



ECONOMIC DEVELOPMENT INITIATIVE STRATEGIC PLAN 2012-2015



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PURPOSE

The purpose of this Economic Development Initiative is to identify goals, strategies, and recommended implementation actions that will result in business retention, expansion and enhanced appeal and desirability for the defined Service Area. The objective of this initiative is to build the economic health and wealth of the northwest Harris County area as measured by increasing employment opportunities and taxable property values within the Service Area. The Economic Development Initiative Strategic Plan (“*EDISP*”), as outlined herein, supports the Economic Development Initiative. The EDISP will position the Houston Northwest Chamber of Commerce as the primary source of data and services supporting the economic development of business and wealth promotion in this Service Area. This document is designed to be a road map to guide work toward this goal. The Economic Development Strategic Planning Task Force is proud of the community’s heritage and excited about the prospects for the future!

EXECUTIVE SUMMARY

Northwest Houston works! Three short words convey the story. There is a reason why the largest publicly traded petroleum and petrochemical enterprise in the world is consolidating many of their offices into a new campus under construction in this market area. Continued strong oil prices, technological improvements in drilling and strong demand from emerging markets for the products manufactured here is good news for the economy. Population growth is greater than the national average in part because Houston is among the nation’s brightest economic stars. The Houston area is adding more jobs than any of the top 20 metropolitan areas in the country. The *Greater Houston Partnership* predicts that the Houston area will have created 80,300 jobs this year, a year over year gain of 3.1%. And next year’s job growth is expected to be even better.

Within the greater Houston MSA, the Service Area (as hereinafter defined) presents an even more compelling story: compared to the Houston MSA, the 15-zip Service Area exhibits higher per capita income, lower unemployment rate, a younger better-educated workforce, a higher degree of owner-occupied housing, and higher median value of occupied housing units. It includes academically strong school districts, a strong and vibrant health care sector, a diverse range of housing options, and immediate availability of all types of commercial real estate at attractive prices.

Based on the data provided in the Appendix, the Service Area reflects the following characteristics:

	EDI Service Area	Houston MSA
Average Annual Population Growth	4.0%	2.6%
2011 Per Capital Income	\$27,977	\$25,974
2011 Median Household Income	\$60,880	\$52,849
2011 Average Household Income	\$81,206	\$73,288
2010 Owner Occupancy	58.2%	56.1%
2010 Vacancy Rate	9.1%	10.2%
2010 Unemployment Rate	8%	10%
Some College or More	62.9%	54.9%

Aside from these easily quantifiable measures, the Service Area additionally offers many “*Quality of Life*” measures including museums, arts and cultural activities, ample green space, numerous varied health and wellness centers and good transportation corridors.

Challenges and obstacles are also evident, many of which will require immediate attention and intervention in some cases:

- Lack of Identity
- Fragmented Unincorporated Status
- Blight and decline along certain retail corridors
- Existing ordinances not being enforced

The Service Area resides in unincorporated Harris County and as such, struggles to compete with neighboring cities, and management districts that collect an extra half-cent sales tax used to promote economic activity. These economic development initiatives are typically carried out by salaried staff members whereby ours is more of a “grass roots” volunteer effort. Collaboration of various stakeholders will be required in order to continue on our path of success.

The goals and action steps for implementation that have been identified in this initiative are listed here and detailed in the report that follows:

1. Develop a structure within the Houston Northwest Chamber of Commerce to further implement the Economic Development Initiative
2. Develop and maintain data resources to help facilitate economic development activities
3. Develop and implement a Business Retention and Expansion (“*BRE*”) program
4. Develop a funding model to better promote economic development activities
5. Develop a marketing strategy to drive economic development

The Houston Northwest Chamber of Commerce has undertaken this study of a 15-zip code Service Area as a foundation for this Economic Development Initiative. The study looks back at the past, reviews our present and presents a plan for our future.

VISION

Northwest Harris County has always been characterized as an energetic community of engaged, ambitious citizens and stakeholders with true pioneering spirit who seek creative, grass roots solutions to accomplish their goals. In keeping with this pioneer spirit, the vision for northwest Harris County through 2015 is ambitious, lofty and yet attainable. This vision focuses primarily on the business community as the primary drivers of economic growth and vitality although the total community is certainly impacted in a positive way.

The vision for northwest Harris County is simply this:

Northwest Harris County is an energetic, innovative and vibrant value-oriented area selected as the “*community of first choice*” by entrepreneurs and established business owners alike. It is a high quality, aesthetically pleasing destination for businesses and families that continues to draw increased attention from business owners seeking to expand existing facilities or relocate to the area. Northwest Harris County possesses a unique synergy of attractive amenities that work together to produce an ideal environment for a productive, gratifying quality lifestyle. These amenities include academically strong public and private schools, colleges and universities, government entities, thriving and successful businesses, churches, civic groups and associations, parks, green spaces, waterways and diverse and affordable real estate assets.

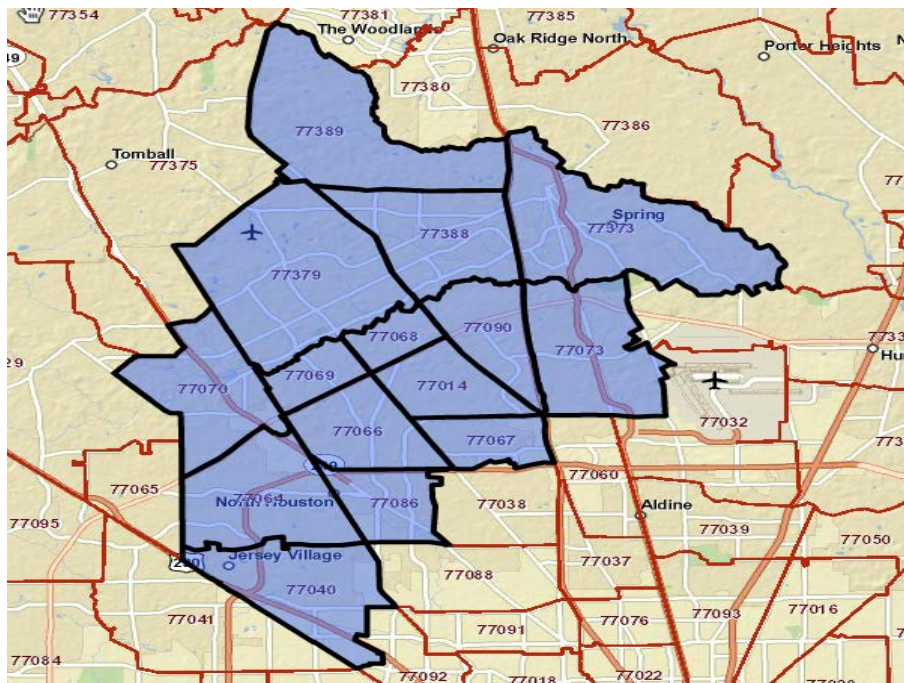
MISSION

The mission of the EDISP is to implement a long-term process driven by clearly defined and consistently applied strategies that will promote economic development in our market area. The economic development process will create wealth through the mobilization of human, financial, capital, physical and natural resources to generate marketable goods and services. Additionally, the process will provide for the retention and expansion of job opportunities and the tax base for the benefit of the community. The focus and goal is to:

- Promote the region to be the first considered by business owners with regard to expansion or relocation
- Capitalize on strengths and lead the region toward even greater recognition
- Implement the Plan with the right combination of imagination and common sense infused with a “can do” attitude and culture of excellence in all we do.

ECONOMIC DEVELOPMENT INITIATIVE SERVICE AREA

It is recognized that local economies are not isolated systems and that a regional focus must be maintained. For purposes of this analysis, a 15-zip code area will be the primary focus. This area will be referenced as the “Service Area” and includes the following zip codes: 77014, 77040, 77064, 77066, 77067, 77068, 77069, 77070, 77073, 77086, 77090, 77373, 77379, 77388, and 77389. It is recognized that Jersey Village and the City of Houston are municipalities within this 15-zip area and they have their own economic development efforts. They have been included here merely for analysis purposes and to keep all 15 zip codes intact.



ECONOMIC DEVELOPMENT INITIATIVE ACTION PLAN 2012-2015

The mission of the Houston Northwest Chamber of Commerce Economic Development Initiative (EDI) is to build the economic health of the northwest Harris County area as measured by increasing both jobs and taxable property value.

Key objectives for the EDI are:

- Develop and implement a business retention and expansion program for existing northwest Houston businesses.
- Support the recruitment of new businesses to the Service Area.

Action Plan for Achieving Economic Development Objectives

Goal I: Expand the community's capacity for increased job growth and prosperity through the Economic Development Initiative.

Action Steps:

1. Increase the flow of communication via the Economic Development Council, Economic Development/Chamber staff, the A-Team of Commercial Brokers and Eco Devo Partners to facilitate business expansion, property development and new jobs.
2. Host a series of quarterly meetings of the A-Team and Economic Development Council and carry out action plans for furthering the area's economic health
3. Work with the Greater Houston Partnership, the Governor's Office of Economic Development and other community partners to respond to prospect leads

Goal II: Develop and maintain data resources that facilitate business development decision-making, positioning the Chamber as the central source of business and economic development information for northwest Harris County.

Action Steps:

1. Maintain relevant data resources that can be utilized upon request
2. Publish annually the Economic Development Strategic Plan and a *Community Update*, a report on progressive developments strengthening our local economy

Goal III: Expand the Business Retention and Expansion program.

Action Steps:

1. Meet with at least 8 companies per year, capturing information to assess risk and opportunity in support of primary employers
2. Expand and promote the 'Business Support System', a comprehensive collection of services and resources to assist in the development of entrepreneurs and small businesses

3. Explore feasibility of employer feedback survey

Goal IV: Identify and secure sustainable funding to provide adequate budget to fund EDI.

Action Steps:

1. Develop fundraising teams to meet with EDI investors
2. Explore grants and other forms of funding EDI

Goal V: Develop and implement a strategic marketing plan to package and market the area

Action Steps:

1. Develop ED website separate from the Chamber site
2. Benchmark other Chambers and EDOs to determine best practices that would be effective in branding and marketing our community
3. Develop and distribute dynamic printed collateral, including the annual *Community Update* to be published by September 2013
4. Develop an Infographic piece by March 15, 2013
5. Maximize the use of social media and mobile communications.
6. Improve media coverage of our Chamber and community.

DEMOGRAPHIC SUMMARY

The 15-Zip Service Area boasts many valuable qualities. Based on the data provided in the Appendix, the EDI Service Area has the following characteristics:

- **Healthy population growth**

	EDI Service Area	Houston MSA
2000 Total Population	385,163	4,715,407
2010 Total Population	538,378	5,946,800
% Change	39.7%	26.1%

- **Young workforce**

	EDI Service Area	Houston MSA
2000 Median Age	32	32
2010 Median Age	32	33

- **Higher per capita income compared to the Houston MSA**

	EDI Service Area	Houston MSA
2000 Per Capita Income (PCI)	\$ 24,870	\$ 21,657
2010 Per Capita Income (PCI)	\$ 27,977	\$ 25,974

- **Higher ratio of owner-occupied housing units compared to the Houston MSA**

	EDI Service Area	Houston MSA
2010 Total Housing Units (HU)	203,505	2,308,205
2010 Owner Occupied Housing Units	118,024	1,294,913
2010 % Total HU Owner Occupied	58%	56%

- **Lower vacancy rate in housing compared to the Houston MSA**

	EDI Service Area	Houston MSA
2010 Total Housing Units (HU)	203,505	2,308,205
2010 Vacant Housing Units	18,481	235,580
2010 % Vacant of Total HU	9%	10%

- **Higher median value of owner-occupied housing compared to the Houston MSA**

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	EDI Service Area	Houston MSA
2010 Median Value Owner Housing Units	\$ 131,876	\$ 121,470
EDI Service Area 8.6% higher		

- **Higher overall education attainment compared to the Houston MSA**

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	EDI Service Area	Houston MSA
2010 Total Population 25+	328,891	3,772,362
Less than 9th Grade	18,610	381,954
Some HS	23,274	368,647
HS Grad	80,288	951,627
Some College	76,797	773,399
Associate's Degree	25,281	238,155
Bachelor's Degree	75,001	709,146
Graduate Degree	29,640	349,434
% of Age 25+ Population With Some College	62.8%	54.8%

- **Greater percentage of college graduates compared to the Houston MSA**

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

2010 Education (age 25+) Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010.

2010 Total Population 25 and older	328,891		3,772,362	
Less than 9th Grade	18,610	6%	381,954	10%
Some HS	23,274	7%	368,647	10%
HS Grad	80,288	24%	951,627	25%
Some College	76,797	23%	773,399	21%
Associate's Degree	25,281	8%	238,155	6%
Bachelor's Degree	75,001	23%	709,146	19%
Graduate Degree	29,640	9%	349,434	9%

- **Lower unemployment rate compared to the Houston MSA**

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	EDI Service Area	Houston MSA
2010 Unemployed Population 16+	20,808	268,112
2010 Unemployment Rate 16+	8%	10%

COMMUNITY ASSESSMENT

An important step in the development of a strategic plan is the analysis of the target area, specifically the area's strengths, weaknesses, opportunities, and threats. We have been fortunate to have had a number of studies conducted in northwest Harris County. These studies form the baseline from which the EDI Strategic Plan is being developed. The SWOT Analysis is derived from these previous studies and from the perspectives of the EDI Strategic Planning Committee members.

Prior Community Assessments

- "A Community Assessment of Northwest Harris County," TIP Strategies, September, 2008
- "Renaissance 1960 Working Preliminary Report," Webb Architects, 2008
- "Potential Projects for the Improvement of the FM 1960 Area," The Davis Alliance Corporation / Renaissance 1960, September 2008
- "Summary of Findings & Strategic Revitalization Options for the FM 1960 Corridor," Spillette Consulting, July 2010
- "1960 Area Community Alliance Corridor Study and Strategic Plan," Johnson & Associates, October 2003

SWOT Analysis

While these studies span time and geography, there are some commonalities that can be extracted to drive future decision-making. The following SWOT Analysis covers many of the issues noted in prior community assessment reports.

Strengths

- Economic strength/lower taxes
- Higher education assets
- Academically strong school districts
- Young, well-educated workforce
- Strong healthcare sector
- Cultural assets
- Trees, parks, greenways, Cypress Creek, medians
- Diverse range of housing options
- Access to transportation corridors and hubs (airport, port, interstates, etc.)
- “Can-Do” spirit of stakeholders

Weaknesses

- Unincorporated area
- Existing ordinances not being enforced
- Lack of financial capacity
- Lack of aesthetics
- Illegal / Unsightly signage
- Lack of Identity / fragmentation
- Traffic / mobility (excess driveways and street lights, lack of instructional signage and addresses)
- Perception of crime

Opportunities

- Investment Potential
- Greenway initiatives
- ExxonMobil and other corporate influx
- Potential town center areas
- Cultural arts expansion
- 249 corridor improvements
- Collaboration with MUDs, property owners and POAs
- Architectural and landscape standards

Threats

- Slow economic growth
- Competition with surrounding EDCs
- Demographic Changes
- Apartments
- Absentee property ownership
- Illicit Massage Parlors
- Loitering Day Laborers

Economic Development Partners

The Houston Northwest Chamber of Commerce must work in collaboration with other economic development entities in the region. EDI partners include:

- CenterPoint Energy
- Governor's Office of Economic Development
- Greater Houston Partnership
- Harris County Community & Economic Development
- Lone Star College System
- Renaissance 1960

There are many efforts that can have a positive impact on the local economy and many can be accomplished by other organizations or Chamber committees outside the scope of this plan. These include but are not limited to:

- Projects to define and brand the community
- MUDs collaborating in community development projects
- Renaissance 1960 and Chamber seeking redevelopment opportunities (TIRZs, improvement district, 380 agreement, etc)

Competition

It is imperative that the EDISP strengthen the region's competitive position relative to neighboring areas. Though our community has many strong assets, we compete with the economic development efforts of communities surrounding our Service Area:

- **Greenspoint:** Bolstered by the Greenspoint Management District and the newly formed North Harris Economic Development Council (NHEDC), this area is making a healthy transformation from a crime-ridden urban wasteland to a viable and safe business center. Well-funded community development initiatives are carried out by the Greenspoint District and the NHEDC is recruiting financial memberships from area management districts and large corporations.
- **Tomball:** Tomball is an incorporated municipality that benefits from the Tomball Economic Development Corporation, a 4-B economic development sales tax corporation that receives one-half cent in local sales tax to fund economic development in the form of infrastructure improvements and business recruitment and expansion incentives.
- **The Woodlands:** Though an unincorporated city, The Woodlands is a well-funded, developer-driven success story. Economic development activities are managed through The Woodlands Area Economic Development Partnership, a division within The Woodlands Chamber of Commerce.
- **Conroe:** Just north of The Woodlands is the City of Conroe. Conroe was a forerunner in establishing a 4-B economic development sales tax corporation, the Greater Conroe Economic Development Council (GCEDC). The GCEDC is a successful business recruitment and retention organization with four employees and a track record of success. The GCEDC acquired land and developed a city-owned industrial park that provides ready facilities for businesses considering locating manufacturing and logistics operations to the area.



ExxonMobil Campus Site

Major Primary and Secondary Sector Employers – By Employee Complement (15 Zips)

The key focus of the EDISP will be to maximize primary job creation in the Service Area. A primary job is defined to mean a job that is available at a company for which a majority of the products or services of that company are ultimately exported to regional, statewide, national or international markets infusing new dollars into the local economy...”

Source: 2008 Economic Development Handbook, Attorney General of Texas, Greg Abbott, p.7

Companies with Primary Jobs and More Than 1,000 Employees

Broadcom Corporation	Semi-conductor Device Mfg.
FMC Technologies	Oilfield Equip Mfg.
Houston Northwest Medical Center	Hospital
Ikon Office Solutions	Duplicating Machine Supplier
Methodist Willowbrook Hospital	Hospital

Companies with Primary Jobs and 500-999 Employees

Foxconn International	Electrical Connector Mfg.
Glazier Foods	Wholesale Grocers
Houston Stats Medical	Wholesale Physician's Supply
National Oilwell Varco	Oilfield Services
NCO Group	Telemarketing Services
Securitas	Security Services
Strike Construction LLC	Construction

Secondary Employers with 400+ Employees

School Districts	Education
Walmart Stores	Retail
Worldwide Express	Retail
Sam Houston Racepark	Horse Racing
Splashtown	Water Park

Source: infoUSA (R), Omaha, NE, 800/555-5211. Copyright (C) 2009. All Rights Reserved.

TOP BUSINESSES BY 15 Zip Codes

Source: Equifax and Texas Workforce Commission

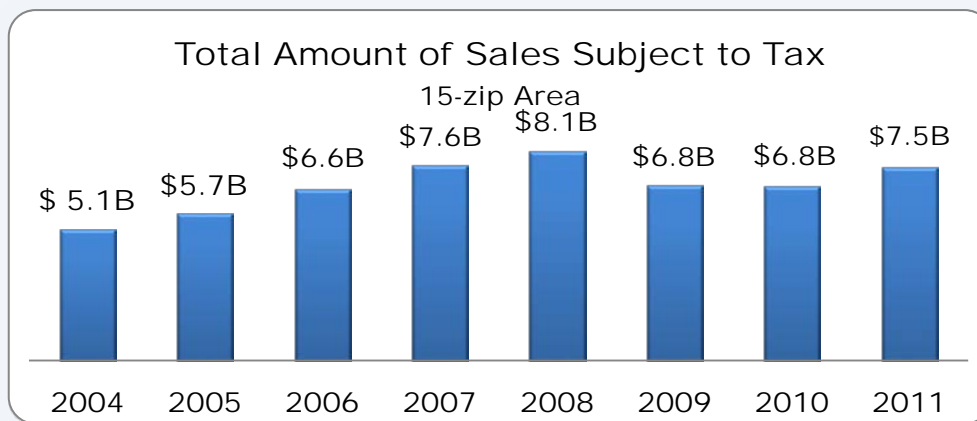
Zip Code	Business	Local Employees
77014	Dover Hills Bakery/cc Express Gourmet Cookies, Inc	460
	99 Cents Only Stores	110
	Williams Companies Inc.	100
	Process Technical Services, Inc	74
	ATP Personnel Consultants	65
77040	Baker Oil Tools	1,000
	Oyo Geospace Corp	891
	Stewart Builders Ltd	850
	Mustang Tractor & Equipment Company	750
	ATOMS Pipeline And Storage, LLC	700

77064	Sam Houston Race Park Ltd	750
	Boots & Coots	665
	Pinnacle Technologies, Inc.	299
	Thomas & Betts Steel Structures	250
	Foxconn Corporation	200
77066	FMA Alliance Ltd.	500
	Houston Distributing Company	399
	Glazier Foods Company	250
	Texas Tim	104
	Citation Land, LLC	100
77067	FMC Measurement Solutions	1,700
	Patterson-uti Energy, Inc.	1,034
	DHL Worldwide Express	1,000
	F M C Corp Wellhead Equipment	800
	Nabors Offshore	669
77068	Wal-mart Supercenter	330
	Computer Tech	173
	Exxon Corp	100
	Gary Greene Realtors	100
	Excel Mortgage Corporation	81
77069	Citation Oil & Gas Corp.	300
	McDonald's/Wal-Mart	232
	Barnes & Noble Booksellers	159
	RadioShack A Division Ta Nd	110
	House Hunters	100
77070	Methodist Willowbrook Hospital	726
	Best Buy	340
	Dillard's	200
	Advent Global Solutions, Inc	189
	Sam's Club #4721	180
77073	Hughes Christensen Co.	750
	Gse Lining Technology, Inc.	700
	Baker Hughes Inteq	529
	Gse Holding, Inc.	525
	Baker Atlas	400
77086	Vectogray, Inc	700
	Ingersoll Rand Security Technologies	400
	Boulder Creations	150
	Banta Global Turnkey Ltd.	140
	Crc-evans Pipeline International Inc	107
77090	Houston Northwest Medical Center, Inc.	1,252
	Acute Care Hospital Of Texas, Inc	693

	Dupont Environmental Remediation Services Inc	690
	Kroger	575
	Demontrond Automotive Group	250
77373	Fred Haas Jr. Toyota Inc.	320
	Wal-mart Stores	210
	Lone Star Fasteners, L.P.	200
	CPI Corp	166
	Albertsons Food & Pharmacy	120
77379	County Of Harris - Ron Hickman Constable	575
	Aquasource, Inc.	500
	Wal-Mart Supercenter	400
	Kroger	210
	County Of Harris – Sheriffs' Office	200
77388	Target Optical	518
	Electra Link Inc.	300
	Best Buy	173
	Randall's Food Mkt.	150
	The Home Depot	103
77389	Northampton Elementary School	70
	Pkwy. Christian School	69
	Hildebrandt Intermediate School	50
	Metzler Elementary School	50
	Texas Drilling Associates/Summit Software	45

Sales Tax Revenues

The following graph shows the sales tax revenue trends for the target Service Area. It shows a peak in the year 2008 and an expected dip in 2009 and 2010 as the nation's economy worsened. Taxable sales began an upward trend in 2011. (*Source: Texas Comptroller's Office)



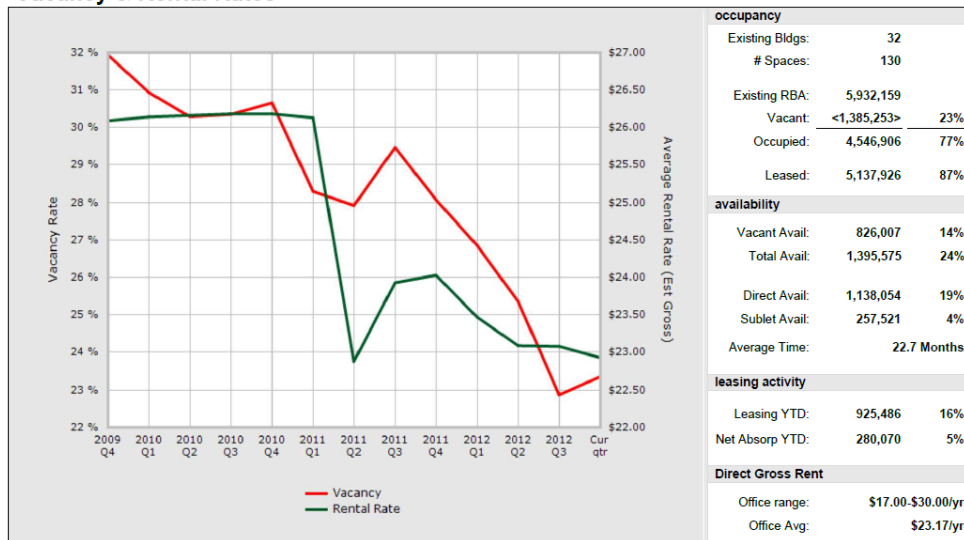
Real Estate Inventory

The following graphs tell the story of office occupancy and industrial occupancy in the 15-zip Service Area over the last ten years. Most of the office space in northwest Harris County is Class B although new Class A properties are being constructed. These graphs suggest an upward trend in Class A and B office space. Since 2011 industrial/flex space vacancies have diminished as businesses discover the availability of industrial property options at affordable rates in the service area.

CLASS A OFFICE

(Source: CoStar Properties, 10.15.12)

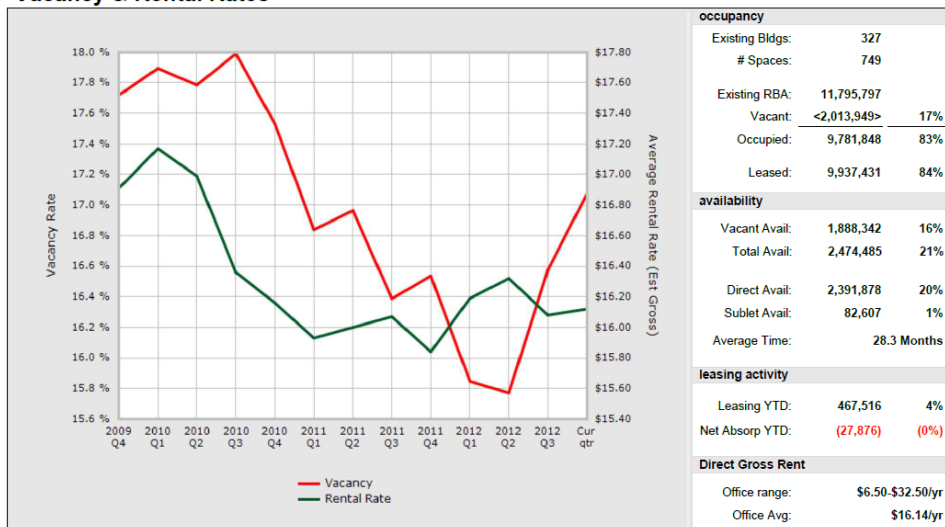
Vacancy & Rental Rates



CLASS B OFFICE

(Source: CoStar Properties, 10.15.12)

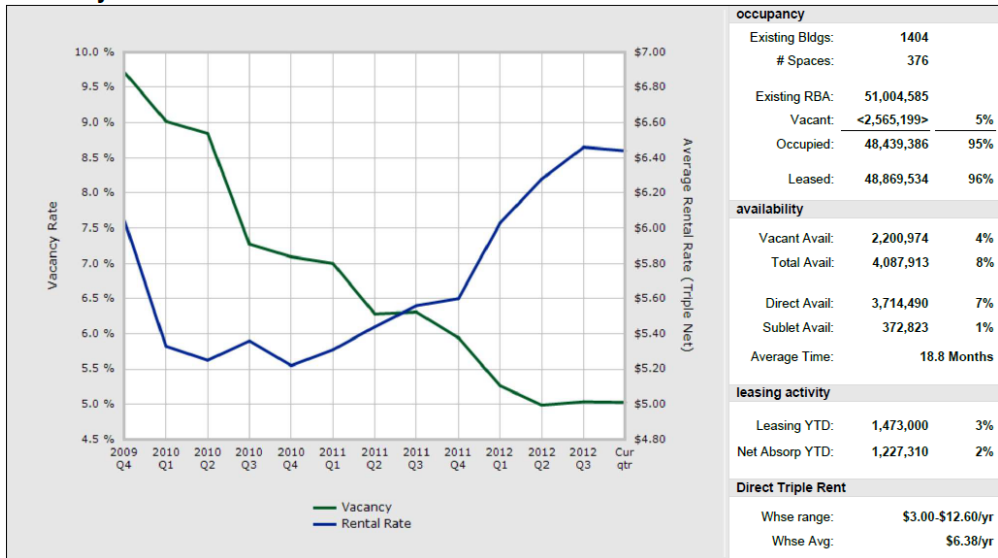
Vacancy & Rental Rates



INDUSTRIAL/FLEX PROPERTY

(Source: CoStar Properties, 10.15.12)

Vacancy & Rental Rates



occupancy			
Existing Bldgs:	1404		
# Spaces:	376		
Existing RBA:	51,004,585		
Vacant:	<2,565,199>	5%	
Occupied:	48,439,386	95%	
Leased:	48,869,534	96%	
availability			
Vacant Avail:	2,200,974	4%	
Total Avail:	4,087,913	8%	
Direct Avail:	3,714,490	7%	
Sublet Avail:	372,823	1%	
Average Time:	18.8 Months		
leasing activity			
Leasing YTD:	1,473,000	3%	
Net Absorp YTD:	1,227,310	2%	
Direct Triple Rent			
Whse range:	\$3.00-\$12.60/yr		
Whse Avg:	\$6.38/yr		

ECONOMIC DEVELOPMENT FUNDING PARTNERS

In order to spur economic development activity and grow taxable property value in northwest Harris County, funding must be secured to provide the necessary resources. These resources include but are not limited to:

- Data resources for decision-making, real estate and economic trends
- A marketing campaign to promote the area
- Staff dedicated to economic development

Local organizations and individuals interested in supporting the economic development of northwest Harris County can do so by committing to an economic development partnership level and receiving the associated benefits. The following recommendations are made for consideration:

Executive Investor \$10,000 annually

- Premier listing on Chamber homepage, in the printed directory and in other media
- Recognition at Chamber luncheons as an Advisory Council Founder
- Corporate spotlight in the Edge E-newsletter
- Seat on the Houston Northwest Economic Development Advisory Council
- Keynote Sponsorship (\$5,000 level) at the annual *Economic Outlook Forum*, including a luncheon table and event admission for eight, speaking role from the podium, prime table location in the business showcase and logo in event promotional materials

Professional Investor \$5,000 annually

- Listing on Chamber homepage, in the printed directory and in other media
- Recognition at Chamber luncheons
- Seat on the Houston Northwest Economic Development Advisory Council
- Host Sponsorship (\$1,000 level) at the annual *Economic Outlook Forum*, including a luncheon table and event admission for eight, table in the business showcase and logo in event promotional materials

Supporting Investor \$3,000 annually*

- Listing on Chamber homepage, in the printed directory and in other media
- Two admissions to the *Economic Outlook Forum*

*This level of investor is included as part of the Chamber's highest membership level.

SUMMARY

Northwest Harris County is a unique community possessing many amenities that enhance its appeal to businesses and families alike. Results, as measured by virtually every category of demographics, are exceptional. The 15-zip Service Area leads the Houston MSA, which in turn leads the Texas economy, which in turn leads the U.S economy as a whole. Numerous characteristics have generated this favorable economic growth: (i) abundant real estate inventory at attractive prices, (ii) a favorable regulatory environment, (iii) modest tax rates, (iv) a below average cost of living index, and (v) good transportation corridors.

With growth come challenges, however. Challenges are best met head on with effective direction and leadership. The Economic Development Planning Task Force strongly submits that in order for the region to continue to thrive and prosper economically, strategic steps must be taken. The Houston Northwest Chamber of Commerce is in the best position to spearhead that effort. This Economic Development Initiative Strategic Plan is designed to enable the business community to achieve its maximum potential ensuring the continuation of a healthy and vital community. Numerous broad strategies and recommendations have been outlined in this EDISP. Like the community, this Plan is deemed to be an ever-changing organic document, easily amended as resources and circumstances change.

This plan is a first step in a developing process. The second step will be implementation. Implementation and the ultimate success of the plan will be driven largely by a strong strategic marketing plan, the ability to raise funds for the effort and the level of internal and external commitment to the community's economic health. It is the EDI Strategic Planning Task Force's hope that the results far exceed those outlined in the EDISP.

APPENDIX

ATTACHMENT I

Demographic Data

HNWCC EDI Service Area Comparison to Houston Metropolitan Statistical Area

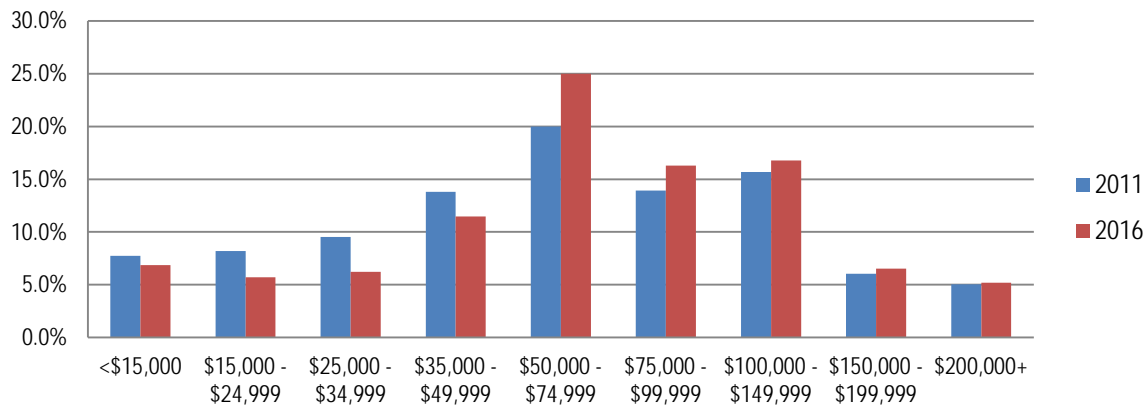
Source: U.S. Census Bureau, Census 2010 Summary File 1 (unless noted)

	EDI Service Area		Houston MSA	
2000 Total Population	385,163		4,715,407	
2010 Total Population	538,378		5,946,800	
2010 Male Population	263,951		2,957,442	
2010 Female Population	274,428		2,989,358	
2010 Median Age	32		33	
2011 Per Capita Income (PCI)	\$	27,977	\$	25,974
2011 Median Household Income	\$	60,880	\$	52,849
2011 Average Household Income	\$	81,206	\$	73,288
2000 Total Households	136,732		1,656,799	
2010 Total Households	185,024		2,072,625	
2000 Total Housing Units	144,147		1,799,627	
2010 Total Housing Units	203,505		2,308,205	
2010 Total Occupied Housing Units	185,024		2,072,625	
2010 Owner Occupied Housing Units	118,413		1,294,913	
2010 Renter Occupied Housing Units	66,611		777,712	
2010 Vacancy Rate	9.10%		10.20%	
2010 Vacant Housing Units	18,481		235,580	
2010 Total Population by Age	%		%	
0-4	43,902	8.2%	472,212	7.9%
5-9	43,474	8.1%	464,573	7.8%
10-14	43,175	8.0%	452,592	7.6%
15-19	41,619	7.7%	438,940	7.4%
20-24	36,421	6.8%	402,540	6.8%
25-34	82,597	15.3%	899,647	15.1%
35-44	79,386	14.7%	860,502	14.5%
45-54	74,833	13.9%	833,352	14.0%
55-64	54,421	10.1%	610,882	10.3%
65-74	24,450	4.5%	303,272	5.1%
75-84	10,599	2.0%	153,874	2.6%
85+	3,491	0.6%	54,414	0.9%
2010 Median Age	32		33	

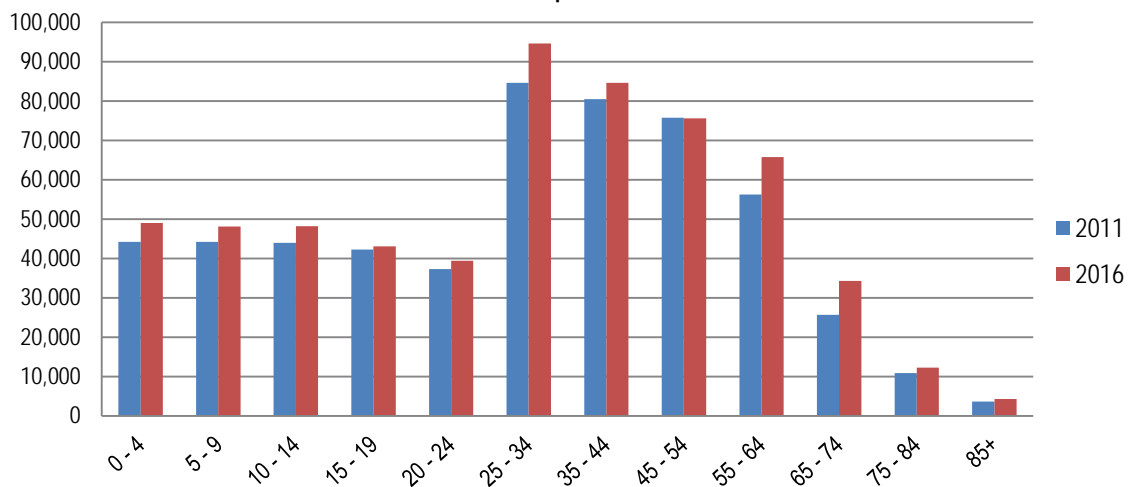
2010 Education (age 25+) Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts (2010).

	EDI Service Area		Houston MSA	
2010 Total Population 25 and older	328,891		3,772,362	
Less than 9th Grade	18,610	6%	381,954	10%
Some HS	23,274	7%	368,647	10%
HS Grad	80,288	24%	951,627	25%
Some College	76,797	23%	773,399	21%
Associate's Degree	25,281	8%	238,155	6%
Bachelor's Degree	75,001	23%	709,146	19%
Graduate Degree	29,640	9%	349,434	9%

2011 Household Incomes and 2016 Projections
15-zip Area



2011 Population by Age and 2016 Projections
15-zip Area

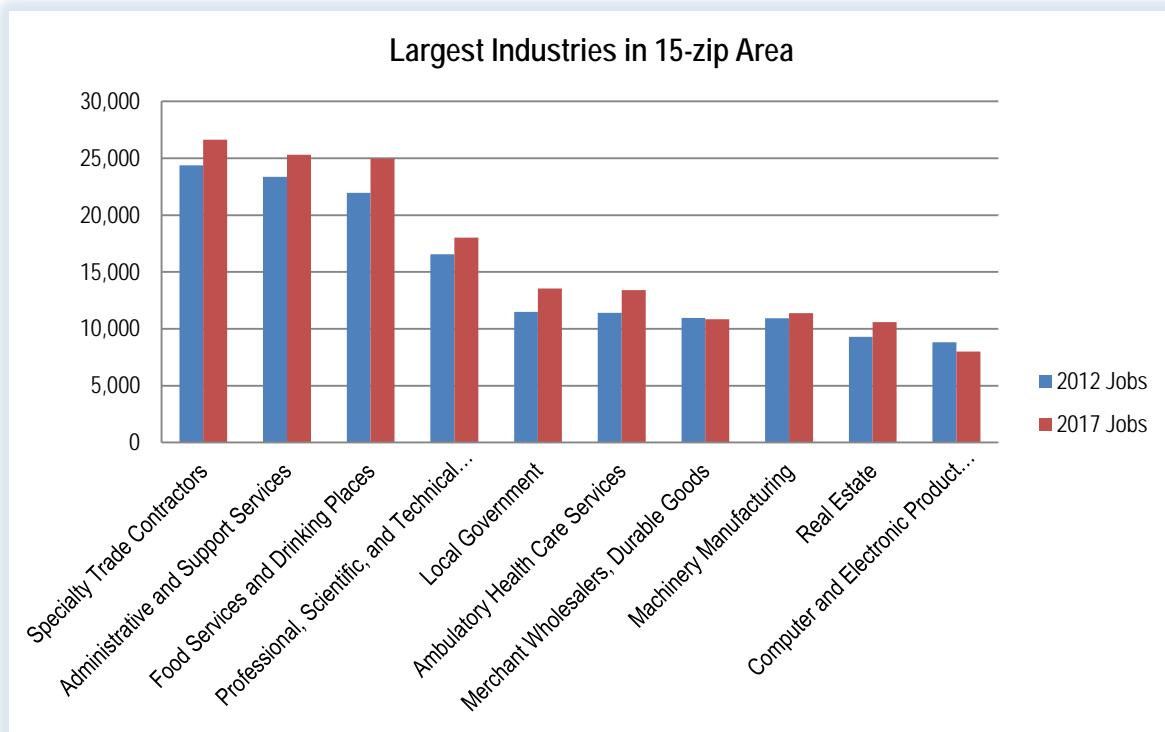


ATTACHMENT II

Industries and Occupations

Largest Industries in 15-Zip Area

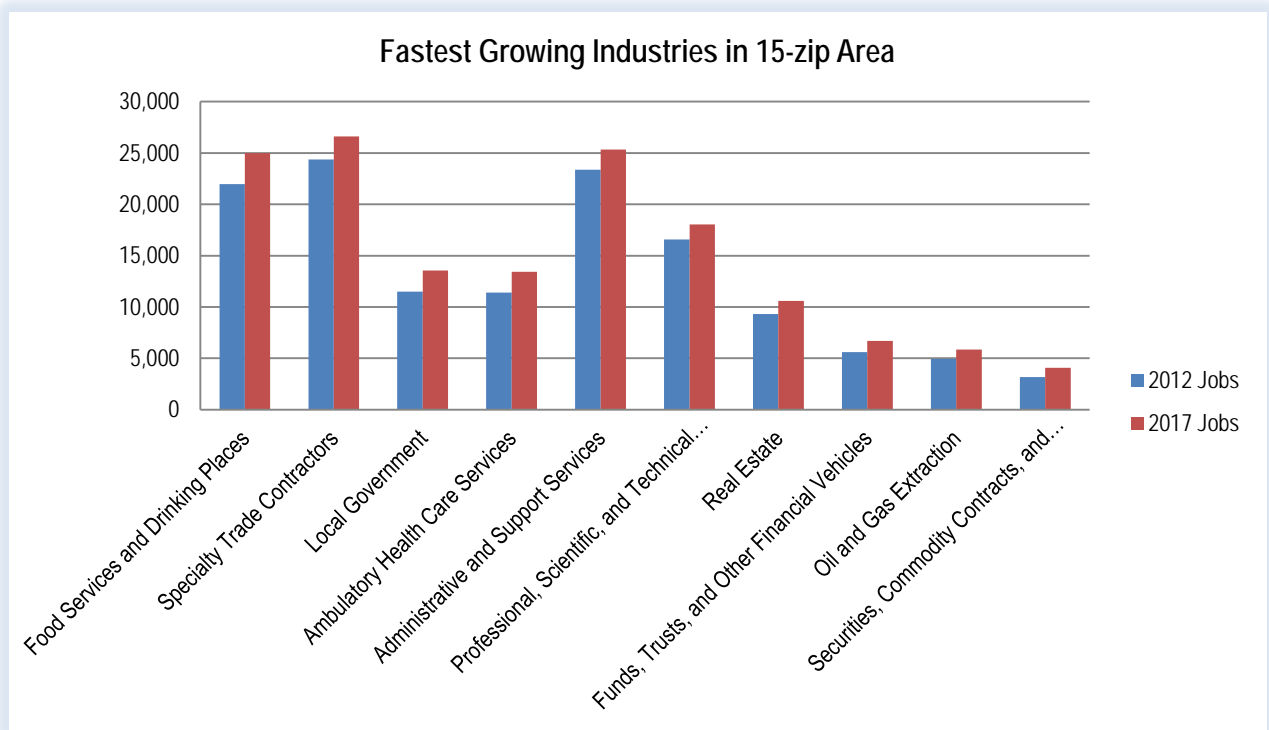
Source: EMSI Complete Employment – 2012.3



NAICS Code	Description	2012 Jobs	2017 Jobs	Change	% Change	2012 Average Earnings
238	Specialty Trade Contractors	24,376	26,625	2,249	9%	\$42,598
561	Administrative and Support Services	23,360	25,321	1,961	8%	\$40,419
722	Food Services and Drinking Places	21,968	24,978	3,010	14%	\$20,075
541	Professional, Scientific, and Technical Services	16,566	18,026	1,460	9%	\$88,485
903	Local Government	11,494	13,539	2,045	18%	\$52,399
621	Ambulatory Health Care Services	11,407	13,420	2,013	18%	\$79,633
423	Merchant Wholesalers, Durable Goods	10,959	10,852	-107	-1%	\$91,874
333	Machinery Manufacturing	10,924	11,381	457	4%	\$120,670
531	Real Estate	9,308	10,597	1,289	14%	\$32,412
334	Computer and Electronic Product Manufacturing	8,819	8,000	-819	-9%	\$124,362

Fastest Growing Industries in 15-Zip Area

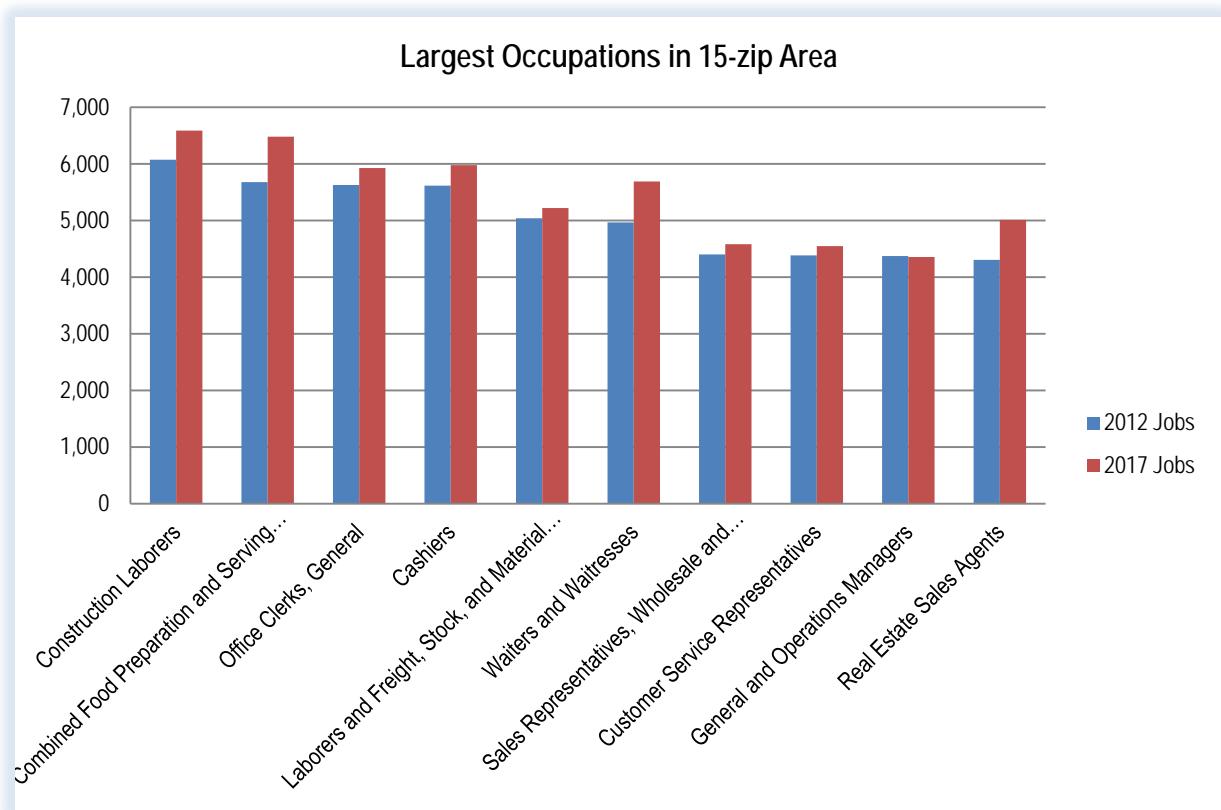
Source: EMSI Complete Employment – 2012.3



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531	Real Estate	9,308	10,597	1,289	14%	\$32,412
525	Funds, Trusts, and Other Financial Vehicles	5,609	6,685	1,076	19%	\$96,325
211	Oil and Gas Extraction	4,936	5,849	913	18%	\$192,139
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	3,178	4,084	906	29%	\$81,884

Largest Occupations in 15-Zip Area

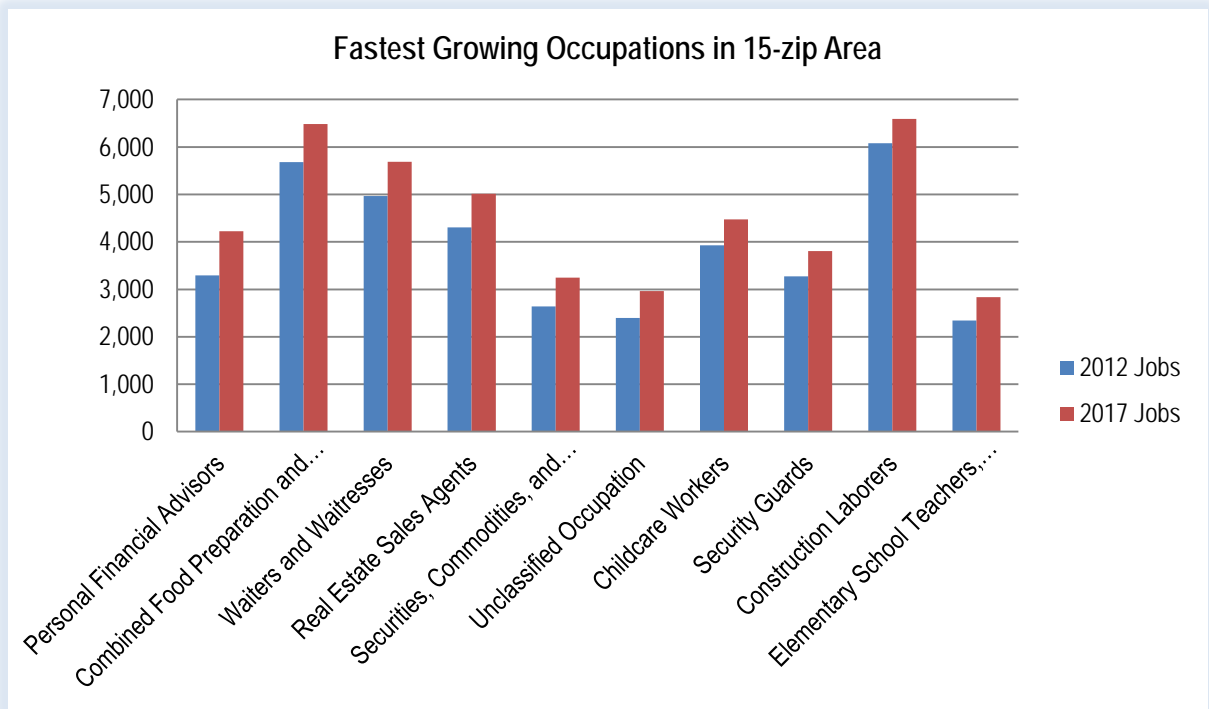
Source: EMSI Complete Employment – 2012.3



SOC Code	Description	2012 Jobs	2017 Jobs	Change	% Change	2012 Avg Hourly Earnings
47-2061	Construction Laborers	6,076	6,589	513	8%	\$12.16
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	5,679	6,481	802	14%	\$9.42
43-9061	Office Clerks, General	5,627	5,931	304	5%	\$15.39
41-2011	Cashiers	5,616	5,980	364	6%	\$9.75
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	5,042	5,220	178	4%	\$13.31
35-3031	Waiters and Waitresses	4,967	5,691	724	15%	\$9.34
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	4,402	4,581	179	4%	\$31.89
43-4051	Customer Service Representatives	4,383	4,547	164	4%	\$15.57
11-1021	General and Operations Managers	4,374	4,358	-16	0%	\$59.15
41-9022	Real Estate Sales Agents	4,307	5,010	703	16%	\$17.47

Fastest Growing Occupations in 15-Zip Area

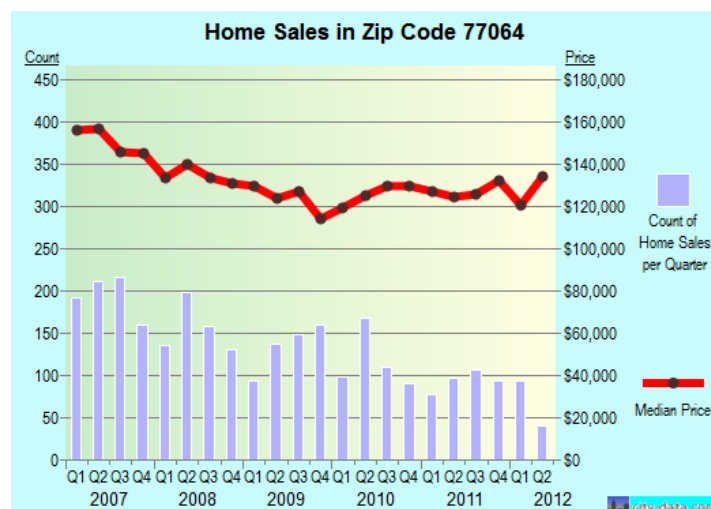
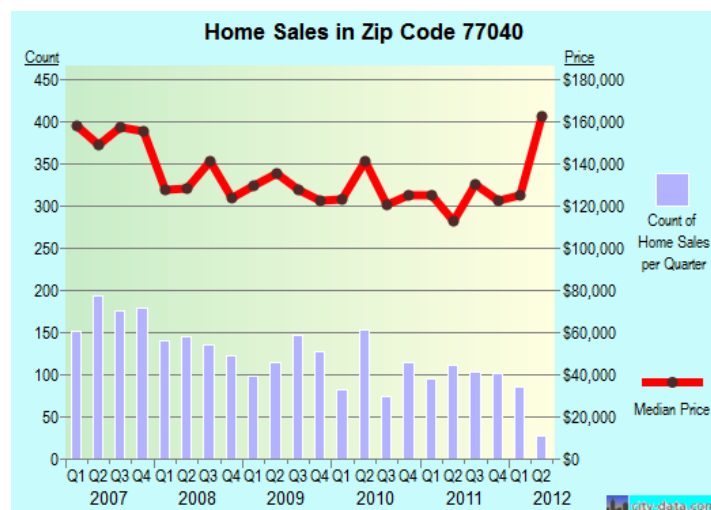
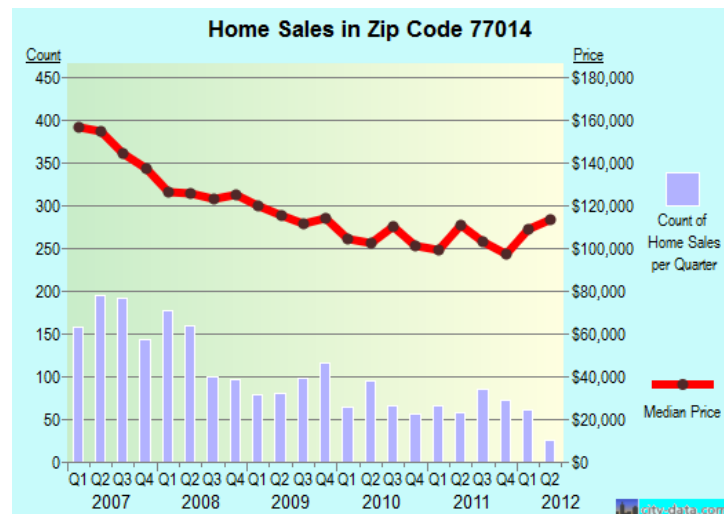
Source: EMSI Complete Employment – 2012.3

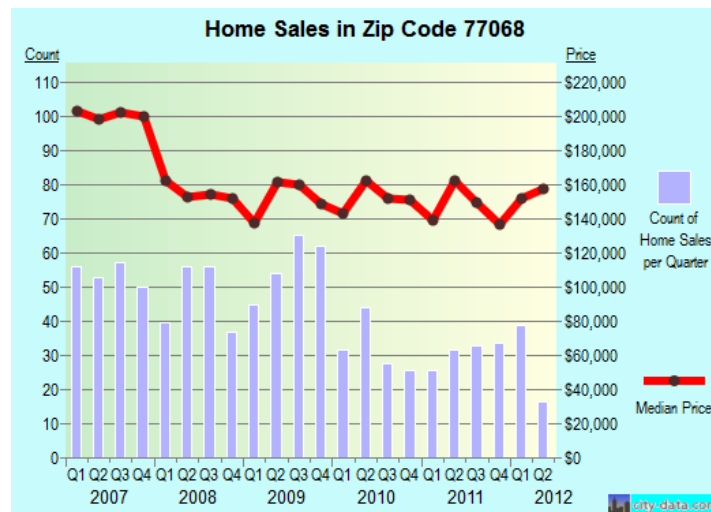
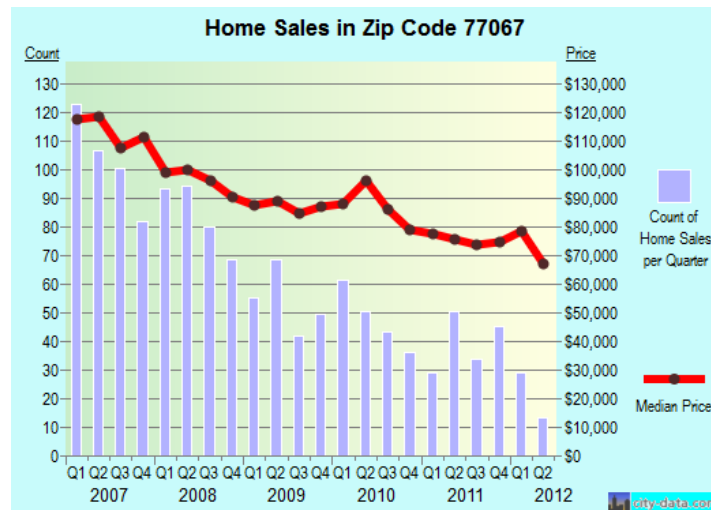
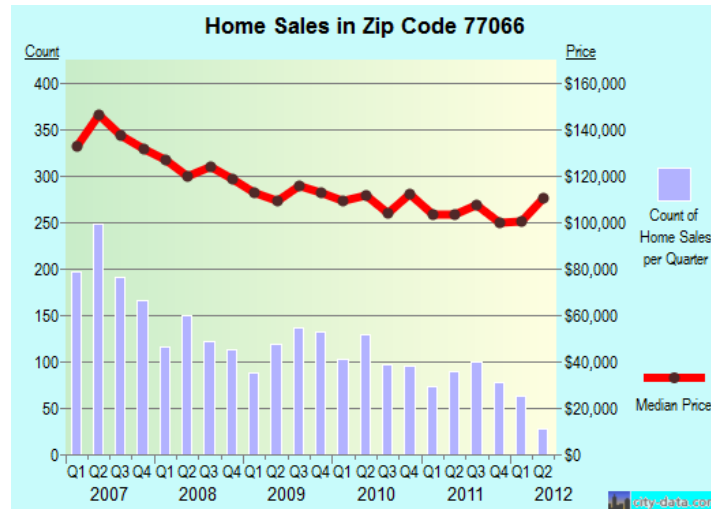


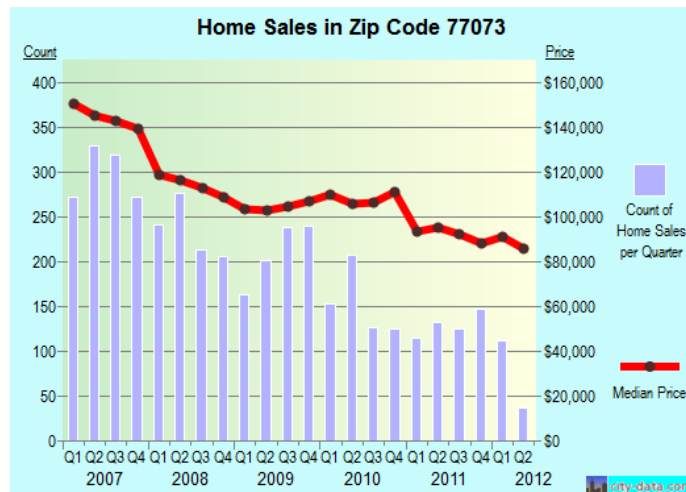
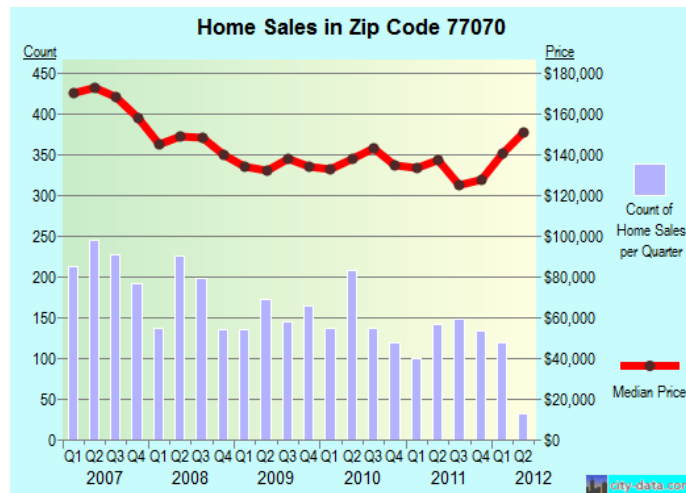
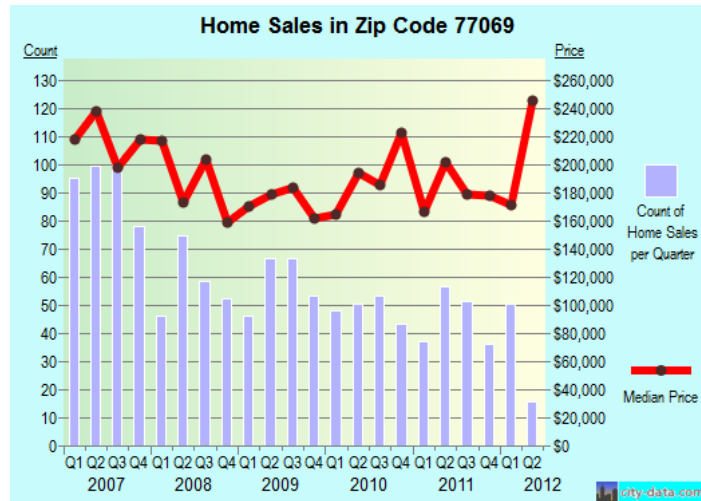
SOC Code	Description	2012 Jobs	2017 Jobs	Growth	Growth %	2012 Avg Hourly Earnings
13-2052	Personal Financial Advisors	3,293	4,222	929	28%	\$32.48
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	5,679	6,481	802	14%	\$9.42
35-3031	Waiters and Waitresses	4,967	5,691	724	15%	\$9.34
41-9022	Real Estate Sales Agents	4,307	5,010	703	16%	\$17.47
41-3031	Securities, Commodities, and Financial Services Sales Agents	2,642	3,246	604	23%	\$32.00
99-9999	Unclassified Occupation	2,396	2,962	566	24%	\$18.49
39-9011	Childcare Workers	3,926	4,471	545	14%	\$7.60
33-9032	Security Guards	3,272	3,807	535	16%	\$10.84
47-2061	Construction Laborers	6,076	6,589	513	8%	\$12.16
25-2021	Elementary School Teachers, Except Special Education	2,341	2,837	496	21%	\$26.06

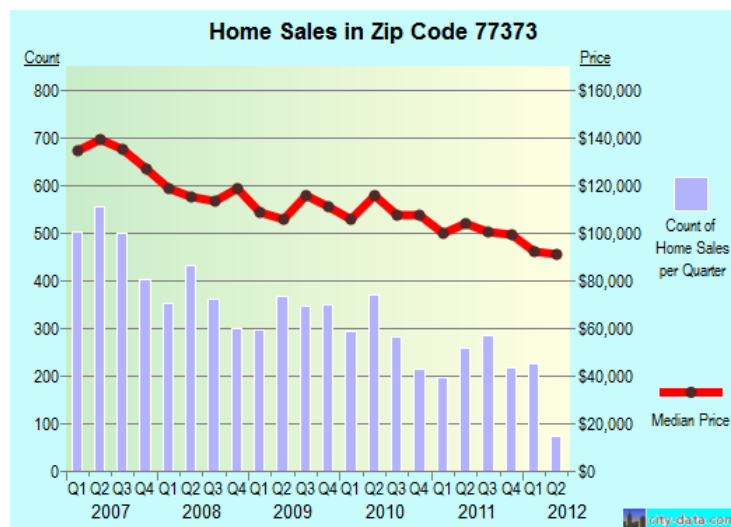
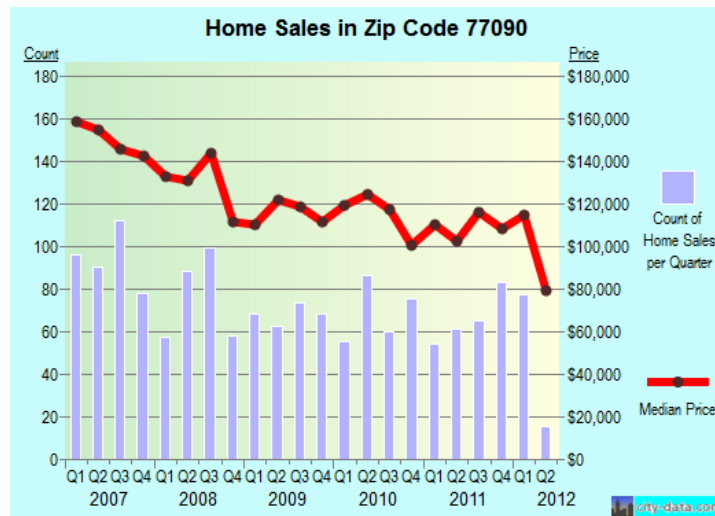
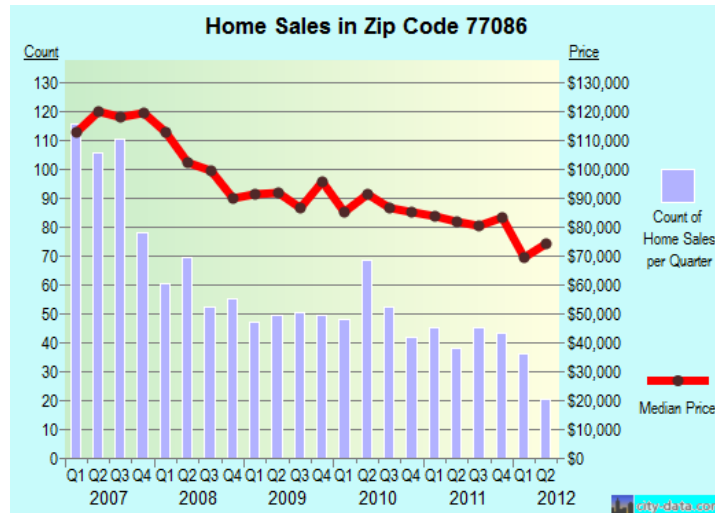
ATTACHMENT III

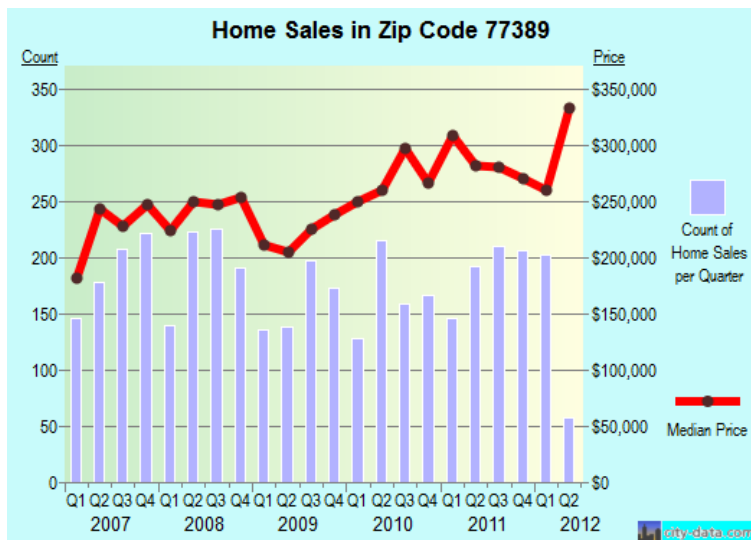
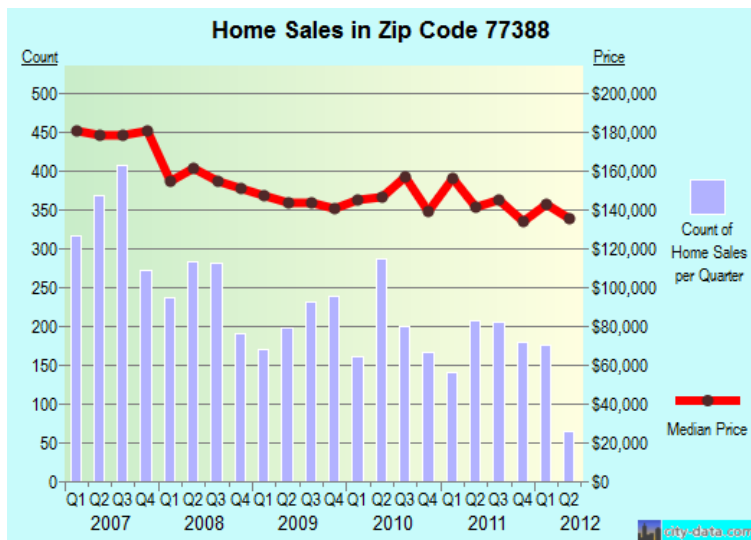
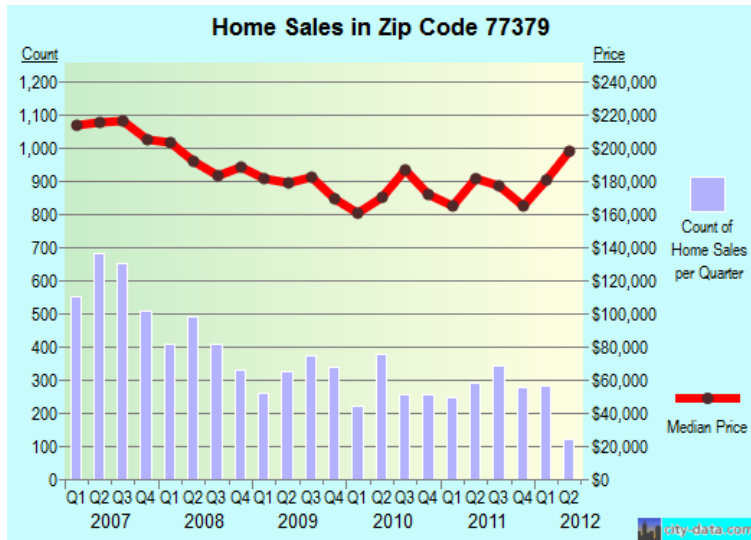
Home Sales by Zip Code through 2012 Q2











HOME SALES: Houston and Harris County

