset, the Capital Crossroads 1.0's Physical Capital initiative was intimately intertwined with The Tomorrow Plan smart growth strategy for three Des Moines metro counties. This interactivity continues, along with Physical Capital strategies connected to Des Moines Area Regional Transit Authority (DART) planning, the Des Moines Area Metropolitan Planning Organization (DMMPO)'s Mobilizing Tomorrow plan, Iowa DOT projects, and integration with infrastructure development from governments across Greater Des Moines. Opportunities proposed in Capital Crossroads to better unify or consolidate MPOs in Greater Des Moines and Ames-Story County did not come to fruition.

An August 2014 Feasibility Study of transit opportunities in the Ames-Des Moines I-35 commuter corridor conducted by the Des Moines Metropolitan Planning Organization found that it would appear that sufficient demand exists to warrant investment in an alternative transportation mode between Ames and Des Moines. The study proposed introducing "more implementable" services like commuter express bus during weekday peak periods while also searching for local funding and grants to transition to a higher level of service.

From a public transit perspective, DART is currently undergoing a study to update the DART Forward 2035 Transit Services Plan. The DART Forward 2035 Plan was adopted by the DART Commission in September 2011, establishing a 25-year blueprint for building a regional transit system in Greater Des Moines. In addition to service changes first implemented in 2012, service improvements have continued in the years since. Other notable changes include the opening of a new transfer station in downtown Des Moines, launch of a redesigned and expanded route network, and addition of service hours, frequency and routes.

A Transit Future Work Group empaneled by Capital Crossroads and comprised of regional business, community, and civic leaders was launched to get ahead of potential transportation challenges while also identifying opportunities and potential solutions for transit in Greater Des Moines. Thinking of transit as a quality of life amenity, especially for young professionals, will also be a component of the Group's work. Surveys have shown that regional residents largely support enhanced transit services, particularly BRT.

A key development with the potential to enhance not only regional quality of life but also business competitiveness is the Terminal Site Study Plan for Des Moines International Airport (DMIA). Consensus has yet to be reached on the preferred location for a new passenger terminal at the airport, but the issue is expected to be resolved soon. Leaders expect that funding will need to be solicited to support state and federal advocacy, education, and public outreach to advance the airport's design and construction.

A key initiative for Physical Capital is the development of a rail port transloading facility in Central Iowa. The City of Des Moines is applying for a federal grant to support facility planning and development and also to provide a local match. The proposed facility adjacent to Martin Luther King, Jr. Parkway would serve businesses within a 150 to 200-square mile region and greatly enhance Central Iowa's competitiveness in the Logistics sector.

Stakeholders feel that the region's most notable progress has been achieved in stormwater and watershed management. Multiple Watershed Management Authorities (WMAs) have been established, which complement efforts to plan trails, greenways, and, now, a regional water trails initiative. Flood control efforts also continue under the coordination of the City of Des Moines.

A key strategy incorporated into Capital Crossroads during the mid-course review process was the implementation of gigabit internet connection speeds across the region. This effort received a considerable boost when Mediacom Communications announced it plans to start rolling out 1 gigabit-per-second (Gbps) internet speeds to its residential customers by the end of 2016.

WHAT THE DATA SAY

The comparison metros for this report are all significantly larger than Central Iowa, so comparing the total passenger counts at their airports is not a valid exercise. However, it is notable that the total number of annual outbound passengers from Des Moines International Airport has grown at a much faster rate than all the comparison areas save for Nashville. Annual flight departures have fallen during this time, so planes are clearly leaving Des Moines full or nearly full. Cargo capacity is also smaller out of DMIA, but again that is to be expected due to the region's smaller annual economic output.

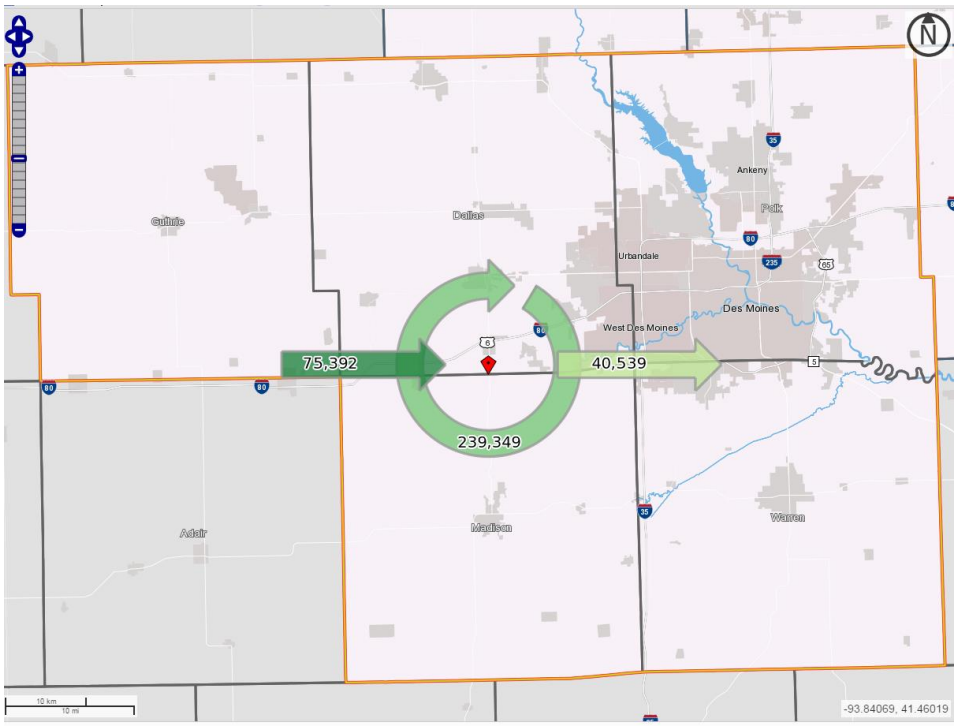
AIRPORT STATISTICS, 2016

	Annual Outbound Passengers (ths)	Change, 2011-2016	Annual Flight Departures	Change, 2011-2016	Freight Capacity (mill)	Change, 2011-2016
Des Moines, IA (DSM)	1,163	30.2%	17,470	-10.1%	152	-3.8%
Indianapolis, IN (IND)	3,915	6.6%	63,145	-4.6%	1,957	1.5%
Kansas City, MO (MCI)	5,150	4.9%	54,713	-17.4%	211	11.6%
Nashville, TN (BNA)	5,749	29.7%	64,206	1.2%	93	4.5%

Source: U.S. Bureau of Transportation Statistics

Increased traffic congestion can certainly be a concern in a fast growing community like Des Moines. In 2014, the most recent year for which Census On the Map data is available, 67 percent of individuals who work in Des Moines commute from outside the city. In 2011, this figure was 66.1 percent—only slightly different. This stability can potentially be attributed not only to the fact that a larger percentage of recent downtown Des Moines development was residential, but also the continuing growth of suburban communities as employment centers.

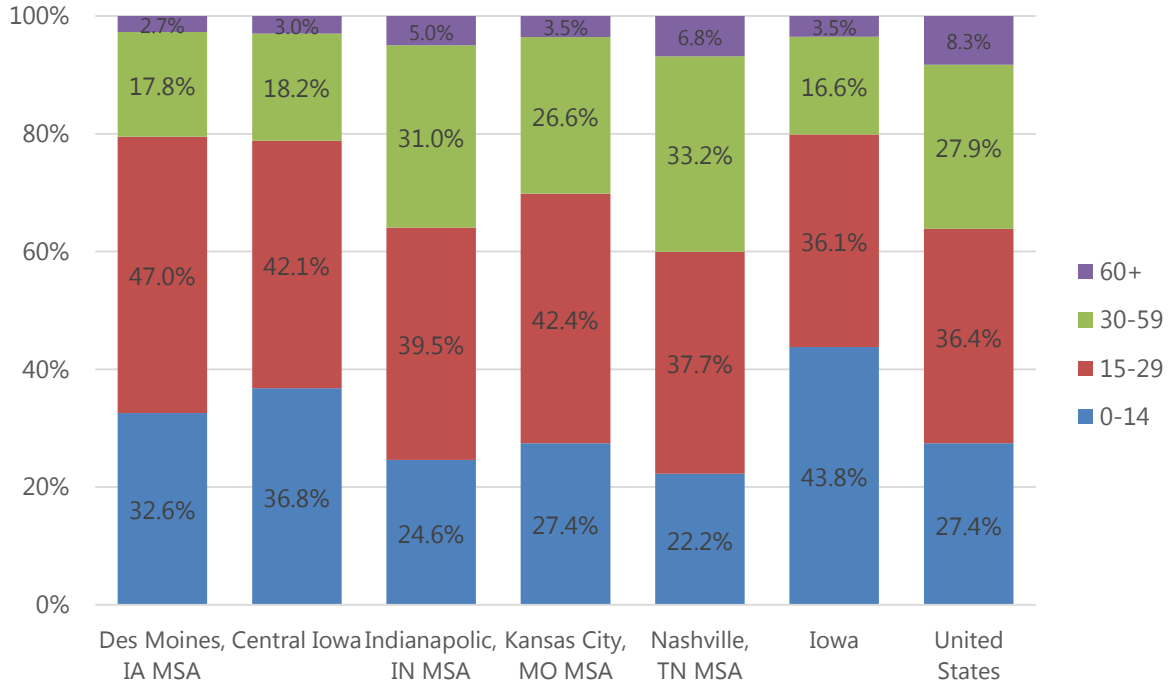
INFLOW/OUTFLOW OF WORKERS AND RESIDENTS, 2014



Source: Census On the Map

Data show that far fewer commuters in Central Iowa drive over 30 minutes to work than in the more sprawling Indianapolis, Kansas City, and Nashville regions. However, this reality also creates challenges to those advocating for increased public transit capacity because there is less incentive for so called "choice riders" to abandon their cars. As the Des Moines area continues to expand quickly, with most of that growth directed to suburban and rural counties, similar sprawl patters could emerge if growth is not effectively managed.

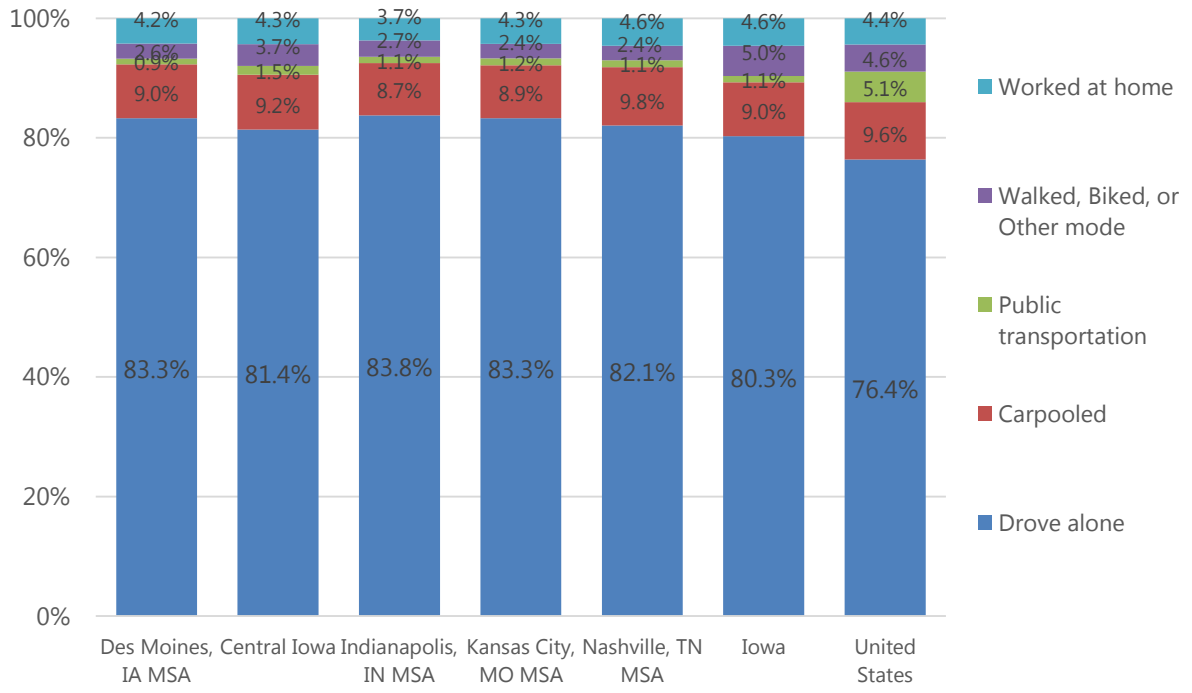
COMMUTE TIME, 2014



Source: U.S. Census Bureau, ACS 5-year estimates

Central Iowa and Greater Des Moines are not significantly different than their metro comparisons in commute mode trends. Over 80 percent of commuters drove alone to work in 2014 in all metros examined and in the state. In Central Iowa, a larger proportion of commuters use public transportation than the comparison metros and the state. Central Iowans also utilize alternative modes of transportation such as walking and biking at a higher rate than the comparison metros only. The Des Moines metro is roughly on par with the comparison metros in terms of the distribution of modes of transportation. From 2011 to 2014, the proportion of commuters who drove alone increased by nearly two percent. Those additional commuters who drove alone mainly were formerly carpoolers.

MODE OF TRANSPORTATION TO WORK, 2014



Source: U.S. Census Bureau, ACS 5-year estimates

As testament to its multi-governmental funding structure, Des Moines Area Rapid Transit covers a higher percentage of its urbanized area population than the public transit agencies in the comparison metros. On average, Des Moines public transit users travel approximately 48 miles per year on public transit, greater than all three comparison metros.

PUBLIC TRANSPORTATION STATISTICS, BUS ONLY, 2014

Main Central City Provider of Transit	% of Population with Service	Average Trip per Resident	Average Miles Per Resident
Des Moines, IA			
Des Moines Area Regional Transit Authority	83.3%	9.58	48.11
Indianapolis, IN			
Indianapolis and Marion County Public Transportation	62.4%	6.92	26.80
Kansas City, MO-KS			
Kansas City Area Transportation Authority	49.3%	10.43	37.38
Nashville-Davidson, TN			
Metropolitan Transit Authority	64.6%	9.50	47.62

Source: National Transit Database

WHAT PEOPLE SAY

Volunteers working on Physical Capital issues said the initiative has seen accomplishments in every area of focus. The Capital Crossroads process has brought together people with different perspectives and made connections that "historically were not there," formalizing new structures for collaboration among private, political, and community constituencies. Understanding future demographic changes and what that means for long-term planning and infrastructure needs continues to be a priority, according to stakeholders. "We're not resting on our laurels," one input participant noted, adding that, "we're identifying ways to be better."

Many stakeholders including – most vocally – the Emerging Professional focus group feel the region is too "car focused" and would like to see additional opportunities for public transportation and bicycle commuting. However, one challenge noted by an input respondent to issues of downtown density, walkability, bus rapid transit, and transit oriented development is that the focus "in contrary to our 'claim to fame,' which is our short commute times." For example, the downtown shuttle is rarely utilized. "We can't think big if we can't succeed at the little things." The need for improved public transit was also a major theme of the online survey, with the issue emerging not only as a priority for young professionals but also as a workforce benefit and one of the most important improvements that can make Central Iowa more competitive with larger destination communities.

Stakeholders would like to see direct air service initiated from Des Moines International Airport to the San Francisco Bay market. Other stated desires were "more frequencies" to Newark and Washington, DC. Input participants also felt that better interconnectivity between DMIA and downtown would be beneficial, recommending a "free trolley system" as one potential idea.

Officials engaged in flood control and stormwater and watershed management efforts feel that the increased attention these issues have garnered with the Des Moines Water Works lawsuit against three northwest Iowa counties over water quality has raised the profile of these challenges and made them a top resident concern. Stormwater and watershed management activities are "deeply connected" and been integrated into flood mitigation strategies as well. The Iowa Soil and Water Future Task Force was praised by input respondents as a true collaborative effort with real potential benefit for the region's soil and water issues. The water trails initiative and removal of Des Moines River dams through downtown were also mentioned frequently as key opportunities not only for infrastructure-related issues but also as quality of life enhancements.

Self-identified business executives in the online survey had positive assessments of class A office and industrial building availability, the cost of utilities, and road and highway capacity and accessibility. Concerns included passenger air capacity (61.5 percent neutral or disadvantage) and gigabit internet connectivity (54.1 percent neutral or disadvantage).

Governance Capital

THE STORY

Market Street often cites the example of Governance Capital initiatives such as the Local Government Collaboration (LGC) Project and Central Iowa Code Consortium (CICC) as national best practices without precedent or equal in our client communities or beyond. Quite simply, the willingness of government officials to come together in purposeful efforts to improve process coordination and unification of tools and services, at the scale accomplished in Greater Des Moines, is beyond the reach of most U.S. regions.

Though there are past, present, and current challenges reported by Governance Capital volunteers in achieving the full breadth of their collaborative vision, the results to date of implementation efforts, the willingness and excitement around continuing these activities, and the acknowledgement of the benefit of inter-governmental collaboration as a concept are true testaments to the spirit of regionalism in the Des Moines metro area and the collective will to remain steadfast to achieve results. The Executive Committee of the CICC probably said it best in a statement quoted in the 2015 Capital Crossroads Annual Report: "This effort would not have progressed without the vision of the Capital Crossroads initiative, the support of the Mayors and City Council members and Board of Supervisors from the Participating Communities and the dedicated committee members representing government officials and business and industry on the Executive and Code Committees."

As with so many Capital activities, threats to the continued efficacy of Governance Capital's signature initiatives are often tied to the capacity to manage the LGC and CICC processes with what is essentially volunteer labor. In the case of Governance Capital, these are compounded by the inherent challenges of getting public officials and department staff out of their comfort zones and fully committed to the practice of collaboration and collective process optimization. With a three-year track record of success, most surveyed leaders feel that the Capital projects have effectively been established as ongoing components of local governance.

WHAT THE DATA SAY

Note: There is no viable and credible data source(s) to assess degrees of government collaboration, coordination, consolidation, or cooperation. Assessment of city and county budgets would not present a full picture as to the effects on this fiscal trends impacted by Governance Capital related strategies. Therefore, no data analysis is included in this section. The potential exists to quantify the savings accrued through governmental collaboration by conducting a targeted study of participating governments' funding and revenue dynamics.

WHAT PEOPLE SAY

Stakeholders engaged in Governance Capital implementation were encouraged by the collaboration, resource-sharing, and focus on continuous improvement demonstrated by partners. Efforts to "get people together around the table," identify and reach consensus on priorities, and "get it done" have been

noteworthy, according to input participants. "We took existing conversations to the next level." There was a dedication of resources from partners and momentum to keep efforts moving beyond the facilitation stage and ensure they are sustainable. At the core, "getting the region's leaders back together again" has been a win. Capital Crossroads then enabled everyone to "stay focused and on track."

While efforts to reinvigorate and expand the Metro Advisory Council have been an ongoing challenge, the Capital's Local Government Collaboration Project and Central Iowa Code Consortium initiatives are entering their third year of working to optimize service delivery and performance of certain key governmental functions. They are considered true successes of regional cooperation and stakeholders hope that progress is sustainable. This is due to the fact that time and personnel efforts to facilitate the LGC committees and Code Consortium are demanding and more resources are required as additional officials become involved and more communities come on board. Governance Capital participants said it has become more challenging to get officials and staff to volunteer for service in these initiatives because it is a "thankless" role subject to "burnout." Issues of "tribalism," or leaders "building silos around your community and not letting others in," can also be counterproductive to Governance Capital efforts, according to input participants.

LGC volunteers cite the face-to-face meetings – in some cases for the first time ever – of certain human resources and department heads as key "first-step" victories of the process. Efforts are now focused on implementation and support of initial consolidation processes and the launch of new collaborations tied to finance and other categories. Volunteers feel it is important to sustain and promote initial successes in order to set up the Collaboration project to take on bigger, more complicated process-alignment opportunities.

Code Consortium participants are concerned that certain policy changes may make it more difficult to achieve consolidation of key development processes. "Chatter" related to the need for more flexible zoning to enable quality of life enhancements has also complicated efforts.

Speaking to challenges related to optimizing the MAC, Governance Capital volunteers again raised the question – as was discussed in Capital Crossroads 1.0 research – of the need for a regional council of governments (COG) in metro Des Moines. This would help smaller communities benefit from the expertise and support of larger cities and formalize tools for inter-governmental conversation and partnerships. However, one input respondent said that rather than creating a new entity, continuing to build capacity in existing partnerships like the LGC would be a more effective solution.

Natural Capital

THE STORY

Though Natural Capital has taken on an expansive and varied set of issues and initiatives, volunteers have moved forward on multiple fronts and remain committed to and engaged in their four areas of focus: land use, zoning, and climate; outdoor recreation and trails; air/water/soil; and marketing and education.

The highest profile efforts are centered on soil and water quality, partially because of an ongoing Des Moines Water Works lawsuit against three Northeast Iowa communities over nitrate contamination in the Raccoon River. A recent report from the U.S. Department of Agriculture's Forest Service provided data on the loss of thousands of acres of Iowa woodlands that is likely contributing to the state and Central Iowa's challenges with farm runoff and water quality. Record high corn and soybean prices at the beginning of the decade compelled farmers to put more land into production, which helped contribute to the decrease in woodlands acreage.

An influential group of local leaders participated in an Iowa Soil and Water Future Task Force that also raised awareness levels of these issues, so much so that the Capital Crossroads 2.0 Steering Committee voted soil and water quality as a top three regional issue for the next strategy. Natural Capital's air/water/soil group is advocating for the implementation of Task Force recommendations as well as supporting WMAs and flood mitigation with development of green infrastructure. Passage of the Iowa's Water and Land Legacy (IWILL) bill was said to be a key "bellwether" of the state's commitment to environmental values and its degree of support for Greater Des Moines' priorities. However, while the fund has been created, it has not been capitalized in six years.

Land use, zoning, and climate team members will support the Urban Land Institute (ULI) – Iowa priorities, including its walkability plan. Members of the Physical Capital focus group cautioned that discussions of regional land use were "touchy" because of different preferences of urban and suburban communities as well as the challenges of implementing region-wide regulatory changes. However, studying and pursuing resource models at a regional scale was identified as an opportunity. A groundswell of support is also building to restripe certain one-way streets in downtown Des Moines to accommodate two-way traffic.

Parks and trails were called out in Capital Crossroads 1.0 input as key amenities that give Central Iowa a competitive advantage for talent. Efforts to enhance the capacity and connectivity of these assets have continued through Natural Capital implementation, including the opening of multiple new trail segments, a new master plan for Des Moines Water Works park, and, most recently, a Water Trails plan released by the Des Moines Area MPO highlighting a 150-mile network of waterways supporting projects such as boat launches, wading areas, business hubs, fishing areas, and the removal of low-head dams along the downtown stretch of the Des Moines River to foster opportunities for water recreation. Natural Capital's outdoor recreation and trails team will support these efforts as well as the cross-Capital Greenway Mapping Project, Jester Park Nature Center development, and Change in the Work's regional park initiative.

Buttressing all these initiatives and priorities is the work of Natural Capital's marketing and education team. Stakeholders acknowledge that without public support of environmental policies, projects, and legislation, their likelihood of implementation is compromised. As such, the team is working on finalizing and promoting an Environmental Educators Plan and striving to increase the visibility of the Natural Capital committee and its projects with graphics, video, and public relations efforts.

WHAT THE DATA SAY

As with other Capitals, measuring holistic data points on Natural Capital implementation progress is challenging in that shared data sets that lend themselves to comparison are either not available (watershed management, water trails, environmental education) or are not available for regions the size of the Des Moines and Ames MSAs (park acreage per capita, trail mileage per capita).

One dataset that does help illuminate criteria related to Natural Capital is the U.S. Environmental Protection Agency's list of counties that experienced drinking water violations. The data in the following table, reflecting a time period between 2013 and 2014, show that Central Iowa counties saw fewer instances of violations than metro Kansas City and but experienced drinking water violations in more of its most populous counties than the Indianapolis and Nashville regions. Greater Des Moines and the Kansas City region were the only two profiled metros to have drinking water violations in their core counties.

COUNTIES WITH DRINKING WATER VIOLATIONS, 2013-2014

MSA	Y/N	County	State
Des Moines-West Des Moines, IA	Y	Dallas County	Iowa
	N	Guthrie County	Iowa
	N	Madison County	Iowa
	Y	**Polk County**	**Iowa**
	N	Warren County	Iowa
Central Iowa (+ Des Moines MSA)	N	Boone County	Iowa
	N	Jasper County	Iowa
	N	Marion County	Iowa
	N	Marshall County	Iowa
Indianapolis-Carmel-Anderson, IN	N	Boone County	Indiana
	N	Brown County	Indiana
	Y	Hamilton County	Indiana
	N	Hancock County	Indiana
	Y	Hendricks County	Indiana
	N	Johnson County	Indiana
	N	Madison County	Indiana
	N	**Marion County**	**Indiana**
	N	Morgan County	Indiana
	N	Putnam County	Indiana
	N	Shelby County	Indiana
Kansas City, MO-KS	N	Johnson County	Kansas
	N	Leavenworth County	Kansas
	Y	Linn County	Kansas
	N	Miami County	Kansas
	N	Wyandotte County	Kansas
	Y	Bates County	Missouri
	N	Caldwell County	Missouri
	Y	Cass County	Missouri
	Y	Clay County	Missouri
	Y	Clinton County	Missouri
	Y	**Jackson County**	**Missouri**
	Y	Lafayette County	Missouri
	N	Platte County	Missouri
	N	Ray County	Missouri
Nashville-Davidson--Murfreesboro--Franklin, TN	N	Cannon County	Tennessee
	N	Cheatham County	Tennessee
	N	**Davidson County**	**Tennessee**
	Y	Dickson County	Tennessee
	N	Hickman County	Tennessee
	N	Macon County	Tennessee
	N	Maury County	Tennessee
	Y	Robertson County	Tennessee
	N	Rutherford County	Tennessee
	N	Smith County	Tennessee
	N	Sumner County	Tennessee
	N	Trousdale County	Tennessee
	N	Williamson County	Tennessee
	N	Wilson County	Tennessee

Core county in **BOLD**
Source: Environmental Protection Agency

Three indices published by Sperling's Best Places for metro areas also prove useful; higher ratings on the indices translate to better environmental quality for that category. Data show that the Des Moines MSA has better air quality than Indianapolis and Kansas City, but lags Nashville, the state, and nation.

In terms of Superfund sites, there are currently three in Central Iowa: Des Moines TCE and Railroad Avenue Groundwater Contamination in Polk County and Midwest Manufacturing/North Farm in Jasper County. The U.S. Environmental Protection Agency (EPA) is actively involved in the cleanup of all of these sites. According to the Superfund Site Index, the Des Moines metro is in a better position regarding Superfund sites than all comparison geographies except Nashville and the State of Iowa as a whole.

Finally, in terms of water quality, the Des Moines MSA outperforms all the comparisons except Nashville. According to the EPA, there are 218 facilities in the Central Iowa region with permits and discharges to waters. While not a complete picture of the rate of pollutants in local and regional systems, this finding is still notable considering the current intensity of discussion in the Des Moines area related to water and soil quality.

ENVIRONMENTAL QUALITY STATISTICS

	Air Quality Index	Water Quality Index	Superfund Site Index
Des Moines, IA MSA	89.9	65.0	86.0
Indianapolis, IN MSA	83.4	22.0	84.0
Kansas City, MO MSA	83.6	46.0	77.0
Nashville, TN MSA	90.5	82.0	93.0
Iowa	92.7	62.0	92.0
United States	93.9	55.0	71.0

Source: Sperling's Best Places

WHAT PEOPLE SAY

Stakeholders involved with Natural Capital implementation praised the depth and breadth of voices engaged in the process and spoke of broadened awareness of environmental issues in Central Iowa. One focus group participant said that Natural Capital had gone from "number ten on the agenda and number one in hearts to number three on the agenda and still number one in hearts." Connectivity between partners and a holistic, integrated focus has helped efforts advance. Participants would like to see broader involvement in certain energy and climate efforts, better attempts to change people's behaviors as it relates to environmental choices, and more inclusion of K-12 districts, college students, and young professionals in conversations on natural issues.

Feedback on accomplishments in Natural Capital implementation often centered around the lack of capacity to effectively advance a disparate array of strategic efforts. Volunteers are questioning how to increase the capacity of the committee and its coordination, better link to what is already going on, and continue to reduce environmental organization silos. Additional connections to other strategic Capitals and

the potential to "join forces" with these volunteers were noted as opportunities. There is fairly good connectivity at the co-chair level, but more intentionality related to partnerships across the board would be useful. Stakeholders spoke of creating a "schedule of initiatives" to move forward as a unit. As Natural Capital "continues to push people out of their comfort zones about problems and solutions," the issue of management capacity becomes especially germane because it will require research and dissemination of information that can help change people's minds on key issues.

The Iowa Soil and Water Future Task Force was a strong move in the direction of increased collaboration, according to input respondents. They feel the findings and recommendations of the Task Force are of great value and have the potential to improve conditions in Central Iowa if leaders can be "continual pressurers and advocates to implement" the Task Force's proposed strategies. A similar focus on collectivizing a set of issues was said to be an opportunity for advancing the Growing Green Communities-supported cross-Capital effort to address Central Iowa's trails, greenways, and parks and recreation systems. By "trying to put it all together" and "wrap a bow around all of this," the advancement of multiple inter-related initiatives would be more viable, according to a Natural Capital volunteer.

Des Moines Water Works' lawsuit against upriver communities was noted as a positive in that it "has been a catalyst for discussion" on the issue of water quality, but the majority of input respondents said that the legal proceedings distract from the potential to achieve collaborative, consensus-based solutions on water quality that can drive positive, lasting change. One input respondent called it the "elephant in the room" that is impeding cooperation among communities. "We can't go forward separately," the respondent added. Some Natural Capital volunteers were surprised to learn that rural landowners had no planning or knowledge of a "way forward" related to nutrient-reduction strategies. Stakeholders feel that these urban/rural tensions will need to be addressed if water quality improvement efforts are to progress. They believe that the WMAs will serve a critical role in these activities.

Natural Capital's marketing and education roles were confirmed by stakeholders and would benefit from expansion. According to one volunteer, to achieve true behavior change, "We have to make it easier to do the right thing. There should be recycling dumpsters in all apartment complexes – and education is necessary to make sure they know what goes where."

When asked to rate the health of Central Iowa's environment, survey respondents praised the region's air quality, natural spaces, wildlife habitats, and biodiversity. They were wary about soil quality, with nearly 30 percent calling it average, but expressed their greatest concern about water quality. Nearly 35 percent said that water quality in Central Iowa was below average or poor. Survey feedback was positive related to availability of parks and trails, with over 78 percent rating it above average or excellent.

Regional Findings

There is no denying that implementation of Capital Crossroads 1.0 has been an overwhelming success; Market Street is happy to relay that fact whenever asked. However, as one regional leader said, "We have to be careful about declaring victory." Indeed, while the hundreds of implementation "wins" secured by Capital Crossroads have made an undeniably positive impact on regional competitiveness, job creation, and wealth-building, the fight for top jobs and talent has never been more intense than in our current economy.

This Regional Assessment has leveraged quantitative and qualitative research to inform narratives of Capital Crossroads' ten strategic Capitals. Though progress has been made in implementation of all ten categories, stakeholders report greater success in some than others. All told, however, not only do these Capital narratives establish a baseline for draft recommendations in the Capital Crossroads 2.0 strategy, but taken together they paint a picture of current and future competitive trends, issues, and opportunities in Central Iowa.

Key regional findings include:

- ✓ Central Iowa is a top performing metro area, not only in the Midwestern U.S. but against any measurable regional criteria. But persistent and deeply rooted challenges in the City of Des Moines and certain rural counties continue to limit these areas' capacity to enjoy the same level of success and wealth-building as other local cities and counties. These trends frequently do not show up in regional data.
    - Some of these issues stem from demographic differences in race, ethnicity, and national origin and ongoing challenges to effectively and sustainably incorporate these groups into the local economy and leadership networks. Some stakeholders feel that inclusion must be a component of the community's fabric and not differentiated by context or Capital.
- ✓ While Central Iowa's population growth continues to increase at a healthy rate and most local school districts are seeing positive performance trends, workforce availability remains the region's top competitive challenge. Consensus has not been reached on whether these are issues of talent availability or a mismatch between worker skills and those required by regional employers.
    - Geographic disparities also exist related to population growth and educational performance.
    - Downtown Des Moines stands out as the locus of the largest investments in new residential and hospitality product and development of renovated and new-build corporate headquarters.
- ✓ For multiple criteria, the urgency for change expressed by Central Iowa Millennials and older generations differs notably.
    - Emerging professionals would like to see the region invest right away in bus rapid transit and transit-oriented development, promote dense walkable urbanism, foster diverse leadership, support individual entrepreneurship, celebrate public art, and redefine its external image.

- Emerging leaders feel that Greater Des Moines must reconcile its multiple high rankings on national lists with the reality that much work remains to make the region a true national destination for talent.
- Young professional preferences are important to Central Iowa leaders who remain concerned that the "next generation" of transformative change-makers has yet to emerge.
- Disparities between Central Iowans' perspectives on their own futures in the region and expectations of their children's priorities are shown clearly in the following results table from the online survey. Over 82 percent of respondents said they will remain in Central Iowa, but almost half are uncertain their children will make the same decision.

PLEASE RATE THE FOLLOWING STATEMENTS:

Answer Options	Not Likely	Somewhat Likely	Very Likely
Likelihood you will continue to live in Central Iowa.	3.2%	15.2%	81.6%
Likelihood you will retire (or remain retired) in Central Iowa.	17.4%	31.4%	51.2%
Likelihood you will raise (or continue to raise) children in Central Iowa.	12.7%	15.1%	72.2%
Likelihood your children (once grown) will want to live in Central Iowa.	19.4%	44.4%	36.2%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

- ✓ Though issues of sustainable growth related to transportation, land use, public services, and housing affordability are key stakeholder concerns, water and soil quality has emerged as a top-tier issue for Central Iowa residents. This is in contrast to a lower profile in Capital Crossroads 1.0 and the mid-course review process.
- ✓ Despite Central Iowa stakeholders' concerns about aspects of the community's future, by far the most common sentiment is that the region continues its ascent as a top-tier metro area in the Midwest and nation as a whole. When asked what qualities differentiate Central Iowa in this regard, the following word cloud demonstrates that survey respondents feel the region's people, sense of community, and the opportunities it provides to residents are its most compelling assets.

IN YOUR OPINION, WHAT IS CENTRAL IOWA'S GREATEST STRENGTH - THE THING THAT DIFFERENTIATES THE REGION FROM ANYPLACE ELSE?

CONCLUSION

In just five short years, Central Iowa's Capital Crossroads initiative has built an interactive implementation network of over 650 volunteers and countless local governments, businesses, organizations, institutions, and citizen groups to advance strategic tactics in ten diverse Capitals representing the region's principal competitive focus areas. It is supported by one full-time director and staff liaisons across multiple partner organizations. All Capital groups spoke of the benefits from working together collaboratively, forging coordinated networks and systems, and reducing programmatic silos between partner entities. "Cross-Capital" initiatives have emerged from interactions among committees overseeing the strategy's principal tactical activities.

As can be expected and was reported in the Capital Crossroads mid-course review, concerns over the capacity to implement the full breadth of the strategy continue to be expressed. "Volunteer fatigue" is still an issue among the Capital committees, with participants interested in identifying additional crosscutting projects and "common intersections" between Capitals. Some would also like to see a more metric-driven implementation focus. Others wonder if opportunities are being missed to incorporate more local and regional planning efforts into the Capital Crossroads network and "connect the dots."

Volunteers also expressed a desire to broaden the exposure and awareness of Capital Crossroads in Central Iowa. One leader noted, "We need to find a way to get more people to have a better understanding of the mechanics and people behind Capital Crossroads… Co-chairs and committee members are still engaged and have bought in, but there is confusion in the broader community." While "hard work isn't always newsworthy," some volunteers would like to see more visible outreach and information delivery to the general public. They also believe that this increased exposure will help volunteer recruitment efforts and ensure that Capital Crossroads is sustainable over the long term.

APPENDIX: ONLINE SURVEY RESULTS

An online survey to query stakeholders from across Central Iowa on a broad range of topics and their perspectives on the Capital Crossroads initiative and its next five-year plan was available from mid-May until the end of July 2016 and garnered 2,815 responses. Responses to key questions are featured in the following pages, along with a sampling of comments to open-ended questions.

What is your race/ethnicity?

Answer Options	Response Percent
White, not Hispanic	90.4%
Black, not Hispanic	2.0%
Hispanic	1.8%
Asian or Asian-American	1.0%
Other	1.3%
Prefer not to answer	3.5%

What is your income level?

Answer Options	Response Percent
Currently not earning income	2.1%
Below $15,000	3.3%
$15,000 to $24,999	1.9%
$25,000 to $39,999	9.8%
$40,000 to $69,999	28.7%
$70,000 to $99,999	18.3%
$100,000 and above	28.1%
Prefer not to answer	7.7%

What is your age?

Answer Options	Response Percent
Younger than 18	0.2%
18-24	6.7%
25-34	21.9%
35-44	22.0%
45-64	42.8%
65 and older	6.4%

What county do you live in?

Answer Options	Response Percent
Polk County	71.5%
Dallas County	7.6%
Warren County	7.1%
Marion County	4.9%
Story County	1.5%
All other counties	7.4%

In your opinion, what is Central Iowa's GREATEST STRENGTH - the thing that differentiates the region from anyplace else?

If Capital Crossroads 2.0 could only accomplish ONE THING, what would you like it to be?

Note: The following questions feature responses from participants self-identifying as young professionals.

Please indicate if you disagree or agree with the following statement about young professionals (working ages 25-34):

	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Central Iowa is an attractive and desirable place to live for young professionals.	1.6%	3.2%	5.8%	46.7%	41.8%
Young professionals can afford to live here.	1.0%	4.5%	7.2%	40.5%	44.4%
Central Iowa has housing options that are attractive to young professionals.	1.9%	6.5%	9.8%	50.5%	29.3%
Central Iowa can successfully compete for young, new residents from outside the community.	1.7%	7.6%	14.4%	50.0%	24.2%
Central Iowa retains college graduates that grew up in the region.	1.6%	11.0%	20.9%	41.6%	15.7%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

If you feel that it's a challenge, what needs to be done in Central Iowa to more effectively retain and attract young professionals?

Top response categories include:

- Affordable housing
- More entertainment options
- Better connectivity (public transportation)
- More job diversity
- More childcare capacity

The following are randomly selected responses:

- A genuinely urban lifestyle needs to be more possible in Des Moines. We're pushing for more density downtown and in some neighborhoods, which is great, but we need more amenities that reduce the dependence on cars.
- I think the biggest challenge is finding the type of housing they'd like for a price they can afford.
- We need to let them know what there is here. I think this is an attractive area for young professionals but that it isn't on their radar screen.

- Additional expansion of entertainment opportunities and increased efforts to control the cost of living relative to income. Currently, I think, Iowa ranks favorably on that metric, but it needs to remain that way.
- Childcare in central Iowa can be a challenge. Organizations would serve their employees well and attract top candidates if they were able to offer child care on site or in coordination with nearby centers.
- We are a group of people care a great deal about social and political issues, and as we age and have children of our own, we want to be in a location where we and our children can depend on quality schools, care for the environment, and socially/globally aware government and individuals.
- I would LOVE to see some kind of recurring event where state/city officials hold public panels geared towards gathering the opinion of the public on issues (city planning, environmental practices, the general 'direction'). More community programs sponsored by both government entities and business entities in order to drive volunteerism.
- Services to help find/develop career paths, affordable rental or housing purchase options
- Start planning for more efficient public transit. (Rail systems?) This is obviously expensive, but with all the communities like Ankeny and Waukee rapidly growing around Des Moines, this would be a huge way to attract YPs, as well as really help expand Central Iowa nationally.
- We need to help young professionals from all socioeconomic and ethnic/cultural backgrounds become engaged in their communities and find job placement/opportunities to continue their education.

The following questions were answered by all respondents.

Please rate the following aspects of Central Iowa's quality of life.

Answer Options	Poor	Below Average	Average	Above Average	Excellent
Overall cost of living	0.6%	6.0%	28.5%	38.6%	26.4%
Diversity of housing options (single-family, multifamily, mixed-use, etc.)	2.4%	11.4%	39.6%	34.9%	11.8%
Housing affordability	2.6%	12.4%	35.9%	35.8%	13.3%
Quality of healthcare	1.1%	4.5%	30.9%	44.6%	19.0%
Availability of licensed child care	5.0%	21.9%	44.1%	21.7%	7.3%
Traffic congestion	1.4%	17.5%	29.1%	34.4%	17.6%
Public transit capacity	17.4%	39.8%	28.9%	10.9%	3.0%
Sense of personal and property safety	0.5%	2.8%	20.5%	51.5%	24.7%
Availability of parks and trails	1.0%	4.3%	16.1%	45.0%	33.6%
Arts and cultural facilities and programs	0.8%	7.4%	26.9%	41.6%	23.3%
Shopping and dining opportunities	0.7%	5.6%	30.6%	40.4%	22.7%
Nightlife opportunities	1.5%	11.6%	38.4%	33.4%	15.1%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

Please rate the following aspects of the health of Central Iowa's environment?

Answer Options	Poor	Below Average	Average	Above Average	Excellent
Air quality	0.5%	2.5%	22.1%	50.4%	24.6%
Water quality	12.9%	21.5%	30.3%	26.0%	9.3%
Soil quality	2.6%	7.9%	28.2%	40.6%	20.7%
Natural spaces	1.7%	9.4%	30.7%	42.9%	15.2%
Wildlife habitat	3.8%	16.3%	35.7%	33.6%	10.7%
Bio-diversity	6.0%	17.2%	41.6%	28.0%	7.2%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

In your opinion, what additional quality of life amenities does Central Iowa need most to become more competitive with comparable communities?

Please rate the following statements on the community's diversity and openness. (all respondents)

Answer Options	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Central Iowa has a good diversity of people and cultures.	3.3%	21.6%	23.4%	46.4%	5.3%
Opportunities, communities & networks in Central Iowa are accessible & open to a diverse range of people & cultures.	3.3%	16.9%	26.1%	48.2%	5.5%
Central Iowa is a welcoming place.	1.3%	4.9%	13.5%	61.0%	19.3%
Central Iowa is an inclusive place.	1.9%	11.9%	29.2%	47.1%	9.9%

Please rate the following statements on the community's diversity and openness. (respondents identifying as African-American, Latino, Asian-American, or Other)

Answer Options	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Central Iowa has a good diversity of people and cultures.	10.2%	30.5%	22.7%	32.0%	4.7%
Opportunities, communities & networks in Central Iowa are accessible & open to a diverse range of people & cultures.	8.7%	27.6%	22.8%	38.6%	2.4%
Central Iowa is a welcoming place.	4.7%	4.7%	20.5%	54.3%	15.7%
Central Iowa is an inclusive place.	7.0%	18.0%	35.9%	29.7%	9.4%

Please respond about the quality in the school/district with which you are most familiar.

Answer Options	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Children in our school/district receive a high-quality education	1.5%	9.4%	8.2%	43.9%	37.0%
Pre-K programs are readily available and affordable	4.3%	16.3%	14.7%	42.7%	22.0%
Teachers and administrators are committed and engaged	0.6%	4.7%	10.2%	49.5%	35.0%
There are ample opportunities for parents to become involved	0.2%	4.5%	8.3%	47.2%	39.8%
There is sufficient attention paid to the needs of English Language Learners	5.0%	17.6%	25.4%	38.8%	13.3%
Facilities are clean, modern, and have the latest technology	1.5%	9.8%	12.7%	46.1%	30.0%
Schools in this district provide a safe learning environment	0.8%	4.3%	10.4%	48.3%	36.2%
There is focused attention on STEM (science, technology, engineering, mathematics) curricula	1.3%	8.0%	15.2%	48.3%	27.3%
There are adequate opportunities for exposure and experiences in the creative arts.	4.0%	17.5%	13.1%	44.8%	20.5%
There are opportunities for career-based learning and/or advisement	2.8%	15.3%	21.0%	44.1%	16.8%
Programs for career-based education are widely available	3.6%	21.4%	25.1%	35.3%	14.6%
More programs for the skilled trades are needed for non-college bound students	1.5%	5.4%	12.3%	37.6%	43.2%
After-school programs are widely available	3.9%	16.9%	20.6%	41.2%	17.4%
Community and business leaders have a commitment to quality, public K-12 education	4.2%	12.9%	18.5%	40.1%	24.3%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

Please rate the quality of public and private colleges and universities in Central Iowa.

Answer Options	Poor	Below Average	Average	Above Average	Excellent
Central College	1.3%	3.0%	26.9%	41.8%	27.0%
Des Moines Area Community College	0.8%	3.6%	28.2%	43.6%	23.8%
Des Moines University	0.5%	1.9%	18.6%	46.7%	32.2%
Drake University	0.3%	1.5%	14.0%	45.5%	38.7%
Faith Baptist Bible College and Theological Seminary	14.1%	20.3%	38.6%	16.5%	10.5%
Grand View University	1.2%	9.0%	34.9%	36.5%	18.4%
Grinnell College	0.9%	0.8%	11.5%	31.1%	55.7%
Iowa State University	0.9%	1.5%	17.6%	41.2%	38.7%
Marshalltown Community College	3.1%	16.8%	50.3%	22.2%	7.6%
Mercy College of Health Sciences	1.5%	5.4%	36.1%	37.7%	19.2%
Simpson College	0.6%	3.8%	24.8%	43.0%	27.8%
Unity Point Health-Des Moines School of Radiologic Technology	2.5%	2.7%	44.2%	33.0%	17.6%
University of Iowa (Des Moines Area programs)	1.7%	4.3%	25.9%	39.5%	28.6%
Upper Iowa University (West Des Moines campus)	5.4%	15.5%	39.9%	26.6%	12.6%
William Penn University (West Des Moines campus)	8.1%	23.7%	38.1%	19.9%	10.2%

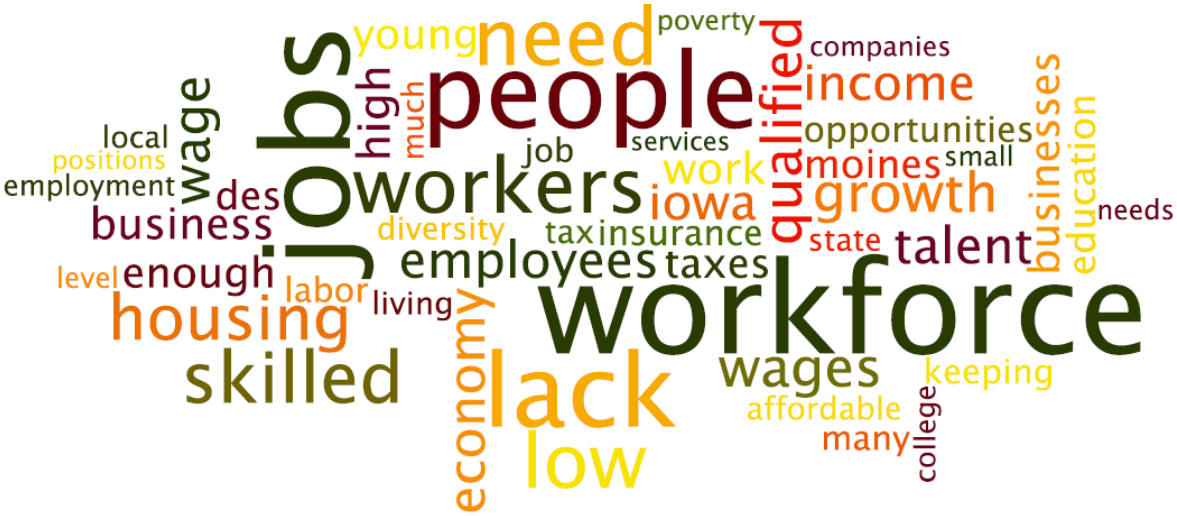
Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

Please rate your awareness (with 1=not aware and 10=very aware) of the following initiatives supportive of Capital Crossroads:

Answer Options	Rating Average
The Tomorrow Plan	2.59
DART Forward 2035	2.89
Housing Tomorrow	2.12
Regional water trails	3.01

Note: The following questions feature responses from participants self-identifying as management level or above in their companies.

In your opinion, what is the biggest CHALLENGE(S) facing Central Iowa's economy?



What is the MOST IMPORTANT THING that needs to happen to improve Central Iowa's economy?

Please evaluate the following aspects of Central Iowa's business climate:

Answer Options	Significant Disadvantage	Disadvantage	Neutral	Advantage	Significant Advantage
Availability of Class A office space	0.5%	6.5%	32.6%	45.6%	14.8%
Availability of industrial sites/buildings	1.2%	9.6%	31.0%	42.9%	15.3%
Road and highway capacity and accessibility	1.5%	12.8%	16.0%	43.8%	26.0%
Passenger air capacity	7.6%	33.7%	27.8%	25.4%	5.5%
Utilities (water, sewer, electric) capacity	0.8%	5.5%	28.3%	49.1%	16.3%
Gigabit internet connectivity	9.2%	22.7%	31.4%	28.4%	8.3%
Utilities cost	0.9%	7.8%	33.1%	42.7%	15.5%
Labor costs	0.9%	6.7%	24.9%	52.3%	15.1%
Local tax climate	4.7%	20.4%	36.5%	31.7%	6.7%
"Business-friendliness" of development-review process	2.2%	10.1%	29.6%	42.2%	15.9%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

Please rate the following statements according to the degree to which you agree.

Answer Options	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
My business will remain in Central Iowa for the long-term.	1.9%	0.7%	4.6%	23.7%	69.0%
My business receives the support from economic development organizations it needs to grow.	4.4%	14.8%	30.8%	28.8%	21.2%
My business receives the support from government it needs to grow.	6.7%	22.1%	28.5%	29.0%	13.7%
I have no trouble finding quality employees for my business.	9.1%	36.5%	19.4%	26.2%	8.8%
I would support raising the minimum wage in my community to $15 per hour.	20.0%	21.0%	14.1%	20.5%	24.4%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

Note: The following questions feature responses from participants self-identifying as entrepreneurs.

Please rate the following components of Central Iowa's entrepreneurial climate:

Answer Options	*Very Weak*	*Weak*	*Average*	*Strong*	*Very Strong*
Availability of early-stage investment capital	13.9%	20.8%	45.8%	19.4%	0.0%
Availability of venture and later-stage capital	2.8%	19.7%	36.6%	38.0%	2.8%
Incubation facilities	1.4%	25.7%	44.6%	24.3%	4.1%
Accelerator programs	1.4%	18.1%	41.7%	33.3%	5.6%
Mentorship opportunities	4.8%	13.3%	31.3%	41.0%	9.6%
Entrepreneur-focused events and meetups	3.4%	13.8%	39.1%	34.5%	9.2%
Availability of talent (skilled employees)	8.0%	17.0%	38.6%	30.7%	5.7%
Small business development support	4.6%	19.5%	44.8%	28.7%	2.3%

Note: Respondents who answered "no opinion/don't know" were not factored into these percentages

What could be done to enhance Central Iowa's entrepreneurial capacity or "ecosystem"?

The following are randomly selected responses:

- More cooperation between Iowa Innovation Corp, incubators, accelerators, JPEC's, Iowa state, CIRAS, Central College, EMERGE, Cultivation Corridor, etc, etc. They all do their own thing, and don't refer or collaborate much with each other.
- We need more highly-skilled tech and creative sector. There a surplus of mid-range talent, but not enough high-end talent.
- Improve availability of early stage investment capital and focused training programs/classes
- Make it more proactive and less reactive — and way more outreach. There should be a team whose job it is to seek out existing and nascent small businesses and consult with them. Most small businesses and entrepreneurs don't know what resources exist that could help them make meaningful strides.
- We have a tremendous amount of business leaders that are in the later stage of their careers, we need to get them involved and utilize their wisdom/experience.
- An active business mentor program would be useful, as would an organized capital sourcing program
- More entrepreneur/small business meetings and events.
- Recognition that 20-30 somethings aren't the only entrepreneurs. 50-70 year olds are looking for "semi-retirement" opportunities to craft small businesses and share skills.
- Make the resources that are available more visible. There are probably many people that could utilize what's out there and just don't know about the programs

Of survey respondents, 6.2% indicated they had participated in a Capital Crossroads strategic Capital Committee. The following questions were answered by this cohort.

Please rate your experience with Capital Crossroads implementation with 1 = Poor and 10 = Outstanding:

Answer Options	1	2	3	4	5	6	7	8	9	10
Overall volunteer experience	1.3%	2.7%	3.3%	4.7%	11.3%	14.0%	17.3%	21.3%	15.3%	9.3%
Usefulness of meetings	1.3%	3.3%	6.0%	7.3%	7.3%	15.3%	18.7%	19.3%	14.0%	8.0%
Translation of meeting discussion into action	3.3%	4.0%	6.7%	5.3%	10.0%	15.3%	18.0%	16.7%	11.3%	10.0%
Communications and information-flow before and after meetings	2.7%	3.3%	2.0%	7.3%	10.7%	14.0%	19.3%	22.7%	12.7%	6.0%
Interactions with volunteers from other Capital Committees	5.3%	5.3%	6.7%	8.0%	18.7%	10.7%	16.0%	14.7%	6.0%	7.3%
Likelihood you will continue to serve as a Capital Crossroads volunteer	5.3%	2.7%	2.7%	3.3%	10.0%	6.7%	8.0%	17.3%	21.3%	22.7%