

Next Steps Scottsdale

Building an Action Plan for Economic Growth



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Building an Action Plan for Economic Growth

PREPARED FOR

Scottsdale Area Chamber of Commerce

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Next Steps Scottsdale

In 2003, concerned civic and business leaders posed the question, *Which Way Scottsdale?* Their primary questions, responses and concerns were captured individually and in group discussions, and then shared in the report of the same title prepared by Morrison Institute for Public Policy.

At that time, there was a concern that Scottsdale’s trajectory of growth, prosperity and preservation of natural beauty might be slowing down. The definition of what makes a thriving community or successful city was changing, and Scottsdale was seeking to reposition itself to grow into its next best version. The five key questions posed in 2003, and discussed in detail in the following sections, are still relevant and pressing in 2010.

Recognizing that concerns still exist, the Scottsdale Area Chamber of Commerce convened 250 business and community leaders to revisit the core questions of *Which Way Scottsdale?* and talk about what the next steps should be. This kickoff event for *Next Steps Scottsdale* in September 2010 was intended to launch a community-wide dialogue about the city’s future.

Each participant at the event brought to the table his or her unique experiences, agenda and set of preferences as to what Scottsdale needs to stay competitive in the 21st Century.

Through a series of facilitated sessions, participants started to identify needs and goals for the community. They also began the difficult discussion about trade-offs necessary to achieve those objectives.

The bottom line: Scottsdale cannot be all things to all people. The city still possesses great strengths, but there are challenges in defining a shared vision and then making the complex, hard decisions required when resources are limited. The current economic downturn only heightens the challenge.

Next Steps Scottsdale provides a framework for beginning community dialogue about crafting an economic and development blueprint for how Scottsdale can build upon its legacy to compete and prosper in the decades ahead.

What Was the Process?

On September 15, 2010, the Scottsdale Area Chamber of Commerce convened the *Next Steps Scottsdale* symposium. Morrison Institute facilitated two sets of five breakout sessions for 250 participants to review the key questions from *Which Way Scottsdale?* and stimulate dialogue about the future of the city. The resulting concerns, discussions and recommendations articulated in this report come directly from the stakeholders present at the conference.

The Five Questions:

- **Legacy at Risk:** How can Scottsdale retain and enhance its quality of place?
- **Redefining Greatness:** How can Scottsdale shape its niche in a new era?
- **The Scottsdale Story:** How can the “Three Scottsdales” work together?
- **Region on the Rise:** How can Scottsdale play with “360-degree” vision?
- **Tougher Agenda:** How will “can-do” Scottsdale get past the “Stopsdale” reputation?

Additionally, in three of the sessions – Legacy at Risk, The Scottsdale Story and Region on the Rise – audience members had the opportunity to respond to questions directly using audience response technology. In those sections of the report, when percent responses are identified, those are directly from the audience survey questions posed at the event. Complete response data can be found in the appendix.

Scottsdale: Then & Now

Before delving into the stakeholder responses to the five key questions, it is important to have a snapshot that compares Scottsdale in 2003 to Scottsdale in 2010. *Which Way Scottsdale?* took a hard look at both the assets and challenges facing the city early in the decade.

Today it seems the more things change, the more they stay the same. As Scottsdale looks to respond to the economic downturn and, more importantly, prepares to grow and thrive as a regional player going forward, the same issues raised in 2003 are pertinent today.

Selected Demographic Characteristics of Valley Cities

	Total Population	Latino	Median Age	Poverty*	Median Household Income	Per Capita Income	BA+
Scottsdale	243,501	8.5%	44.5	6.0%	\$72,033	\$51,037	51.6%
Chandler	245,087	21.3%	32.4	7.3%	\$70,924	\$31,296	37.6%
Gilbert	217,521	15.3%	30.5	4.5%	\$80,705	\$30,589	38.9%
Glendale	249,197	36.1%	32.1	15.8%	\$52,083	\$23,351	18.8%
Mesa	461,102	26.5%	34.1	10.9%	\$51,180	\$24,816	22.3%
Phoenix	1,575,423	42.1%	31.9	17.7%	\$49,933	\$24,377	23.7%
Tempe	174,833	21.2%	29	18.1%	\$50,147	\$26,953	38%

* Below poverty level in last 12 months.

Sources: Arizona Department of Commerce, July 1, 2009; U.S. Census Bureau, American Community Survey 3-year estimates, 2006-2008.

That Was Then... This is Now

	2003	2010
The talent war: young, entrepreneurial residents can choose where they want to be.	Scottsdale's talent pool and diversity were key in winning the talent war. 44% held a college degree. 88% non-Hispanic white 41 median age	Young, educated, and diverse residents are still the key. Today, Scottsdale is better educated and older. 52% of residents hold a college degree. 85.1% non-Hispanic white 44.5 median age
Growth and development strategies were focused in key areas.	Emphasis on the McDowell Corridor. Protecting Scottsdale's "brand" was potentially impacting creating regional connections. Bioscience and SkySong were "Big Bets."	McDowell Corridor hit hard. Even before the downturn, the "Motor Mile" saw sales diminish 30-40% . At least 9 of 17 dealerships are closed. Lack of connectivity concerns continue. SkySong has contributed – 43 firms and 600 jobs – but not as impactful as hoped. 42 bioscience firms now call Scottsdale home.
Vacant land for development a concern.	Less than 4,000 acres available.	About 2,500 acres, almost all in North Scottsdale.
Declining sales tax receipts.	Two years prior demonstrated a standstill in real growth of sales tax revenue.	Sales tax revenue was flat in first third of decade, jumped mid-decade after tax increase, then dropped 18.1% in FY2008-2009 and another 9.3% in FY2009-2010.

Legacy at Risk: How Can Scottsdale Retain and Enhance Its Great Quality of Place?

In 2003, there was no question that high quality of place was a key component of the Scottsdale brand. Even then, the community recognized that its lofty status was not guaranteed. As a vibrant city looking to reinvent itself, understanding, maintaining and enhancing quality of place would be required.

When stakeholders convened in September 2010, several concerns about quality of place – expressed through natural environment, distinctive cultural amenities, entrepreneurial and innovative business culture, and smart and tolerant residents – still remained.

Quality of Natural Environment

Scottsdale has always been proud of the desert vistas and outdoor activities the city landscape provides. The McDowell Mountain Preserve serves as a centerpiece to this identity. Participants overall felt the city had done a good job on continuing to preserve open space and create a distinctive natural environment. However, there was concern about inadequate infrastructure, including disability access, and the need to link the preserve to more neighborhoods. Additionally, participants talked about exploring other opportunities, including those in Papago Park and along Indian Bend Wash.

Quality of Culture Amenities

Session participants did not express the same level of endorsement of Scottsdale's progress in creating new cultural amenities and enhancing existing ones. While there was recognition of cultural strengths, including the new Soleri Bridge and public art, there was also belief that Scottsdale had fallen into "second tier" status behind Phoenix in providing cultural opportunities. Participants warned that Scottsdale was "resting on its laurels" and just "keeping up" in developing as a cultural destination. Improved leadership and a need to infuse new and younger talent were offered as possible solutions.

Progress on Quality of Life Measures

- 83% rated the city as excellent or good at creating a distinctive natural environment.
- 45% rated the city as excellent or good at creating cultural amenities.
- 15% rated the city as excellent or good in attracting young, diverse entrepreneurs.

Source: Audience response question.

Quality in Attracting Young, Diverse Entrepreneurs

Participants felt the city was substantially lacking in this area. Not one person rated Scottsdale as "excellent" in attracting young talent. Participants stressed the need to "choose" the quality of life identity that Scottsdale wants. The city cannot focus on attracting successful retirees, and then question its lack of younger, diverse talent. As one participant put it, Scottsdale must be more than simply a "community of arrival." There need to be more entry points than retirement.

Affordability was a key concern for those wanting to bring in younger residents as was the kind of environment – including walkability, strong schools and an already existing mass of intellectual capital – needed to attract diverse entrepreneurs.

Trade-Offs

Scottsdale cannot be all things to all people, participants agreed. But they had widely divergent views on the kinds of hard choices the city must make to move forward. While some stressed that Scottsdale should seek new sources of revenue for development and for attracting new businesses and residents, others suggested focusing on what has worked well in the past.

Tourism and the benefits of attracting high-end visitors to enhance Scottsdale's quality of life was recommended by more than one participant, while others suggested that cultivation of a health and wellness identity would attract both businesses and visitors. Still others thought using resources to examine ways to draw young, entrepreneurial talent would be the best investment.

Understanding these trade-offs, then making the hard choices, are necessary if Scottsdale wants to preserve its quality-of-life legacy.

Redefining Greatness: How Can Scottsdale Shape Its Niche in a New Era?

Like all of metropolitan Phoenix, Scottsdale in 2003 had ridden the first wave of growth and was looking to define its role as the second wave approached. Even then, concerns about becoming an aging and complacent star were beginning to arise. It was important that Scottsdale think strategically about what it wanted to become, just as it is of key importance today.

Tourism as Destination, or as Leverage?

Participants all agreed Scottsdale's reputation as a tourist destination remains strong. But how predominant a role tourism should play in the community's future was a key discussion point. Some backed the idea of taking that strength and continuing to build in that direction. Medical tourism – which would link Scottsdale's health care facilities, including the Mayo Clinic and Scottsdale Healthcare, to destination resorts and wellness opportunities – was one niche stakeholders identified as a possible economic growth area for the city.

Many stakeholders suggested touting Scottsdale as a “Mecca of Wellness,” promoting the opportunity to enjoy a healthful, active lifestyle. Accomplishing this would require protecting and adding more open space, focusing on the McDowell Sonoran Preserve as a key “jewel” in Scottsdale's crown, and linking to green industries that tie wellness, outdoor lifestyle and economic opportunity together.

Several participants viewed elevating the quality and visibility of Scottsdale's arts and culture scene as both a tool for strengthening tourism as well as a niche goal within itself. Creating synergy between artists and the business community was one possible avenue for creative economic problem solving and growth.

Creating a New Vision

Participants questioned how Scottsdale would be able to attract the intellectual capital needed to serve as a magnet for drawing new businesses to the community. Still others questioned if it wasn't time to examine and cultivate an alternative image. Connecting with Arizona State University to create a student pipeline that leads talented graduates back to Scottsdale was one idea. Additionally, while participants acknowledged the city is not known as a research and technology hub, this was an area of economic development the city needed to pursue further.

Cultivating higher paying jobs was a major concern. Relying solely on tourism to define the city's greatness was met with reluctance since many tourism-based jobs fail to provide the level of salary needed to live in Scottsdale.

Community niches defined:

- **Hub of makers:** sophisticated manufacturing
- **Hub of creativity:** research and design
- **Hub of connectors:** global connections and cultural exchange
- **Hub of entertainment:** cultural experiences

Synergy and collaboration continued to ring as a theme for these participants, as it did in all five breakout sessions convened. Scottsdale taking on a leadership role in creating cross-boundary synergies with neighboring communities was a particular goal.

Success Begets Success and Big Ideas in Tough Times

A number of participants suggested that the first step should be sharing the city's success stories.

Additionally, several individuals recognized the challenge of proposing big ideas in times of economic need such as these. Although one participant stated, “Now's a bad time to come forward with large-scale problems,” a different take on the downturn also emerged.

For example, one participant noted that in these tough economic times it “takes a bigger commitment from the community to say ‘we may not build it right now, but we need to commit to plan it and dream the big dream.’” Participants think Scottsdale needs to dream now, and then take the required planning steps, in order to realize its vision.

Finally, stakeholders discussed the challenge of reaching consensus in a city that has acknowledged divisions, both within and among communities, as well as geographically. Some participants indicated that across-the-board consensus may be a bit overrated: “Any good idea should have controversy.” Others stressed the value of gaining commitment over consensus.

Accountability, synergy and the ability to work collaboratively are critical in securing Scottsdale's niche of greatness. One member posed the question, “What are we selling economically that is unique?” Answering that is key to Scottsdale's next steps.

The Scottsdale Story: How Can the “Three Scottsdales” Work Together?

Scottsdale is a city shaped by unique geographic and socio-economic divisions. As a result, when the original *Which Way Scottsdale?* was published, the difficulty of holding the city together was a key area of concern. Today, how the “Three Scottsdales” fit the city's 2010 success story is still up for debate.

The “Three Scottsdales”:

- **North Scottsdale** is characterized by open space and rural neighborhoods.
- **Central Scottsdale** dominates the city's employment picture.
- **South Scottsdale** is losing jobs and projected employment growth remains the slowest in the city.

Cultivation of Unique Communities

While 73 percent of session participants agreed that there are still “Three Scottsdales,” 65 percent thought the best path for economic and community growth was through cultivating each as a unique area. There was a desire to unify the three, but not to homogenize each.

Participants recommended identifying and capitalizing on each community's strengths and then pursuing complementary strategies to market and brand each of them for business and tourism. Additionally, a strong theme of the entire day – collaboration – was a driver for those considering how the Scottsdale Story will unfold.

Discussion about collaboration, and the dire need for it, followed two threads:

- **Collaboration with city neighbors:** Participants noted that today there are actually more than “Three Scottsdales.” Many cited the strong tribal community bordering the city to the East as a fourth Scottsdale. Additionally, it was noted that in South Scottsdale there is often little distinction between where Tempe ends and Scottsdale begins. Future success of that part of the city, in particular, hinges upon inter-city collaboration and coordination with Tempe, including Arizona State University.
- **Collaboration within the city:** Participants discussed not only coordinating among the three communities, but also addressing rifts within other areas of the city. First, each of the three communities contains distinctive neighborhoods and economic centers. In Central Scottsdale, the Airpark has grown into the state’s second largest business center with 2,576 businesses, more than 48,000 employees and an amorphous identity; it is poised to adopt a brand that befits its status. In South Scottsdale, the downtown has distinctive urban amenities including the Waterfront, Soleri Bridge and Old Town. Second, as one participant noted, the “Three Scottsdales” could now more accurately be described as the business community, Chamber of Commerce and city government, all of which need to collaborate. Many felt that the divisiveness within the community, beyond the geographic borders, was the primary challenge.

High Quality Education Regardless of Address

One area of agreement was the need to ensure a high-quality education, regardless of which “Scottsdale” a child resides in. Participants, as well as achievement data, point to a deficit in South Scottsdale. Economic differences, along with the large number of different school districts within Scottsdale’s boundaries, were viewed as contributors to the citywide imbalance.

SkySong in South Scottsdale was identified as one possible tool to leverage and link K-12 education to higher education and economic and job opportunities. However, overall participants viewed education funding as a challenge that only state-level intervention could truly impact. They believed there was little Scottsdale stakeholders could do locally to equalize opportunity for K-12 students across the entire city.

Region On the Rise: How Can Scottsdale Play With “360-Degree” Vision?

When Scottsdale first emerged as a nationally known city, the Phoenix metro area was without an established national presence. By 2003, all of

that had changed, and Scottsdale was one of numerous cities within a metropolitan region. *Which Way Scottsdale?* identified the region’s “Three Big Bets” that could provide a basis for Scottsdale’s economic future. In 2010, participants revisited these big bets, and discussed the city’s role within the larger metropolitan community.

2003’s Big Bets

- Arizona State University
- Genome research
- Top-tier science and technology clusters

Collaboration and Coordination

The message heard loud and clear from participants was that Scottsdale, regardless of which of the “Big Bets” it invests in, has to engage and work across city boundaries with all of its metropolitan neighbors, including the tribal community.

This was demonstrated by audience support for two regional projects that the city recently opted not to join. 92 percent of participants supported Scottsdale joining the Discovery Triangle, an urban-redevelopment

How does Scottsdale, in its entirety, stack up against its metro neighbors?

- Highest per capita income
- Best educated
- Oldest residents
- Fewest Latino residents
- Second fewest poverty-level households

project stretching from Phoenix to Tempe that also would have included SkySong in Scottsdale. 79 percent expressed support for extending the light rail into the city.

In examining Scottsdale’s connection to the “big bets” of 2003 – Arizona State University, genomics and industry clusters – attendees kept reiterating that success in any one of these areas was dependent upon becoming a regional player.

Support for All “Three Big Bets”

Of all the big bets, support was the strongest for ASU. When polled during the sessions, 94 percent of participants said they believed ASU was a bet still worth pursuing. Further, Scottsdale needs to think about ASU as more than just SkySong. There are opportunities to open satellite campuses in Scottsdale, as well as provide the kind of intellectual capital that builds momentum for more economic opportunity. One individual noted how Downtown Phoenix had capitalized on its relationship with ASU, in conjunction with light rail, to create a new hub of economic development while revitalizing a previously neglected part of Phoenix.

As for courting genomics research, 87 percent of participants thought this was an economic development strategy worth championing. Enthusiasm was even stronger for cultivating specific industry clusters, with all but one individual insisting that Scottsdale needs to go after such opportunities.

One industry that continued to dominate discussion was Scottsdale’s medical sector. While some cautioned that this industry does not yield the same job creation payoff as other base industries, many maintained that with Mayo Clinic, Scottsdale Healthcare and other hospitals and health care centers, the framework exists to create a strong medical cluster within the city.

Scottsdale has traditionally eschewed providing incentives for business creation. However, 86 percent of session participants said they would welcome thoughtful, targeted incentives aimed at creating the kind of economy that would make Scottsdale a major economic player in the Valley.

Can Scottsdale Stay Scottsdale and Still Be a Regional Partner?

The resounding answer from participants was “Yes!” The Scottsdale brand – one defined by high quality of life and high-end resorts – does not have to be a barrier to regionalism, or end up subsumed in city partnerships.

Most were quite comfortable with the Scottsdale brand, and perceptions of that brand, and preferred to focus on how it could be leveraged. Highlighting what makes the city great, without implying any insular approach to development, may be the best approach: Promote the brand, rather than protect it, they said.

No matter which path Scottsdale takes, or which bet prompts the city to go all in, it was clear from participant responses that a regional perspective and commitment to inter-city collaboration will be essential in the years ahead.

Tougher Agenda: How Will "Can-Do" Scottsdale Get Past the "Stopsdale" Reputation?

In the 1990s, Scottsdale suffered a setback in its reputation as a city that gets things done. In 2003, while it appeared it was making strides in recovering that image, several challenges were on the horizon. These included dwindling land for development and declining tax revenues generated by new growth. These challenges are even more pronounced, and more critical, in 2010.

Is the Reputation Still Fair?

It depends. That was the general consensus of session participants. Echoing one of the primary themes heard in every session, many felt that when it came to engaging in regional partnerships, Scottsdale was still reluctant to cooperate. One participant noted, "We are operating in a cocoon." As a specific example, a number of individuals cited the lack of city engagement in the Discovery Triangle as a failure to collaborate regionally.

While some felt the lure of Scottsdale's reputation can serve as an economic catalyst, many pointed out that same cachet could inadvertently be portrayed in a way that squelches regional cooperation. One participant stated, "The only time I've ever heard about the 'Scottsdale Cachet' is in Scottsdale." One even said bluntly, "We're pretty stuck on ourselves." Further, some participants expressed concern that the city was relying on carryover from its past successes to move forward.

However, when examining cooperation within the city to drive development and guide projects internally, many felt the "Stopsdale" reputation was no longer accurate or deserved.

How Can Scottsdale Be "Can-do?"

As the state struggles to climb out of the current recession, the challenges cited in the original *Which Way Scottsdale?* report – diminishing land for development and declining tax revenues – are now more substantial than could have been imagined in 2003.

Participants described how the city faces a dilemma in the ongoing tension surrounding future development. While growth is the objective of many, there is a counter argument that Scottsdale must grow thoughtfully to ensure quality is maintained.

Regardless, how to guide development moving forward is a critical conversation to have. One participant noted that any solutions, to be successful, would have to be complex, requiring the community to move past seeking easy wins. Such complexity would include consideration of options like redevelopment of existing residential and business centers and better transportation choices.

Another possible solution set forth was reexamining city zoning to allow for higher-density development. One individual noted the city's skyline has not changed much in 25 years. Reconsidering height restrictions was also recommended.

Exploration of further development along Scottsdale's extensive canal system, especially during this time of historically cheap construction costs, was viewed as another growth opportunity.

Another key driver of future growth noted by participants was the need to attract and retain young families. Many agreed that housing affordability can serve as a barrier to bringing in younger residents. This not only limits the number of young professionals moving to Scottsdale, but also poses an obstacle to building a more diverse community. The public schools and concerns over declining student enrollment were also cited as deterrents to relocating families.

Attracting young talent to the city also was identified as a way to grow a more balanced economic base. One individual noted Scottsdale cannot build a strong economy by relying exclusively on service industry employees.

However, participants were also quick to point out bright spots, including the Scottsdale Airpark, which is a key employment center that has blossomed in the years since the original *Which Way Scottsdale?*

"Can-do" Means "Can Collaborate"

When it came to setting an agenda, there was no surprise as to what participants chose as the key component of success: collaboration. They expressed frustration with city leadership and cited specific examples of potentially missed opportunities for cooperation. However, they also realized that collaboration requires at least two partners. Emphasis was placed on the need to bridge gaps, and to establish and nurture relationships. Also, stakeholders including Scottsdale's government and businesses, must work together to build a strong economic future. Finally, leadership based on vision and values was articulated as key. As one participant noted, values should be maintained, but leadership should be able to adjust the vision when needed.

Shaping Scottsdale: Next Steps

Session participants shared their concerns honestly and provided thoughtful direction on what steps they believed were critical to Scottsdale's future success.

A dominant theme that ran through every discussion was the need for Scottsdale to be open to cooperation and collaboration. This will require bridging the economic, geographic and community fractures within Scottsdale, as well as divides between the city and its metropolitan neighbors, including the Salt River Pima-Maricopa tribe to the east.

In 2003, *Which Way Scottsdale?* stated, "In order to compete in the 21st century, Scottsdale will have to acknowledge – and build on – the regional context of metropolitan Phoenix that is now an undeniable part of Scottsdale's own situation." This could not be truer today.

This distillation of the sessions, combined with community discussion, will serve as a catalyst for Scottsdale to begin not only visioning, but planning, for the next steps. Trade-offs, vision, values, collaboration and a commitment to a more unified Scottsdale will be essential to transforming the community into a 21st-century contender.

Construction Activity and Revenue Are on the Decline

Permit Type	2003		2006		2009	
	No.	Value	No.	Value	No.	Value
Residential	2,154	\$367,949	1,913	\$466,318	646	\$98,952
Commercial	927	\$257,493	1,044	\$492,833	217	\$55,252
Industrial	4	\$1,200	2	\$3,821	0	0
Total	2,545	\$626,642	2,959	\$962,972	863	\$154,204

Appendix

Participant responses to audience response questions are noted below. Data is provided by CCS Presentation Systems.

Legacy at Risk

Session 1

2003's *Which Way Scottsdale?* identified key issues related to quality of life that need attention to keep Scottsdale moving forward. How would you rate the city's progress on:

Q1: Creating a distinctive and accessible natural environment?

Response	Number of Responses	Percent of Total
Excellent	18	34%
Good	28	53%
Fair	7	13%
Poor	0	0%

Q2: Creating cultural amenities?

Response	Number of Responses	Percent of Total
Excellent	3	6%
Good	25	47%
Fair	18	34%
Poor	7	13%

Q3: Attracting young, diverse entrepreneurial talent?

Response	Number of Responses	Percent of Total
Excellent	0	0%
Good	10	20%
Fair	22	43%
Poor	19	37%

Session 2

2003's *Which Way Scottsdale?* identified key issues related to quality of life that need attention to keep Scottsdale moving forward. How would you rate the city's progress on:

Q1: Creating a distinctive and accessible natural environment?

Response	Number of Responses	Percent of Total
Excellent	8	36%
Good	8	36%
Fair	5	23%
Poor	1	5%

Q2: Creating cultural amenities?

Response	Number of Responses	Percent of Total
Excellent	0	0%
Good	6	26%
Fair	14	61%
Poor	3	13%

Q3: Attracting young, diverse entrepreneurial talent?

Response	Number of Responses	Percent of Total
Excellent	0	0%
Good	1	4%
Fair	10	44%
Poor	12	52%

The Scottsdale Story

Session 1

Q1: Are there still "Three Scottsdales?"

Response	Number of Responses	Percent of Total
Yes	7	54%
No	6	46%

Q2: Does future success rely more on trying to unite the three areas, or cultivating three distinct "cities within a city"?

Response	Number of Responses	Percent of Total
Unify all three under a common Scottsdale vision	6	46%
Cultivate each as a unique "city within a city"	7	54%

Session 2

Q1: Are there still "Three Scottsdales?"

Response	Number of Responses	Percent of Total
Yes	12	54.5%
No, not any longer	1	4.5%
No, there are more than three	9	41%

Q2: Does future success rely more on trying to unite the three areas, or cultivating three distinct "cities within a city"?

Response	Number of Responses	Percent of Total
Unify all three under a common Scottsdale vision	6	29%
Cultivate each as a unique "city within a city"	15	71%

Region on the Rise

Session 1

Q1: Is the Scottsdale brand – high quality of life, high-end resorts – an impediment to regional partnerships?

Response	Number of Responses	Percent of Total
Yes	5	21%
No	19	79%

Q2: Is the "Big Bet" identified in 2003, ASU, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	25	96%
No	1	4%

Q3: Is the "Big Bet" identified in 2003, Genomics, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	20	83%
No	4	17%

Q4: Is the "Big Bet" identified in 2003, Industry Clusters, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	15	100%
No	0	0%

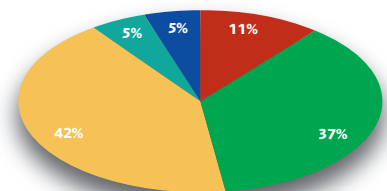
Q5: Of these clusters identified as new opportunities, rank from most important, to least important, where Scottsdale should concentrate its efforts:

- A. Corporate Headquarters
- B. High-tech, Bio and Sustainability Industries
- C. Healthcare and Medical
- D. Research and Development
- E. Business and Professional Services

Response-Ranking in Order Using Letter Identifiers Noted Above

Ranking	Number of Responses	Ranking	Number of Responses
B,D,C,E,A	1	C,A,B,E,D	1
A,D,E,B,C	1	B,C,E,A,D	1
D,B,C,A,E	1	C,D,B,E,A	1
C,A,D,E,B	1	E,A,B,C,D	1
C,E,B,A,D	1	B,C,D,A,E	2
A,C,E,B,D	1	C,D,B,A,E	2
B,A,C,D,E	1	B,C,A,D,E	1
C,B,A,D,E	1	C,A,D,B,E	1
B,C,D,E,A	1		

Percent of Respondents Who Ranked Cluster as Most Important



Q6: Should we call the region Metropolitan Phoenix?

Response	Number of Responses	Percent of Total
Yes	16	73%
No	6	27%

Q7: Should Scottsdale provide incentives to businesses?

Response	Number of Responses	Percent of Total
Yes	22	88%
No	3	12%

Q8: Should Scottsdale be a part of the Discovery Triangle?

Response	Number of Responses	Percent of Total
Yes	19	95%
No	1	5%

Q9: Should Scottsdale have light rail?

Response	Number of Responses	Percent of Total
Yes	21	75%
No	7	25%

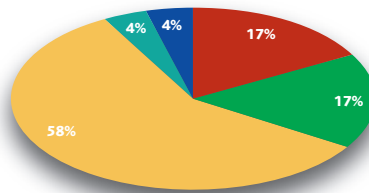
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- E. Business and Professional Services

Response-Ranking in Order Using Letter Identifiers Noted Above

Ranking	Number of Responses	Ranking	Number of Responses
C,B,D,A,E	3	B,E,C,D,A	1
A,E,C,B,D	1	A,C,E,B,D	2
C,B,D,E,A	6	A,C,B,D,E	1
E,A,B,D,C	1	C,E,B,D,A	1
C,A,E,D,B	1	D,C,A,B,E	1
B,C,D,E,A	1	C,E,A,B,D	1
C,A,B,E,D	1	B,E,A,D,C	1
B,C,A,D,E	1	C,E,B,A,D	1

Percent of Respondents Who Ranked Cluster as Most Important



Q10: Should incentives be regionally based?

Response	Number of Responses	Percent of Total
Yes	27	90%
No	3	10%

Q11: Can participating in regionalism hurt Scottsdale's brand?

Response	Number of Responses	Percent of Total
Yes	9	30%
No	21	70%

Session 2

Q1: Is the Scottsdale brand – high quality of life, high-end resorts – an impediment to regional partnerships?

Response	Number of Responses	Percent of Total
Yes	10	38%
No	16	62%

Q2: Is the "Big Bet" identified in 2003, ASU, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	26	93%
No	2	7%

Q3: Is the "Big Bet" identified in 2003, Genomics, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	25	89%
No	3	11%

Q4: Is the "Big Bet" identified in 2003, Industry Clusters, still worth pursuing as part of the city's next steps?

Response	Number of Responses	Percent of Total
Yes	24	96%
No	1	4%

Q6: Should we call the region Metropolitan Phoenix?

Response	Number of Responses	Percent of Total
Yes	8	30%
No	19	70%

Q7: Should Scottsdale provide incentives to businesses?

Response	Number of Responses	Percent of Total
Yes	26	74%
No	5	16%

Q8: Should Scottsdale be a part of the Discovery Triangle?

Response	Number of Responses	Percent of Total
Yes	25	89%
No	3	11%

Q9: Should Scottsdale have light rail?

Response	Number of Responses	Percent of Total
Yes	21	84%
No	4	16%

Acknowledgements

Next Steps Scottsdale: Building an Action Plan for Economic Growth is a multi-year initiative that began with an Economic & Community Development Symposium on September 15th, 2010.

Inspired by those committed to Scottsdale's future

Executed by Scottsdale's citizens and business leaders

Convened by the **Scottsdale Area Chamber of Commerce:**

Kurt Zitzer, *Chair, Board of Directors*

Rick Kidder, *President/CEO*

Debra L. Kuffner, *Chief Operating Officer*

Cindi L. Eberhardt, *Executive Vice President*

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Geoff Beer

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Dr. Lattie Coor

Grady Gammage Jr.

Craig Jackson

Eric Larson

Jim Pederson

Max Poll

Dave Roderique

Rachel Sacco

Tom Sadvary

Corporate Contributors of the Next Steps Scottsdale Symposium

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Barrett-Jackson Auction Co LLC

DMB Associates, Inc.

FirstBank of Arizona

Henkel Consumer Goods Inc

Mayo Clinic

Magellan Health Services of Arizona

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Ryerson Group

Scottsdale Fashion Square

Scottsdale Healthcare

Scottsdale Insurance Company

Salt River Project

The Pederson Group

Wells Fargo Bank

City of Scottsdale & Community Stakeholder Representation

Airport Advisory Commission

Budget Review Commission

Channel 11 Programming Commission

City of Scottsdale Administration

Coalition of Greater Scottsdale

Community Services Division

Economic Vitality & Aviation Divisions

Historic Preservation Commission

Housing Board

Neighborhood Enhancement Commission

Planning Commission

Planning, Neighborhoods & Transportation Division

Scottsdale Area Association of Realtors

Scottsdale Chamber Airpark Committee

Scottsdale Chamber Ambassador Committee

Scottsdale Chamber Board of Directors

Scottsdale Chamber Economic Development Advisory Council

Scottsdale Chamber Executive Committee

Scottsdale Chamber Partner Council

Scottsdale Chamber Public Policy Advisory Council

Scottsdale Community College

Scottsdale Convention & Visitors Bureau

Scottsdale Cultural Council

Scottsdale Leadership

Scottsdale Pride Committee

Scottsdale Residents

Scottsdale Small Businesses

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Signs by Tomorrow - Scottsdale

the next great event, llc.

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Council members Lisa Borowsky,
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City Manager David Richert





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