



HAYS CALDWELL EDP

Economic Development Strategic Plan

Letters to Our Partners

A Message from the Exec Committee

Fellow investors, partners, communities, and colleagues,

The Hays Caldwell Economic Development Partnership (HCEDP) is at an exciting and pivotal point.

At this juncture, we are excited to share HCEDP's new five-year strategic plan. This roadmap will guide our efforts to enhance economic opportunity, strengthen partnerships, and position this region as a premier destination for business investment.

The plan reflects months of thoughtful collaboration and input from our investors, community leaders, educators, and industry partners. It outlines a clear, actionable framework to advance regional prosperity — with priorities focused on expanding our workforce and education pipeline, supporting infrastructure and policy alignment, attracting and retaining high-impact employers, and elevating the marketing of our dynamic region.

More than a document, this strategic plan represents a shared commitment to growth and resilience. It is designed to align our collective strengths – public and private, local and regional – so that together, we can accelerate progress and deliver measurable outcomes for the communities we serve.

Of course, achieving these goals will require dedication and engagement. HCEDP's success depends on the continued partnership and investment of leaders like you. I encourage you to stay involved, lend your expertise, and participate in the committees and initiatives that will bring this plan to life.

As we look to the future, we anticipate new levels of opportunity, from national and international investment to emerging industry clusters. These will define our region's economic landscape for decades to come. The road ahead will demand focus and collaboration, but the potential rewards for our communities are immense.

Our legacy of collaboration, innovation, and shared vision are the launchpad for the future. Your commitment and support have helped lay a solid foundation for growth. Thank you for your continued trust and partnership. Together, we are shaping the next chapter of growth for the Texas Innovation Corridor, and the future is bright.

With appreciation,

Mick Hawton

Chairman of the Board

Letters to Our Partners

A Message from the CEO

Economic Development Partners,

As we look to the future of the Hays Caldwell Economic Development Partnership (HCEDP), I am proud to share the launch of our new five-year Strategic Plan, a bold, forward-thinking framework that will guide our mission to enhance economic growth, promote innovation, and ensure sustainable development across Hays and Caldwell counties.

This plan is the product of collaboration. It reflects months of thoughtful dialogue and input from our investors, public and private sector partners, community leaders, and educators. Together, we have created a roadmap that not only outlines where we're headed but also how we'll get there through engagement, shared effort, and collective accountability.

Our success depends on you, the investors, partners, and advocates who have made HCEDP what it is today. This plan is designed to strengthen that partnership by providing new and meaningful ways for you to participate. Whether through serving on committees, contributing to task forces, or lending your industry expertise, your engagement will directly shape the outcomes we achieve.

Economic development is not a solo endeavor; it is built through collaboration. The communities, companies, and individuals who step forward today will help define the future of the Texas Innovation Corridor. Your continued involvement will help us expand workforce and education initiatives, attract quality employers, align policy and infrastructure priorities, and elevate the visibility of our region as a destination for investment and opportunity.

The years ahead hold tremendous promise. With new investment, new industries, and a growing regional identity, we stand ready to move from potential to progress, together. I am deeply grateful for your partnership, your leadership, and your belief in what we can achieve when we work as one.

Thank you for being an essential part of HCEDP's mission. Together, we are not only advancing economic growth, but we are shaping the future of our region for generations to come.

With appreciation,

Mike Kamerlander

President & CEO

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Who We Are

Hays Caldwell Economic Development Partnership, or HCEDP, is a 501(c)6 nonprofit public-private partnership that serves as the regional economic development organization for the City of San Marcos, and Hays and Caldwell Counties, located at the heart of the Texas Innovation Corridor.

HCEDP promotes and markets the region to attract new employers, assists existing companies to expand, fosters entrepreneurial growth, and ensures the continued development of our skilled workforce.



What We Do



BUSINESS ATTRACTION

HCEDP works diligently with site consultants and company leaders through all phases of the site selection process, helping them to determine whether our region will be a good fit for a location or expansion. HCEDP promotes the assets, features and benefits of the Texas Innovation Corridor to attract new business operations and their job producing investment. Since HCEDP's founding in 2010, more than 70 companies have relocated or expanded to the footprint, resulting in an estimated annual economic impact of \$2.9 billion and thousands of new jobs for the residents of Hays and Caldwell Counties.



BUSINESS RETENTION & EXPANSION

HCEDP assists already established companies in Hays and Caldwell Counties, helping them with their growth and expansion aspirations by connecting them with a network of resources.



WORKFORCE/TALENT DEVELOPMENT

HCEDP partners with government agencies, the local business community, educational institutions, and other workforce development partners to prepare our talented workforce for the current and future needs of our growing economy.



MARKETING

The purpose of marketing is clear: to reach your target audience and showcase the advantages of relocating and growing your business along the Texas Innovation Corridor. Once established here, we aim to keep the benefits of doing business in Hays and Caldwell Counties 'top of mind' for others. The Hays Caldwell Economic Development Partnership's marketing team is dedicated to supporting your company's success by actively promoting your growth and prosperity within the region.



ENTREPRENEURSHIP

HCEDP helps entrepreneurs and small business owners by connecting them with the regional resources they need to properly prepare, plan, grow and succeed in the Texas Innovation Corridor.



Board of Directors

Mick Hawton
Chairman of the Board
Sara Ibarra
Secretary
David Case
Treasurer
Hondo Powell
Board Member
Jane Hughson
Board Member
Stephanie Reyes
Board Member
Alyssa Garza
Board Member
Shane Scott
Board Member
Debbie Ingalsbe
Board Member
Ed Theriot
Board Member
Holly Malish
Board Member

CJ Watts
Board Member
Shawn Cox
Board Member
Dr. Michael Cardona
Board Member
Mark Estrada
Board Member
Jim Wimberly
Board Member
Jim Chiles
Board Member
Jeff Nydegger
Board Member
James Lovett
Board Member
Jennifer Finch
Board Member
Lacee Duke
Board Member
John Doucet
Board Member

John Cyrier
Board Member
Page Michel
Board Member
Pablo Zuniga
Board Member
Ruben Becerra
Board Member
Dr. Kelly Dampousse
Board Member
Dr. Russell Lowery Hart
Board Member
Phil Hutchinson
Board Member
Bob Honeycutt
Board Member
Jennifer Storm
Board Member
Jordan Schaefer
Board Member
Trina Eastwood
Board Member

Lance Spruiell
Board Member
Victoria Vargas
Board Member
Norman Turner
Board Member
JD Dillender
Board Member

Committee Structure

Standing Committees

Purpose:

To establish a precedence for the formation and participation of investors in HCEDP committees. Under the current bylaws the Board Chair may form and structure any number of committees. Committees have been used in the past to move the organization forward in the realization of its purpose and plans. In many cases these have been related to the strategic plan or other needs-based situations. Given the maturity of HCEDP, and after significant dialogue amongst the current executive committee, we propose the following committee structure to be used moving forward.

- Finance

- a. Purpose - to provide guidance, oversight and planning for, and use of the annual HCEDP budget.
- b. Main Task(s) - review organizational spending quarterly, plan annual budget, and provide actionable financial recommendations to the full board.
- c. Members - chair = Treasurer, minimum of one public investor representative, minimum of two private investor representative, board chair.

- Administration

- a. Purpose - to provide recommendations on organizational adjustments and alignment as identified by the executive committee and board.
- b. Main Task(s) - review the current bylaws and organizational structure and provide guidance and recommendations to the full board on organizational adjustments and alignment.
- c. Members - chair = Secretary, minimum of one public investor representative, minimum of one private investor representative, board chair.

Committee Structure (continued)

Standing Committees

- Legislation and Public Policy
 - a. Purpose - Ensure HCEDP is informed and engaged in local and state public policy initiatives which impact economic development.
 - b. Main Task(s) –
 - i. Be aware and track the progress of current local and state economic development public policy initiatives.
 - ii. Provide recommendations and language to the board regarding potential responses to public policy initiatives.
 - iii. Provide recommendations of public policy initiatives to support at the local and state level.
 - iv. Work closely with HCEDP President and executive committee and local and state elected officials to provide input into economic development policy initiatives.
 - c. Members - chair = chair elect, minimum of three public investor representatives, minimum of three private sector representatives.

Committee Structure (continued)

Standing Committees

- Data and Technology
 - a. Purpose - Provide input, guidance, and recommendations to HCEDP research for the improvement of existing or future technology solutions to drive engagement with site selectors and leads in the HCEDP footprint.
 - b. Main Task(s) –
 - i. Review and provide user feedback on existing technology and data tools for both HCEDP and investor partners who are seeking to enhance economic development in the HCEDP footprint.
 - ii. Provide user feedback on data and technology tools.
 - iii. Assist with building relationships with existing or new partners who are seeking to provide technology tools.
 - iv. Provide recommendations to the President, executive committee and board for the adoption and use of new data and technology tools.
 - c. Members - chair = private investor, minimum of one public investor, minimum of two private investors.

Committee Structure (continued)

Standing Committees

- Community Engagement

- a. Purpose - Ensure we build and maintains deep and meaningful relationships with all communities in the HCEDP footprint.
- b. Main Task(s) –
 - i. Meet with HCEDP staff and communities who are not currently a part of HCEDP and determine how we can be of assistance to them.
 - ii. Provide recommendations to the President and executive committee on service enhancements for member communities.
 - iii. Assist President and staff with responses to questions and issues that may arise with member communities.
- c. Members – chair = public investor, minimum of two public investors, minimum of two private investors.

- Events

- a. Purpose - Continuous improvement of existing events and development of new events.
- b. Main Task(s) –
 - i. Assist HCEDP staff with planning and promoting existing events.
 - ii. Assist HCEDP staff with the development of new events to enhance economic development for the member communities and HCEDP investors.
 - iii. Provide meaningful and actionable feedback on HCEDP events.
- c. Members - chair = private or public investor, minimum of one public investor, minimum of one private investor.

Committee Structure (continued)

Standing Committees

- Events

- a. Purpose - Continuous improvement of existing events and development of new events.

- b. Main Task(s) –

- i. Assist HCEDP staff with planning and promoting existing events.

- ii. Assist HCEDP staff with the development of new events to enhance economic development for the member communities and HCEDP investors.

- iii. Provide meaningful and actionable feedback on HCEDP events.

- c. Members - chair = private or public investor, minimum of one public investor, minimum of one private investor.

Committee Structure (continued)

Standing Committees

- Nominations Committee
 - a. Purpose - Nominate and approve to Board of Directors potential members to the Board.
 - b. Main Task(s) –
 - i. Vet nominees for Board.
 - ii. Recommend new Board members.
 - iii. Recommend officers to the Board at large.
 - iv. Work closely with HCEDP President and executive committee and local and state elected officials to provide input into economic development policy initiatives.
 - c. Members – Per the bylaws:
 - i. The Chair
 - ii. The Chair-elect
 - iii. One Director
 - iv. Representative who is not also a Director
 - v. One Director, who shall be the Mayor or member of the San Marcos City Council

Committee Structure (continued)

Temporary Committees

- Capital Campaign

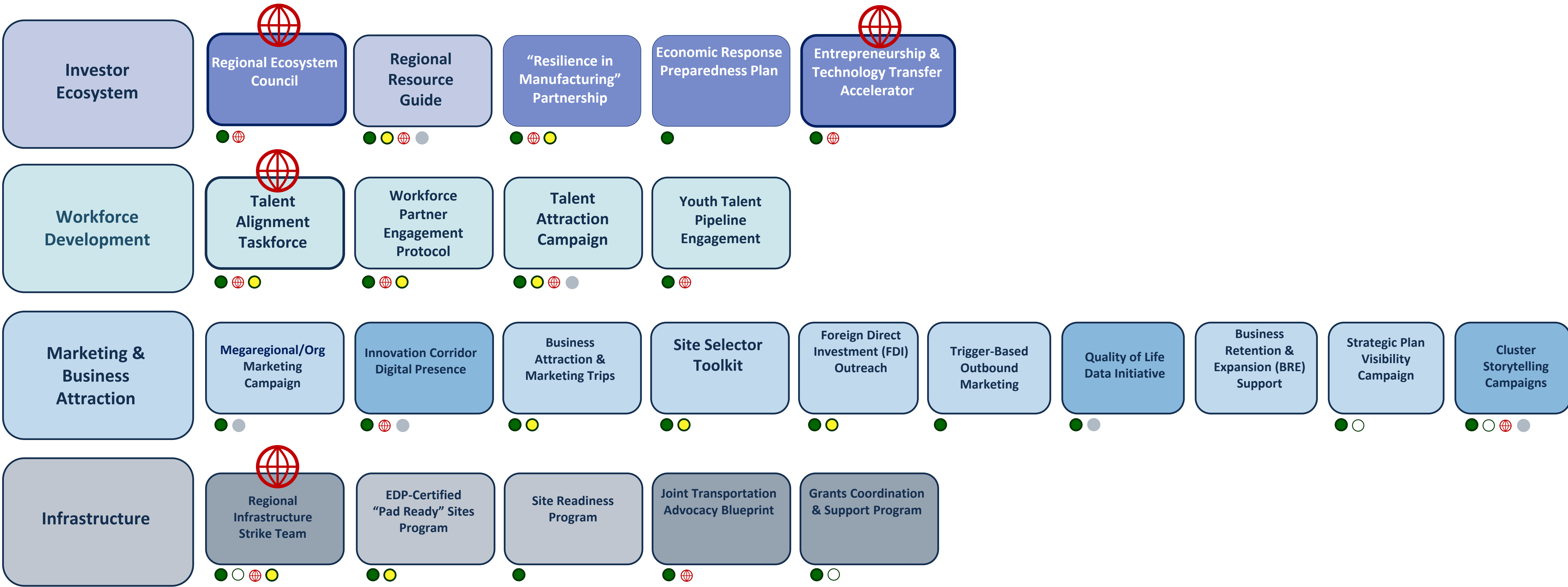
- a. Purpose – Ensure HCEDP achieves its fundraising goals.
- b. Main Task(s) -
 - i. Manage list of existing investors to ensure maximum investment from all organizations.
 - ii. Develop list of potential new investors from public and private investor networks.
 - iii. Develop relationships with potential new investors, meet with them to share value of investing in HCEDP.
- c. Members - chair = named by board chair when beginning planning for capital campaign, minimum of two public investors, minimum of three private investors.

- Office Relocation/Improvement

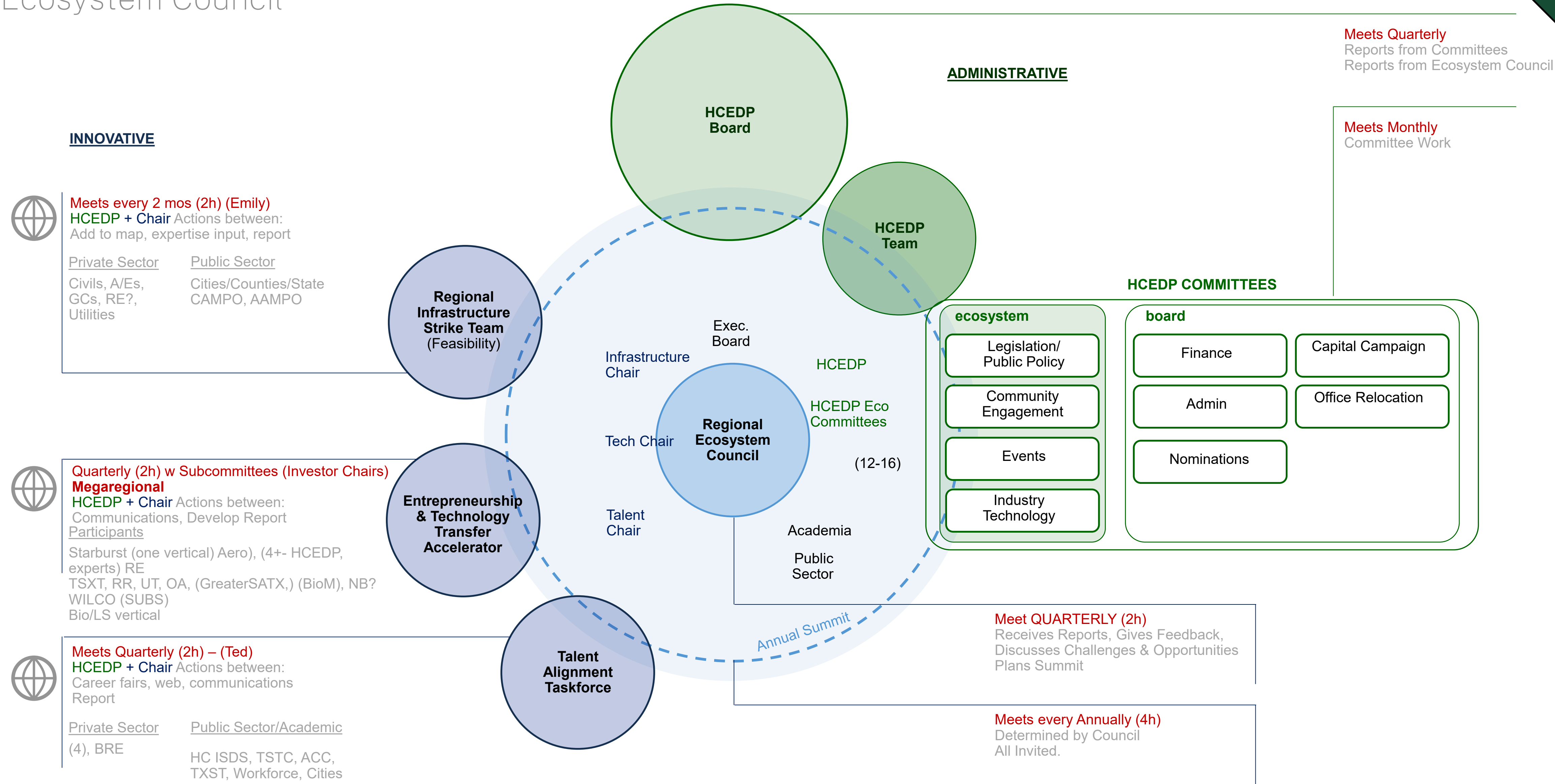
- a. Purpose – Ensure HCEDP has sufficient office space to maximize operations.
- b. Main Task(s) -
 - i. Develop list of potential spaces available to lease in the HCEDP footprint.
 - ii. Assist President and staff with negotiation of lease for new office space.
 - iii. Assist President and staff with space planning for new office.
- c. Members - chair = private investor with real estate license/experience in office leasing, minimum of two private investors.

Enhanced Investor Engagement

Strategic Plan Poster



Enhanced Investor Engagement Ecosystem Council



Strategy Role Glossary

Action Plan

The roles listed below are intended to reflect the role that the Hays-Caldwell EDP as well as investors and stakeholders will play in executing the strategies presented within this strategic plan.

Task Roles

- **Convener: Organization in the lead – HCEDP or Executive Committee**

The Convener brings together diverse stakeholders, facilitating collaboration and dialogue to advance the strategy. This role focuses on building relationships, fostering trust, and creating partnership opportunities and shared action. The Convener ensures inclusivity, bridges gaps between groups, and creates a platform for collective contributions toward the strategy's success.

- **Advocate: Investor**

The Advocate champions the strategy by promoting its goals, values, and benefits to key audiences, including the public, policymakers, and potential partners. Advocates raise awareness, generate support, and secure buy-in from stakeholders whose engagement is crucial for success. This role involves communication, lobbying, and outreach efforts to build momentum and foster a positive perception of the initiatives.

- **Leader: Taskforce / Committee Chair**

The Leader drives the implementation of the strategy by providing direction, oversight, and motivation to the stakeholders involved. This role is pivotal in maintaining focus on the goals, making critical decisions, and ensuring accountability throughout the process. Leaders should help to inspire collaboration, resolve conflicts, and guide teams toward achieving desired outcomes.

Our Investors

LEAD INVESTORS (\$20,000+)

- Brookfield Residential
- BVRT Utility Holding Co., LLC
- CHRISTUS Santa Rosa Hospital
- Corridor Title
- Doucet & Associates A Kleinfelder Company
- Embassy Suites
- ENDEAVOR Real Estate Group
- Frost Bank
- La Cima
- McCoy's Building Supply
- Plum Creek Development Partners
- Scarborough Lane Development
- SH 130 Concession Company
- Walton Global
- Winstead PC
- Buda Luling Economic Development Corporation
- Caldwell County
- City Of Buda-City Hall
- City of Kyle
- City of Lockhart
- City of San Marcos
- Hays County
- Lockhart Economic Development Corporation
- Lower Colorado River Authority
- Pedernales Electric Cooperative, Inc.
- Texas State University

PRINCIPAL INVESTORS (\$10,000+)

- Acres Advisory Group
- American Constructors
- Austin Business Journals
- Austin Commercial
- Austin Community College District
- Carson Properties
- Cude Engineers
- Headwater Companies
- Highpointe Communities Inc
- Hill & Wilkinson General Contractors
- HNTB Corporation
- Ingram Readymix, Inc.
- JE Dunn Construction
- La Tierra Realty
- Live Oak
- Page
- Pape-Dawson Engineers, Inc.
- Quiddity Engineering
- Real Cold
- Related Fund Management
- Rosendin Electric, Inc.
- Southwest Engineers Inc.
- SpawGlass
- Tex-Mix Concrete

Our Investors

EXECUTIVE INVESTORS (\$5,000+)

- American Structurepoint, Inc.
- American Ventures
- Avison Young
- CBRE
- CFAN
- Chuck Nash Auto Group
- Clean Scapes
- Divided Sky Roofing & Solar
- DPFG, Inc.
- Drenner Group
- Four Rivers Association of Realtors
- Gary Job Corps
- HCS Technical Services, LLC
- Heldenfels Enterprises, Inc.
- Heritage Title of Austin
- KDW-Kingham Dalton Wilson, Ltd
- Kimley-Horn
- Mark Shields Enterprises
- Mark Smith Realty Consultants
- Maxwell Locke & Ritter
- Metcalfe Wolff Stuart & Williams, LLP
- ONE Gas
- Red Oak Development Group
- Republic Services
- RiverCity Screenprinting & Embroidery
- RVi Planning & Landscape Architecture
- Safe Hands Holdings/ Elegant Holdings
- Sage Capital Bank
- San Marcos Industrial Foundation
- Schertz Bank & Trust
- Studio8 Architects
- T. Wilson
- Texas Disposal Systems
- Texas Gas Service
- Texas Regional Bank
- University Federal Credit Union
- Waterridge
- WSB
- Yarrington Road Materials, LP / FM 158 Land, LTD
- City of Dripping Springs
- City of Luling
- City of Mustang Ridge
- City of Uhland
- City of Wimberley
- Guadalupe-Blanco River Authority Industrial Development Corporation
- Luling Economic Development Corporation

Our Investors

ASSOCIATE INVESTORS (\$1,500 +)

- Ace Relocation Systems, Inc.
- Ascension Seton
- Balcones Real Estate
- Bank of America
- Bartlett Cocke General Contractors
- Benchmark Ins. Group, Inc.
- Benesch
- BGE, Inc.
- BGK Architects
- Bluebonnet Electric Cooperative
- Cadence McShane Construction
- Centerpoint Plaza Shopping Center
- CERRIS Builders
- Cody's Restaurant Bar & Patio
- First Lockhart National Bank
- Fuse Architecture Studio
- Garver
- Graves Dougherty Hearon & Moody
- Green Guy Recycling Services
- Halff Associates Inc
- Hart Properties
- Independence Title Co-Buda
- Karnes County National Bank
- Land Consultants, Ltd. Co.
- Mochas & Javas
- MWM Design Group
- Ozona Bank
- Peregrine Land Investments
- Plum Creek Business Park
- RBFCU- Randolph Brooks Federal Credit Union
- San Marcos Regional Airport
- Square One Consultants
- Structure Tone STO Building Group
- Structures PE, LLP
- Texas Aviation Partners, LLC.
- The Broaddus Companies
- The Damron Group Realtors
- Tree Mann Solutions, LLC.
- Turner Construction Company
- Two P's & Calli's Boutique
- United Properties
- WGI, Inc
- Yates Construction
- Zachry Construction Corporation

CHAMBER PARTNERS

- Dripping Springs Chamber of Commerce
- Greater Buda Chamber of Commerce
- Kyle Chamber of Commerce
- Lockhart Chamber of Commerce
- Luling Chamber of Commerce
- Office of Senator John Cornyn
- Office of Senator Ted Cruz
- San Marcos Area Chamber of Commerce
- Wimberley Valley Chamber of Commerce

Mission Statement

Improve the quality of life for the residents in Hays and Caldwell Counties through focused, strategic and sustainable economic growth by facilitating the creation of high-quality jobs in growth-oriented target sectors; attracting new capital investment to the region; optimizing and preparing the regional workforce; and uniting the region's diverse stakeholders in the collaborative pursuit of economic prosperity for all.

What We Believe

Core Values

OUR VALUES ARE:

C

CONNECTION

L

LEADERSHIP

E

ENGAGEMENT

A

ACCOUNTABILITY

R

RESOURCEFULNESS

Connection

We build bridges between communities, companies, and partners. We align people, ideas, and opportunities to drive shared success throughout the region.

Leadership

We lead with purpose, integrity, and vision. We take initiative, embrace challenges, and guide our region to smart, sustainable growth.

Engagement

We show up, we listen, and we act. Through collaboration and open communication, we foster strong relationships that move our mission forward.

Accountability

We take ownership of our actions and our outcomes. We hold ourselves and each other to high standards and follow through on our commitments.

Resourcefulness

We find solutions where others see roadblocks. With creativity and determination, we make the most of every opportunity and challenge.

Strategies & Action Plan

Strategic Focus Areas



STRATEGIES & ACTION PLAN



Strategies

Business Development Strategies

The Hays-Caldwell EDP has partnered with Hickey Global to develop an economic development strategic plan for the region. This plan aims to guide the organization's efforts over the next three to five years, focusing on engaging investors, enhancing economic growth, promoting innovation, and ensuring sustainable development within the community.

The recommended Implementation Stage for each strategy is listed on its corresponding one-pager as: Short Term, Medium Term, and Long Term. Short-term strategies within the context of an economic development plan typically refer to actions and initiatives that can be promptly implemented to achieve immediate results or address pressing issues, typically within 1-2 years. These strategies are designed to have a relatively quick impact, laying the groundwork for long-term success. Medium-term strategies encompass a range of initiatives to foster sustainable growth and resilience over an intermediate timeframe, usually 3 to 5 years. These strategies involve more substantial and enduring efforts compared to short-term interventions. These strategies focus on building a solid foundation for long-lasting prosperity, laying the groundwork for sustained economic development in Hays and Caldwell counties. Finally, long-term strategies are envisioned as transformative initiatives designed to shape the region's economic landscape over an extended period, looking 5 years and beyond. These strategies entail comprehensive and forward-looking measures, which could position the region for sustained economic prosperity over many years.

CONTENT

The Strategies section includes

1. 23 strategies divided into four strategic focus groups,
2. A one- or two-pager for each of the 23 strategies explaining the Rationale, Action Plan, Impact, Role, and Implementation Stage of each.

INVESTOR ECOSYSTEM



Recommended Strategies

Investor Ecosystem

RECOMMENDED STRATEGIES

1. Regional Resource Guide: Create a comprehensive, regularly updated directory of business, workforce, and community resources available in Hays and Caldwell counties. This guide will serve as a central reference for entrepreneurs, employers, and investors seeking support in the region.
2. “Resilience in Manufacturing” Partnership: Begin a collaboration to strengthen the megaregion’s manufacturing sector. The initiative will focus on supply chain resilience, workforce readiness, and adoption of advanced manufacturing technologies.
3. Regional Ecosystem Council: Pilot the creation of a leadership forum bringing together representatives from government, education, industry, and nonprofits to coordinate economic development strategies. The council will address cross-sector challenges and champion shared regional goals.
4. Economic Response Preparedness Plan: Develop a proactive strategy for responding to economic disruptions such as natural disasters, market shifts, or major employer closures. This plan will outline roles, resources, and communication protocols to minimize recovery time.
5. Entrepreneurship & Technology Transfer Accelerator: Advocate for the creation of a program to cultivate startup culture and support commercialization of research through targeted mentorship, capital access, and technology transfer pathways. The accelerator will connect local entrepreneurs with investors, industry partners, and global markets.

Regional Resource Guide

Investor Ecosystem

Create a comprehensive, regularly updated directory of business, workforce, and community resources available in Hays and Caldwell counties.

THE WHY (RATIONALE)

Entrepreneurs, employers, and investors often face challenges in finding reliable, centralized information about available resources. By creating a comprehensive and well-organized resource guide, the Hays Caldwell Economic Development Partnership (EDP) can simplify access to vital tools and support networks. This initiative will foster stronger connections among local partners, including businesses, educational institutions, and government agencies. In doing so, the EDP can project a positive image of the region as organized and committed to economic growth, ultimately creating a more vibrant business environment that attracts investment and encourages entrepreneurship.

THE HOW (ACTION PLAN)

Phase 1: Compile a comprehensive list of essential resources that encompass business support organizations, various funding opportunities, workforce training providers, and community services. Structure the guide into well-defined categories for easy navigation, providing detailed contact information, clear eligibility criteria, and succinct descriptions for each resource.

Phase 2: Create a user-friendly digital version with search functionality and downloadable PDFs. Promote the guide through the EDP website, partner newsletters, and social media channels, ensuring it reaches entrepreneurs, investors, and site selectors.

Phase 3: Establish a quarterly review process to verify and update listings. Encourage partners to submit changes or new resource information to keep the guide current and relevant.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener 	- Guide published within six months of project start. 500 downloads or online visits in the first year. 90% of listings verified as current during quarterly updates.	Short



“Resilience in Manufacturing” Partnership

Investor Ecosystem

Begin a collaboration to strengthen the megaregion’s manufacturing sector.

THE WHY (RATIONALE)

Manufacturing remains a cornerstone of economic vitality in Central Texas, particularly across Hays and Caldwell counties. The newly established Megaregion offers a powerful framework for coordinated economic growth. By leveraging the strengths of this megaregion, local communities can better prepare for challenges such as global supply chain disruptions, evolving workforce demands, and rapid technological change.

Engaging through the megaregion provides an opportunity for the Hays Caldwell EDP to amplify regional impact, create stronger industry networks, and ensure that manufacturers across the corridor are better positioned to remain competitive, sustainable, and adaptable in an increasingly interconnected economy.

THE HOW (ACTION PLAN)

Phase 1: Formalize participation in megaregion manufacturing initiatives by aligning with peer organizations across the megaregion territory. Conduct surveys and focus groups to identify shared challenges, opportunities, and top priorities among manufacturers.

Phase 2: Co-design initiatives such as supplier matchmaking events, regional workforce training pipelines, and pilot projects for advanced manufacturing technologies. Leverage state and federal funding opportunities, as well as megaregion-scale partnerships, to support implementation.

Phase 3: Track key metrics including workforce placement rates, supply chain partnerships, and technology adoption levels. Use outcomes to refine programs and expand the reach of collaborative efforts, ensuring the megaregion maintains its competitive edge in manufacturing.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener 	- At least three joint workforce or technology programs launched within two years. 20% increase in local supplier relationships among participating manufacturers. - Positive satisfaction rating from 80% of engaged manufacturers.	Medium



Regional Ecosystem Council

Investor Ecosystem

Pilot the creation of a leadership forum bringing together representatives from government, education, industry, and nonprofits to coordinate economic development strategies.

THE WHY (RATIONALE)

Collaboration across various sectors is critical for effectively addressing the complex economic challenges that no single organization can tackle on its own. To facilitate this, the proposed Regional Ecosystem Council will serve as a structured platform for aligning leadership, sharing resources, and coordinating efforts around shared goals. This council will bring together stakeholders from different industries, promoting collaboration and enhancing communication. By leveraging the diverse expertise and strengths of its members, the council aims to create a more significant collective impact, enabling participants to confront common economic issues in a more effective and sustainable manner.

THE HOW (ACTION PLAN)

- Phase 1:** Identify and recruit senior representatives from each sector, ensuring balanced geographic and industry representation. Establish bylaws, meeting schedules, and decision-making processes.
- Phase 2:** Develop a shared agenda focused on key regional priorities such as workforce development, infrastructure investment, and business attraction. Assign working groups to advance each priority.
- Phase 3:** Publish semi-annual progress reports summarizing achievements, challenges, and next steps. Use these reports to keep the community informed and engaged.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener 	- Council established with at least 15 cross-sector members in the first year. - Implementation of three joint initiatives annually. - Public release of two progress reports per year.	Medium



Economic Response Preparedness Plan

Investor Ecosystem

Develop a proactive strategy for responding to economic disruptions such as natural disasters, market shifts, or major employer closures.

THE WHY (RATIONALE)

Unexpected economic disruptions can have significant and lasting negative impacts on communities, affecting everything from local businesses to employment rates and overall quality of life. However, proactive planning can play a crucial role in reducing recovery time and minimizing economic loss. By developing a comprehensive preparedness plan, communities can clearly outline the roles of various stakeholders, identify necessary resources, and establish effective communication protocols. This organized approach enables the region to respond quickly and efficiently in times of crisis, ensuring that the community can bounce back more rapidly and sustainably in the face of adversity. Overall, this diligence in preparedness not only helps mitigate immediate challenges but also lays the groundwork for long-term resilience and stability.

THE HOW (ACTION PLAN)

- Phase 1:** Identify the most likely and impactful economic disruption scenarios for the region. Compile an inventory of available resources, partners, and contingency funding sources. Utilize the information provided by the IEDC’s Disaster Preparedness Initiative: <https://restoreyoureconomy.org/>.
- Phase 2:** Create clear response protocols for each scenario, including communication plans, partner responsibilities, and rapid deployment measures for assistance programs.
- Phase 3:** Conduct tabletop exercises with partners to test the plan’s effectiveness. Revise based on lessons learned to ensure readiness.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- Completion of the preparedness plan within one year. - Reduction in average response time to economic disruptions by 25%.	Medium

Entrepreneurship & Technology Transfer Accelerator

Investor Ecosystem

Advocate for the creation of a program to cultivate startup culture and support commercialization of research through targeted mentorship, capital access, and technology transfer pathways.

THE WHY (RATIONALE)

Entrepreneurship is a vital force that drives job creation, stimulates innovation, and encourages economic diversification. By supporting startups and providing resources to help researchers bring their groundbreaking technologies to market, the region can cultivate a more resilient and competitive economy. This support not only helps to create new job opportunities but also fosters an environment where creativity and new ideas can thrive, leading to advancements that benefit the community as a whole. By investing in entrepreneurship, the EDP will lay the groundwork for sustainable growth and long-term prosperity that can weather economic fluctuations.

THE HOW (ACTION PLAN)

Phase 1: Develop the accelerator structure, including cohort size, duration, curriculum, and mentorship network. Recruit partners such as universities, investors, and corporate sponsors.

Phase 2: Select participants through a competitive application process. Provide training, mentorship, networking events, and access to potential investors. Support technology transfer by connecting university researchers with commercialization experts.

Phase 3: Maintain engagement with program graduates through ongoing networking and investment opportunities. Use alumni success stories to attract future participants and funding.

ROLE	METRICS	IMPLEMENTATION STAGE
Advocate	- At least 10 startups or research projects supported annually. 50% of graduates securing investment or revenue growth within one year. - Creation of 100 new jobs through program alumni within three years.	Medium

WORKFORCE DEVELOPMENT



Recommended Strategies

Workforce Development

RECOMMENDED STRATEGIES

1. Talent Alignment Taskforce: Initiate a cross-sector working group bringing together employers, educators, and workforce agencies to identify skill gaps and align training programs with industry needs. The Taskforce will regularly review labor market data and coordinate targeted solutions that strengthen the regional talent pipeline.

Workforce Partner Engagement Protocol: Develop a formal framework for engaging with key workforce partners, including Texas State University's Office of Workforce, Leadership, and Strategy (OWLS), training providers, and employers. This protocol will define regular communication touchpoints, shared objectives, and joint program development to maximize regional workforce impact.

Talent Attraction Campaign: Launch a coordinated marketing effort to position Hays and Caldwell counties as premier destinations for skilled professionals. Leveraging quality-of-life, affordability, and career opportunities, the campaign will target in-demand talent through digital channels, relocation resources, and employer partnerships.

Youth Talent Pipeline Engagement: Advocate for the development of a structured program to connect Career and Technical Education (CTE) students with local employers, ensuring alignment between school programs and high-demand regional careers. The initiative will include an annual review of CTE offerings, employer participation tracking, and targeted outreach to fill participation gaps.

Talent Alignment Taskforce

Workforce Development

Initiate a cross-sector working group bringing together employers, educators, and workforce agencies to identify skill gaps and align training programs with industry needs.

THE WHY (RATIONALE)

Hays and Caldwell counties are experiencing rapid population growth and business expansion; however, local employers continue to encounter persistent skills gaps, especially in high-demand sectors such as advanced manufacturing, healthcare, and technology. Without a coordinated effort between training providers and industry, these gaps can impede local hiring, hinder business growth, and diminish competitiveness. To address this issue, a formal Talent Alignment Taskforce should be established to ensure that educators, workforce agencies, and employers work together rather than in isolation. This task force should share labor market data and coordinated strategies to close the skills gaps and prepare the talent pipeline for future needs.

THE HOW (ACTION PLAN)

Phase 1: Recruit key representatives from major employers, education institutions, workforce boards, and local government to form the Taskforce. Establish a clear charter outlining goals, roles, and decision-making processes.

Phase 2: Convene sector-specific working groups to map existing training pathways against industry needs, identifying redundancies and gaps. Collaborate with training providers to adjust curricula, incorporate industry-recognized credentials, and create pilot programs for high-demand sectors, ensuring employers commit to offering internships or job placements for graduates.

Phase 3: Implement an annual review to assess training outcomes, employer satisfaction, and labor market shifts, using the findings to refine programs and priorities.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener 	- At least 3 new or modified training programs aligned to employer needs within two years. - Reduction in regional job postings that remain unfilled after 90 days by 15% in three years. - Annual reduction in identified skill gaps by at least 15%.	Short



Workforce Partner Engagement Protocol

Workforce Development

Develop a formal framework for engaging with key workforce partners, including Texas State University’s Office of Workforce, Leadership, and Strategy (OWLS), training providers, and employers.

THE WHY (RATIONALE)

The region boasts a diverse array of strong workforce partners, including universities, training providers, workforce boards, and employers. However, these stakeholders sometimes operate independently, resulting in missed opportunities for collaboration. By establishing a formal engagement protocol, the Hays-Caldwell Economic Development Partnership (EDP) can facilitate better coordination among these partners, align resources, and enhance overall impact. This strategy will create a more responsive, unified, and attractive regional workforce system for employers and site selectors.

THE HOW (ACTION PLAN)

- Phase 1:** Identify all key workforce stakeholders and define roles, responsibilities, and shared objectives. Establish standardized communication channels, such as quarterly partner summits or a shared project calendar, to ensure alignment on priorities. These partners should also be invited to participate in the Talent Alignment Taskforce.
- Phase 2:** Launch initial joint initiatives, such as co-branded job fairs or sector-based training programs, to build trust and demonstrate the value of collaboration. Develop shared performance metrics to track participation, program completions, and employer satisfaction across partners.
- Phase 3:** Conduct annual surveys and review sessions with partners to assess the protocol’s effectiveness. Adjust communication cadence, partnership structures, and priority areas based on feedback, ensuring that the engagement model evolves with workforce needs.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener 	90% of identified key partners participating in at least two joint initiatives annually. - At least \$500,000 in jointly secured workforce-related grant funding within three years. - Partner satisfaction score above 80% in annual survey.	Short



Talent Attraction Campaign

Workforce Development

Launch a coordinated marketing effort to position Hays and Caldwell counties as premier destinations for skilled professionals.

THE WHY (RATIONALE)

The competition for talent is becoming increasingly intense. Regions that fail to actively promote themselves may lose top candidates to larger, better-known markets. Hays and Caldwell counties offer an attractive value proposition: affordable housing, strong schools, a vibrant community, and proximity to Austin. By strategically promoting these advantages, the Hays-Caldwell EDP can attract in-demand talent. A targeted campaign will help employers address skill gaps and attract companies that appreciate a robust and diverse workforce.

THE HOW (ACTION PLAN)

- Phase 1:** Define key messaging points focused on quality of life, career opportunities, and affordability. Use labor market data to identify high-demand occupations and create tailored profiles for each, specifying the industries, employers, and career pathways available locally.
- Phase 2:** Launch digital advertising, social media storytelling, and relocation-focused landing pages targeting talent in competitive markets. Partner with employers to promote current job openings and relocation assistance. Distribute relocation guides to recruitment agencies and relocation consultants.
- Phase 3:** Track website visits, engagement rates, and relocation inquiries, using this data to refine targeting and adjust creative content for maximum impact.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader 	20% increase in inbound relocation inquiries within two years. - Engagement rate of 10% or higher on campaign digital content.	Short



Youth Talent Pipeline Engagement

Workforce Development

Advocate for the development of a structured program to connect Career and Technical Education (CTE) students with local employers, ensuring alignment between school programs and high-demand regional careers.

THE WHY (RATIONALE)

Local Career and Technical Education (CTE) programs are essential for providing a steady stream of talent to the regional workforce. However, without active engagement from local industries, students may not be aware of or able to access career opportunities nearby.

Strengthening the connection between schools and employers ensures that students receive relevant training and are encouraged to start their careers locally. This not only benefits the individual students but also supports long-term workforce sustainability by creating a skilled labor pool that meets the needs of local industries and promotes economic growth in the region.

THE HOW (ACTION PLAN)

Phase 1: Conduct a review of all CTE programs in the region to assess participation levels, industry focus areas, and gaps in employer engagement.

Phase 2: Establish advisory committees with industry employers to provide insights on curriculum updates, essential equipment, and credentialing standards. Additionally, consider organizing employer-led workshops and industry days to offer students hands-on experience and direct engagement with professionals, helping to align education with workforce demands.

Phase 3: Regularly assess employer participation rates and student placement outcomes in CTE programs. Gather satisfaction feedback from both employers and students to identify strengths and areas needing improvement.

ROLE	METRICS	IMPLEMENTATION STAGE
Advocate  	25% increase in employer participation in CTE programs within two years. 70% of participating students securing work-based learning opportunities annually. - At least 50% of engaged students entering the local workforce post-graduation.	Short



MARKETING & BUSINESS ATTRACTION

Recommended Strategies

Marketing & Business Attraction

RECOMMENDED STRATEGIES

1. “We Are the Boom” Marketing Campaign: Launch a high-impact branding initiative to act as a guide, highlighting the rapid growth, opportunities, and unique advantages of the megaregion. The campaign should feature dynamic, project-specific landing pages with built-in metrics tracking to measure ROI for events, announcements, and business attraction efforts.
2. Innovation Corridor Digital Presence: Cultivate a targeted online campaign showcasing the region’s position as a hub for innovation, connectivity, and business growth along the innovation corridor. This initiative will aim to build a robust digital presence to attract investors, entrepreneurs, and technology-driven companies.
3. Business Attraction & Marketing Trips: Lead in the creation of a scheduled outreach program where EDP representatives engage with site selectors, corporate executives, and industry influencers in priority markets. These trips will promote the region’s assets, build relationships, and generate qualified business attraction leads.
4. Site Selector Toolkit: Provide a curated resource bank tailored for site selection professionals, featuring up-to-date property data, drone footage, testimonials, and regional highlights. The toolkit will be paired with a maintained database of site selectors for targeted outreach.
5. Foreign Direct Investment (FDI) Outreach: Generate a proactive business attraction strategy focusing on international markets with strong industry alignment, such as Korea, Japan, and Mexico. The program should leverage existing successes, such as Samsung’s, to position the region as a landing point for global expansion.

Recommended Strategies

Marketing & Business Attraction

RECOMMENDED STRATEGIES

6. Trigger-Based Outbound Marketing: Internally, develop a ready-to-deploy recruitment packet and marketing materials designed for rapid response to corporate changes such as mergers, buyouts, and executive transitions. This approach ensures timely engagement with companies seeking relocation or expansion opportunities.
7. Quality of Life Data Initiative: Introduce an effort to compile, update, and share compelling data on livability, education, housing, and amenities in Hays and Caldwell counties. This information will be embedded into marketing campaigns to support talent attraction and business recruitment.
8. Strategic Plan Visibility Campaign: Consider a visible reintroduction of the EDP Strategic Plan to the public and stakeholders through events, media coverage, and online content. The goal is to reaffirm the region's economic vision and inspire investor and partner engagement.
9. Cluster Storytelling Campaigns: Produce an annual content strategy that highlights regional industry clusters through coordinated storytelling with partners. This campaign should feature case studies, videos, and success stories that position the region as a leader in targeted sectors.

“We Are the Boom” Marketing Campaign

Marketing & Business Attraction

Launch a high-impact branding initiative to act as a guide, highlighting the rapid growth, opportunities, and unique advantages of the megaregion.

THE WHY (RATIONALE)

Hays and Caldwell counties are among the fastest-growing areas in Texas; however, this growth is not fully recognized in external perceptions of the megaregion. By positioning the area as a hub of opportunity — supported by measurable growth, infrastructure investment, and a skilled workforce — the Hays-Caldwell EDP can attract new businesses, investors, and residents. A distinctive, data-driven branding campaign will enhance awareness and improve the region's reputation in competitive markets.

THE HOW (ACTION PLAN)

- Phase 1:** Develop a unified visual identity, messaging framework, and storytelling themes that emphasize growth, opportunity, and local success stories. Build (or add to existing resources) a library of professional photography, video, and drone footage to support multi-platform content.
- Phase 2:** Deploy the campaign across targeted digital advertising, social media, and project-specific landing pages with integrated metrics tracking. Use earned media opportunities, press releases, and speaking engagements to amplify reach. Coordinate with local businesses to co-brand materials and increase visibility in regional and national outlets.
- Phase 3:** Monitor website traffic, engagement rates, and lead generation tied to campaign content. Use analytics to identify the highest-performing channels and content types, reallocating resources accordingly. Refresh messaging annually to reflect new success stories, development milestones, and growth statistics.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	25% increase in website visits to EDP’s economic development landing pages within one year. 15 qualified business attraction leads generated in the first 12 months. - At least three national or industry media mentions annually.	Short

Innovation Corridor Digital Presence

Marketing & Business Attraction

Cultivate a targeted online campaign showcasing the region’s position as a hub for innovation, connectivity, and business growth.

THE WHY (RATIONALE)

Hays and Caldwell counties are ideally located along the innovation corridor, which presents a significant opportunity for economic growth. However, without a strong digital presence, the region risks being overlooked by investors and entrepreneurs searching for innovative locations.

The EDP can enhance the region's visibility by creating an engaging online profile that showcases the strengths of Hays and Caldwell counties. This strategy would position the area as an attractive destination for businesses in technology, logistics, and advanced manufacturing.

THE HOW (ACTION PLAN)

Phase 1: Create a dedicated Innovation Corridor microsite with interactive maps, infrastructure data, and profiles of key industry clusters. Develop content highlighting case studies, expansion projects, and innovation assets such as incubators, research institutions, and high-speed connectivity.

Phase 2: Run geo-targeted ads in priority markets, such as Austin, San Antonio, Dallas, and select national innovation hubs. Use LinkedIn, industry newsletters, and paid search campaigns to reach site selectors, investors, and industry executives.

Phase 3: Host virtual tours, webinars, and Q&A sessions focused on location advantages along the corridor. Track engagement metrics, inbound inquiries, and social media reach, adjusting messaging based on which industries and markets show the highest response.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader/Convener   	20% increase in inbound site selector inquiries within two years. - At least 10 new qualified investor or corporate leads per quarter. 5,000 unique visitors to the corridor microsite in the first year.	Medium



Business Attraction & Marketing Trips

Marketing & Business Attraction

Lead in the creation of a scheduled outreach program where EDP representatives engage with site selectors, corporate executives, and industry influencers in priority markets.

THE WHY (RATIONALE)

Engaging directly with key decision-makers — including site selectors, corporate executives, and influential industry leaders — is essential for fostering trust and building strong relationships that can ultimately lead to significant investment opportunities. By implementing a consistent outreach strategy on a quarterly basis, the EDP can ensure that Hays and Caldwell counties remain a prominent consideration for companies looking to relocate or expand their operations. This proactive approach not only keeps the region at the forefront of potential prospects’ minds but also enables the EDP to adapt to shifts in the market landscape swiftly.

THE HOW (ACTION PLAN)

- Phase 1:** Identify priority geographic markets and industry sectors based on information provided within the Industry Analysis section of this report. Develop tailored trip itineraries with pre-scheduled meetings, presentations, and networking events, leveraging existing business and political connections for introductions.
- Phase 2:** Send EDP representatives and regional ambassadors to meet with targeted companies, site selectors, and trade associations. Present customized pitches, showcasing regional assets, available sites, workforce strengths, and incentive programs. Distribute high-quality marketing materials and follow up promptly after each meeting.
- Phase 3:** Track all leads in the EDP’s CRM, assigning follow-up actions and timelines. Evaluate the ROI of each trip by measuring the number of qualified leads generated, follow-up engagements secured, and eventual project wins. Adjust target markets and messaging based on results.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- At least 40 direct meetings with site selectors or corporate decision-makers per year. 20% conversion of initial contacts into active prospects. - At least three project wins annually directly tied to these trips.	Short



Site Selector Toolkit

Marketing & Business Attraction

Provide a curated resource bank tailored for site selection professionals, featuring up-to-date property data, drone footage, testimonials, and regional highlights.

THE WHY (RATIONALE)

Site selectors often face tight deadlines when making important decisions about locating businesses or facilities. To support their needs, it is essential to provide them with rapid access to accurate and visually engaging information. Developing a comprehensive, high-quality toolkit that is regularly updated will enhance the perception of Hays and Caldwell counties as responsive and professional partners.

This toolkit should include detailed demographic data, information on available properties, infrastructure details, and available incentives. Ultimately, a well-prepared and visually compelling toolkit will give Hays and Caldwell counties a distinct competitive advantage in attracting new investments and businesses during the site selection process.

THE HOW (ACTION PLAN)

Phase 1: Compile a collection of essential resources, including drone footage of sites, GIS property maps, and workforce data that highlights local labor availability and skills. Gather information on utility access, alongside testimonials and case studies that showcase successful projects.

Phase 2: Create and maintain a database of active site selectors and distribute toolkit updates quarterly via email and direct mail. Provide customized versions for prospects that include sector-specific data relevant to their projects/sectors.

Phase 3: Implement a process for quarterly content updates to ensure all data and visuals remain current. Gather feedback from site selectors on usability and completeness, incorporating suggestions to improve future editions.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader 	- Toolkit distributed to 100% of active site selectors in the database each quarter. - At least 50% of recipients engaging with toolkit content within two weeks of release. - Positive feedback rating of 85% or higher from surveyed site selectors.	Short

Foreign Direct Investment (FDI) Outreach

Marketing & Business Attraction

Generate a proactive business attraction strategy focusing on international markets with strong industry alignment, such as Korea, Japan, and Mexico, including working alongside efforts that are currently underway within the megaregion.

THE WHY (RATIONALE)

Hays and Caldwell counties stand out as attractive destinations for foreign direct investment (FDI), particularly for international firms in advanced manufacturing and technology. Now, with the formation of the megaregion, the area gains even greater visibility and competitiveness on the global stage. This collaborative framework signals to international companies that Central Texas is not just a local market, but part of a coordinated regional ecosystem capable of supporting long-term growth and innovation. By focusing on markets like Korea, Japan, and Mexico — which have existing corporate relationships and cultural ties — the region can enhance its credibility and attract investment more quickly, benefiting both local businesses and the broader economy.

THE HOW (ACTION PLAN)

- Phase 1:** Identify target countries and industries based on compatibility with the region’s strengths. Map existing relationships and potential trade partners. Build partnerships with international trade offices, embassies, and chambers of commerce to open doors.
- Phase 2:** Participate in targeted trade missions and international business expos. Host inbound delegations from target countries, offering site tours and meetings with local executives and officials. Develop marketing materials translated into target languages.
- Phase 3:** Create a concierge-style support process for interested foreign investors, including site selection assistance, permitting guidance, and introductions to local suppliers. Maintain consistent follow-up using your CRM and track progress toward project commitments.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- At least five new qualified FDI leads per year from targeted markets. - One to two project wins from international companies within three years. 100% of prospective FDI investors receiving follow-up within two weeks of initial contact	Short

Trigger-Based Outbound Marketing

Marketing & Business Attraction

Internally, develop a ready-to-deploy recruitment packet and marketing materials designed for rapid response to corporate changes such as mergers, buyouts, and executive transitions.

THE WHY (RATIONALE)

Corporate transitions frequently serve as critical inflection points for companies, compelling them to reassess various aspects of their operational footprint. This creates valuable opportunities for proposals related to relocation or expansion. By keeping a close eye on corporate news, market trends, and industry advancements, the EDP can strategically engage with key decision-makers at the most opportune moments — anticipating their needs before competitors have a chance to intervene. Such proactive outreach not only showcases the EDP's commitment to supporting businesses but also positions them as a vital resource during periods of change, ultimately fostering stronger partnerships and community growth.

THE HOW (ACTION PLAN)

Phase 1: Set up a system of alerts and subscriptions to reliable business intelligence services that track mergers, leadership changes, and expansion announcements. Additionally, create an internal protocol to review and prioritize these opportunities within 24 to 48 hours of identification, ensuring a swift and strategic response.

Phase 2: Develop a targeted library of industry-specific recruitment packets and case studies that can be easily customized with relevant websites, workforce statistics, and incentive options. Assign a dedicated team to personalize outreach strategies for each trigger event, ensuring alignment with the unique needs of potential candidates in various sectors.

Phase 3: Deploy outreach via email, phone, and LinkedIn within days of the trigger event. Log all interactions in the CRM, noting timing, response rate, and lead progression. Review outcomes quarterly to refine targeting and improve response speed.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- At least 15 rapid-response outreach efforts annually. 20% of triggered contacts progressing to active project discussions. - Average outreach deployment time of less than five days from event identification.	Short

Quality of Life Data Initiative

Marketing & Business Attraction

Introduce an effort to compile, update, and share compelling data on livability, education, housing, and amenities in Hays and Caldwell counties.

THE WHY (RATIONALE)

Quality of life metrics — such as housing affordability, education quality, recreational opportunities, and healthcare access — are increasingly vital for attracting talent and businesses. To meet these needs, the Economic Development Partnership (EDP) should maintain a credible and up-to-date database of this information. By doing so, the EDP can craft effective marketing messages that showcase the region's advantages and help decision-makers confidently evaluate the area's livability for potential relocation or investment.

THE HOW (ACTION PLAN)

- Phase 1:** Gather quantitative and qualitative data on housing, schools, amenities, safety, and community assets from sources such as this strategic plan, census data, local government reports, and third-party studies. Verify accuracy with subject matter experts.
- Phase 2:** Incorporate quality-of-life data into site selector toolkits, recruitment packets, the EDP website, and talent attraction campaigns. Use infographics, maps, and testimonials to make data visually compelling.
- Phase 3:** Update the dataset annually to reflect changes, highlighting new developments or rankings that improve the region’s profile. Pair data updates with human-interest stories and media outreach to maximize visibility and emphasize proof-of-concept.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- Complete data refresh every 12 months. - Inclusion of quality-of-life data in 100% of major marketing materials. - At least three positive media mentions annually featuring this data.	Medium



Strategic Plan Visibility Campaign

Marketing & Business Attraction

Consider a visible reintroduction of the EDP Strategic Plan to the public and stakeholders through events, media coverage, and online content.

THE WHY (RATIONALE)

An effective economic development strategy relies heavily on the awareness and support it receives from stakeholders, partners, and residents. Actively promoting the Strategic Plan is essential to ensure that its objectives are clearly communicated and understood within the community. By engaging diverse groups and fostering dialogue, the Hays Caldwell EDP can cultivate a sense of ownership and commitment among residents. This engagement not only generates momentum for the plan but also aligns community support with regional priorities. When a unified vision is presented, it attracts investments that resonate with these objectives, reinforcing the region’s economic vitality. Ultimately, inclusive participation is key to building trust and ensuring that the initiatives reflect the community’s needs and aspirations.

THE HOW (ACTION PLAN)

Phase 1: Condense the strategic plan into engaging formats like infographics, short videos, and key takeaway documents that communicate its main points, utilizing the executive summaries provided within. Create a consistent visual identity across all campaign materials, using a unified color palette and typography to enhance brand recognition and reinforce the campaign's goals.

Phase 2: Organize launch events and stakeholder briefings to effectively present the plan’s vision and key initiatives. Consider creating a dedicated website landing page that features downloadable resources and interactive elements, allowing users to explore the plan’s objectives in greater depth.

Phase 3: Integrate plan updates into newsletters, social media posts, and quarterly progress reports. Highlight successes and milestones to maintain engagement and demonstrate accountability.

ROLE	METRICS	IMPLEMENTATION STAGE
● ○ Leader	- At least 500 unique visitors to the plan’s webpage within the first month of launch. 80% of surveyed stakeholders reporting improved awareness of EDP priorities. - Quarterly updates distributed to 100% of identified partners and investors.	Short

Cluster Storytelling Campaigns

Marketing & Business Attraction

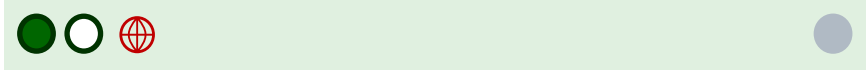
Produce an annual content strategy that highlights regional industry clusters through coordinated storytelling with partners.

THE WHY (RATIONALE)

Emphasizing the achievements of local industry clusters enhances their identity and attracts complementary businesses, fostering a collaborative economic environment. Narrative-driven marketing plays a key role in humanizing these industries, making them relatable to external investors and local residents alike. Compelling stories about the people and innovations within these clusters create a stronger connection and highlight the region's unique contributions. This approach not only distinguishes the area in a competitive landscape but also builds community pride, positioning the region as a vibrant hub for economic growth and encouraging further investment.

THE HOW (ACTION PLAN)

- Phase 1:** Partner with industry leaders to highlight impactful stories. Establish an editorial calendar that aligns with key industry events and news cycles to ensure timely and engaging content.
- Phase 2:** Create engaging videos, articles, and case studies that highlight the unique contributions of cluster businesses and their employees. Share this content across the EDP’s channels, partner websites, local media, and industry publications to enhance visibility and promote collaboration within the community.
- Phase 3:** Host events, webinars, or panel discussions featuring cluster companies. Track engagement metrics such as content shares, media mentions, and inbound leads to evaluate campaign effectiveness and refine future storytelling.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader 	2-3 major stories produced per cluster annually. 15% increase in social media engagement for cluster-related content. - Five inbound business leads attributed to campaign content within the first year.	Medium



INFRASTRUCTURE

Recommended Strategies

Infrastructure

RECOMMENDED STRATEGIES

1. Regional Infrastructure Strike Team: Create a multi-jurisdictional task force of public and private partners dedicated to accelerating infrastructure project planning and execution. The team will address critical needs such as utilities, transportation, and broadband, ensuring alignment with economic development priorities.
2. EDP-Certified “Pad Ready” Sites Program: Lead the development of a certification process to verify that industrial and commercial sites are development-ready with essential infrastructure in place. This designation will help attract site selectors and streamline project timelines. (sample to be provided)
3. Site Readiness Program: Following participation in the “Pad Ready” Site Program, provide technical assistance to help property owners and communities prepare sites for development, including feasibility studies, permitting guidance, and infrastructure assessments. The program will expand the region’s inventory of market-ready sites.
4. Joint Transportation Advocacy Blueprint: Work together with various economic development stakeholders towards a coordinated lobbying effort to secure state and federal funding for transportation projects that enable large-scale industrial and commercial growth. The blueprint will focus on infrastructure expansions critical to serving future mega sites.
5. Grants Coordination & Support Program: Convene stakeholders as part of a support service for municipalities seeking infrastructure improvement funding through state and federal grants. The EDP should connect projects with private development needs, ensuring utility and infrastructure grants are aligned with regional growth priorities.

Regional Infrastructure Strike Team

Infrastructure

Create a multi-jurisdictional task force of public and private partners dedicated to accelerating infrastructure project planning and execution.

THE WHY (RATIONALE)

Economic expansion in Hays and Caldwell counties hinges on the timely delivery of utilities, transportation, and broadband infrastructure. Without a coordinated approach, managing multiple jurisdictions can be slow and inefficient. A Regional Infrastructure Strike Team would aid in streamlining decision-making and aligning priorities, enabling more efficient funding and ensuring that infrastructure projects keep pace with the region's growth. This proactive strategy will support a more vibrant and sustainable economic environment for the communities involved.

THE HOW (ACTION PLAN)

Phase 1: Assemble representatives from cities, counties, utility providers, and private sector partners. Map all active and proposed infrastructure projects, identifying those with the highest economic development impact.

Phase 2: Create joint project timelines, identify funding opportunities, and coordinate grant applications. Advocate as a unified body for state and federal funding, emphasizing the region's shared priorities.

Phase 3: Implement a shared tracking tool for monitoring progress, removing bottlenecks, and reporting outcomes to stakeholders. Adjust priorities annually based on emerging needs.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener	- Completion of a regional infrastructure priority list within six months. - At least \$10 million in combined funding secured within three years. 90% of priority projects advancing on schedule.	Medium

EDP-Certified “Pad Ready” Sites Program

Infrastructure

Lead the developed of a certification process to verify that industrial and commercial sites are development-ready with essential infrastructure in place.

THE WHY (RATIONALE)

Site selectors prioritize locations that are ready for immediate development, as this readiness plays a crucial role in their decision-making process. Certifying sites as “Pad Ready” serves as a clear signal to prospective investors and businesses that the region is well-prepared to accommodate their needs and can meet aggressive timelines. This assurance not only boosts the overall competitiveness of the area but also significantly improves project win rates, making it an attractive option for companies looking to establish or expand their operations. By investing in the certification of sites, communities can better position themselves in the marketplace and attract investment more effectively.

THE HOW (ACTION PLAN)

- Phase 1:** Establish comprehensive infrastructure and permitting standards that outline the specific criteria necessary for certification. Utilize the sample on the following page as an outline for site readiness “requirements.”
- Phase 2:** Conduct site assessments, verifying utilities, zoning, and environmental readiness. Award certifications and promote through EDP marketing channels as well as adding a layer based on each Tier to the EDP’s sites database and map.
- Phase 3:** Expand certification to more sites each year, tracking inquiries and projects tied to certified properties. Additionally, encourage communities with sites that they wish to “upgrade” to a higher Tier to participate in the Site Readiness Program, outlined in this plan.

ROLE	METRICS	IMPLEMENTATION STAGE
Leader	- At least five sites certified within the first year. 20% increase in prospect interest for certified sites. 50% of certified sites under active development within three years.	Short

EDP-Certified “Pad Ready” Sites Program

Sample

Site Characterization Tier Levels

The following Site Characterization Tier Levels describe the current level of development at a site:

Tier 1:

- ☐ Owner(s) is/are agreeable to marketing the site for economic development purposes.
- ☐ Owner(s) will allow access to the property for site assessment and marketing purposes.

Tier 2:

- ☐ Documented price and terms via an option agreement or other acceptable documentation.
- ☐ Comprehensive Plan reflects that the site is intended for industrial or commercial development land use, but the site is not zoned as such.

Tier 3:

- ☐ The site is zoned for industrial or commercial development land use.
- ☐ Boundary survey with easements and encumbrances identified.
- ☐ Geotechnical Report.
- ☐ Topographic Survey.
- ☐ Completed Phase I Environmental Site Assessment.

Tier 4:

- ☐ Archeological Report.
- ☐ Endangered Species Report.
- ☐ Completed waters of the US (wetlands and streams) delineation.
- ☐ Master Development Plan.

Tier 5:

- ☐ Must be served or plan to be served with electric service within 12 months.
- ☐ Must be served or a plan in place to be served with water service within 12 months.
- ☐ Must be served or a plan in place to be served with wastewater service within 12 months.

Site Readiness Program

Infrastructure

Following participation in the “Pad Ready” Sites Program, provide technical assistance to help property owners and communities prepare sites for development, including feasibility studies, permitting guidance, and infrastructure assessments.

THE WHY (RATIONALE)

Many properties within the region have significant development potential; however, they often fall short in crucial areas such as comprehensive studies, necessary permits, or existing infrastructure. These deficiencies can deter potential investors, limiting the ability of these properties to realize their full potential. By offering targeted technical assistance, the EDP can address these gaps, facilitating the completion of foundational studies and the acquisition of required permits. Additionally, improving the infrastructure surrounding these properties will not only make them more attractive to investors but will also enhance the overall competitiveness of the region in securing new development projects. This proactive approach will ultimately foster economic growth and innovation in the area.

THE HOW (ACTION PLAN)

- Phase 1:** Identify priority sites that exhibit high development potential but currently have gaps in readiness. Provide detailed information on what is lacking to get from, for example, Tier 2 to Tier 4.
- Phase 2:** Collaborate directly with partner communities to develop comprehensive preparedness plans tailored to their specific needs. This includes providing detailed guidance on essential aspects such as permitting processes, infrastructure planning considerations, and conducting thorough environmental assessments to ensure a sustainable approach.
- Phase 3:** Track readiness milestones and promote improved sites through EDP marketing efforts. Encourage continued investment by showcasing success stories.

ROLE	METRICS	IMPLEMENTATION STAGE
● Leader	- At least three sites improved to market-ready status annually. 15% increase in inquiries for assisted sites. 50% of assisted sites entering development within three years.	Short

Joint Transportation Advocacy Blueprint

Infrastructure

Work together with various economic development stakeholders towards a coordinated lobbying effort to secure state and federal funding for transportation projects that enable large-scale industrial and commercial growth.

THE WHY (RATIONALE)

Efficient transportation networks are vital for employers and industries, enabling the movement of goods and ensuring a reliable workforce can access jobs. Within the megaregion, connectivity is especially critical, as seamless supply chains and workforce mobility strengthen the area’s global competitiveness.

By fostering coordinated advocacy among businesses, governments, and community organizations, the region can deliver a unified message to policymakers and funding agencies. This megaregional approach boosts the chances of securing support for high-impact projects while prioritizing those that benefit multiple metropolitan areas. Strategic alignment amplifies the region’s voice and ensures transportation investments enhance both economic growth and quality of life.

THE HOW (ACTION PLAN)

- Phase 1:** Identify and evaluate transportation projects with the greatest potential for economic impact, particularly those supporting proposed future mega sites and enhancing connectivity across the megaregion. Engage in collaborative discussions to build consensus among jurisdictions and industry partners, ensuring priorities reflect the shared interests of communities throughout the corridor.
- Phase 2:** Develop advocacy materials, including economic impact data and project maps that highlight megaregional benefits. Coordinate lobbying trips, legislative meetings, and public awareness campaigns to showcase the collective voice of the region.
- Phase 3:** Submit applications for grants and funding programs, emphasizing the megaregion’s coordinated strategy. Track success rates and refine advocacy tactics to strengthen future efforts.

ROLE	METRICS	IMPLEMENTATION STAGE
Convener/Advocate  	- At least three major transportation projects prioritized and promoted annually. \$20 million in secured transportation funding within five years. 80% partner participation in advocacy efforts.	Medium

Grants Coordination & Support Program

Infrastructure

Convene stakeholders as part of a support service for municipalities seeking infrastructure improvement funding through state and federal grants.

THE WHY (RATIONALE)

Securing grant funding has the potential to greatly alleviate the financial burdens associated with infrastructure projects, particularly for smaller municipalities. However, these local governments often face significant challenges due to limited staff resources and a lack of specialized expertise needed to navigate the intricate and sometimes overwhelming grant application processes effectively. To enhance the prospects of success in securing these funds, it is essential to implement coordinated support systems. Such systems could provide tailored guidance and resources to help these municipalities prepare and submit competitive applications.

THE HOW (ACTION PLAN)

- Phase 1:** To support community growth, it's crucial to identify priority infrastructure projects that align with our strategic goals. Additionally, maintaining a regional grants calendar is essential to track application deadlines and funding opportunities, ensuring we stay organized and proactive in securing financial assistance for initiatives. This approach will enhance infrastructure and promote regional development.
- Phase 2:** Provide technical assistance for application development, including data collection, narrative writing, and budget preparation. Facilitate public-private partnerships to strengthen proposals.
- Phase 3:** Monitor submitted applications and track award outcomes. Share success stories and lessons learned to improve future applications.

ROLE	METRICS	IMPLEMENTATION STAGE
●○ Convener	- Support at least 10 grant applications annually. - Achieve a 50% success rate for submitted applications. - Secure \$5 million in grant funding within three years.	Medium





HAYS CALDWELL EDP

Stakeholder Engagement Report

Stakeholder Engagement

Reception of Feedback

- Feedback should be regarded not as inherently positive or negative, but rather as valuable information.
- It's crucial to bear in mind that stakeholder responses are rooted in individual perceptions and may not always align with objective facts.
- Stakeholder feedback plays a crucial role in uncovering potential blind spots within the organization and allows for necessary adjustments.
- The concept of listening to understand is pivotal. The ability to actively listen to stakeholders, comprehend their perspectives, address their concerns, and discern what matters most to them is critical for the success of this type of engagement.
- Embracing feedback opens doors to improvement and provides a clear path forward.
- Stakeholder feedback is crucial because it provides insights into the stakeholder's wants and needs. It serves as a compass for decision-making, mitigates risks, and ensures alignment with expectations.

Stakeholder Engagement

Hickey Global Questions

1. What is holding the region back from full potential?
2. What should be Hays Caldwell EDP's top 3 priorities over the next 2 years?
3. How should the EDP market the region?
4. What Hays Caldwell EDP services or programs are needed to strengthen the area?
5. What initiative or service is missing from the current Hays Caldwell EDP plan of work?
6. Where do you find the most value in the EDP's work?
7. Where do you find the least value in EDP's work?
8. What should Hays Caldwell EDP keep doing?
9. What should Hays Caldwell EDP stop doing?
10. What should Hays Caldwell EDP start doing?
11. What economic development initiative would you be excited to get involved in?

Bonus Question: What did we not ask, that we should have asked?

Stakeholder Engagement

Insights (1 of 2)

- Regarding what is holding the region back from full potential: The most significant barriers are critical infrastructure limitations, especially water and power capacity, along with bureaucracy, the need for more high-paying industrial jobs, and better workforce alignment.
- As for what should be the Hays Caldwell EDP's top 3 priorities over the next 2 years: Key priorities should focus on addressing infrastructure deficiencies (water, power, transportation), enhancing regional collaboration and strategy, and improving workforce development and alignment.
- On how the EDP should market the region: Marketing should emphasize the region's strategic location, growth, affordability, and land, highlight the diverse workforce, and leverage innovation strengths, such as TXST research and key corridors.
- About what Hays Caldwell EDP services or programs are needed to strengthen the area: Strengthening the area requires creating an infrastructure task force, enhancing workforce development coordination with education and industry, promoting increased regional collaboration, and focusing on existing business retention and expansion.
- Regarding what initiative or service is missing from the current Hays Caldwell EDP plan of work: The plan would benefit from being more visible and accessible, having more transparent processes for engaging stakeholders/investors, and a more defined value proposition and targeted approach to development.
- When asked where the most value in the EDP's work is found, Stakeholders consistently identify the most value in the EDP's role as a convener, its ability to foster connections and networking, providing valuable data and research, and its essential efforts in marketing the region and supporting site selectors.

Stakeholder Engagement

Insights (2 of 2)

- Concerning where the least value in the EDP's work is found: Areas of lesser perceived value stem from unclear roles and expectations for investors/board members, insufficient opportunities for meaningful engagement, funding dependency, and a perceived lack of early involvement or tangible output/leads.
- For what the Hays Caldwell EDP should keep doing: The EDP should continue its essential functions of maintaining a regional focus, supporting existing businesses (BRE), engaging in advocacy, research, and outreach, and hosting networking and informational events like the Economic Outlook.
- In terms of what Hays Caldwell EDP should stop doing: Suggested areas to reconsider include early morning meetings, adding board members without clear roles, relying too heavily on specific funding sources, and international trips with unclear ROI.
- On what Hays Caldwell EDP should start doing: Key initiatives include enhancing regional collaboration with all partners, developing a clearer regional story/brand, improving communication and data sharing, and conducting deep dives into infrastructure needs like electrical capacity.
- About what economic development initiative stakeholders would be excited to get involved in: Excitement was expressed for initiatives focused on developing critical infrastructure (water, power, transportation), enhancing workforce development and skilled trades training, participating in regional strategic planning, and leveraging specific industry clusters tied to regional assets like TXST research.

STAKEHOLDER ENGAGEMENT RESPONSES



Holding the region back

What is holding the region back from full potential?

INSIGHTS

- Stakeholders widely feel that bureaucracy and slow project approval processes are significant impediments to development.
- Interviewees also identified significant infrastructure limitations, particularly concerning water and power, as key deterrents for both talent and businesses.
- Additionally, stakeholders noted challenges in aligning education with workforce needs and a perceived "anti-growth" mentality in certain areas.

What is holding the region back from full potential?

INFRASTRUCTURE & RESOURCES

- Infrastructure (roads, water)
- Water, insufficient power
- Water
- Road infrastructure (35)
- Infrastructure - roads
- Power demand
- Limited water
- Electrical demands
- Transportation gridlock
- Infrastructure – roads, especially, are a deterrent for talent and business attraction
- Resources - water, electricity, funding (for infrastructure)
- Transportation (more capacity is needed on major roads)
- Mass transit is missing, which connects Austin to San Antonio
- Transportation - 35 corridor - SH130 is underdeveloped

COMMUNITY PERCEPTION & MENTALITY

- Intersection of the business community to influence public perception
- More commercial and entertainment offerings locally
- San Marcos lacks a growth mindset as opposed to neighboring cities
- Community feedback - fear of embracing change and additional development
- Anti-growth mentality
- Competition from surrounding communities
- Talk about the numbers and the impact, as well as the natural resources, workforce, values, etc
- Executive housing
- San Marcos' lower socioeconomic status
- Sometimes it's a David vs Goliath mentality - having our own identity, telling the story



What is holding the region back from full potential?

WORKFORCE & EDUCATION

- Educational options
- No alignment between colleges and communities
- Public school performance
- Secondary education - aligning secondary/post-secondary with company needs
- Rift between TXST's plans and what the city wants to do
- There are quality schools, but there are more disadvantaged schools that don't produce the best numbers or turn out the most high-quality workforce/high-skill, underprivileged families with lacking parental support
- Education (K-12) - demographics; dramatically lower median household income in San Marcos ETJ, disproportionate
- Need for multifaceted education/information
- Competition from two major cities that have the workforce
- Retaining graduates
- Workforce quality and quantity
- Qualified workforce
- People are leaving the area to work elsewhere due to a lack of high-paying job availability



What is holding the region back from full potential?

REGIONAL COLLABORATION & PLANNING

- Think long term
- Differences in what different communities want to focus on (more rural vs urban)
- Role as a convener/supporter (EDP) versus what EDCs do - articulation and understanding of this
- Global competition - ability to articulate the region's strengths; competition is higher than it used to be
- Need more regional efforts
- Lack of regional planning and coordination
- Regional alignment/cooperation
- If the region is disjointed and there's any conflict, it makes things hard
- If we can't come out of this process with a solid plan and structure on how to collaborate and work together as a region, then other states are going to start outpacing us
- The relationship between the EDCs and the partnership could be better

BUREAUCRACY & POLITICAL WILL

- Bureaucracy (the time that process takes is an obstacle for projects)
- Bureaucracy - hard to get projects done here
- Political will of most elected officials – the quality and interests of those who are running for office
- Policy decisions

MISCELLANEOUS

- Need more industrial, major employers to have higher salaries, better tax base
- Reactive without being selective
- Marketing is challenging

Top 3 Priorities

What should be Hays Caldwell EDP's top 3 priorities over the next 2 years?

INSIGHTS

- Community members emphasized that improving transportation infrastructure, especially along I-35, is a critical priority.
- Stakeholders also emphasized the need for enhanced workforce development efforts to better align educational outcomes with industry requirements.
- Attracting more major industrial employers was frequently mentioned as a priority to create higher-paying jobs and strengthen the tax base.



What should be Hays Caldwell EDP's top 3 priorities over the next 2 years?

BUSINESS ATTRACTION, RETENTION, & SUPPORT

- Continue doing core functions, including creating jobs
- Looking at redevelopment opportunities (looking at warehouse space)
- Something more than advanced manufacturing
- Small business development
- Vetting companies to determine if legitimate
- Focusing on what fits in the community
- Stick to the core functions of the EDP, not daycare and housing
- Be careful of mission creep
- Focus on large industrial projects
- Develop leads
- Sales tax assistance
- Increased tax base
- Focus on more high-tech companies, utilize STAR park (incubator)
- Existing business focus
- Improved small business support - especially when traffic drops outside of the school year
- Taking leads from the state and helping to land the industrial-type/large job-creation projects
- have not seen any leads/projects come through them
- Job creation - sustainable jobs, good corporate citizen companies

INFRASTRUCTURE & RESOURCE MANAGEMENT

- Transportation infrastructure, roads (35)
- Support roads
- SH-21 (from San Marcos to SH-130)
- Transportation options for people who want to live in San Marcos but have jobs in Austin, etc.
- Effects on water resources
- Understanding of water supply, understanding the limit
- Infrastructure (lack of water is a severe problem)
- Support infrastructure development



What should be Hays Caldwell EDP's top 3 priorities over the next 2 years?

DATA, COMMUNICATION, & MARKETING

- Economic development information gathered in one spot
- Being more visible in the mega region
- Site selector trips are getting popular
- Some background on who is in (helping evaluate leads)
- Better understanding of resources and assets
- Define how the EDP wants to be
- Develop resource inventory
- Being both reactive and proactive (BREA) - know data/information on the region that benefits attraction efforts
- Defined value prop
- Data clearinghouse for prospects associated with dated parcels (not just boundaries)

REGIONAL COLLABORATION & PLANNING

- Effective regional strategy and collaboration
- More consolidation of resources from local to regional
- Match Big projects and resources
- Continue to plan ahead
- Keep a good relationship with other EDOs
- Be an advocate for a unified voice
- Find our "one thing" to focus on and do well
- Actionable 5-year plan
- Continuing a regional focus
- Sustainable growth and planning
- Being intentional about growth, responding to what communities want
- Promoting regionalism in terms of economic development
- Working hand in hand with San Marcos to problem-solve
- Bringing people together to have a shared vision for the region

Review: Stakeholder Feedback

Part 3 of 3

What should be Hays Caldwell EDP's top 3 priorities over the next 2 years?

WORKFORCE-RELATED

- More emphasis on workforce development, leveraging the assets we have
- Workforce development
- Connect the workforce community to share practices
- Build programming for teacher CTE training focus
- Retention of Texas State students - not always jobs for people who want to stay

MISCELLANEOUS

- Preserve the culture
- Keep residents in the region
- Focusing on house affordability/daycare
- Smooth permit process
- Involving membership on committees and tasking them with something that they follow through with
- Requiring engagement of board members
- Staff development
- Youth recreation

Marketing

How should the EDP market the region?

INSIGHTS

- Stakeholders suggested marketing should strongly emphasize the region's relative affordability and its prime location along the I-35 and SH-130 corridors.
- Interviewees felt it is crucial to tell a clearer, more positive story that highlights regional assets, such as a diverse workforce and higher education institutions, especially Texas State University.
- Marketing efforts should also specifically target key audiences like site selectors and developers through various channels.

How should the EDP market the region?

MESSAGING & VALUE PROPOSITION

- Fastest-growing counties in the country
- Cutting-edge companies moving to the corridor
- Good land costs
- Friendly place and population
- Sell assets: workforce, costs, land
- Affordable option between Austin and SATX
- Benefits of not having to commute to Austin (traffic) if you work in San Marcos
- The cost of living is better than in Austin and San Antonio
- Labor shed - ours is bigger than Austin and San Antonio - get that concept across
- Focus on QoL

HIGHLIGHTING KEY REGIONAL ASSETS

- Prime spaces for development
- Emphasis on the innovation corridor helps to set apart
- Two universities
- Diverse workforce
- Market 35 and 130
- Innovation-focused promotion
- Market corridors as unique opportunities
- Wide range of workforce talent
- Great airport
- Market Texas State strengths and accolades
- Train infrastructure and ease of access
- The number of higher education institutions/college-educated people we have in this area
- Land availability
- JobCorps
- San Marcos High School - 23 different CTE programs (promotion of this)



How should the EDP market the region?

TARGET AUDIENCES & CHANNELS

- Market to investors who will help with the infrastructure first
- Market to developers and infrastructure providers
- Increase site selection programming
- Market region first and then individual, unique communities
- Need internal marketing - region and state
- Need a national campaign
- I'm not sure - internal and external are important
- Opening up marketing trips a bit more, even considering charging for them
- More ads/visibility with site selectors

REGIONAL IDENTITY & STORYTELLING

- Tell a better story that is more positive
- Knowing what each community wants and pushing it
- Center of the next big metroplex
- The value prop needs to be clearly defined
- Uniqueness of the area

MISCELLANEOUS

- In some communities, industries are working with communities to develop workforce (trades), which is a big plus to attract industries to the region
- EDP should embrace the tourism angle
- Prime land for development
- I am not sure

Services or Programs Needed

What Hays Caldwell EDP services or programs are needed to strengthen the area?

INSIGHTS

- Stakeholders expressed a need for improved regional collaboration and strategic planning to unify community initiatives and efforts.
- Several interviewees felt that services should include enhanced support for small businesses and more intentional retention efforts for existing companies.
- Developing stronger partnerships with educational institutions to ensure skills alignment with industry needs was also frequently mentioned.



WORKFORCE & EDUCATION PROGRAMS

- Employability skills
- Education session for employers- resources to help them build internships
- Mentoring to attract students to a particular industry (for example, healthcare)
- Better K-12 to industry coordination

MARKETING & SITE SELECTOR ENGAGEMENT

- Marketing trips are a tool for networking
- Going to conferences
- More advertising of the EDP at the state and national level
- More site selector engagement
- More trade show planning with investors
- Participate in company and site selector visits

INFRASTRUCTURE

- Utilities conversation
- Taskforce to focus on infrastructure - liaison

BUSINESS SUPPORT

- Small business retention and expansion
- Strengthen Entrepreneurship, capitalize on Texas state capabilities
- Family businesses: incentivize youth to stay working on those
- Create industry task forces
- Better cluster study and move subclusters
- Need to determine if BRE is a focus or if it's just attraction
- City is pushing on lower-end/mom & pop shops



What Hays Caldwell EDP services or programs are needed to strengthen the area?

REGIONALISM

- EDP could advocate for the unification of the communities' initiatives
- Taskforce (looking at other regions, on how they are forming there)
- Being more intentional
- Relationships
- Defining areas to develop in the corridors
- What would be the strategic development plan?
- Helping to convene meetings
- Promote more regional collaboration
- Work with communities to develop new initiatives
- Education of elected officials
- A collaborative effort/strategic development plan

MISCELLANEOUS

- Promote the tourism industry (tourism study is needed) (conference center is currently being built)
- Support law enforcement and healthcare
- Housing
- Affordable housing
- Nothing off the top of my head
- Ensure that those who have complaints are participating in efforts to make things grow - if you want change, there needs to be action
- N/A - starting to see new people, use new venues, staff is fantastic, continue to support current efforts
- Unsure
- Not familiar enough to answer

Missing Initiatives or Services

What initiative or service is missing from the current Hays Caldwell EDP plan of work?

INSIGHTS

- Many stakeholders felt the strategic plan needs to be more visible and accessible, potentially online, and that it should be reviewed annually.
- Interviewees suggested a need for a more sophisticated cluster analysis to update target industries and better articulate the region's value proposition.
- Improved involvement and communication with workforce partners and utility providers during site visits and planning processes were also identified as missing elements.

Review: Stakeholder Feedback

Part 1 of 2



What initiative or service is missing from the current Hays Caldwell EDP plan of work?

TRANSPARENCY & COMMUNICATION

- Being clear about the story, opportunities
- Make the plan more visible and accessible
- Essential to have a roadmap for future reference, they can always look back at the big picture plan
- Annual review of the strategic plan would be helpful
- If the plan could live on the website or somehow be more visible or accessible, it would be beneficial
- Emails to board members or investor reps could be clearer - meeting purpose, intended audience, cost associated, expectations
- Messaging isn't consistent

INVESTOR/BOARD ENGAGEMENT & STRUCTURE

- More involvement of workforce partners in the site visits
- Offering opportunities for investors to have intentional face time with what they bring to the community
- Focused committee(s) with purpose and plan - work off of a model from other EDOs
- Board member roles aren't well-defined, and we aren't utilized
- Need board orientation, no introduction of new board members, lack of response to emails



What initiative or service is missing from the current Hays Caldwell EDP plan of work?

SPECIFIC PROGRAMS/FOCUSES

- More sophisticated cluster analysis (target industries need to be updated)
- Understand value proposition
- Improve school performance
- Housing affordability
- More help for existing businesses that had been longer than 10 years
- More law enforcement
- Helping the image of the school districts here.
- Getting positive data out, marketing the benefits/program, and changing the perception
- Annual report on the school districts - student profiles, getting that story out
- BRE - equal focus on all communities, not just one city
- Less on "big" things, more support for small businesses and no focus on retail (BRE)

FINANCIAL STABILITY & RESOURCES

- Expanding footprint financially - don't be so reliant on San Marcos
- Less control over incentives due to the structure
- Income/budget
- I don't know if the current budget structure allows for the proper staffing
- I want to ensure they have the resources they need to do what they want/need to do effectively

MISCELLANEOUS

- Do not know, no access to the plan
- Megaregion opportunities/participation
- N/A - doing a great job
- Name change was small in action but significant in impact

Value of Work

Where do you find the most/least value in the EDP's work?

INSIGHTS

MOST VALUE

- Stakeholders reported finding significant value in the EDP's role as a convener and connector, facilitating networking opportunities and building relationships within the business community and with outside prospects.
- Many felt the EDP effectively increases the region's competitiveness through its broad marketing reach and ability to attract businesses, offering a valuable regional perspective.

INSIGHTS

LEAST VALUE

- Some stakeholders expressed concerns regarding a perceived lack of tangible output or specific leads generated through the EDP's efforts.
- There is a feeling among some investors and board members of insufficient opportunities for meaningful involvement, with a need for better clarification of roles and expectations.

Review: Stakeholder Feedback

Part 1 of 3

Where do you find the most value in the EDP's work?

REGIONAL COLLABORATION

- Making introductions with potential clients
- Collaboration work
- Building an ecosystem
- Convening people
- Connections and networking
- Partnership component
- Relationships
- Integrate with the business community
- Community piece - being a part of watching an area grow
- The gateway for opportunity in the region
- A rising tide raises all ships - any prosperity impacts all of us for the better
- Anything they can pull together as a cohesive region

BUSINESS ATTRACTION

- To get in early on the projects, learn more about new projects
- Marketing trips
- Bringing the site selectors
- Recruit business
- The storytelling with business attraction
- Partner within projects, link for incentives
- Building project pipeline
- Find and vet projects
- RFIs response
- Site selector programs
- Connections, relationship-building with site selectors
- Prospect facilitation



OVERALL IMPACT & PERSPECTIVE

- EDP increases the competitiveness of the region
- Support overall growth
- They have a regional perspective
- They know assets
- EDP is well respected, long history
- Understand what's happening in the community
- Bring a level of professionalism
- They provide a lift for the community that benefits our businesses and customers
- Motivated to continue to make this a great place for people to want to come here, stay here, and be gainfully unemployed
- Having the opportunity to participate in initiatives to drive growth, change, and improve economic outcomes
- The growth is balanced across the region – San Marcos isn't more or less important than any other town in the region.

STAFF & RELATIONSHIPS

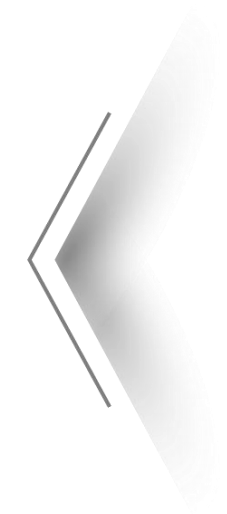
- The people, the presence
- Good staff
- Staff support with working in the region
- Continue with the chemistry among the team, be patient, and give yourselves time

INFORMATION, DATA, AND RESEARCH

- They have valuable information
- Information and data
- Research capacity
- Economic impact analysis
- They know what each community has and what they don't have

Review: Stakeholder Feedback

Part 3 of 3



Where do you find the most value in the EDP's work?



MISCELLANEOUS

- More announcements are needed
- Value the work they do
- I don't think there's much value; it's a historical investment
- Workforce development

Review: Stakeholder Feedback

Part 1 of 2



Where do you find the least value in the EDP's work?

INVESTOR/BOARD - RELATED

- Investors would like to have more opportunities to be involved
- Diversity on the board that reflects the business population
- Need more output from committees
- Need to clarify investor expectations and roles
- Need better board member orientation
- Not asking industry leaders for assistance
- Less diversity on the board
- Politician heavy on board
- Would like more opportunities to be involved (e.g., strong and purposeful committees)
- Would like clarification of role(s), expectations, and how to best contribute
- Need more opportunities for lead investors to be more involved

TRANSPARENCY & COMMUNICATION

- More transparency
- Too much gatekeeping
- Educating the community on economic development and projects
- Continued improved communication, turnaround time /responsiveness
- Be mindful of the story that is being told
- Be strategic with the information being shared

FUNDING & POLITICAL DEPENDENCY

- Difficulties in getting money from the city of San Marcos
- Too dependent on government funding
- Dependent on City of San Marcos for funding, subject to political changes

Where do you find the least value in the EDP's work?

LEAD GENERATION

- Lead generation is missing
- Big projects not vetted regarding water and Power
- Have never gotten any leads/projects from them
- Be brought in way early when a prospect is looking at the area

FOCUS & STRATEGY

- They shouldn't be involved in business development for small businesses in San Marcos
- Focus on high-impact, high-growth
- Defined roles with San Marcos are needed

MISCELLANEOUS

- Think more carefully about what to invest in
- Not much value right now
- Having a good understanding of water and power
- Bureaucracy
- Not enough parking at meetings
- Business development efforts
- Need better metrics - quality versus quantity
- Future - continue to be aware of environmentally sensitive issues
- Don't understand their mission and what they do for us/other cities
- There are still some government entities that maybe don't feel as much a part of the concerted effort to grow in the counties
- Need better interaction from the workforce team

Keep Doing

What should Hays Caldwell EDP keep doing?

INSIGHTS

- Stakeholders strongly advocated for the EDP to continue its regional focus and approach, recognizing the importance of working across the two-county footprint.
- Maintaining consistent communication with members through updates, networking events, and luncheons is highly valued.
- Interviewees appreciated and suggested that the EDP should continue activities like hosting meetings in different locations, supporting policy work, and providing research and advocacy.



REGIONAL FOCUS & COLLABORATION

- Keep the regional focus
- Keep a relationship with the chamber and other chambers in the region
- Support collaboration
- Regional approach
- Keep a two-county footprint
- Convening opportunities
- Economic Outlook w/ chamber

COMMUNICATION & NETWORKING EVENTS

- Having updates and networking
- More info on what the EDP is doing, info on leads
- Communication is good
- Quarterly meetings
- Keep luncheons for information sharing and networking
- Communication with members
- Big events (economic outlook, summits, etc.)
- Keep board meetings to quarterly
- Board meetings having a speaker or a panel
- The luncheons are lovely - need to be more focused and understand what we're trying to do/the value we get out of them

What should Hays Caldwell EDP keep doing?

SPECIFIC ACTIVITIES

- Continue looking at other EDCs and try those new things
- Keep diversifying the meeting locations, as it shows the landscapes and variety of the region
- Hosting meetings in different cities –a variety of topics
- Continue to be conscious of environmental constraints
- Keep supporting policy work
- Convene groups around issues

ORGANIZATIONAL

- Stability
- Continue current efforts
- Continue adjusting to the reshaping and growth within the organization
- Continue with the chemistry among the team, be patient, and give yourselves time

CORE FUNCTIONS

- Research
- Outreach
- Advocacy
- Recruiting
- Handling clients
- Prospect facilitation

MISCELLANEOUS

- They appreciate that they have utility investors
- Closer relationship with the Chamber of Commerce
- The EDP website is a good resource
- Responsive to members
- Current efforts, focus in
- Continue balancing "charm" with growth/innovation
- Cohesive GIS map for the entire region project

Stop Doing

What should Hays Caldwell EDP stop doing?

INSIGHTS

- Some stakeholders suggested the EDP should stop adding board members to avoid potential dilution of focus or inefficiency.
- There was a specific suggestion to stop holding early morning meetings, as they are inconvenient for members traveling from across the region.
- Several interviewees felt the EDP should stop being overly reliant on funding, specifically from San Marcos, or appearing to highlight one community over others.

What should Hays Caldwell EDP stop doing?

COMMUNICATION ISSUES

- Sometimes members are not very aware of meetings and events, and more work on communication can be done
- A list or newsletter would be helpful
- They are lighter on communication

MISALLOCATION OF RESOURCES

- Wasting resources on bringing industries that the region is not ready to handle, given the water supply, for example
- Relying on money from San Marcos specifically
- International trips with unknown/low ROI or tangible benefits

LACK OF VISIBILITY/EQUITY

- Set up meetings with companies without contacting the community
- Unsure - not a lot of visibility of what they're doing
- Be equitable in what you do - don't highlight one community over another

MISCELLANEOUS

- Do not know
- Stop adding board members
- Nothing at this time
- No early morning meetings

Start Doing

What should Hays Caldwell EDP start doing?

INSIGHTS

- Stakeholders emphasized that the EDP needs to significantly enhance its external and internal communication efforts, providing more frequent updates and better telling the region's story.
- There is a strong desire for more intentional collaboration and partnership, including inviting various stakeholders like utility providers and community leaders to meetings and working more closely with areas outside San Marcos.
- Specific initiatives suggested include identifying major commercial corridors, conducting deeper dives into target industries and utility demands, and supporting skilled trades programs.



What should Hays Caldwell EDP start doing?

COMMUNICATION & TRANSPARENCY

- Giving more updates
- Share aggregated data from projects (High-level view of different areas), which will help understand demands
- Enhancing outside communication
- Giving more advanced notice of meetings and events - build an annual calendar
- More communication on engagement (check software)
- Share aggregated data from the project pipeline
- More context of meetings before attending
- Ensure communications are received/clear
- List of upcoming events (via email and/or on website)
- Newsletter
- Better communication of the organization's purpose/goals (especially in the name of our city)

REGIONAL COLLABORATION

- More regional collaboration
- It would be helpful for the cities to get to know the work the EDP does
- Have more meetings where they invite a variety of stakeholders to get updates
- Partnerships
- Provide leads
- More work with the Chamber of Kyle and other municipalities, as is done with the San Marcos Chamber of Commerce
- Educate the community on the benefits of projects
- Listening tour to understand the community
- More elected official training
- Work to find and support future elected officials
- Develop and strengthen city council relationships
- Someone from HCEDP should either attend or watch council meetings
- Capture what is essential to community members
- More of an active role in all communities, instead of just a passive

What should Hays Caldwell EDP start doing?

STRATEGIC PLANNING

- Reaching out on Smaller projects (natural gas standpoints), they could provide a temporary solution
- Dig into electrical demands, provide feedback to partner communities
- Partnership (education and businesses) to foster skill development (help in knowing what those skills are)
- Improve advisory board quarterly meetings (not just a checkbox, but they would like to get more insights into education/workforce)
- Help with grant writing
- Conduct regional tours of assets and companies
- Deep dive into the target industries
- Link high school to local jobs
- Mapping project - resources, assets, environmental avoidance
- Vetting of sites program
- Make the connection between the skills provided and to skills needed
- Help develop fast-track permitting
- Create an infrastructure committee
- Connect business managers to education leadership
- Regionally connect businesses not using education placement services with education
- Skilled trades should be more of a focus
- Build a coalition between school districts and trade schools
- Be more cohesive about what we're looking at
- Aligning targets with our strengths
- Diversify targeted industry/jobs

What should Hays Caldwell EDP start doing?

RELATIONSHIP BUILDING

- Inform investors of how the project happened
- Host developer and government service introductions
- Include utility partners earlier in the process
- Invite government department heads to give a 2-minute update on efforts
- Partner more with Texas State as a Tier 1 university
- Edo's driving conversation with utilities
- Work with Texas State on IP commercialization
- Work with STAR park
- Engage with the university - maybe could use some strategy on how to do this
- Meetings/discussions with partner communities to understand what is wanted/needed in terms of ROI

MISCELLANEOUS

- Change investment levels
- Task force/committees, engaging investors
- Raise more money and have more of a budget to work with - esp. to offset the reduction in San Marcos' contribution
- How do we catapult the transportation system in central Texas, utilizing the assets
- More tourism-related development, something for kids to do

MARKETING & STORYTELLING

- Need to find a better way to tell the story of the region
- Identify major commercial corridors
- Sell the message of what HCEDP does and the economic impact and benefits (positives, not negatives)
- Tell their story better

Economic Development Initiatives

What economic development initiative would you be excited to get involved in?

INSIGHTS

- Many stakeholders expressed strong interest in participating in infrastructure-focused initiatives, particularly those addressing critical water, power, and sewage challenges.
- Engagement in workforce development programs is desired, including efforts to upskill workers and align educational outcomes more closely with industry needs.
- Opportunities related to Quality of Place initiatives and housing affordability also generated enthusiasm among the interviewees.

Review: Stakeholder Feedback

Part 1 of 3



INFRASTRUCTURE & RESOURCES

- Infrastructure task force (Power, water, sewage)
- TXDOT working group/interface group
- Somehow being involved in CAMPO or AACOG to represent HCEDP and other various transportation groups
- Not just for show, putting teeth into it, and direct action steps for the organization
- Support for airport infrastructure development

INDUSTRY-SPECIFIC OPPORTUNITIES

- Getting involved with Hill Country Studios
- Interest in Space, CHIPS, AI, and water
- Texas legislature funding in the film industry, San Marcos film studio - huge opportunity, make sure this is on the radar

WORKFORCE DEVELOPMENT

- Skilled trades (how to incentivize youth to get into them, shortage)
- Workforce development initiatives
- Upskilling workers - displaced workers
- Having a more formal community college presence here, beyond just technical/continued education opportunities
- Workforce development, small business program
- Grow a relationship with the University
- Making sure we have the programs/skills we need for jobs

HOUSING INITIATIVES

- Affordable housing initiative
- Need diversity of housing - not just "affordable" (that isn't affordable anymore)
- Need affluent housing as well

Review: Stakeholder Feedback

Part 2 of 3



REGIONAL COLLABORATION

- Ability to bring all communities together
- Understanding community differences
- Opportunities for them to come in and update our city council/economic development committee
- Asking how they can better support/serve us
- Is there room for any mentor-type coaching on economic development?
- Regional strategic planning for economic development
- What do major stakeholders (cities) want/not want?
- What does long-term success look like for each of the investing cities?

BOARD STRUCTURE & COMMITTEES

- Re-establishing board makeup to be as efficient as it can be
- Need specific action items in this plan, committees/people to ensure that things are done, and hard deadlines
- Bolster committees- legislative/policy committee, data/technology committee, finance committee*, admin*, infrastructure
- Committees should all have a structure and a purpose (long-term, not just following the plan)
- A process for finding board members who are interested in being on the executive board/identifying candidates

Review: Stakeholder Feedback

Part 3 of 3

What economic development initiative would you be excited to get involved in?

MISCELLANEOUS

- Think about how tourism is a valuable resource
- Quality of Place initiatives (not anti-growth, but preserving what makes the area special)
- Anything they need - happy to cheerlead always
- Ensure staff are supported and have everything they need
- More visibility

What did we not ask that we should have?

MISCELLANEOUS

- What can the utility group do for the EDP?
- Understanding the role of EDP
- Turnover of staff seems a lot
- How can investors help EDP be better?
- Need 3-4 big ideas to focus on at every meeting - North Star
- More staff diversity
- How can utilities support ED efforts (non-financial)
- Question the turnover of staff
- Hire grant writers.
- Annual review session of check-in of strategic plan - how are we doing, etc., to allow for dialogue
- The board needs term limits.
- Committees should all have a structure and a purpose (long-term, not just following the plan)
- Support for airport infrastructure development. Unrealized opportunity. Focus on freight. FTZ or point of entry.
- Need specific action items in this plan, committees/people to ensure that things are done, and hard deadlines
- What do major stakeholders (cities) want/not want?
- What does long-term success look like for each of the investing cities?
- Opportunities for them to come in and update our city council/economic development committee.
- Asking how they can better support/serve us.
- Texas legislature funding in the film industry, San Marcos film studio - huge opportunity, make sure this is on the radar



HAYS CALDWELL EDP

Community Assessment

Community Assessment

Overview

The community assessment provides important context for strategic plans by highlighting significant trends and indicators. In addition to building a quantitative framework to evaluate regional strengths and opportunities, the assessment can also flag challenges to be addressed through focused economic development efforts.

To that end, macroeconomic data covering a variety of topics has been analyzed for Hays and Caldwell Counties, the Austin-Round Rock-San Marcos MSA, and the state of Texas. The results portray a growing community with substantial educational assets and future growth prospects. Most of the data is derived from Lightcast, with additional information included from the Census Bureau.

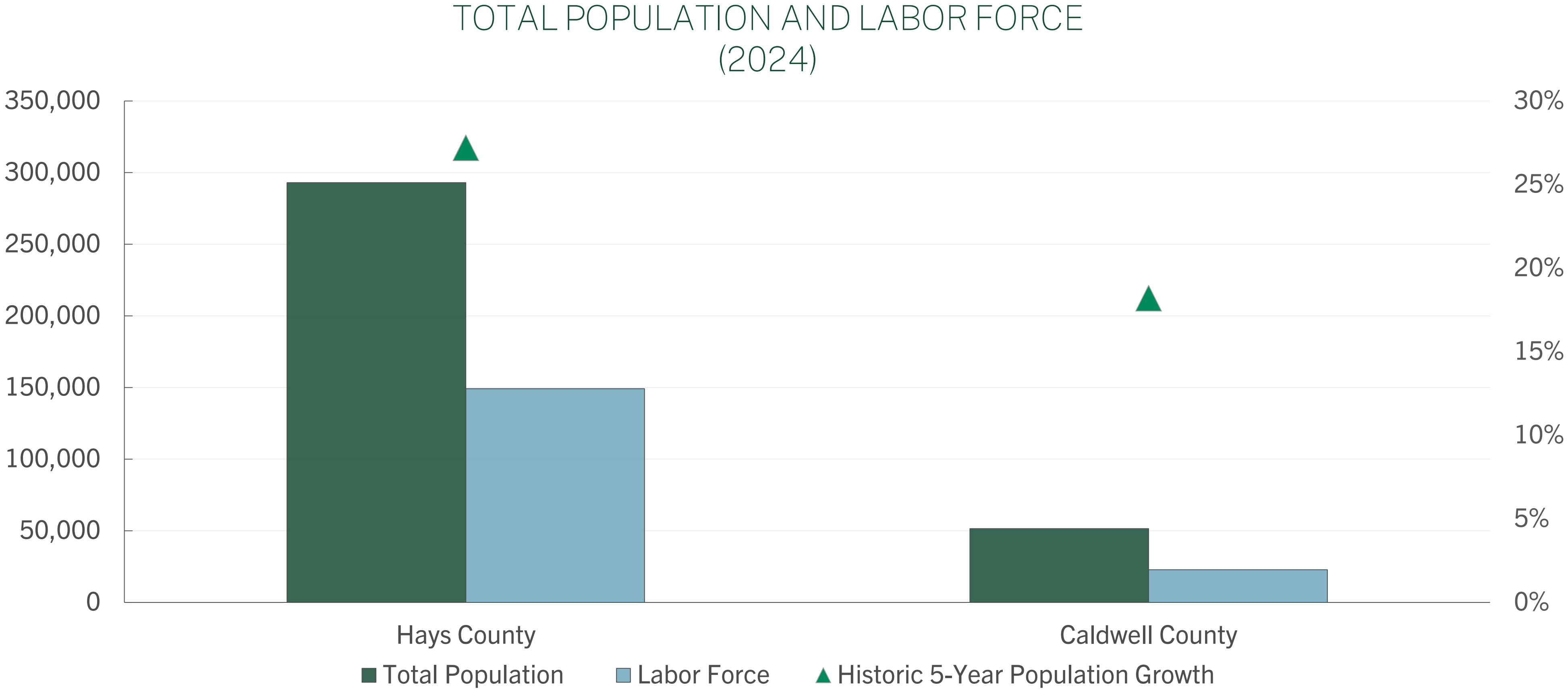
TOPICS COVERED

- Population & Labor Force
- Demographics
- Migration
- Commuting & Transportation
- Regional Income
- Housing
- Educational Attainment
- Employment Growth

Population Growth

Community Assessment

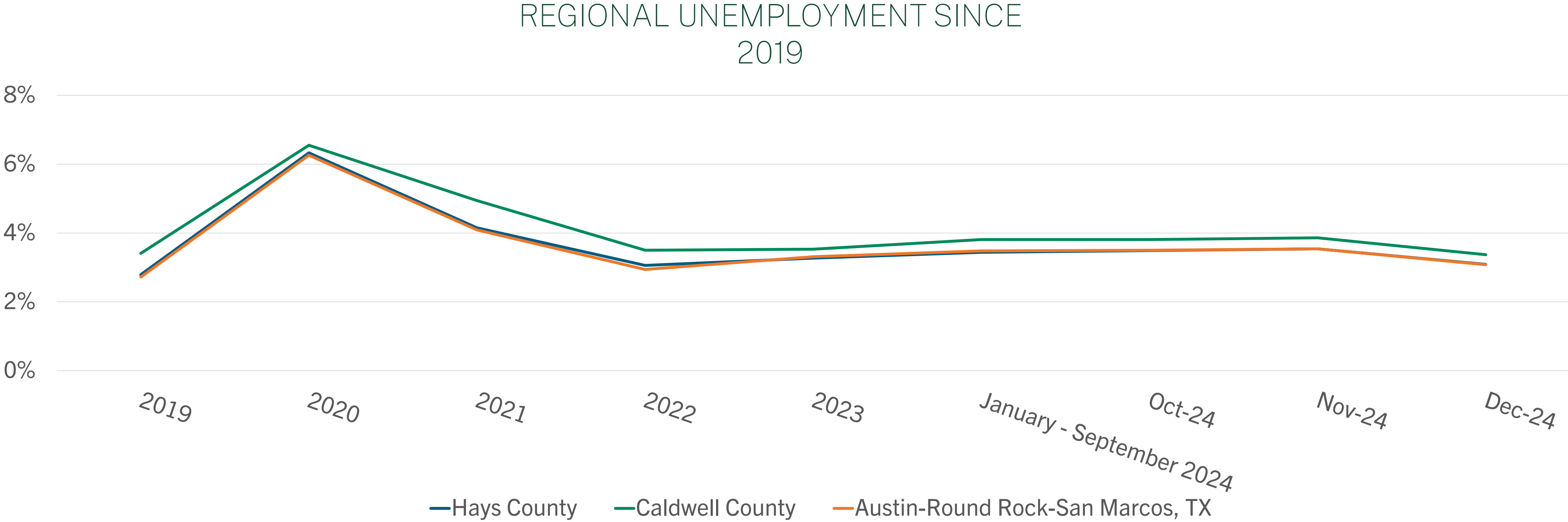
The chart below shows the current population and labor force against the five-year growth rate for Hays and Caldwell Counties. Both counties have experienced significant population growth since 2019, with over 25% growth occurring in Hays County and nearly 20% in Caldwell County. Both of these growth rates outpace that of the wider region, with the Austin MSA experiencing 14% population growth from 2019 to 2024.



Source: Lightcast, Hickey Global

Unemployment

Community Assessment



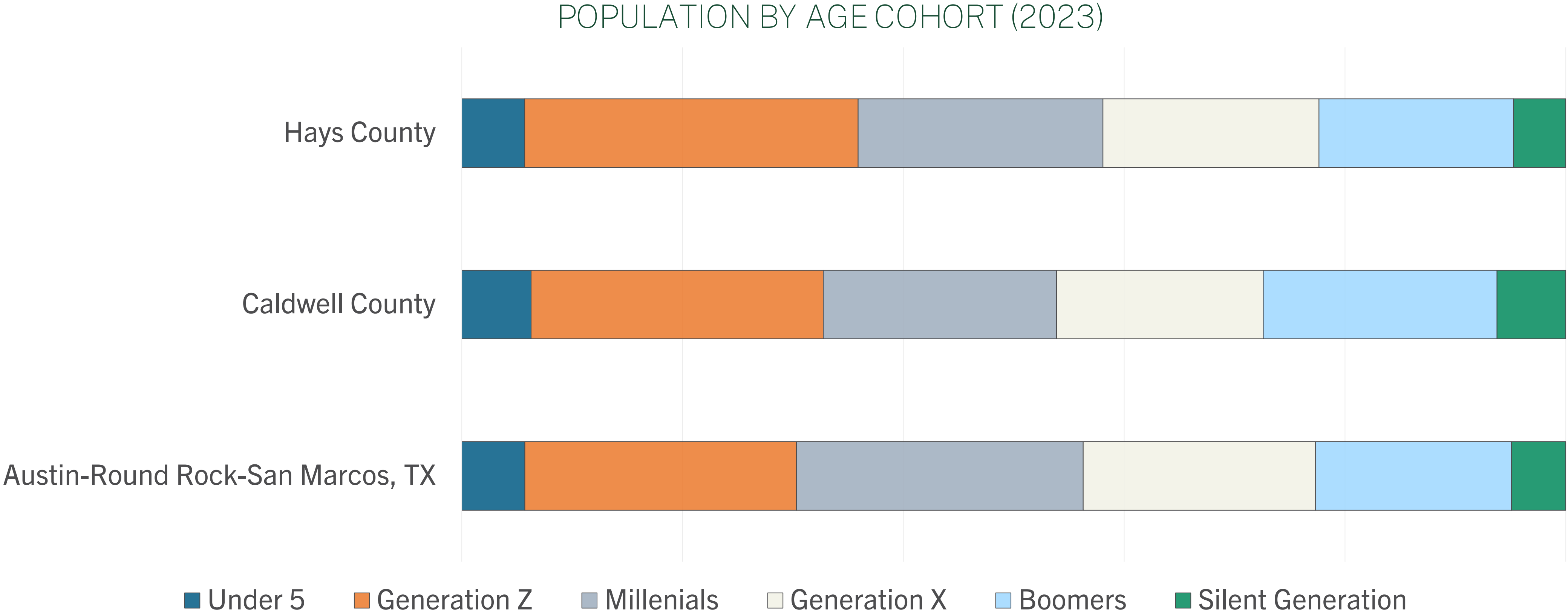
Unemployment in Hays County has tracked closely to levels experienced in the Austin MSA, with unemployment rates peaking in early 2020 during the onset of the COVID-19 pandemic. Caldwell County’s unemployment has consistently been higher than Hays by an average of 0.4%. However, Caldwell has been able to reach the county’s pre-pandemic unemployment rate while Hays County and the Austin MSA remain higher than their 2019 levels.

Source: Lightcast, Hickey Global

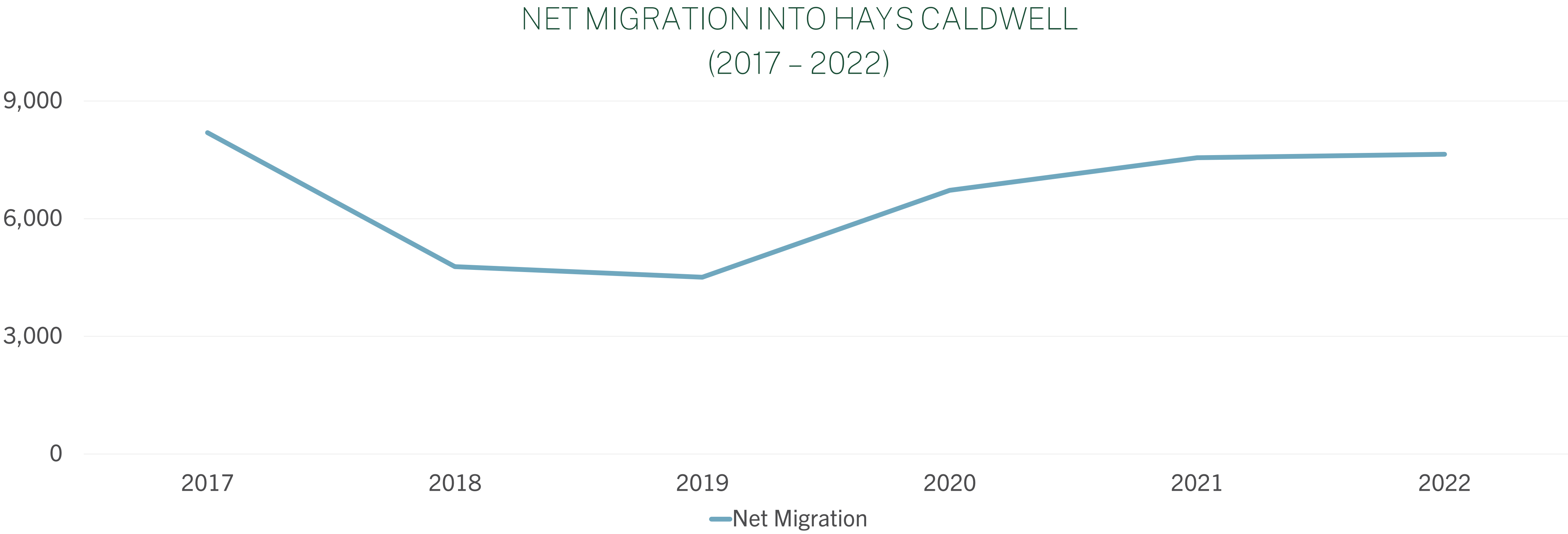
Population Demographics: Age Cohorts

Community Assessment

The chart below depicts the distribution of ages by generational cohort for Hays and Caldwell Counties as well as the Austin-Round Rock- San Marcos MSA. Hays County’s demographic distribution closely resembles that of the Austin MSA with a large portion of young residents in the overall populace. Caldwell County skews slightly older with a larger portion of Baby Boomers and residents over the age of 79. Overall, the region indicates a healthy mix of age cohorts, driven in part by major educational assets such as Texas State University.



Source: Lightcast, Hickey Global



The chart above shows the combined migration into Hays Caldwell from 2017 to 2022, the most recent data year. Each year within the analysis period resulted in a net gain of residents, peaking in 2017 with over 8,000 individuals. The onset of the COVID-19 pandemic did not hamper the region’s attractiveness for new residents, with higher levels of migration from 2020 on than in both 2018 and 2019. Of the two counties, Hays County contributes roughly 90% of the region’s total net migrants each year. New residents largely arrive from neighboring Texas counties, with additional arrivals from various counties in California.

Source: Lightcast, Hickey Global

Commuting Patterns

Community Assessment

Region	Total Inbound Commuters	Total Outbound Commuters	Total Net Commuters
Hays Caldwell	50,994	98,848	-47,853
Commuting Region	Commuters into Hays Caldwell	Commuters from Hays Caldwell	Total Net Commuters
Travis County, TX	15,549	67,431	-51,881
Bexar County, TX	7,392	8,679	-1,288
Comal County, TX	6,948	4,930	2,018
Williamson County, TX	4,789	6,566	-1,778
Guadalupe County, TX	3,588	2,488	1,100
Bastrop County, TX	2,189	1,251	939
Bell County, TX	1,297	1,221	76
Gonzales County, TX	736	392	344
Fort Bend County, TX	671	650	21
Burnet County, TX	585	407	178

Residents of Hays and Caldwell Counties currently commute out of the region at a greater rate than those commuting in. This is almost entirely due to the large number of commuters from Hays Caldwell with employment in and around Austin. Excluding Travis County entirely, the Hays Caldwell region would have a net positive number of inbound commuters with large amounts of workers coming from Comal, Guadalupe, and Bastrop Counties.

Source: Lightcast, Hickey Global

Transportation

Community Assessment

	Mean Commute Time (Minutes)	% of Commuters Carpooling to Work	% of Commuters Driving Alone to Work	% of Commuters Taking Public Transportation to Work	% of Commuters Walking to Work	Remote Workers	% Work from Home
Hays County	31.3	9.1%	73.5%	0.3%	1.8%	16,788	13.5%
Caldwell County	34.1	9.1%	79.8%	0.1%	1.6%	1,503	7.5%
Austin-Round Rock-San Marcos, TX	27.3	8.0%	66.4%	1.3%	1.8%	255,222	20.7%
Texas	26.6	9.7%	75.1%	1.0%	1.5%	1,512,512	11.0%

The table above shows the primary modes of transportation used by commuters in and around Hays Caldwell. As in most regions across the United States, the majority of commuters rely on personal vehicles, while only a small percentage carpool. Similarly, public transportation is uncommon in the area, with less than one percent of residents taking public transportation to work. Hays County has a sizeable portion of remote workers with 13.5% of residents working from home.

Source: Lightcast, Hickey Global

Regional Income

Community Assessment

	Median Household Income (2023)	Per Capita Income (2023)	Cost of Living Adjusted Average Earnings
Hays County	\$85,827	\$64,671	\$66,709
Caldwell County	\$68,503	\$44,202	\$65,085
Austin-Round Rock-San Marcos, TX	\$97,638	\$80,471	\$102,451
Texas	\$76,292	\$65,768	\$87,225

The table to the left presents regional income indicators for Hays and Caldwell Counties, the Austin MSA, and Texas overall. The median household income for Hays County is higher than the state average, whereas Caldwell County’s is significantly lower. This disparity is also reflected in per capita income, with the combined Hays Caldwell Region reporting a lower per capita income than Texas as a whole. When controlling for the cost of living, however, the average earnings for both counties are largely commensurate albeit lower than the MSA and Texas.

The regional income indicators suggest that economic development success can improve the equitable distribution of income throughout the MSA,.

Source: Lightcast, U.S. Bureau of Economic Analysis, Hickey Global

Housing

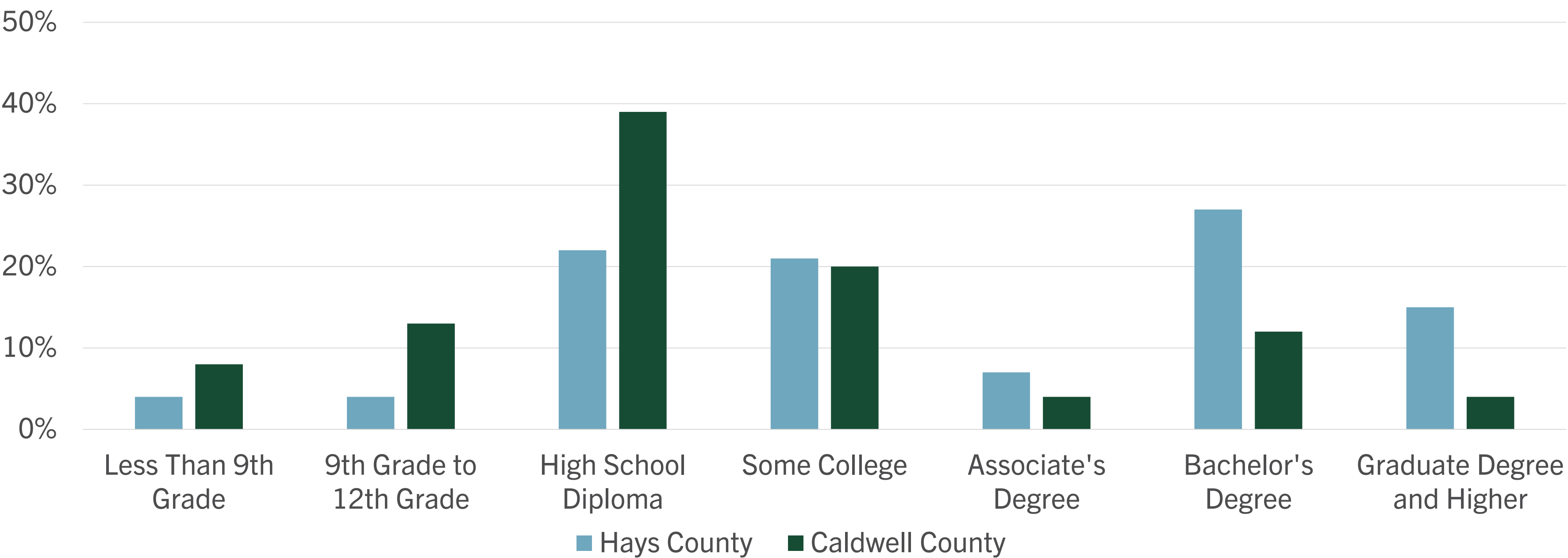
Community Assessment

	Median House Value (2023)	Housing Units (2023)	Housing Units Growth (2018 – 2023)	Homeownership Rate	Median Monthly Rent
Hays County	\$335,700	94,988	31.0%	64.1%	\$1,355
Caldwell County	\$185,400	16,517	17.3%	73.2%	\$1,084
Austin-Round Rock-San Marcos, TX	\$390,500	960,087	24.0%	58.1%	\$1,529
Texas	\$238,000	11,654,971	10.4%	62.6%	\$1,251

While the median household income is higher than the surrounding area, the median house value in Williamson County is lower than the Austin MSA. This differential may be leveraged to attract prospective homeowners to the region in pursuit of lower costs. This opportunity has not translated to the county’s homeownership rate, however, which is lower than both the MSA and the state. Median rents are also relatively high, which can produce a challenge for nonfamily households and single earners. Housing units continue to be added in both counties, with nearly 35% growth since 2018. The extraordinary rate of development can help mitigate inflationary pressures on housing prices and maintain current migration trends.

Source: Lightcast, U.S. Census Bureau, Hickey Global

EDUCATIONAL ATTAINMENT BY LEVEL



The chart above compares the distribution of educational attainment in Hays and Caldwell Counties. As a whole, Hays County has a high proportion of residents with some level of college education, with 42% of the populace holding a Bachelor’s Degree or higher (compared to the state’s 36%). On the other hand, Caldwell County has a much higher percentage of residents without college experience – roughly 60% of the populace.

Completions by Select Degree Program

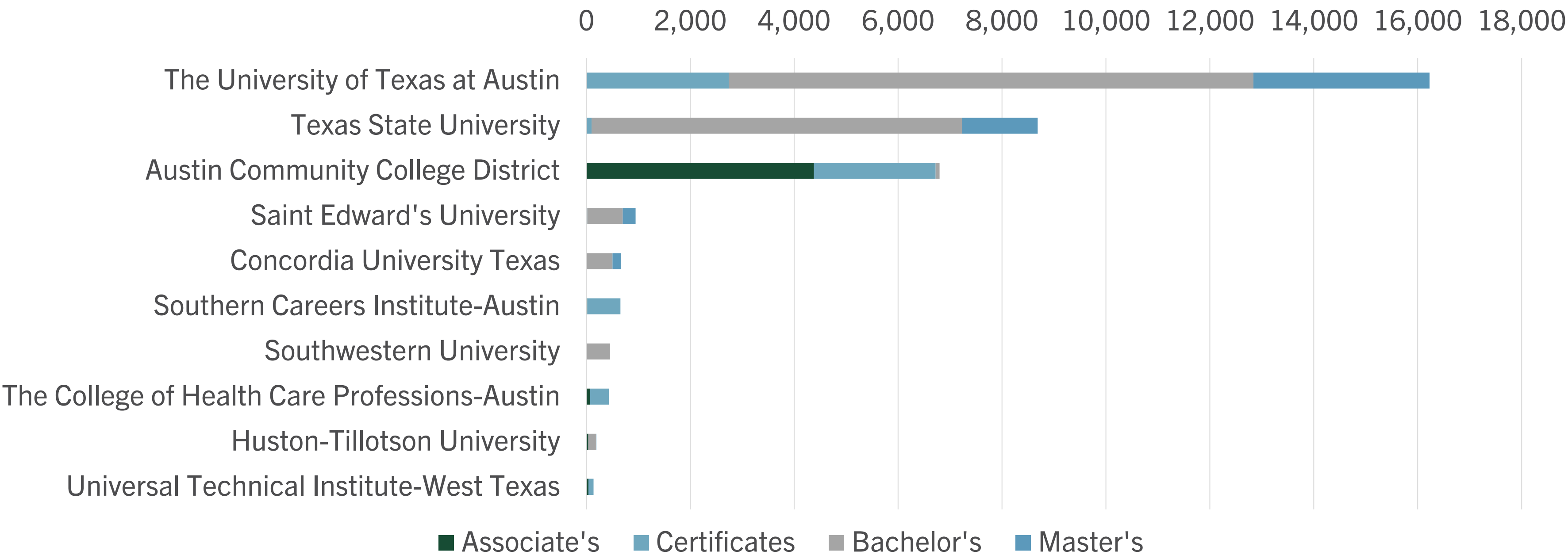
Community Assessment

	2023 Total	Computer and Information Sciences and Support Services	Education	Engineering and Engineering Related Technologies	Mathematics and Statistics	Liberal Arts and Sciences, General Studies and Humanities	Biological and Biomedical Sciences	Physical Sciences	Health Professions and Related programs	Business Management, Marketing, and Related Support Services
Hays County	8,835	389	592	181	76	146	412	52	681	1,371
Austin-Round Rock-San Marcos, TX	38,543	3,131	2,319	2,885	657	2,241	1,793	488	3,951	5,252
Texas	400,108	21,936	17,257	24,738	3,326	51,390	13,989	2,657	66,096	59,467

The table above shows the 2023 degree totals for Hays County, the Austin MSA, and the state of Texas, as well as the number of degrees awarded in select fields. Texas State University is a major contributor to regional skill acquisition, awarding nearly 9,000 degrees annually. More than 80% of these are bachelor’s degrees, with master’s degrees accounting for an additional 16%. The availability of a local talent pipeline generating workforce capabilities in areas such as computer science, biological and biomedical sciences, and health professions is a considerable asset for competitive site selection projects.

Source: Lightcast, Hickey Global

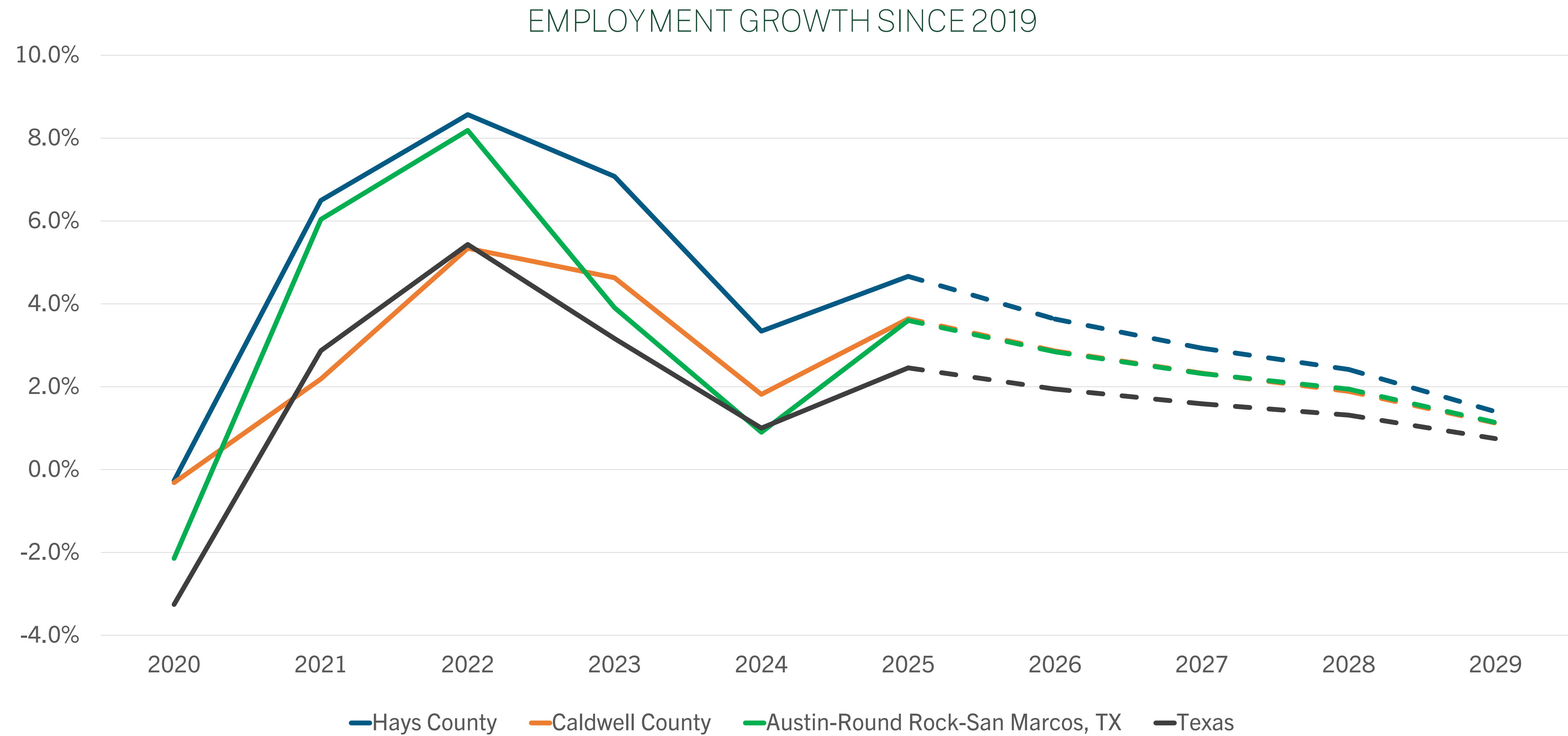
INSTITUTION COMPLETIONS BY DEGREE TYPE
(2023)



The above institutions represent the largest degree producers in the Austin MSA. The leading institution by size is the University of Texas at Austin, which awarded nearly half the total degrees received in 2023. The top three is rounded out by Texas State University and the Austin Community College, the latter producing most of the region’s associate’s degrees in a range of fields.

Employment Growth

Community Assessment



Employment Growth

Community Assessment

This table shows high-level employment data for the Hays Caldwell region. The largest occupation group by employment is Food Preparation (13,206), followed by Transportation and Material Moving (13,004). Regional strengths are found in Management roles, Sales occupations, and the aforementioned Transporation and Material Moving group, with each group demonstrating a location quotient greater than one.

Regional Occupation Growth by 2-Digit SOC Code			
Occupation	2024 Jobs	2024 Employment Concentration	2019 – 2024 % Change
Management	9,919	1.12	63%
Business and Financial Operations	5,757	0.74	47%
Computer and Mathematical	2,691	0.71	33%
Architecture and Engineering	1,292	0.68	6%
Life, Physical, and Social Science	767	0.68	23%
Community and Social Service	1,633	0.75	25%
Legal	592	0.58	19%
Educational Instruction and Library	9,407	1.38	19%
Arts, Design, Entertainment, Sports, and Media	2,166	0.98	25%
Healthcare Practitioners and Technical	4,318	0.62	18%
Healthcare Support	3,305	0.59	23%
Protective Service	1,820	0.70	38%
Food Preparation and Serving Related	13,206	1.39	27%
Building and Grounds Cleaning and Maintenance	3,897	0.95	16%
Personal Care and Service	3,347	1.00	26%
Sales and Related	12,608	1.22	11%
Office and Administrative Support	12,305	0.90	10%
Farming, Fishing, and Forestry	408	0.51	7%
Construction and Extraction	7,626	1.42	15%
Installation, Maintenance, and Repair	5,095	1.08	32%
Production	4,583	0.72	11%
Transportation and Material Moving	13,004	1.26	62%
Military-only	332	0.51	17%



HAYS CALDWELL EDP

Cluster Study

Cluster Study

Summary

Hickey Global has taken a data-oriented approach to confirm the presence of target industry activity and each cluster's contribution to regional economic growth. This analysis provides a summary of industry employments and workforce assets that can be leveraged for future growth. The study also includes an updated framework for the EDP's key industries, organizing current targets into three distinct groups. These groups are:

Foundational Clusters, which identify sectors that play a role in target industry development throughout the economy, Core Competencies, which represent areas with occupation strengths that enable the growth of other target industries, and Target Industries, which include both established and emerging areas that stem from foundational clusters and are supported by core competencies.

This framework provides a flexible approach to target industry development that supports both legacy industries and growth opportunities for the region.

KEY FINDINGS

Community Growth

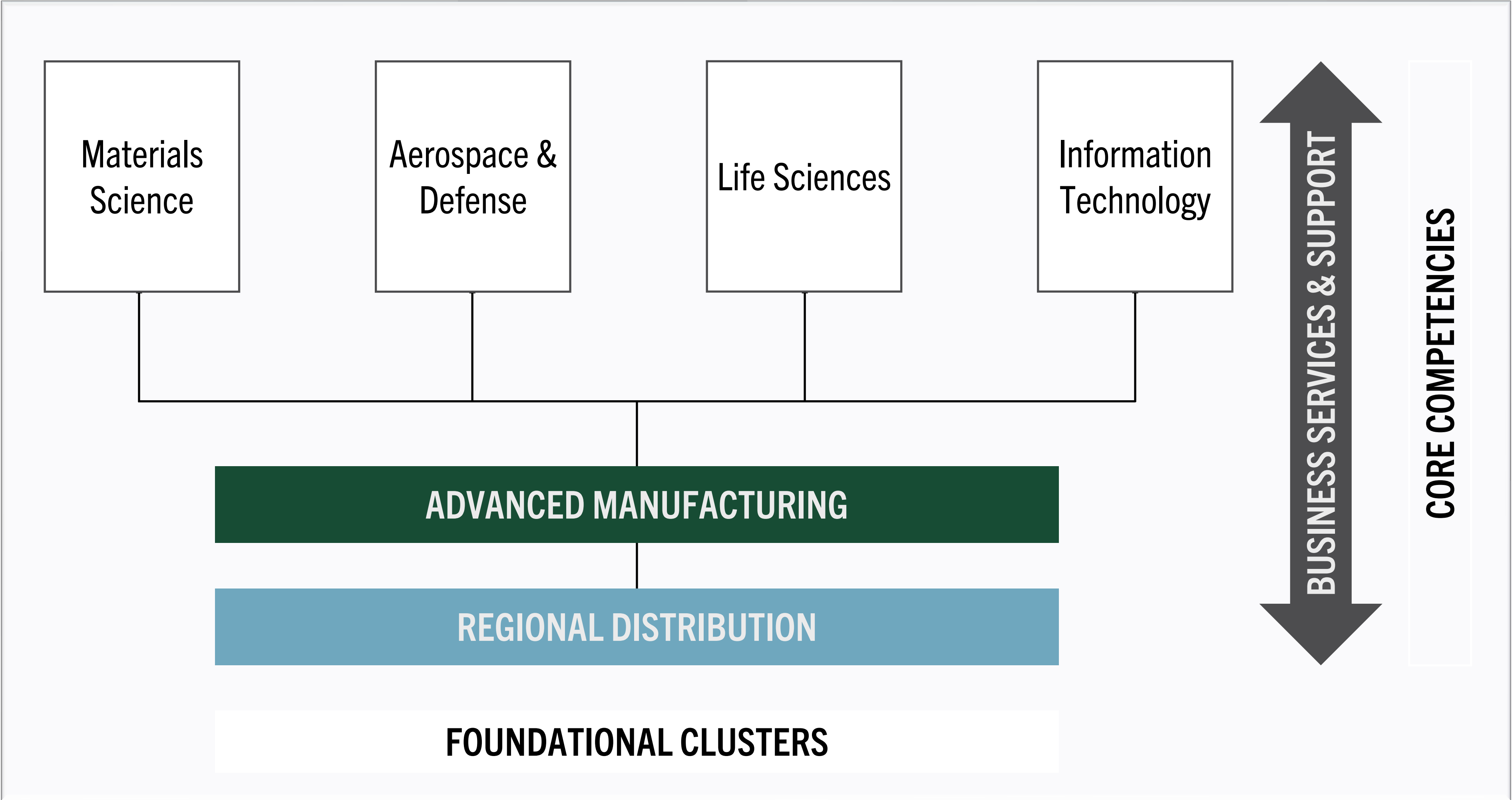
Corroborated by the community assessment, Hays Caldwell has experienced significant growth in key industries and occupations. Supported by regional developments and local economic development efforts, these trends should be nurtured to support growth in target areas in order to diversify the economy of Hays and Caldwell Counties.

Synchronized Development

Based on the industry and occupation data analyzed in the study, Hays Caldwell's industries have the potential to support cross-cluster growth through positive feedback loops between local employers, institutions, and economic development partners.

Cluster Concepts

Cluster Visualization



Hays Caldwell's Key Industries

Employment and GRP

The Hays Caldwell region's key industries are significant drivers of employment and capital investment. The accompanying table shows total industry employment, growth, and gross regional product for each target industry across the two counties. Since 2019, these clusters have experienced strong growth, encompassing established hubs of economic activity such as advanced manufacturing as well as emerging targets in life sciences and technology. Together, these industries support the region's economic prospective growth with extensive opportunities for job creation, competitive wages, and continued investment.

	INDUSTRY EMPLOYMENT (2024)	EMPLOYMENT GROWTH (2019 – 2024)	GROSS REGIONAL PRODUCT (2023)
ADVANCED MANUFACTURING	1,982	-8%	\$402 Million
REGIONAL DISTRIBUTION	6,880	113%	\$513 Million
BUSINESS SERVICES & SUPPORT	2,287	57%	\$327 Million
LIFE SCIENCES	1,024	23%	\$149 Million
INFORMATION TECHNOLOGY	2,261	35%	\$537 Million

Cluster Concepts

Target Industry Criteria

Hickey Global uses a set of criteria to evaluate the industries within a region and their suitability for target industry efforts. These factors are widely used across economic development organizations to ensure that business development activities will yield the highest value over time through higher wages and payroll, contributions to GRP, and likelihood of business recruitment and expansion success. For each of Hays Caldwell's clusters, the following information will be considered to ensure best fit for the community and its businesses.

TARGET INDUSTRY CRITERIA

1. (Exporting) Traded Industries: Companies should sell products or services to customers outside of the immediate region.
2. Current Industry Activity & Specialization: There should be an existing industry base that represents levels of employment that indicate a competitive advantage within the region.
3. Future Growth Prospects & Industry Trends: Benchmarks should be established to reveal how the growth or decline of the industries in the region compare to national and international trends.
4. Workforce: The regional performance of each industry can be verified through labor indicators and the availability of a skilled workforce.
5. Correlation with Local Economic Development Priorities: Industry targets should align with economic development priorities throughout the region to ensure stakeholder participation and reliable support from the local ecosystem.

Definitions

Cluster Concepts

WHAT IS A CLUSTER?

The U.S. Small Business Administration defines clusters as geographic concentrations of organically interconnected small, medium and large businesses, universities, non-governmental organizations, and economic development organizations in a particular field. Cluster activities increase opportunities for these segments to participate and promote innovation, identify research, create jobs and attract capital within a particular industry and generally enhance regional economic growth.

TRADED INDUSTRY

Traded industry clusters are groups of interlinked businesses that sell goods and services in markets outside of their local region. Traded industries tend to offer higher wages and stronger career pathways to their employees and bring larger investment and tax revenues into a community. As such, economic development organizations favor traded industries for targeted business development efforts.

LOCAL INDUSTRY

Conversely, local industry clusters are groups of industries that primary serve the local region. Because local industries are not as competitive, they do not typically benefit from competitive advantages inherent to a community. Some industries have operations that serve both the local economy and regional clients; these functions are identified as blended industries, which can be incorporated into the region's target industry framework on a case-by-case basis.

Why NAICS?

Cluster Concepts

NAICS CODES ARE NECESSARY BUT NOT SUFFICIENT

PROS	CONS
• Allows for data-driven analysis and justification of cluster • Tracks changes in cluster growth over time • Provides ability to crosswalk to skills and occupations	• NAICS are self-identified by companies • May not include emerging industries • Will not capture all business types within a cluster

Using NAICS codes to identify and define target industries is a useful way for economic developers to:

- Track economic growth in certain sectors, and
- Highlight industry-specific assets within their community.

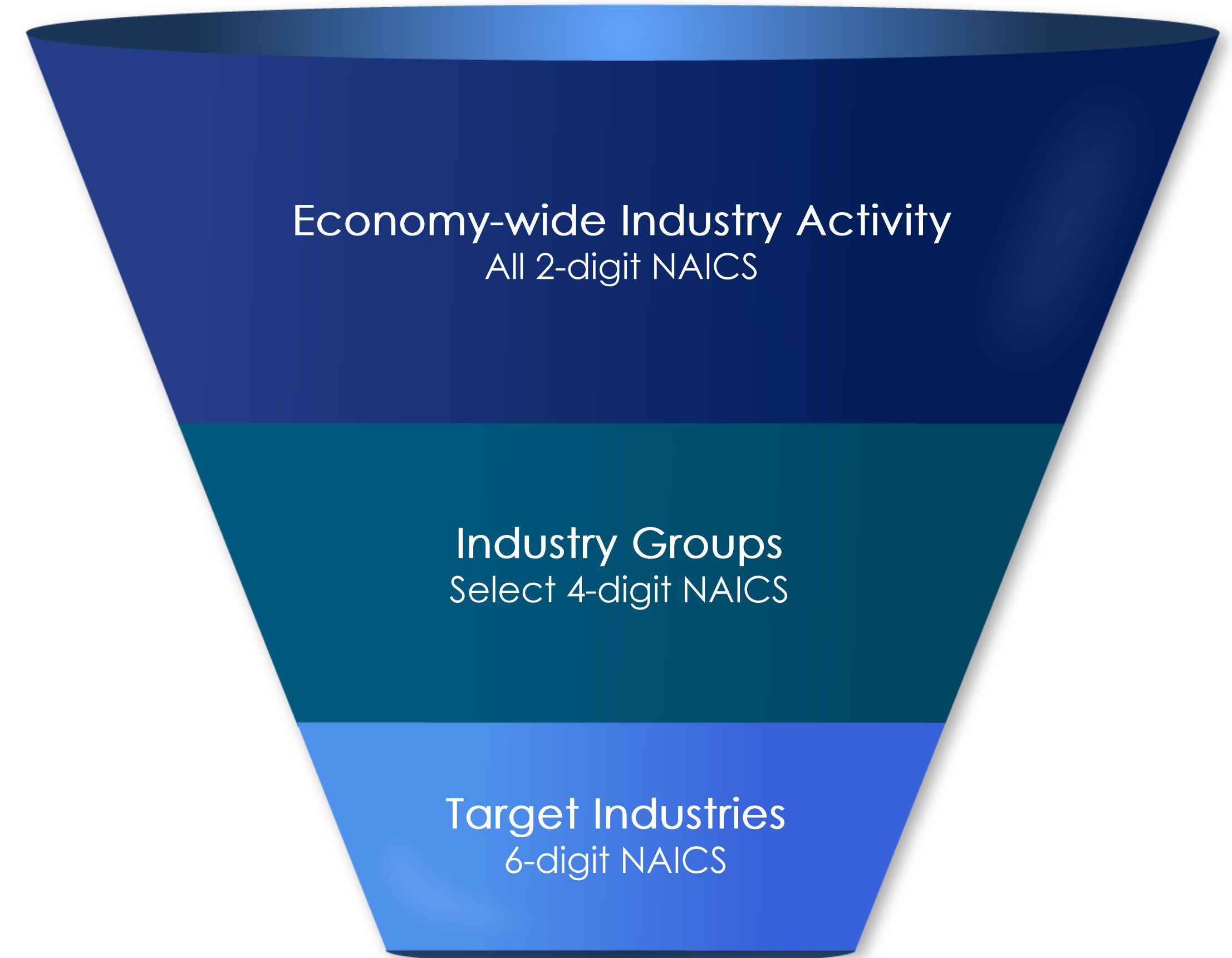
At the same time, NAICS codes should be considered a guideline rather than a fixed limit on target industries due to the reasons listed above. This framework empowers economic developers to remain flexible in their business attraction efforts and pursue targets in emerging industries. If used as a requirement for incentive eligibility, NAICS definitions should be carefully defined and updated regularly to capture new business types or changes in coverage.

Methodology

Cluster Concepts

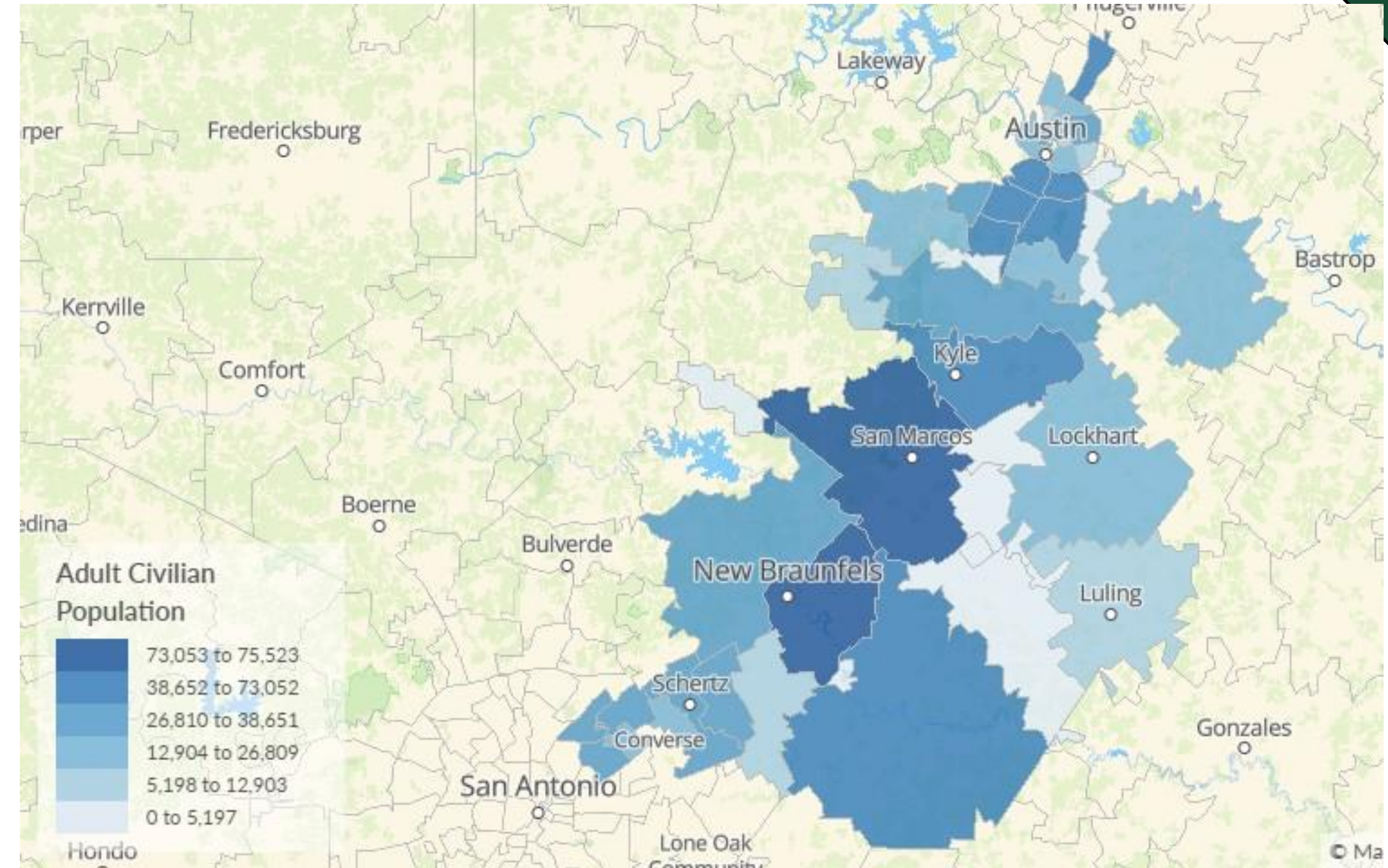
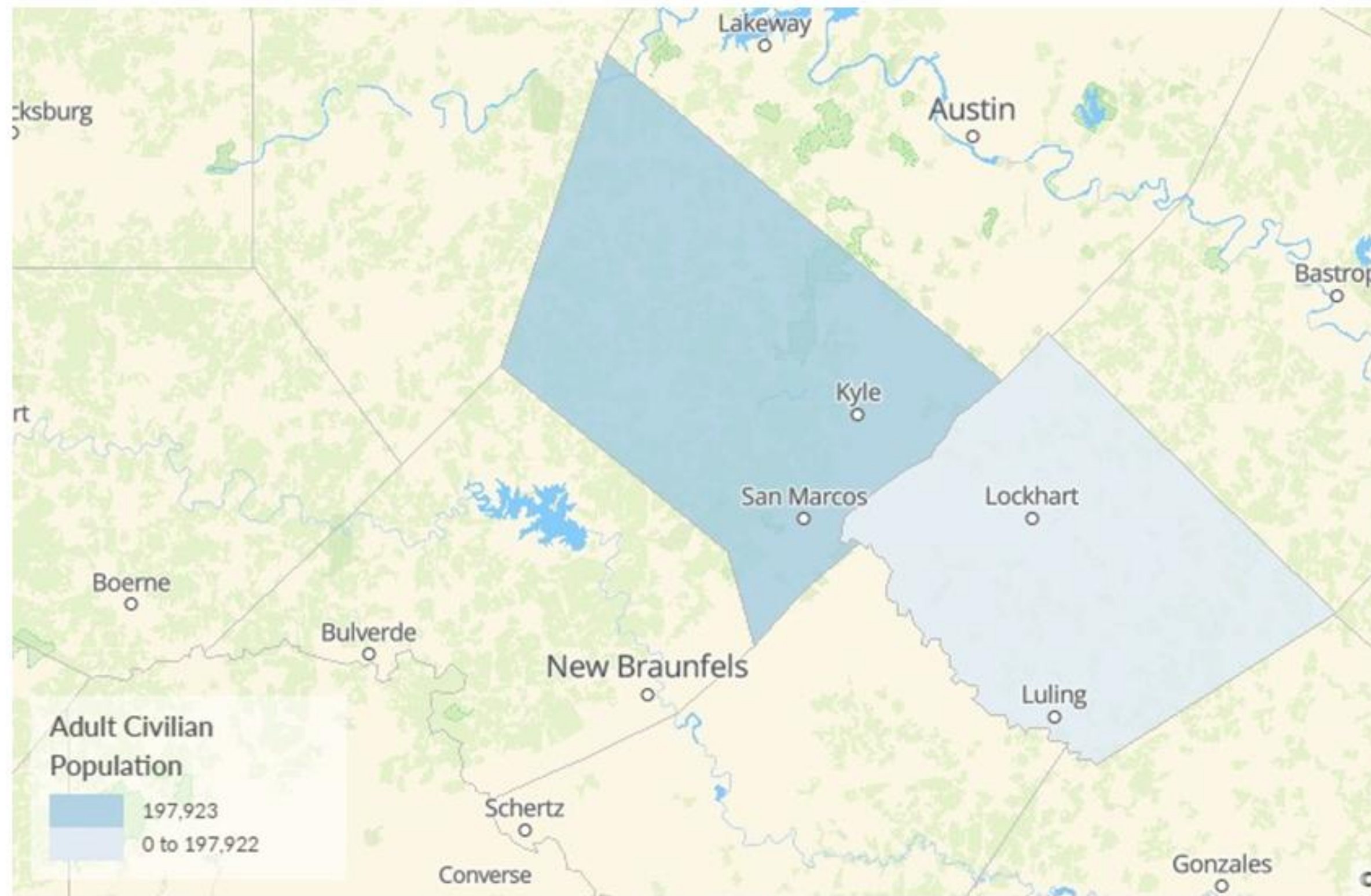
PROCESS

1. The cluster identification process begins by assessing all industries at the highest level of analysis, using 2-digit NAICS to identify traded industries that have a combination of specialization and growth prospects in the region.
2. Once specializations are identified, industry groups are reviewed at the 3 or 4-digit NAICS level to further refine opportunities and strengths.
3. “Best bet” industries are chosen at the 6-digit NAICS level to create a baseline list of potential targets for economic development activities. These industries are then grouped together according to similarities in industrial processes, materials, talent, or other site selection requirements to create target clusters for the community.



Study Geography

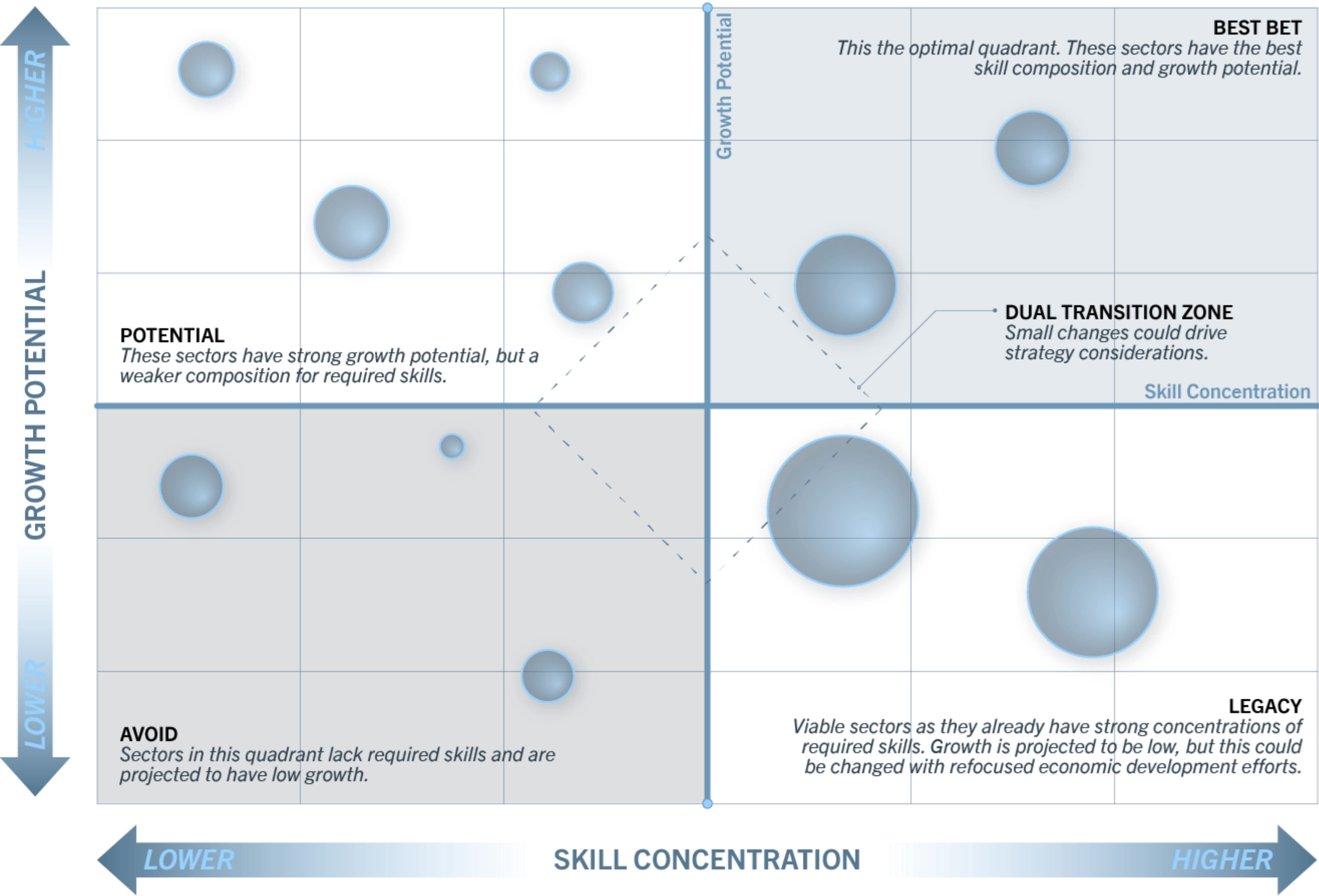
Cluster Concepts



The clusters discussed in this report are organized by county indicators derived from data pulled for both Hays and Caldwell Counties as well as the Austin-Round Rock-San Marcos MSA. Occupation data is also reviewed at the regional level, indicated by the drive time analysis from San Marcos shown on the map on the right. The county level data demonstrates the firms and workers that Hays Caldwell EDP can reasonably expect to influence through economic development efforts, whereas the wider region represents the potential labor pool available to local employers.

Target Industry Validation

Quadrant Graph Legend



To validate industry performance within a region, Hickey Global plots projected employment growth against the skill concentration of individual industries or aggregated groups. The analysis begins with an economy-wide evaluation of NAICS codes at the 2-digit level, then narrows down to sub-sectors that represent meaningful areas of opportunity for the region.

Target industries and clusters are typically found in the “Best Bet” and “Legacy” quadrants due to regional specialization and existing hubs to build upon. Often, economic development

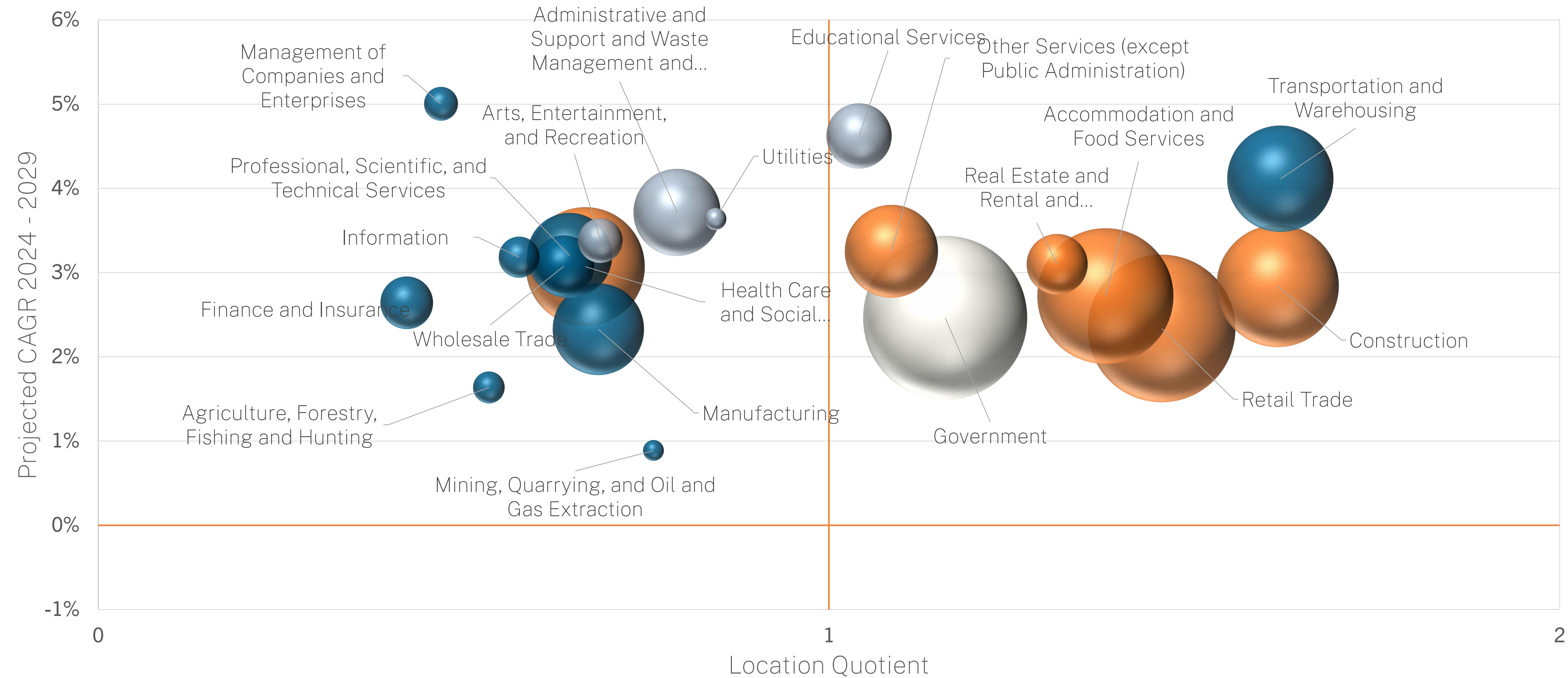
Economy-Wide Industry Activity

Regional Location Quotient and Annual Growth



LOCATION QUOTIENT VS PROJECTED GROWTH
2-DIGIT NAICS CODE

Note: Dot Size represents Regional Employment within the Sector



Source: Lightcast, Hickey Global

Economy-Wide Industry Activity

Regional Location Quotient and Annual Growth

As shown on the prior page, Hays and Caldwell Counties are projected to achieve growth across all major industry categories over the next five years. While the regional economy is skewed towards locally serving industries such as retail trade and accommodation and food services, the high growth potential can make a significant impact on the community’s industrial distribution. In combination with the positive indicators identified in the community assessment, the Hays Caldwell EDP has numerous opportunities for target industry development.

The following pages show similar data view for major traded industry groups including manufacturing, professional services, and information. As with the industries shown above, the region is typified by widespread growth opportunities and distinct areas of specialization in certain industries.

Percentage of Regional
Employment by Industry
Category

Traded Industry: 23.4%

Local Industry: 48.6%

Blended Industry: 8.9%

Government: 16.7%

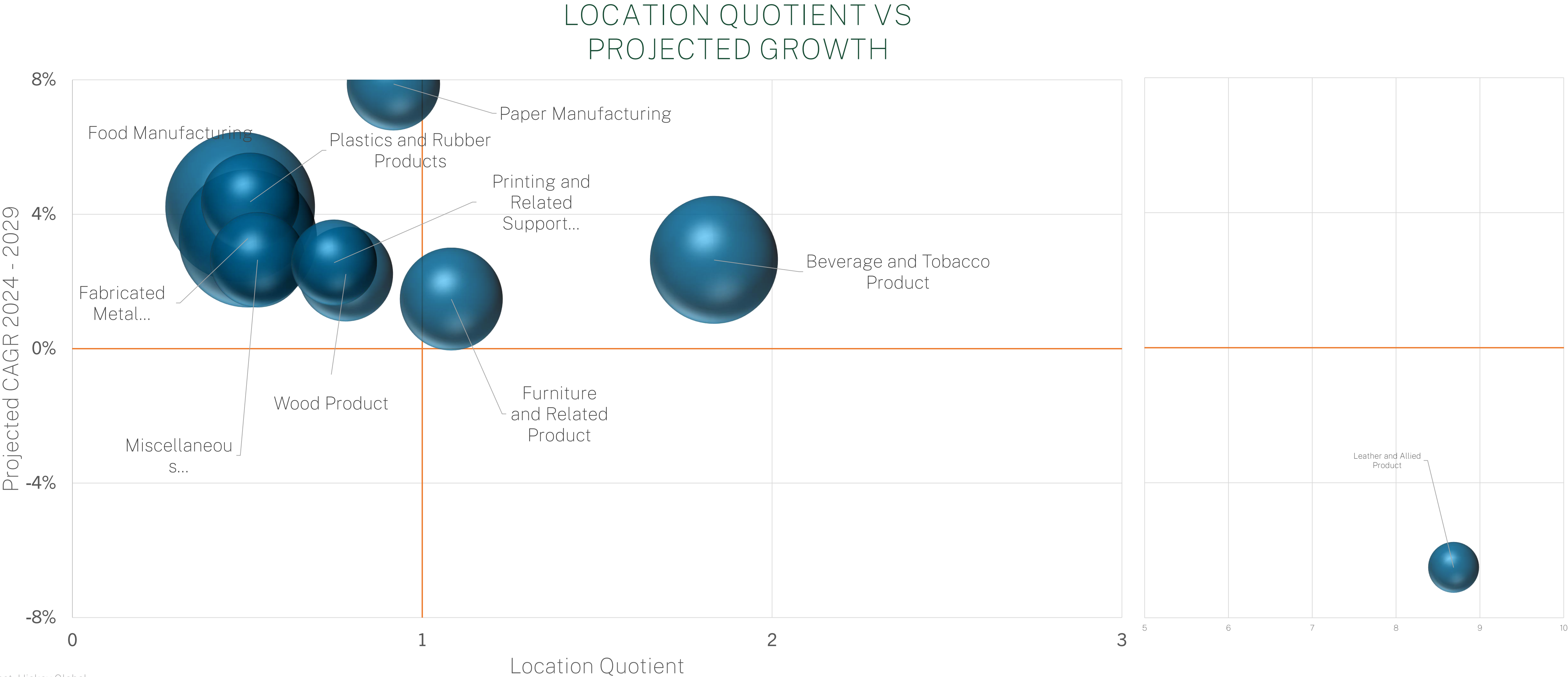
Source: Lightcast, Hickey Global

INDUSTRY GROUP REVIEW





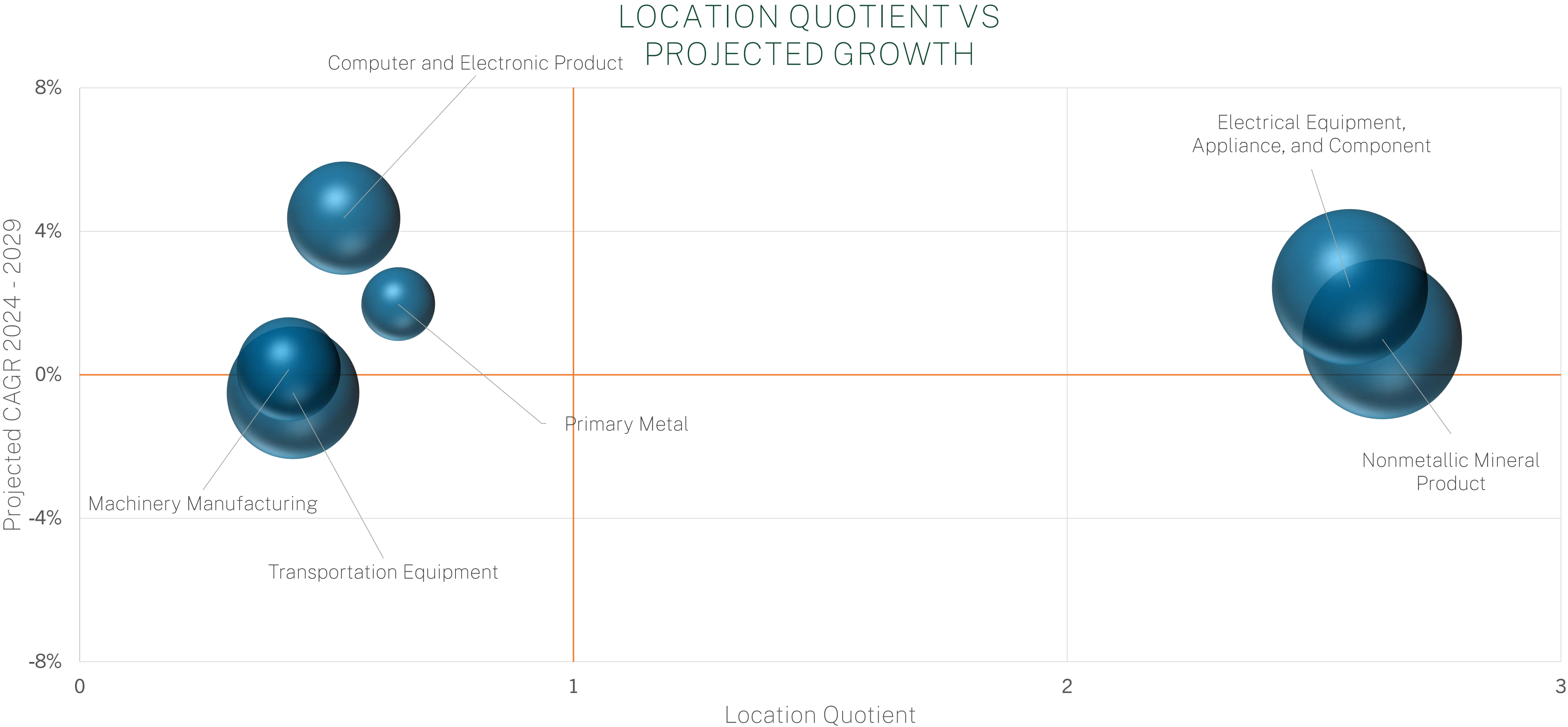
Note: Dot Size represents Regional Employment within the Sector



Source: Lightcast, Hickey Global



Note: Dot Size represents Regional Employment within the Sector



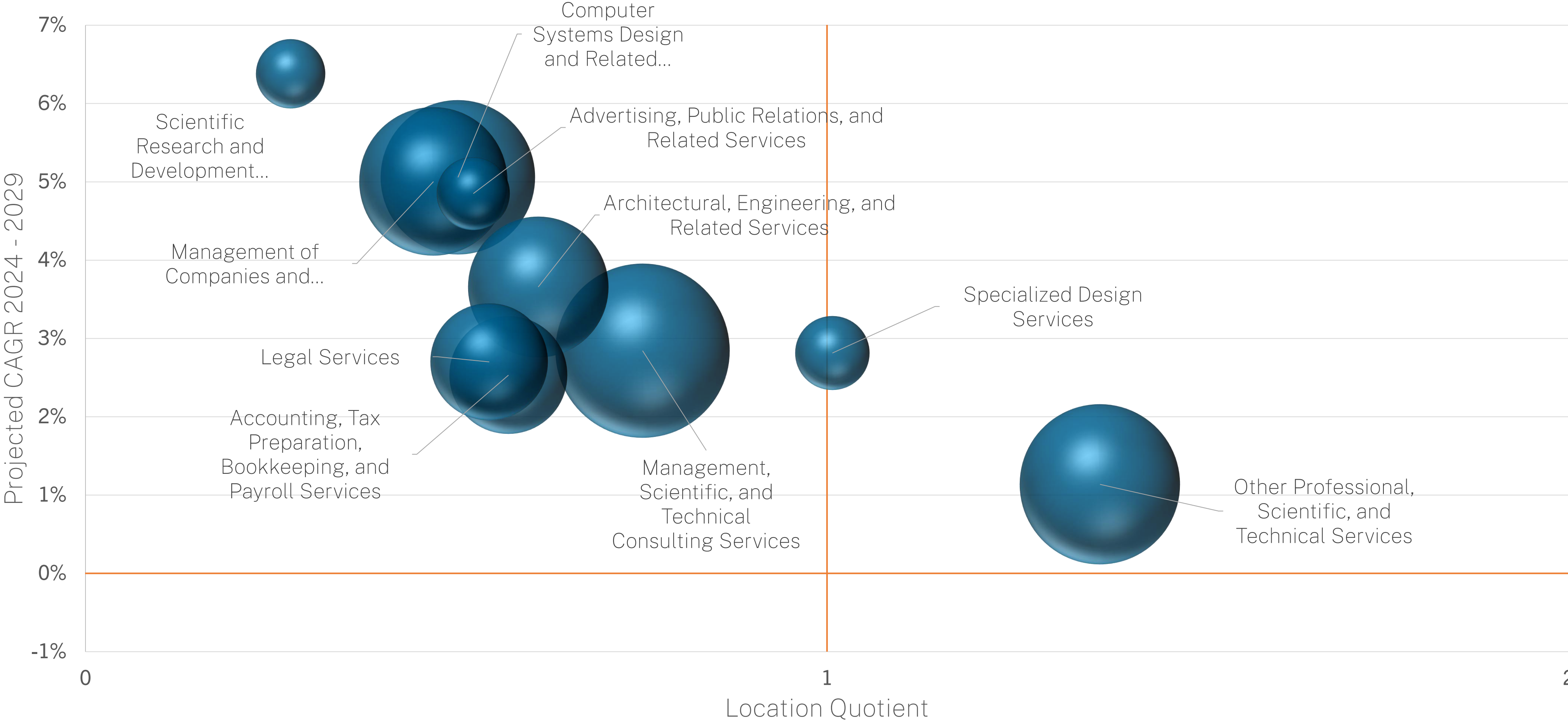
Source: Lightcast, Hickey Global

Professional Services & Corporate Headquarters

Regional Industry Group



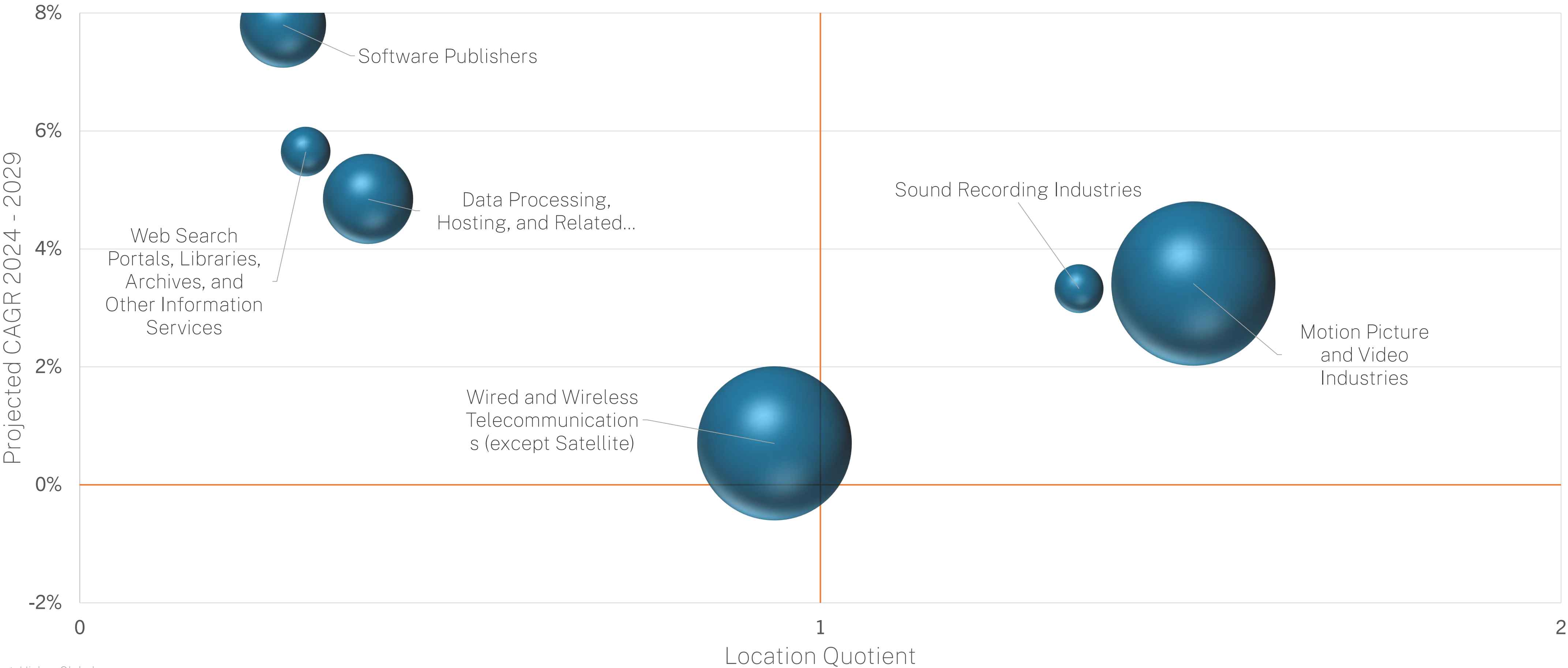
Note: Dot Size represents Regional Employment within the Sector



Source: Lightcast, Hickey Global

Information

Regional Industry Group



Source: Lightcast, Hickey Global

FOUNDATIONAL CLUSTER: Advanced Manufacturing



Target Industry: Advanced Manufacturing

Overview

INDUSTRY EMPLOYMENT	EMPLOYMENT GROWTH	GROSS REGIONAL PRODUCT	INDUSTRY STATUS
1,982	-8%	\$402 Million	Foundational
2024	2019 - 2024	2024	

Advanced Manufacturing refers to manufacturing processes that make use of innovative technologies to increase production efficiency and quality. For the Hays Caldwell region, advanced manufacturing can be understood as a foundational cluster that supports ongoing developments in target industries such as materials science, defense, life sciences, and information technology. As such, many of the six-digit manufacturing industries present in advanced manufacturing are found in life sciences and information technology as well.

Despite the topline decline in total employment over the last five years, Hays and Caldwell counties have demonstrated significant capabilities in key industries and stand to gain from ongoing developments throughout the MSA. One opportunity unique to the region is Aerospace and Defense, with existing industrial activity in aircraft engine and aircraft parts manufacturing as well as cybersecurity-adjacent industries found in Information Technology. These skillsets can be developed and leveraged to encourage targeted growth in areas that correspond to defense operations and other regional priorities.

Source: Lightcast, Brookings Institute, Hickey Global

Target Industry: Advanced Manufacturing

NAICS Definition

		Regional Employment (2024)	MSA Employment (2024)	Location Quotient (2024)	Employment Growth (2019 – 2024)	Payrolled Business Locations	Regional GRP (2024)
335931	Current-Carrying Wiring Device Manufacturing	447	513	21.70	-32%	1	\$146,108,046
333613	Mechanical Power Transmission Equipment Manufacturing	163	163	17.35	21%	1	\$31,387,586
335929	Other Communication and Energy Wire Manufacturing	121	135	13.36	-	1	\$26,012,184
335132	Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing	132	481	10.08	-49%	2	\$26,966,790
336412	Aircraft Engine and Engine Parts Manufacturing	460	465	7.21	-19%	2	\$70,910,648
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	213	1,096	5.31	31%	1	\$21,632,861
335139	Electric Lamp Bulb and Other Lighting Equipment Manufacturing	32	278	3.87	199%	3	\$5,401,715
331512	Steel Investment Foundries	24	24	3.14	-	1	\$2,849,746
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	80	1,130	3.10	>200%	3	\$13,408,282
327993	Mineral Wool Manufacturing	35	44	2.88	-55%	1	\$6,932,095
334517	Irradiation Apparatus Manufacturing	22	147	2.31	-	1	\$6,007,937
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	72	2,674	1.70	41%	2	\$18,158,302
336510	Railroad Rolling Stock Manufacturing	23	25	1.47	-39%	1	\$2,574,395
333248	All Other Industrial Machinery Manufacturing	66	4,574	1.32	37%	2	\$11,444,346
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	91	95	1.24	151%	1	\$12,275,761

Source: Lightcast, Hickey Global

Site Selection Factors

Advanced Manufacturing

SKILLED TRADES

The primary site selection problem facing advanced manufacturers in the U.S. and globally is the availability of talent in skilled trades. Following a nearly 6% decrease in manufacturing talent during the initial peak of the COVID-19 pandemic, skilled trades have grown in the U.S. but are forecasted to once again reduce as retirees leave the workforce. While many communities have successfully generated pipelines for certain skills such as CNC operators and machinists, continued flexibility and proactive workforce development will be required to address persistent issues in the hiring of skilled workers.

INFRASTRUCTURE AND UTILITY CAPACITY

Extensive growth in markets such as the southeast U.S. have introduced new problems for manufacturers: shrinking availability of new sites and buildings as well as dwindling utility capacity. As traditional hubs face saturation, manufacturers with challenging site and utility requirements are casting a wider net in order to balance talent needs with pad-ready sites.

LONG-TERM RISK MITIGATION

Due to the high development costs of creating a new facility, advanced manufacturers place a premium on low-risk environments that can support their company's growth over an extended time horizon. While this includes risks such as political changes and population growth, companies are increasingly considering the long-term climate risks of potential communities and how persistent changes could affect the resiliency of their supplier network, costs of utilities, and ability to recruit talent.

Communities that can point to measures taken to address these issues will demonstrate significant value as companies seek partnership models to achieve sustainable growth.

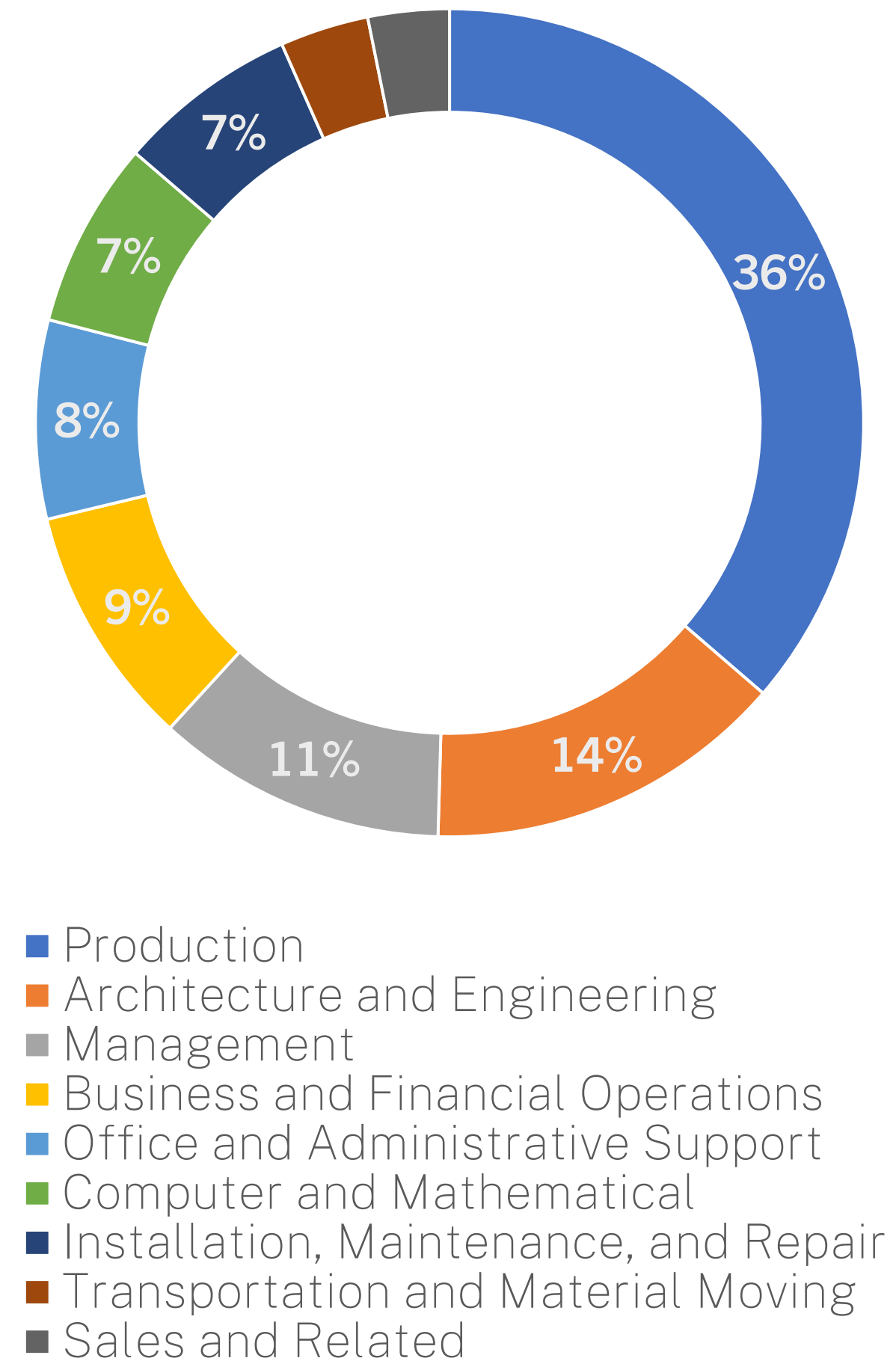
Staffing Patterns

Advanced Manufacturing

Hickey Global uses staffing patterns to develop a list of occupations that are most relevant to target industry operations. Staffing patterns refer to the occupational makeup of an industry by percentage, allowing for the identification of occupations and skillsets aligned with typical hiring requirements for an advanced manufacturing project. Staffing patterns used in the study use NAICS industry definitions to highlight skills relevant to regional employers in particular.

- Industrial Production Managers
- Buyers and Purchasing Agents
- Electrical Engineers
- Electronics Engineers, Except Computer
- Industrial Engineers
- Mechanical Engineers
- Electrical and Electronic Engineering Technologists and Technicians
- Industrial Machinery Mechanics
- First-Line Supervisors of Production and Operating Workers
- Electrical- Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers
- Miscellaneous Assemblers and Fabricators
- Machinists
- Welders, Cutters, Solderers, and Brazers
- Computer Numerically Controlled Tool Operators
- Laborers and Freight, Stock, and Material Movers, Hand

EMPLOYMENT DISTRIBUTION BY OCCUPATION TYPE



Staffing Patterns Data

Advanced Manufacturing

Hays Caldwell’s advanced manufacturing firms are supported by over 4,500 workers in key occupations. At the regional level, this employment increases to 34,300. The most prominent roles are Laborers and Freight, Stock, and Material Movers, Hand followed by Miscellaneous Assemblers and Fabricators, both of which have significant roles throughout a variety of manufacturing verticals. Overall, county employment is growing within the advanced manufacturing occupations with certain exceptions.

ADVANCED MANUFACTURING					
Occupation	2024 Jobs	2024 Jobs (Regional)	Historic 5-Year Growth (2019 – 2024)	Average Annual Earnings	2024 Location Quotient
Industrial Production Managers	154	962	114%	\$127,499	0.91
Buyers and Purchasing Agents	276	2,301	10%	\$75,579	0.77
Electrical Engineers	87	760	-24%	\$128,121	0.64
Electronics Engineers, Except Computer	45	627	-38%	\$123,662	0.64
Industrial Engineers	203	1,513	66%	\$103,250	0.82
Mechanical Engineers	78	789	-33%	\$110,960	0.38
Electrical and Electronic Engineering Technologists and Technicians	54	611	-22%	\$66,691	0.77
Industrial Machinery Mechanics	333	2,094	85%	\$62,888	1.08
First-Line Supervisors of Production and Operating Workers	360	2,414	20%	\$66,764	0.74
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	116	918	1%	\$44,261	0.62
Miscellaneous Assemblers and Fabricators	447	5,320	-26%	\$39,551	0.43
Machinists	83	571	-28%	\$55,163	0.38
Welders, Cutters, Solderers, and Brazers	314	1,847	39%	\$55,867	0.96
Computer Numerically Controlled Tool Operators	82	418	97%	\$48,254	0.66
Laborers and Freight, Stock, and Material Movers, Hand	2,034	13,231	61%	\$36,072	0.96
Advanced Manufacturing Subtotal	4,666	34,378	28%	\$55,213	-

Source: Lightcast, Hickey Global

FOUNDATIONAL CLUSTER: Regional Distribution



Target Industry: Regional Distribution

Overview

INDUSTRY EMPLOYMENT	EMPLOYMENT GROWTH	GROSS REGIONAL PRODUCT	INDUSTRY STATUS
6,880	113%	\$513 million	Foundational
2024	2019 – 2024	2024	

With over half of the Austin MSA’s employment in general warehousing and storage, the Hays Caldwell region is a distribution powerhouse. The indicators shown above demonstrate the extensive employment activity, growth, and contribution to the regional economy that qualify regional distribution as a foundational cluster that supports growth in all goods-producing industries. The precipitous growth in population and employment throughout Central Texas has led to increased demand for goods and industrial products, leading to significant logistics growth and further opportunities for cluster development.

RELEVANT SUB-CLUSTERS:

- Warehousing and Storage
- General Freight Trucking

Source: Lightcast, Brookings Institute, Hickey Global

Target Industry: Regional Distribution

NAICS Definition

		Regional Employment (2024)	MSA Employment (2024)	Location Quotient (2024)	Employment Growth (2019 - 2024)	Payrolled Business Locations	Regional GRP (2024)
493110	General Warehousing and Storage	5,876	10,913	4.78	126%	9	\$329,506,819
493190	Other Warehousing and Storage	78	511	2.02	>200%	2	\$9,904,453
484110	General Freight Trucking, Local	253	1,569	0.96	57%	16	\$52,102,784
423860	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	26	187	0.92	-	3	\$8,770,159
425120	Wholesale Trade Agents and Brokers	298	5,836	0.85	47%	66	\$48,208,612
423830	Industrial Machinery and Equipment Merchant Wholesalers	142	1,315	0.58	-2%	21	\$23,107,115
484121	General Freight Trucking, Long-Distance, Truckload	206	1,941	0.44	105%	38	\$41,420,399

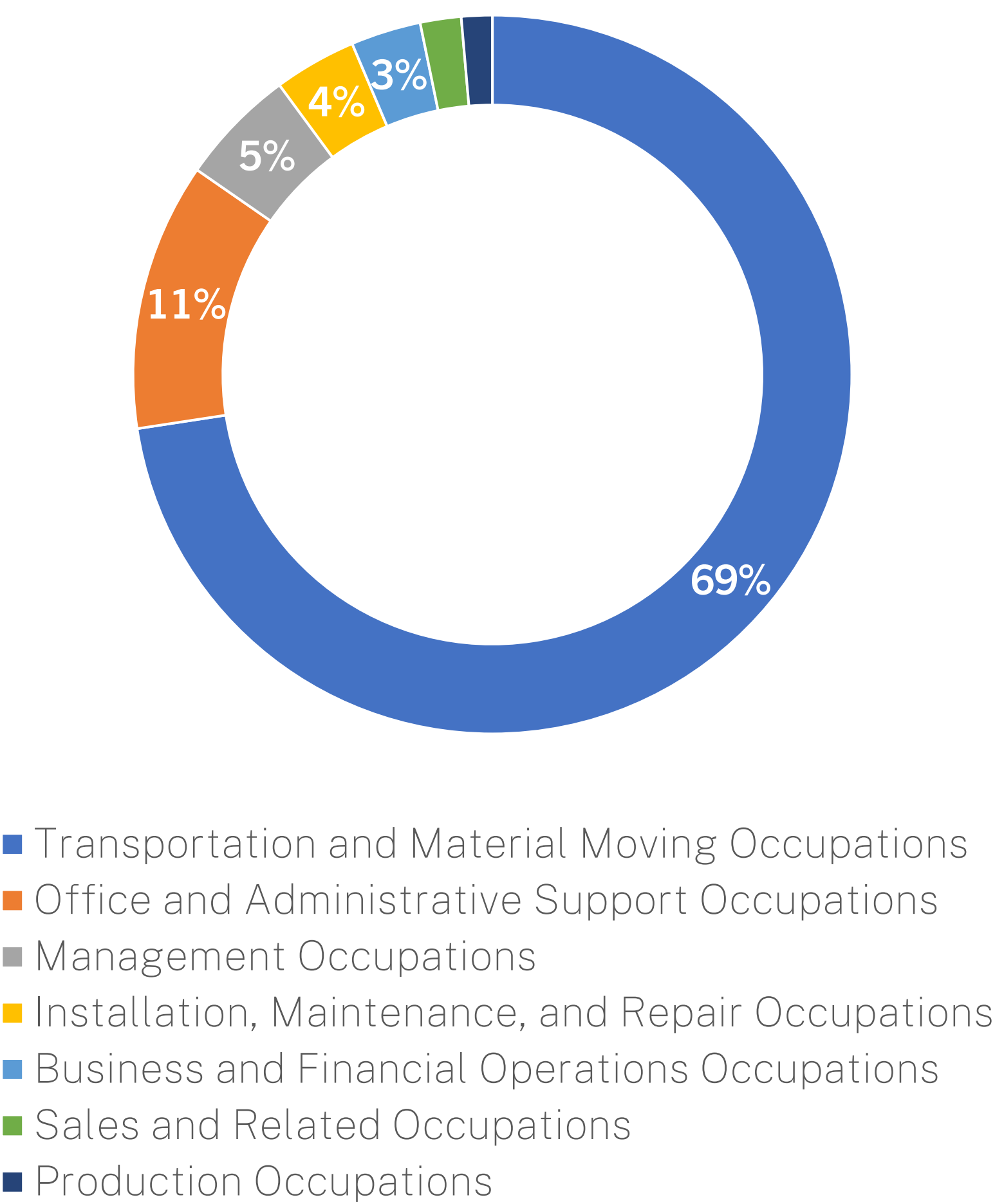
Source: Lightcast, Hickey Global

Staffing Patterns

Regional Distribution

- Transportation, Storage, and Distribution Managers (11-3071)
- Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products (41-4012)
- Shipping, Receiving, and Inventory Clerks (43-5071)
- Bus and Truck Mechanics and Diesel Engine Specialists (49-3031)
- Mobile Heavy Equipment Mechanics, Except Engines (49-3042)
- Industrial Machinery Mechanics (49-9041)
- Maintenance and Repair Workers, General (49-9071)
- First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors (53-1047)
- Driver/Sales Workers (53-3031)
- Heavy and Tractor-Trailer Truck Drivers (53-3032)
- Light Truck Drivers (53-3033)
- Industrial Truck and Tractor Operators (53-7051)
- Laborers and Freight, Stock, and Material Movers, Hand
- Packers and Packagers, Hand
- Stockers and Order Fillers (53-7065)

EMPLOYMENT DISTRIBUTION BY
OCCUPATION TYPE



Staffing Patterns Data

Regional Distribution

Regional distribution is a considerable workforce strength for Hays Caldwell with nearly 15,000 employees in key occupations. Many of these occupations have distinct employment concentrations within the counties, such as Industrial Truck and Tractor Operators and Stockers and Order Fillers. Additionally, each of the occupations have experienced some level of growth over the past five years, indicating a robust labor force that can sustain continued cluster growth.

REGIONAL DISTRIBUTION					
Occupation	2024 Jobs	2024 Jobs (Regional)	Historic 5-Year Growth (2019 – 2024)	Average Annual Earnings	2024 Location Quotient
Transportation, Storage, and Distribution Managers	228	1,413	171%	\$108,380	1.42
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	557	4,513	4%	\$78,371	0.60
Shipping, Receiving, and Inventory Clerks	813	4,613	49%	\$38,714	1.34
Bus and Truck Mechanics and Diesel Engine Specialists	220	1,372	40%	\$60,280	0.99
Mobile Heavy Equipment Mechanics, Except Engines	114	840	8%	\$58,241	0.84
Industrial Machinery Mechanics	333	2,094	85%	\$62,888	1.08
Maintenance and Repair Workers, General	1,233	8,800	52%	\$45,529	1.05
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	508	2,903	73%	\$59,889	1.18
Driver/Sales Workers	496	3,170	31%	\$32,141	1.60
Heavy and Tractor-Trailer Truck Drivers	1,748	12,279	37%	\$58,673	1.05
Light Truck Drivers	672	5,261	59%	\$47,041	0.90
Industrial Truck and Tractor Operators	1,780	7,791	92%	\$43,588	3.12
Laborers and Freight, Stock, and Material Movers, Hand	2,034	13,231	61%	\$36,072	0.96
Packers and Packagers, Hand	348	2,434	6%	\$29,257	0.80
Stocker and Order Fillers	3,727	18,247	227%	\$34,682	1.91
Regional Distribution Subtotal	14,813	88,961	75%	\$45,087	-

Source: Lightcast, Hickey Global

CORE COMPETENCY: Business Services & Support



Core Competency: Business Services & Support

Overview

INDUSTRY EMPLOYMENT	EMPLOYMENT GROWTH	GROSS REGIONAL PRODUCT	INDUSTRY STATUS
2,287	57%	\$327 million	Core Competency
2024	2019 – 2024	2024	

The businesses services cluster supports activities across a wide range of industries and facilities. While industry employment is relatively modest in Hays and Caldwell Counties, the business services labor pool is a core competency in the region that enables the growth of each of the community’s key industries. These cross-sector capabilities are evident in the industrial composition of the area, where business services primarily focus on environmental consulting, engineering services, and technical consulting. These specialized services not only address the specific needs of local industries but also support the attraction of new businesses.

RELEVANT SUB-CLUSTERS:

- Management, Scientific, and Technical Consulting Services
- Architectural, Engineering, and Related Services

Source: Lightcast, Brookings Institute, Hickey Global

Core Competency: Business Services & Support

NAICS Definition

		Regional Employment (2024)	MSA Employment (2024)	Location Quotient (2024)	Employment Growth (2019 – 2024)	Payrolled Business Locations	Regional GRP (2024)
541191	Title Abstract and Settlement Offices	134	844	2.96	37%	9	\$24,776,323
541370	Surveying and Mapping (except Geophysical) Services	86	1,151	2.05	93%	13	\$8,564,046
541690	Other Scientific and Technical Consulting Services	336	2,427	1.80	169%	33	\$55,669,686
541620	Environmental Consulting Services	118	1,105	1.40	>200%	11	\$11,250,420
541410	Interior Design Services	107	1,689	1.34	56%	13	\$9,972,717
541320	Landscape Architectural Services	47	914	1.31	98%	8	\$4,307,361
541618	Other Management Consulting Services	103	6,027	1.00	-19%	21	\$10,706,278
541420	Industrial Design Services	18	211	0.99	9%	3	\$1,878,200
541430	Graphic Design Services	73	1,120	0.82	4%	12	\$6,184,255
541810	Advertising Agencies	115	3,164	0.68	62%	26	\$25,194,041
541613	Marketing Consulting Services	182	6,248	0.65	45%	50	\$25,009,452
541490	Other Specialized Design Services	14	266	0.63	-	6	\$1,039,829
541611	Administrative Management and General Management Consulting Services	403	12,500	0.58	22%	128	\$57,788,858
541330	Engineering Services	465	17,966	0.55	63%	60	\$72,751,121
541310	Architectural Services	86	2,976	0.55	146%	17	\$11,915,336

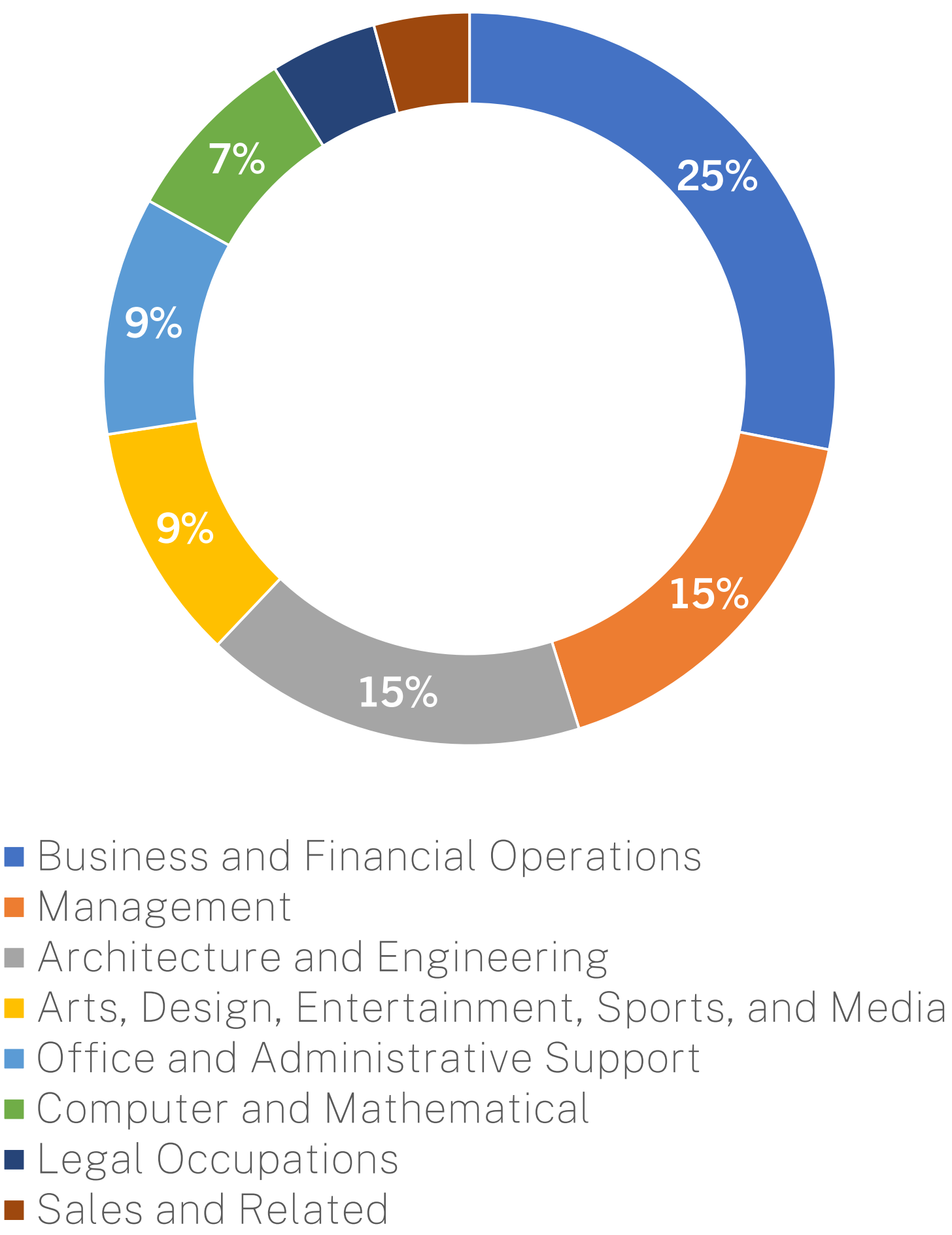
Source: Lightcast, Hickey Global

Staffing Patterns

Business Services & Support

- Marketing Managers (11-2021)
- Architectural and Engineering Managers (11-9041)
- Managers, All Other (11-9199)
- Human Resources Specialists (13-1071)
- Project Management Specialists (13-1082)
- Management Analysts (13-1111)
- Market Research Analysts and Marketing Specialists (13-1161)
- Business Operations Specialists, All Other (13-1199)
- Accountants and Auditors (13-2011)
- Software Developers (15-1252)
- Architects, Except Landscape and Naval (17-1011)
- Civil Engineers (17-2051)
- Architectural and Civil Drafters (17-3011)
- Graphic Designers (27-1024)
- Customer Service Representatives (43-4051)

EMPLOYMENT DISTRIBUTION BY
OCCUPATION TYPE



Staffing Patterns Data

Business Services & Support

As a core competency for the region, the business services & support occupations represent strong growth areas for Hays Caldwell and the surrounding region. With occupations covering disciplines from project management, HR, software development, and engineering, these roles are critical inputs to and enablers of the region’s foundational clusters and target industries. While many of the occupations have location quotients less than one, the significant growth over the past five years is a major draw for prospective employers.

BUSINESS SERVICES & SUPPORT					
Occupation	2024 Jobs	2024 Jobs (Regional)	Historic 5-Year Growth (2019 – 2024)	Average Annual Earnings	2024 Location Quotient
Marketing Managers	310	3,341	194%	\$143,829	1.06
Architectural and Engineering Managers	91	946	-7%	\$173,009	0.61
Managers, All Other	859	5,883	32%	\$104,945	1.05
Human Resources Specialists	574	6,004	96%	\$76,191	0.82
Project Management Specialists	844	8,300	91%	\$94,689	1.15
Management Analysts	506	5,883	72%	\$131,991	0.66
Market Research Analysts and Marketing Specialists	445	4,705	64%	\$82,537	0.68
Business Operations Specialists, All Other	678	7,242	118%	\$79,142	0.79
Accountants and Auditors	809	7,940	24%	\$87,012	0.72
Software Developers	735	13,136	86%	\$126,651	0.61
Architects, Except Landscape and Naval	81	846	32%	\$103,394	0.84
Civil Engineers	230	2,425	38%	\$98,145	0.85
Architectural and Civil Drafters	69	692	27%	\$63,950	0.89
Graphic Designers	155	1,543	9%	\$62,262	0.80
Customer Service Representatives	2,160	20,214	30%	\$38,940	1.10
Business Services Subtotal	8,546	89,097	52%	\$84,705	-

Source: Lightcast, Hickey Global

TARGET INDUSTRY: LIFE SCIENCES



Target Industry: Life Sciences

Overview

INDUSTRY EMPLOYMENT	EMPLOYMENT GROWTH	GROSS REGIONAL PRODUCT	INDUSTRY STATUS
1,024	23%	\$149 Million	Emerging
2024	2019 – 2024	2023	

Anchored by Texas State University and high-performing medical institutions, life sciences in the Hays Caldwell region is concentrated on bio- and nanotechnology R&D with further opportunities in medical device manufacturing. Further development of the institutional ecosystem will encourage employment gains and the ability to attract and retain specialized talent within Hays and Caldwell Counties.

RELEVANT SUB-CLUSTERS:

Medical Instruments

Research & Development

Source: Lightcast, Brookings Institute, Hickey Global

Target Industry: Life Sciences

NAICS Definition

		Regional Employment (2024)	MSA Employment (2024)	Location Quotient (2024)	Employment Growth (2019 – 2024)	Payrolled Business Locations	Regional GRP (2024)
334517	Irradiation Apparatus Manufacturing	22	147	2.31	-	1	\$6,007,937
541713	Research and Development in Nanotechnology	26	214	1.51	-	5	\$8,036,396
621511	Medical Laboratories	106	2,389	0.64	67%	10	\$16,825,381
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	90	2,240	0.40	>200%	15	\$36,491,253
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	123	3,624	0.32	>200%	15	\$22,094,217
339113	Surgical Appliance and Supplies Manufacturing	16	1,099	0.23	-35%	3	\$2,402,483
622110	General Medical and Surgical Hospitals	612	26,195	0.17	-9%	10	\$52,345,045
541714	Research and Development in Biotechnology (except Nanobiotechnology)	24	1,731	0.12	-3%	5	\$4,944,231

Source: Lightcast, Hickey Global

Site Selection Factors

Life Sciences

MANUFACTURING

1. Ecosystem

Due to the industry’s costs, regulatory burdens, and consistent demand for lower prices, a healthy life sciences ecosystem demonstrates a region’s capacity for growth.

2. Talent Pipeline

Medical device manufacturing companies are reliant on top-level talent to develop and commercialize innovative products. An extensive talent pipeline of new graduates, mid-level and senior employees, and steady migration helps life science companies sustain growth over various product cycles.

3. Regional Supply Chain

Stringent quality controls and speed-to-market requirements create a premium on regional infrastructure and supply chain capacity. Companies must be able to store and access sensitive materials, manufacture products, and distribute to end users, with each step relying on fast and efficient suppliers and transportation hubs. Warehousing, air transportation, and highways all play a role in the successful distribution of medical devices and related goods.

The site selection factors for Hays Caldwell’s life sciences industry have been organized in two categories: Manufacturing (medical devices and related products) and R&D. For each scenario, the top three decision factors are summarized to indicate unique requirements for each industry. The talent requirements for both scenarios differ as well, with medical devices requiring specialized production talent and R&D requiring science and technology roles.

RESEARCH & DEVELOPMENT

1. Funding

Regions with strong federal funding and venture capital activity are preferred by decision makers in the R&D sector as companies seek NIH contracts and other sources of capital. In addition to established funding streams, local and regional incentives can help offset high start-up costs and promote growth for small and mid-sized R&D operations.

2. Partnership Opportunities

Strategic partnerships offer life science companies a reliable path to scale operations. Proximity to universities, major hospital systems, and established companies leads to increased levels of technology transfer, clinical trial partnerships, and skilled workers available for relocation or expansion projects.

3. Lab Space

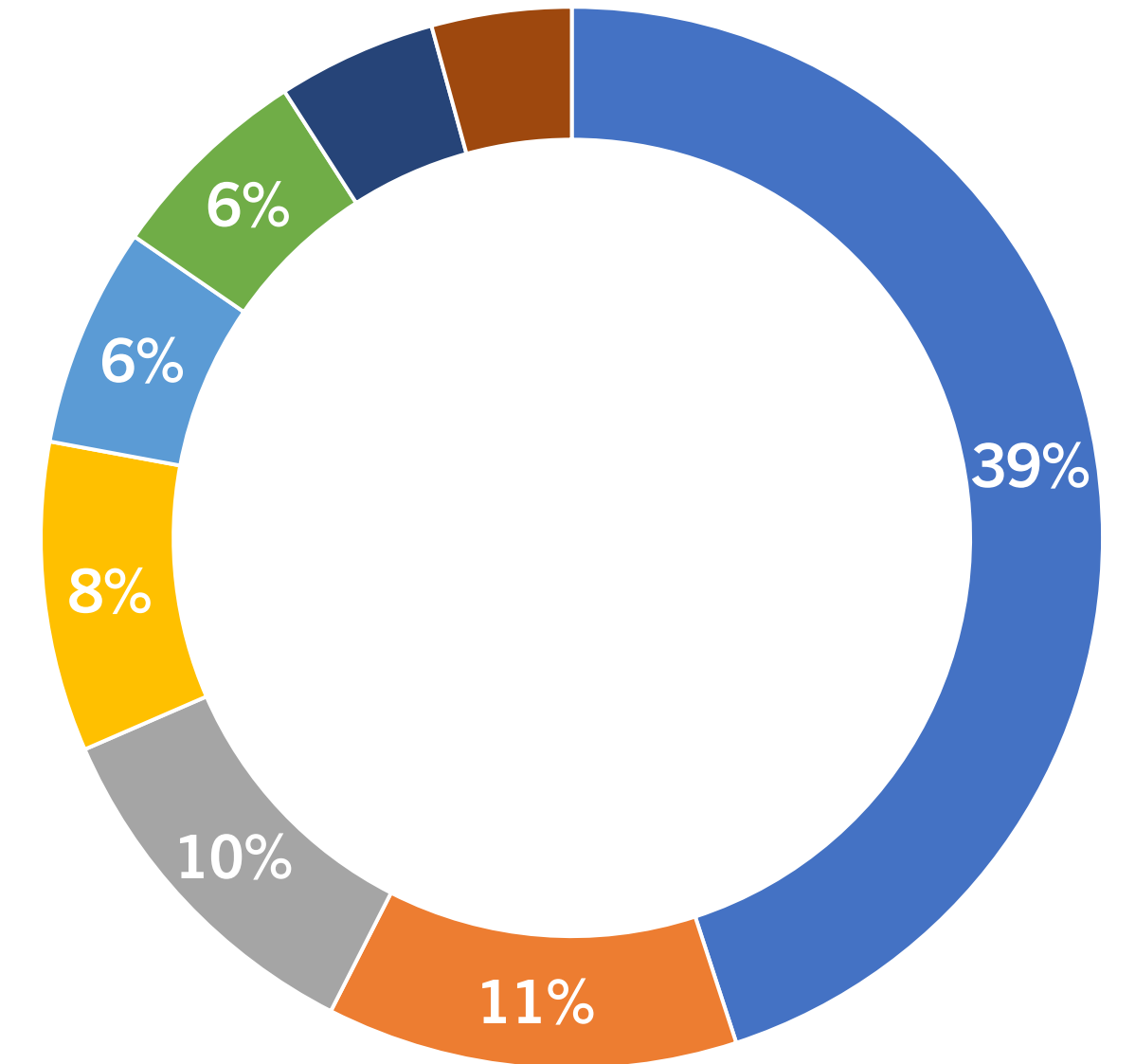
From wet labs to clean rooms, R&D facilities often require highly specialized lab space outfitted for their specific product. New, purpose-built labs are extremely cost prohibitive, making existing rental options in low-cost markets a priority for many firms.

Staffing Patterns

Life Sciences

- Medical and Health Services Managers (11-9111)
- Software Developers (15-1252)
- Medical Scientists, Except Epidemiologists (19-1042)
- Registered Nurses (29-1141)
- Clinical Laboratory Technologists and Technicians (29-2018)
- Radiologic Technologists and Technicians (29-2034)
- Medical Assistants (31-9092)
- Phlebotomists (31-9097)
- Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products (41-4011)
- Medical Secretaries and Administrative Assistants (43-6013)

EMPLOYMENT DISTRIBUTION BY
OCCUPATION TYPE



- Healthcare Practitioners and Technical
- Office and Administrative Support
- Management Occupations
- Healthcare Support
- Computer and Mathematical
- Business and Financial Operations
- Life, Physical, and Social Science
- Sales and Related

Staffing Patterns Data

Life Sciences

Characterized by modest employment activity but large growth prospects, Hays Caldwell’s Life Sciences occupations are representative of the emerging industry opportunities within the region. Outside of Registered Nurses, the largest occupation group in Hays and Caldwell Counties is Software Developers, indicative of the community’s unique connection to technology and innovation.

LIFE SCIENCES					
Occupation	2024 Jobs	2024 Jobs (Regional)	Historic 5-Year Growth (2019 – 2024)	Average Annual Earnings	2024 Location Quotient
Medical and Health Services Managers	306	3,281	96%	\$114,526	0.73
Software Developers	735	13,136	86%	\$126,651	0.61
Medical Scientists, Except Epidemiologists	84	797	48%	\$120,260	0.71
Registered Nurses	1,022	13,289	24%	\$84,461	0.43
Clinical Laboratory Technologists and Technicians	100	1,480	-6%	\$55,853	0.40
Radiologic Technologists and Technicians	56	952	-10%	\$74,901	0.35
Medical Assistants	314	3,732	12%	\$41,280	0.54
Phlebotomists	36	620	8%	\$41,950	0.37
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	244	3,379	33%	\$86,036	1.14
Medical Secretaries and Administrative Assistants	281	3,269	20%	\$41,181	0.47
Life Sciences Subtotal	3,179	43,935	36%	\$88,526	-

Source: Lightcast, Hickey Global

TARGET INDUSTRY: Information Technology



Target Industry: Information Technology

Overview

INDUSTRY EMPLOYMENT	EMPLOYMENT GROWTH	GROSS REGIONAL PRODUCT	INDUSTRY STATUS
2,261	35%	\$537 million	Emerging
2024	2019 – 2024	2024	

Information Technology is an essential factor in the Austin MSA’s historic growth and future outlook. Driven by innovations and investments in technological design and services, the region’s rise has driven long-term employment growth both within Austin and throughout the surrounding communities. In Hays and Caldwell counties, technology-related jobs are split between two main areas: select manufacturing industries that support technology and innovation, and services such as custom computer programming and computer systems design. As noted for advanced manufacturing, many of the information technology industries currently present in Hays Caldwell are related to cybersecurity and other defense operations, indicating the potential for further industry development.

RELEVANT SUB-CLUSTERS:

Electrical Equipment and Component Manufacturing
Defense

Source: Lightcast, Brookings Institute, Hickey Global

Target Industry: Information Technology

NAICS Definition

		Regional Employment (2024)	MSA Employment (2024)	Location Quotient (2024)	Employment Growth (2019 – 2024)	Payrolled Business Locations	Regional GRP (2024)
335931	Current-Carrying Wiring Device Manufacturing	447	513	21.70	-32%	1	\$146,108,046
333613	Mechanical Power Transmission Equipment Manufacturing	163	163	17.35	21%	1	\$31,387,586
335929	Other Communication and Energy Wire Manufacturing	121	135	13.36	-	1	\$26,012,184
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	213	1,096	5.31	31%	1	\$21,632,861
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	80	1,130	3.10	>200%	3	\$13,408,282
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	72	2,674	1.70	41%	2	\$18,158,302
423690	Other Electronic Parts and Equipment Merchant Wholesalers	165	2,487	1.63	62%	7	\$55,163,666
541511	Custom Computer Programming Services	570	33,490	0.70	128%	123	\$117,966,148
518210	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	135	11,175	0.39	>200%	27	\$59,606,047
541512	Computer Systems Design Services	295	23,757	0.35	13%	84	\$47,890,921

Source: Lightcast, Hickey Global

Site Selection Factors

Information Technology

VENTURE CAPITAL

A strong venture capital presence is essential for fostering growth within the Information Technology sector. Regions with established VC networks provide startups and scaling firms with access to funding, which fuels their growth and development. This proximity to VC firms creates invaluable connections, providing mentorship, business guidance, and potential investment opportunities. The presence of venture funds also contributes to the development of vibrant tech hubs that attract top talent and generate a cycle of reinvestment in the local economy.

COMMERCIALIZATION

Commercialization, the process of bringing innovations to market, is a major draw for tech companies. Regions with a robust commercialization infrastructure, including research universities, technology transfer offices, incubators, and investor networks, are able to provide the support needed for companies to successfully transition from concept to market. By fostering strong connections between academia, industry, and investors, these ecosystems enable firms to leverage cutting-edge research, access funding, and gain valuable mentorship. A well-developed commercialization framework not only helps companies refine their technologies and business models but also accelerates the path to market entry by reducing the time and cost associated with product development.

R&D CAPACITY

Research and development is a major decision driver for technology and innovation clusters. Companies prioritize locations that offer access to research institutions, federal or regional grants, collaboration opportunities with academic and industry labs, and a pipeline of highly skilled talent. Regions with a dynamic R&D ecosystem not only help firms accelerate innovation but also signal long-term sustainability for high-tech growth. For EDAs, emphasizing R&D assets demonstrates the region's ability to nurture next-generation technologies and create a steady stream of commercialization opportunities that feed into the local economy.

Site Selection Factors

Information Technology

WORKFORCE

As industries undergo constant transformation due to rapid advancements in technology, the ability to attract and retain skilled professionals has become essential for any technology or innovation-driven organization. Regions that offer a deep pool of qualified engineers, scientists, developers, and programmers provide firms with the talent needed to stay competitive. Beyond size, the flexibility and diversity of the talent ecosystem matter to decision-makers. A strong, well-developed educational infrastructure — coupled with access to specialized, customizable training programs — serves as a key incentive for companies when deciding where to establish or expand operations. Companies increasingly seek regions with programs that can quickly adapt curricula to emerging technologies, support credentialing in specialized fields, and provide pathways for lifelong learning. By cultivating and retaining top talent, regions not only meet industry needs but also create a collaborative innovation culture that drives problem-solving, entrepreneurship, and new business formation.

INFRASTRUCTURE & CONNECTIVITY

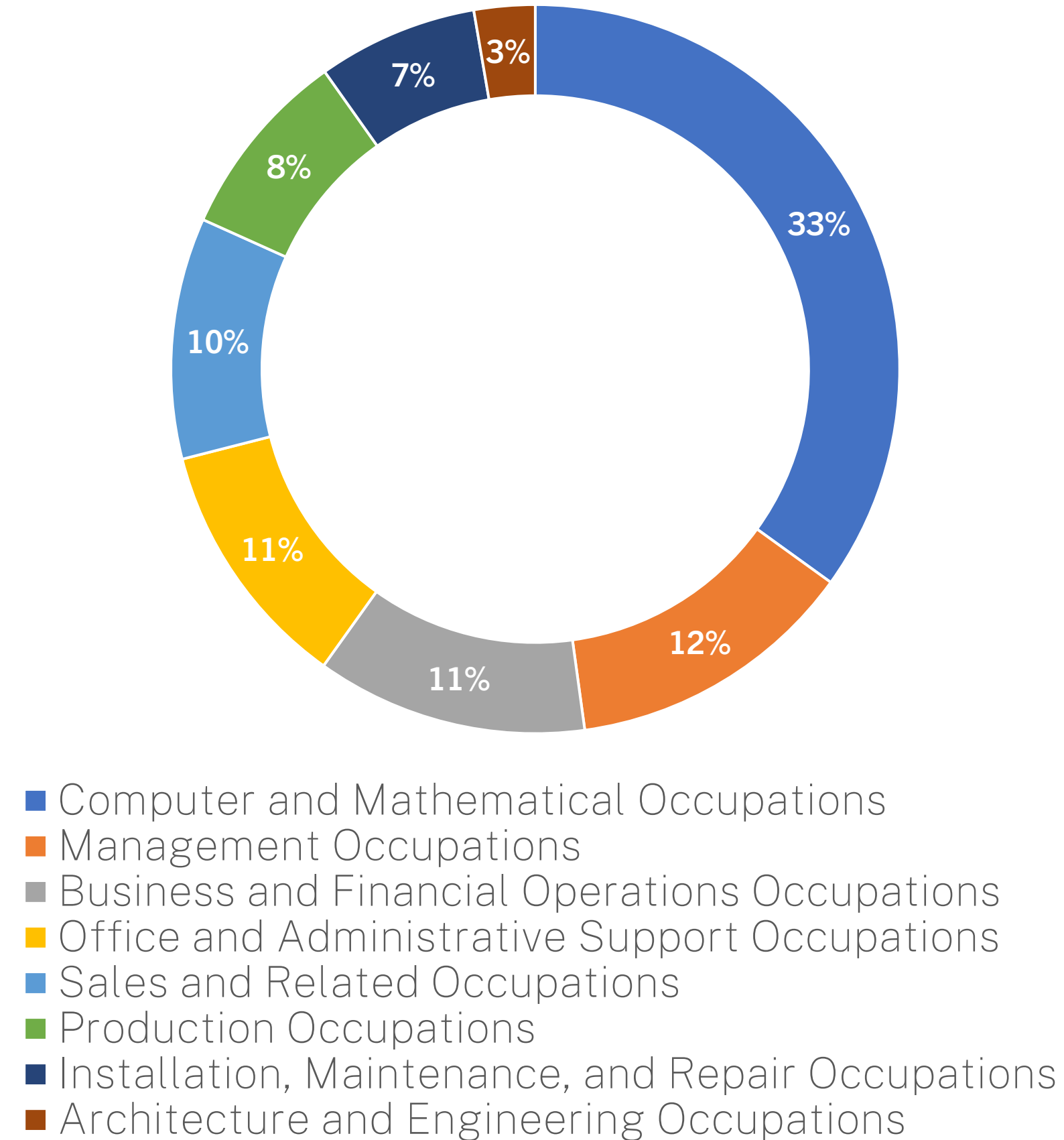
Robust infrastructure assets and seamless connectivity serve as foundational pillars that help develop an active information technology ecosystem. For technology-driven companies, the availability of reliable, high-speed internet, a resilient power grid, and efficient transportation networks are essential factors impacting daily operations. These elements ensure uninterrupted communication, fast data transfers, and the efficient movement of people and goods — key factors for maintaining business continuity and supporting rapid innovation. Advanced infrastructure also plays a crucial role in enabling the development and deployment of next-generation technologies, such as artificial intelligence, IoT, and 5G networks, which require high levels of bandwidth and low-latency connectivity. Regions that proactively invest in infrastructure assets act as a strategic enabler that drives growth, innovation, and competitiveness in their business community.

Staffing Patterns

Information Technology

- Computer and Information Systems Managers (11-3021)
- Project Management Specialists (13-1082)
- Computer Systems Analysts (15-1211)
- Information Security Analysts (15-1212)
- Computer Network Support Specialists (15-1231)
- Computer User Support Specialists (15-1232)
- Computer Network Architects (15-1241)
- Network and Computer Systems Administrators (15-1244)
- Computer Programmers (15-1251)
- Software Developers (15-1252)
- Software Quality Assurance Analysts and Testers (15-1253)
- Web Developers (15-1254)
- Web and Digital Interface Designers (15-1255)
- Computer Occupations, All Other (15-1299)
- Data Scientists (15-2051)

INFORMATION TECHNOLOGY
STAFFING PATTERNS



Staffing Patterns Data

Information Technology

As part of an MSA known for its technological expertise, Hays and Caldwell Counties have a growing share of highly sought-after skillsets related to the information technology industry. In addition to the occupations listed here, Hays Caldwell’s Information Technology firms benefit from production occupations similar to those seen in the advanced manufacturing staffing patterns.

INFORMATION TECHNOLOGY					
Occupation	2024 Jobs	2024 Jobs (Regional)	Historic 5-Year Growth (2019 – 2024)	Average Annual Earnings	2024 Location Quotient
Computer and Information Systems Managers	389	5,420	120%	\$167,802	0.83
Project Management Specialists	844	8,300	91%	\$94,689	1.15
Computer Systems Analysts	311	4,256	11%	\$101,907	0.86
Information Security Analysts	66	1,018	38%	\$115,667	0.48
Computer Network Support Specialists	84	1,003	-13%	\$63,827	0.78
Computer User Support Specialists	380	4,732	11%	\$57,104	0.73
Computer Network Architects	66	1,093	16%	\$124,775	0.52
Network and Computer Systems Administrators	236	2,629	15%	\$94,433	1.01
Computer Programmers	52	736	-31%	\$88,783	0.59
Software Developers	735	13,136	86%	\$126,651	0.61
Software Quality Assurance Analysts and Testers	66	1,329	0%	\$96,111	0.47
Web Developers	42	540	-13%	\$85,102	0.67
Web and Digital Interface Designers	59	762	31%	\$90,593	0.66
Computer Occupations, All Other	396	5,576	121%	\$106,802	1.12
Data Scientists	118	1,587	417%	\$112,565	0.70
Information Technology Subtotal	3,845	52,117	55%	\$106,819	-

Source: Lightcast, Hickey Global