

SAN LUIS VALLEY
DEVELOPMENT RESOURCES GROUP
&
COUNCIL OF GOVERNMENTS

SAN LUIS VALLEY COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2026-2031

SAN LUIS VALLEY
DEVELOPMENT RESOURCES GROUP
& COUNCIL OF GOVERNMENTS

A Resolution
Adopting the 2026 Comprehensive Economic Development Strategy

WHEREAS: Economic Development Districts have been established by the U.S. Department of Commerce, Economic Development Administration (EDA) for the purpose of planning and implementing economic and community development programs; and

WHEREAS: A San Luis Valley Economic Development District (District) has been designated for the six-county region that includes Alamosa, Conejos, Costilla, Mineral, Rio Grande and Saguache counties; and

WHEREAS: The San Luis Valley Development Resources Group (SLVDRG) maintains District membership requirements, receives annual Planning Grants, and carries out responsibilities for the District in accordance with EDA guidelines; and

WHEREAS: Districts are required to conduct and maintain a Comprehensive Economic Development Strategy (CEDS) planning process and a CEDS document as part of their planning responsibilities; and

WHEREAS: Guidelines require a CEDS Strategy Committee to be established for this purpose; and

WHEREAS: The CEDS Strategy Committee has completed the planning process and has established economic development priorities in a Regional Action Plan for the District.

San Luis Valley
Colorado Genuine

NOW, THEREFORE, BE IT RESOLVED: The Executive Board of the San Luis Valley Development Resources Group hereby approves and adopts this document as the 2026 Comprehensive Economic Development Strategy for the San Luis Valley Economic Development District.

Dawn Krukes
DRG Chair
(Name & Title)

7-27-26
Date

Gene W. Lamm
DRG Vice Chair
(Name & Title)

7-27-26
Date

ACKNOWLEDGEMENTS

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Trent Thompson and Daniel Kojetin with the Economic Development Administration for their guidance throughout this CEDS update.

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Judi Perez for volunteering to be our writer/editor during final formatting of this document.

INTRODUCTION



Sandhill cranes at sunset, Monte Vista National Wildlife Refuge/Brenda Felmlee

The San Luis Valley Development Resources Group

The mission of the San Luis Valley Development Resources Group is to promote and facilitate economic and community development programs which will create jobs, improve income, and maintain the quality of life in the San Luis Valley. We are investing in ourselves.

Regional Vision

The San Luis Valley seeks to build a robust, diversified economy rooted in its agricultural heritage, natural resources, entrepreneurial culture, and emerging opportunities in advanced manufacturing, renewable energy, logistics, and outdoor recreation. Through coordinated implementation of this strategy, the region will improve infrastructure capacity, strengthen workforce readiness, expand business development services, and create conditions that support both existing industries and new economic sectors.

The 2026-2031 CEDS recognizes that rural economic development requires long-term investment, regional cooperation, and adaptive planning. The regional background, demographic and economic overview, resilience analysis and action plan identified within this document provide a practical roadmap for achieving measurable economic outcomes over the next five years while preparing the region for future growth opportunities.



Great Sand Dunes National Park and Preserve, Alamosa and Saguache Counties/Brenda Felmlee

Building Regional Prosperity Through Infrastructure, Workforce Development, Innovation, Resilience, and Manufacturing Expansion

Guided by regional collaboration, strategic investment, and public-private partnerships, the 2026-2031 CEDS outlines how local governments, economic development organizations, educational institutions, businesses, and state and federal agencies will work together to strengthen the San Luis Valley's economy and improve the quality of life for residents.

The implementation period from April 2026 through March 2031 focuses on five interconnected goal areas: Critical Infrastructure, Workforce Development, Innovation and Entrepreneurship, Economic Recovery & Resilience, and the complete development of a regional Manufacturing Sector Strategy. Together, these initiatives are designed to position the San Luis Valley as a competitive rural economy capable of attracting investment, supporting business expansion, increasing wages, and creating sustainable employment opportunities.

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THE ORGANIZATION

The San Luis Valley Development Resources Group (SLVDRG) has been the leader in economic and community development projects in the six counties of the San Luis Valley - Alamosa, Conejos, Costilla, Mineral, Rio Grande, and Saguache - since 1994. The organization is governed by a board of directors comprised of representatives from local government and the private sector.

SLVDRG is also recognized by Colorado's Department of Local Affairs as the planning agency for State Planning Region 8, which encompasses the six counties of the region. The U.S. Economic Development Administration has designated the region as an Economic Development District with SLVDRG as the certified planning agency.

Organization History

The San Luis Valley Development Resources Group is the product of three major organizational efforts which have served the region since the early 1970's, including the San Luis Valley Regional Development and Planning Commission (RDPC), the San Luis Valley Economic Development Council (SLVEDC), and the San Luis Valley Council of Governments (SLVCOG). The RDPC brought with it the EDA District designation and a business loan program; the SLVEDC contributed a broader spectrum of private sector partners and the State's Enterprise Zone program; and the COG allowed local governments a role in developing and reviewing strategic plans, project proposals, and other regional investment priorities.

Originally part of the Southern Colorado Economic Development District, the San Luis Valley became its own economic development district in 1970 with the formation of the RDPC. The first offices were on the Adams State campus, and the organization was an affiliation of the school. In 1972, the COG was formed to carry out the administrative functions, with RDPC representing the Valley counties on the SCEDD and advisory to the COG.

Programs under the original SLVCOG included mapping and drafting services, assistance to local governments creating comprehensive plans needed for HUD funding, base studies, zoning and subdivision regulations, housing program coordination, water and sewer, open space and outdoor recreation planning, nursing and health planning, water quality monitoring, job training programs, and senior citizens services.

In 1980, a separate San Luis Valley Economic Development District was formed with a focus on searching for new industries. Early projects include:

- Alamosa Industrial Park
- Cumbres and Toltec restoration
- Alamosa Mushroom Farm
- Unsuccessful efforts to attract a barley malting plant, ethanol, protein energy bars, an alfalfa pellet mill, and solar energy equipment

In 1982, COG terminated its operations after spending cuts impacted its programs. The RDPC leveraged EDA and local government support to continue operating, but with a focus on tourism and small business development. The Revolving Loan Fund was founded in 1984 as an essential tool to assist business projects. The RDPC also launched a regional tourism marketing and planning strategy by hiring a Tourism Coordinator and creating an attractions map and the Valley-Six Promotion Council. During that time, RDPC also helped foster businesses tied to the region's geothermal potential, including aquaculture and the development and expansion of the SLV Alligator Farm.

In the late 1980's, a separate SLV Economic Development Council was formed, which required paid business membership, to focus on business recruitment and administration of Enterprise Zone State Tax credits. Over time, a decline in funding sources and staff turnover encouraged EDC and RDPC to combine efforts. Thus, in January 1994, the EDC and RDPC were consolidated, which dissolved the EDC and expanded membership on the RDPC under the EDA District membership rules and its 501(c)(3) non- profit tax status. This consolidation also enabled a

much broader mix of program responsibilities and response to the area's economic development needs, with little or no increase in staffing.

By 2008, local communities and counties came to believe that the reorganization of the San Luis Valley Council of Governments would be beneficial to access additional funding for regional programs. The SLVCOG was thus re-established using a Memorandum of Agreement with the San Luis Valley Development Resources Group. The resulting organization serves the six counties of Alamosa, Conejos, Costilla, Mineral, Rio Grande, and Saguache, and the municipalities of Alamosa, Hooper, La Jara, Antonito, Manassa, Sanford, San Luis, Blanca, Monte Vista, Del Norte, South Fork, Creede, Center, Moffat, Bonanza, Saguache, Crestone, and Romeo. Also, non-profit organizations that provide social, economic, or physical planning and which represent region-wide interests may be granted membership in the DRG.

Since 1994, SLVDRG has incubated and financed numerous projects and organizations that are fundamental to the economic vitality of the region. These projects include the E-911 and GIS/GPS authorities, Rio Grande Hospital expansion, Creede Repertory Theater expansion and employee housing, Idaho Pacific potato flake plant, and the first utility-scale solar plant in 2007.

Organization Programs

The San Luis Valley Development Resources Group (SLVDRG) serves as the region's lead economic development organization, administering programs and providing technical assistance that support business development, regional planning, infrastructure investment, and community capacity across the San Luis Valley. Core programs and services include:

San Luis Valley Business Loan Fund – Provides gap financing, in partnership with local lenders, to support business start-ups, expansions, and retention while encouraging job creation and investment.

San Luis Valley Enterprise Zone – Administers Colorado's Enterprise Zone program, offering up to nine state tax credits and incentives, including incentives for job creation, capital investment, research and development, job training, rehabilitation of vacant commercial buildings, manufacturing equipment, and community contributions through the Enterprise Zone Contribution Tax Credit. All six counties in the region are also eligible for Enhanced Rural Enterprise Zone incentives which further support value-added agriculture, manufacturing, and rural business growth. At the time of this CEDS update, the redesignation process is still under review.

SLVCOG Economic Development Grant Program – For many years, SLVDRG has administered this Department of Local Affairs (DOLA)-funded mini-grant program on behalf of the San Luis Valley Council of Governments (SLVCOG), providing funding for small economic development projects that fall outside local government budgets. Although no state funding was available for the program in 2026, SLVDRG will continue to pursue future funding because this program has been an important resource for member communities.

Comprehensive Economic Development Strategy (CEDS) – Develops and maintains the region's long-term economic development strategy while serving as one of the Valley's most frequently referenced sources for regional demographics, economic analysis, and planning information.

Regional Data and Research Services – Serves as the San Luis Valley's primary source for economic and demographic information, producing the annual Statistical Profile, responding to more than 50 data requests each year from local governments, nonprofits, businesses, and residents, and supporting community planning and grant development.

Business Expansion and Relocation Assistance – Assists businesses with site selection, community information, coordination with local governments, and connections to state and federal economic development resources.

Regional GIS Services – Supports regional planning, site selection, and economic development through the implementation of a regional GIS framework following completion of a GIS Needs Assessment and Strategic Plan.

Transportation Planning – Coordinates regional transportation planning in partnership with the Colorado Department of Transportation through the San Luis Valley Transportation Planning Region.

Opportunity Zone Support – Promotes investment in designated Opportunity Zones through community prospectuses, data resources, and investment marketing to attract private capital.

Beyond these programs, SLVDRG provides administrative, personnel, and technical support for regional organizations, including the **San Luis Valley Council of Governments (SLVCOG)** and the **San Luis Valley Transportation Planning Region**, strengthening regional collaboration and coordinated service delivery.

The organization also works closely with regional partners, including the **San Luis Valley Small Business Development Center (SBDC)**, creating a continuum of entrepreneurial support from business counseling and technical assistance to financing, tax incentives, and site selection services. Looking ahead, the CEDS identifies opportunities to strengthen this continuum by exploring partnerships for micro-lending or other financing options that better serve sole proprietors, startups, and very small businesses that may not yet qualify for the Business Loan Fund. In addition, SLVDRG is committed to ensuring equitable access to its programs through inclusive outreach and engagement strategies that reflect the Valley's diverse communities, including Spanish-language business assistance where appropriate.

Executive Board

NAME	AFFILIATION
Sheldon Rockey	Owner, White Rock Specialties LLC.- Private Business
Dawn Krebs, Chair	Alamosa City Council- Public Official
Gene Glover, Vice Chair	Rio Grande County Commissioner- Public Official
Vern Heersink	Alamosa County Commissioner- Public Official
Shane Castleberry	City of Creede Trustee- Public Official
Robert Espinosa, Secretary/Treasurer	Costilla County Commissioner- Public Official/Minority
Karla Shriver	Farmer, Non-Profit- Community Representative
Bill Nelson	Colorado Workforce Consortium- Workforce Development
Eric Eriksen	CEO, San Luis Valley Rural Electric- Utilities
Yusri Zaro	Assistant Professor of Finance, Adams State University- Higher Education

Staff

Sarah Stoeber – Executive Director

Shawn Pagnotta – Senior Accounting Manager

Craig Barraclough- Regional Grants Navigator

Alliyah Garcia- Business Loan Fund Manager

Jessie Barraclough- Executive Assistant

Andy Setser- REDI Contractor

Hew Hallock – Transportation Contractor

THE CEDS



The Comprehensive Economic Development Strategy (CEDS) refers to the planning process and document generated from it, which sets forth the San Luis Valley's economic development vision, goals, strategies, and priorities for the next five years. CEDS work for the Valley is carried out by the San Luis Valley Development Resources Group (SLVDRG), as part of its Economic Development District functions under the U.S. Department of Commerce, Economic Development Administration (EDA).

The 2026 CEDS represents the eighth major update and is intended to build upon previous versions as a framework for economic development planning and as an essential reference document. Originally called the Overall Economic Development Program, previous editions were completed in 1979, 1984, and 1992 by the San Luis Valley Regional Development and Planning Commission, and in 2002, 2007, 2013, 2018, and 2021 by San Luis Valley Development Resources Group.

The CEDS process was established by the Public Works and Economic Adjustment Act and is governed by EDA regulations under 13 CFR 303. EDA programs in Colorado are administered by the Denver Regional Office, which covers 10 states in the central Rockies and Great Plains.

Beyond the document itself, work on the CEDS is intended to be ongoing, and provides flexibility for annual reviews and evaluation of the strategies being carried out to make an effective response in the programming efforts to changing economic conditions, or to respond to new and unforeseen opportunities. As a performance-based plan, the CEDS will serve a critical role in the region's efforts to defend against economic dislocations due to global trade, competition, and other events resulting in the loss of jobs and private investment.

2026 CEDS Strategy Committee

Joseph Baroz – Conejos County Commissioner

Carl Denslow – Denslow Cattle Company

DJ Enderle – Planner, City of Monte Vista

Erik Eriksen – San Luis Valley Rural Electric Co-op

Robert Espinoza – Costilla County Commissioner

Gene Glover – Rio Grande County Commissioner

Arlene Harms – CEO, Rio Grande Hospital

Vern Heersink – Alamosa County Commissioner

Dawn Krebs – Councilor, City of Alamosa

Ryan LeClair – Town of Center Community and Economic Development

Bernadette Martinez – Town Manager, Town of Del Norte

Liza Marron – Saguache County Commissioner

Paula Medina – Mayor, Town of La Jara

Sheldon Rockey – White Rock Specialties, LLC

Susan Sanderford – Costilla County Economic Development

Jae Sanders – San Luis Valley Local Foods Coalition

Karla Shriver – Farmer, Non-profit Community Leader

Barry van Sant – Businessman, Community Leader, Mt Valley Transit

Zeke Ward – Mineral County Commissioner

Ameille Warner – Saguache County Sustainable Environment and Economic Development

Kathy Woods – Alamosa County Economic Development Corp.

Yusri Zaro – Adams State University

Committee Engagement Process

The CEDS Committee met multiple times over the 10 months during which this report was updated. The kick-off meeting was held on September 29, 2025, at the DRG office at the Depot in Alamosa. While many attendees were also part of either the DRG or COG Board, others were new to the economic development community and process. DRG staff facilitated discussions on themes in the region's economy since 2021. The committee identified the increase in housing costs; the aging of the workforce, especially in professional services; the increase in second homes and vacation rentals tied to the tourism industry; a new owner of our railroad; increased investment in broadband services allowing for more remote work opportunities and an increase in the price of water as it relates to the agricultural economy as major themes to take forward in the CEDS update.

DRG staff provided monthly updates to the Committee through email and Board meeting updates throughout the update process. The Committee met in person in February to analyze strengths, weaknesses, opportunities, and threats (SWOT) to inform the Action Plan. Once a CEDS draft was available in late May, Committee members were given extended review time and focused briefings in June and July at board meetings ahead of finalization by July 30, 2026.



REGION BACKGROUND: THE SAN LUIS VALLEY

The San Luis Valley in south-central Colorado is a well-known land feature in the state. Located midway between Denver and Albuquerque, this is the largest alpine valley in North America. The vast, flat surface of the valley floor at 7,500 feet is bordered on the east by the sharply rising Sangre de Cristo Mountains, which ascend to 14,000-foot peaks, and to the west by the more gradually rising foothills and 12,000-foot peaks of the San Juans, which mark the Continental Divide. The Sangre de Cristos – Spanish for “blood of Christ” – are so-named for their rose hue at sunset.

Both ranges join near Poncha Pass at the north end of this valley, forming a ring of mountains, while the open end to the south slopes gradually downward after crossing the New Mexico state line. The great open space of the desert plain and the rugged snow-capped peaks of the Sangre de Cristos in spring resemble a veritable “altiplano”

of the Rockies. This region is also home to the Great Sand Dunes National Park and Preserve, with the tallest dunes in North America.

Boundaries of the San Luis Valley region are represented by the six counties of Alamosa, Conejos, Costilla, Mineral, Rio Grande, and Saguache, each maintaining a separate identity but economically interdependent.



Blanca Forestry Products, Costilla County/John McEvoy

About 122 miles long from north to south, and about 74 miles across, this covers an area of 8,193 square miles; larger than the state of Massachusetts, but with a combined 2025 population of 46,577 (only 5.6 persons per square mile). Saguache County alone is larger than Delaware and Rhode Island combined.

Within its borders, the Valley harbors a great diversity of natural and cultural settings. The landscape on the floor of the Valley changes dramatically with the presence of water. From its headwaters in the San Juans to the Texas coast, the Rio Grande is the nation's second-longest river and the lifeblood of the Valley's agriculture and development in general. Canals and ditches from the Rio Grande and the Conejos River, as its major tributary, supply one of the state's most important farming areas, famous for its potatoes, barley, alfalfa, and other crops.

Vegetation and cottonwood forests line these and lesser river courses across the Valley in contrast to the dominant tracts of greasewood and other desert plants. The state's most extensive system of wetlands is also found here, which supports a variety of wildlife and wildlife areas, including the famous stopover place for crane migration between Idaho and the Bosque del Apache in New Mexico.

The rise in elevation substantially changes the landscape, as marked by a succession of plant and tree species shown on the schematic cross-section of the Valley. This begins with sage, followed by pinon-juniper, ponderosa pine, mixed conifer, aspen, extensive stands of Engleman spruce, and alpine tundra on the peaks.

Streams, lakes, and reservoirs are found higher up and, on the flats, as well. Several million acres of public land managed by the Rio Grande National Forest and San Luis Valley Field Office of the Bureau of Land Management offer a variety of recreational opportunities, wildlife habitat, and protected wilderness areas with hiking trails.

A true sense of place captured by the Valley's natural setting is further enhanced by its depth of history, art, culture, and people as described later in this chapter and other parts of the analysis. The population is diverse, with 39% of Hispanic origin, many of whom are descendants of the early settlers from New Mexico.

Location and Travel

Alamosa is 73 miles from the closest interstate, I-25. The region is about halfway between Denver (239 miles) and Albuquerque (214 miles). Driving time to Denver is four to four-and-a-half hours via US 160/I-25 or CO 17/US 285, and three-and-a-half to four hours via US 285/I-25 to Albuquerque.

Use of snow tires, chains, or four-wheel drive vehicles is frequently required for winter driving on La Veta Pass to Walsenburg, and Wolf Creek Pass to Pagosa Springs and Durango. Other passes, including Cochetopa, Cumbres, Poncha, and US 285 at the New Mexico border, may also require these conditions on a less frequent basis. Spring Creek and Slumgullion pass west of Creede on CO 149 may be closed in winter. Travel times, by car, from Alamosa to other towns range from about 15 minutes to La Jara, 20 minutes to Monte Vista, one hour to San Luis, and 1.5 hours to Creede.

There are multiple airports in the region serving diverse needs. Commercial passenger service is provided to the San Luis Valley Regional Airport in Alamosa by Denver Air Connection to Denver International Airport through an Essential Air Service contract with the Federal Aviation Administration (FAA). Since taking over the service in 2023, Denver Air has offered an early morning and midafternoon flight most days of the week. Flight time is about one hour. Denver Air does codeshare with American, United and Delta for shared trip planning and baggage-handling purposes. Car rental is available at the airport, but maintaining a stable service is often a challenge. Shuttle service may be available through independent driving companies, but there is no designated shuttle service available at the airport. Alamosa County manages the airport operations as well as compliance with the FAA, which has gotten more involved since the airport increased its operating capacity under the Part 139 Certification Process. Since receiving this certification in 2021, the airport has maintained over 10,000 enplanements, or boarded passengers, annually, which is a significant increase from previous years.

The Monte Vista Municipal Airport is located just west of the Alamosa/Rio Grande County line and provides essential aviation services for the general aviation community, as well as an alternate landing option and emergency landing option if the San Luis Regional Airport is closed. The Astronaut Kent Rominger Airport, north of Del Norte in Rio Grande County, also serves the general aviation community as well as the medical evacuation needs of the west side of the San Luis Valley, anchored by Del Norte Hospital. Rominger also provides Jet A fuel to offer more revenue opportunities and increase capabilities for future fire suppression support. Leach Airport is northeast of Center in Saguache County and serves the general aviation community tied to the surrounding agriculture. The Mineral County Memorial Airport is two miles south of Creede and serves the general aviation community, as well as gliders and hang-gliders. Each of these airports has a significant economic impact within its communities as well as economic development opportunities, as documented in this report released by the State of Colorado in 2025.

There are a few options for public transportation within the region, although efforts are ongoing to improve services to residents. Bus service by the Colorado Department of Transportation's Bustang Outrider from Alamosa departs daily for Pueblo at 6 a.m. The bus route is north to Salida, proceeding to Pueblo or connecting to a route to Denver. The Chaffee Shuttle also began serving San Luis Valley routes in June 2018 and rebranded as Mountain Valley Transit to better represent its service area. They provided multiple bus routes in the region but changed to an on-demand model in November 2025. Valley-Wide Health Systems also provides on-demand transportation, and Red Willow Inc serves Medicaid-eligible passengers.

The valley also has a major rail system originally built as part of the Denver and Rio Grande Railroad around 1880 to access the silver mines in Southwest Colorado. The railroad comes into the region over La Veta Pass through Costilla County, and splits in Alamosa to head west towards Monte Vista and south to Antonito. In Monte Vista, another short line railroad heads north to Center to service the agricultural community. The rail line is often a source of economic development discussion, including shipping timber by rail from Rio Grande County and reviving a tourist train to the top of La Veta Pass for events.

Since 2021, however, the management of this rail line underwent a major restructuring with the bankruptcy of San Luis and Rio Grande Railroad. In February 2023, the rail line was purchased by the Soleviev Group and renamed Colorado Pacific Rio Grande Railroad. They offer freight service five days a week with allowable car weights of up to 263,000 pounds at an operating speed of 10 mph. In partnership with the SLV Council of Governments, SLVDRG helped develop and submit a successful $7.1 million USDOT grant application to improve the Colorado Pacific Rio Grande Railroad along La Veta Pass. The proposed project will reduce derailments, increase freight capacity and operational efficiency, and strengthen regional supply chain infrastructure critical to agricultural inputs and outbound commodities such as potatoes and grain.

Environmental Conditions

The San Luis Valley is characterized by dry air, sunny days, clear nights, moderate/high evaporation, and large daily temperature extremes. Extremely frigid conditions and blizzards can occur, but severe weather conditions such as tornadoes, floods, deep snow, and damaging hail are uncommon. Surface winds are heaviest from March-June, and gusts of 30/mph and greater are common. The strongest winds blow from the southwest.

The mountains, which surround the broad interior valley, form substantial barriers against approaching atmospheric moisture. As a result, the valley floor is the driest place in Colorado, typically receiving only 7-10 inches of precipitation a year.



Alamosa Canyon Gateway in Conejos County/ Brenda Felmlee

The Valley also acts as a large basin to trap cold air, creating temperature inversions where dense, cold air is trapped beneath warmer air. Extremely cold temperatures occur when clear weather follows winter storms with significant snowfall. With close to 350 days of sunshine, the cold temperatures are more bearable, and noontime temperatures can be 35-40 degrees warmer than early mornings.

By contrast, the foothills and mountains gradually receive higher amounts of precipitation with the increase in elevation. Annual averages range from 7.1 inches in Alamosa (7,544 feet), 13.7 inches in Creede (8,838 feet), and up to 45.4 inches on Wolf Creek Pass (10,850 feet).

Snowfall also follows the same pattern, with an average low of 24.6 inches in Center to an amazing 435.6 inches on Wolf Creek Pass. The Wolf Creek Ski Area typically has the best quantity and quality of snow of any ski area in the state, and snow depths of 60 inches or more are common. High elevation also explains why an area located this far south on the continent would have such relatively cold temperatures in winter and cool nights in summer.

Extremely low nighttime temperatures, which usually occur over a six-week period from around Christmas to early February, give the San Luis Valley a reputation of being one of the coldest places in the nation, but Gunnison and some other locales are as cold or colder. These reports do not consider the relatively short number of hours over which these extremes occur, and the predictable sunshine, dryness of the air, and a sharp temperature rise by noonday. January average minimums range from -1.8 degrees F in Alamosa to 10.1 degrees F in Crestone. Alamosa also holds the title of the extreme low of -42 degrees F. Summer high temperatures are usually milder than most parts of the Southwest, ranging from a July average maximum of 65.8 degrees F on Wolf Creek Pass to 83.5 degrees F in Crestone.

The surrounding mountain ranges cause cold mountain air to sink and pool on the valley floor creating a short growing season of only 90-110 days. Recent years, however, have had milder winters and warmer summers than those experienced in the past. The winter of 2025-2026 was alarmingly warm with little snow, with few nights below zero and multiple days over 65 in February, including the high of 67 on February 3, which was the warmest winter day on record.

Geology

The San Luis Valley is part of the much larger Rio Grande Rift Zone, which extends from southern New Mexico northward through the San Luis Valley to its northern termination near Poncha Pass. The Sangre de Cristo Mountains on the east are the result of extensive block faulting during the Laramide Orogeny, and the placement of Precambrian basement, Paleozoic sedimentary, and Tertiary intrusive rocks in contact with Tertiary valley-fill deposits. The San Juan Mountains on the western flank are the result of extensive Tertiary volcanism. In sharp contrast with the steeply faulted eastern side of the valley floor, the Oligocene volcanic rocks of the San Juans gently dip eastward into the valley floor, where they are interbedded with valley-fill deposits.

Faults in the valley floor, which produce geothermal water flows, have not been much of a concern for earthquakes, but mild quakes do occur occasionally. An earthquake registering 3.4 on the Richter scale was registered at an epicenter 20 miles southwest of Del Norte in May 1991, with a previous quake of 3.1 in the same area in January 1988. A smaller quake in 2007 in San Luis registered 2.6.



Land Ownership

The San Luis Valley is made up of 5.24 million acres, with 2.9 million acres under federal control (55 percent), 2.16 million acres of private land (41 percent), and 178,711 acres (3 percent) owned by the state government. Costilla County is virtually 100 percent privately owned, with Mineral County almost the exact opposite at 93.5 percent federal ownership. Alamosa County shows 72.6 percent private ownership, and only 19.8 percent federal.

The Rio Grande National Forest, a unit of the US Forest Service, is the largest federal land manager in the region, encompassing 2.1 million acres, or 39.1 percent of the region's lands. The San Luis Valley Field Office of the Bureau of Lanad Management is the second largest, managing 618,000 acres, or 11.8 percent. The National Park Service manages 121,518 acres, or 2.3 percent, through the Great Sand Dunes National Park and Preserve and the U.S. Fish and Wildlife Service manages 105,521 acres, or 2 percent through the Baca, Monte Vista, and Alamosa National Wildlife Refuges. Saguache and Mineral counties have the greatest concentrations of national forest, and Saguache and Conejos have the greatest concentrations of BLM.

Land Use

About 2.3 million (43.6 percent) of the total Valley acreage is utilized as rangeland; 2.1 million acres (39.3 percent) is forest; and a little over 616,000 acres (11.8 percent) is classified as agricultural land. County land uses vary from

the regional pattern. Alamosa (60.4 percent), Conejos (51.7 percent), and Costilla (47.5 percent) have higher percentages in rangeland; Rio Grande (25.2 percent), Alamosa (24.3 percent), and Conejos (16.0 percent) have relatively greater shares for agriculture; and Mineral (71.2 percent) and Saguache (43.6 percent) have larger percentages of forest. About 2.1 million acres cover the area defined as the "valley floor." Larger concentrations include heavy vegetation (21.2 percent); irrigated meadow (13.1 percent); medium vegetation (9.6 percent); and sparse vegetation (26.5 percent). Crop acreages are broken out in more detail in the economic resilience section.

Telecommunications

The San Luis Valley is connected to the other parts of the state through multiple fiber optic, cable, and telephone line routes. An additional fiber path also exists for E-911 and other emergency connections. Over the past 15 years, government funding related to the pandemic and investment by Internet Service Providers, including region-based Ciello and Jade Communications, have dramatically improved fiber infrastructure in the San Luis Valley.

Industry-leading, high-speed, fiber-optic connectivity and redundant wireless solutions are available across all six counties, serving as a backbone for economic development and public safety. This infrastructure provides high-capacity, high-speed, low-latency connectivity required for modern commerce, telehealth, data center, and remote education. By integrating redundant backhaul routes, the regional network ensures business continuity and protects against service interruptions during environmental or technical emergencies. A San Luis Valley service provider has received national recognition for scoring in the Top 5 highest American Customer Satisfaction Index.

Comprehensive fiber-optic and fixed wireless coverage exists spanning the six-county region (Alamosa, Conejos, Costilla, Mineral, Rio Grande, and Saguache), targeting both high-density hubs and agricultural zones. The region also supports capacity for multiple Terabytes of data transmission in and out of the San Luis Valley, making the region ideally suited for businesses requiring very high data transmission. There is widespread availability of symmetrical gigabit speeds that exceed federal benchmarks for "Broadband Ready" communities.

Regarding system redundancy, seven regional backhaul paths exist out of the San Luis Valley supporting redundant ring architecture to carrier hotels in Denver and Albuquerque. Redundant network operation centers and fiber loops are strategically located to provide robust failover protection for critical regional data traffic. Multiple ISPs have secured state and federal funds to eliminate "unserved" pockets and ensure equitable digital access for all residents. Opportunities for strategic expansion continue to exist through potential economic development partnership opportunities supporting ongoing regional growth. The region's network also provides high-capacity links for Community Anchor Institutions, including regional medical centers, emergency response units, schools, transportation, and commerce.

The Broadband Equity Access and Deployment program launched a mapping effort in 2023 through the National Telecommunications and Information Administration and Colorado Broadband Office to help consumers learn about services available where they live. The National Broadband Map offers neighborhood and canyon-level information on service providers, technology (fiber, fixed wireless, or satellite), and data download speeds for consumer comparison. Overall, services to individual homes in rural locations have improved significantly since the 2013 and 2018 CEDS.

Health Care Assets

The San Luis Valley has multiple health care facilities serving the diverse needs of this rural population, and health care and related services are the second biggest employer in the region. Starting on the west side of the region, Rio Grande Hospital is a Critical Access Hospital in Del Norte with related satellite clinics in Creede, South Fork, and Monte Vista, as well as a recently opened Wellness Center with training facilities and patient and employee housing on site. As previously discussed in the airports section, medical evacuations for Rio Grande Hospital are based out of neighboring Rominger Airport north of Del Norte.



Rio Grande Hospital Wellness Center opened in 2023/File Photo

Moving east, San Luis Valley Health in Alamosa is the only Level Three trauma facility in the region, with a helipad for medical evacuations in coordination with flights out of San Luis Valley Regional Airport. SLV Health also partners with the Conejos County Hospital, also a Critical Access Hospital, located in La Jara. One of the single largest employers in the region, SLV Health also has clinics in Monte Vista, Antonito, La Jara, and additional clinical and specialty care in Alamosa, separate from the hospital. They also have patient and employee housing as well as an education facility.

Valley-Wide Health Systems is a Federally Qualified Health Center with a constellation of clinics throughout the region offering family medicine, behavioral health, dental, pharmacy, and physical therapy services. Their administrative offices are in Alamosa, but they have clinics in Moffat, Center, Monte Vista, Alamosa, La Jara, Antonito, and San Luis, as well as outside the region in the Arkansas Valley and Chaffee County. Valley-Wide also offers on-demand transportation services, discussed in the transportation section.

The US Department of Veterans Affairs Eastern Colorado Health Care System has a Community-Based Outpatient Clinic in Alamosa for eligible veterans and their families. The Alamosa clinic was reviewed as part of a required Asset and Infrastructure Review of the Denver Market of VISN 19 in 2022, as required by the MISSION Act. Unlike other rural locations in Salida and La Junta, the Alamosa CBOC was not recommended for closure, but additional enrollments of eligible veterans were encouraged. This level of agency review may be conducted every three years if fully implemented.

Education

The San Luis Valley has 14 school districts across six counties, as well as multiple for-profit, online, and home school programs serving the K-12 student population. Within the region, families can choose to move their students to any district through the School Choice program. The San Luis Valley Board of Cooperative Education Services serves all 14 districts and fosters collaboration by employing key compliance positions that serve multiple districts. In many of the region's smaller communities, the school districts are the biggest employers outside of town or county government. The sustainability of these school districts, including student enrollment and cost for compliance with state requirements, is a critical part of the economy in all six counties. Background on each district is discussed below, while enrollment and demographic trends are further presented in the Demographic and Economic Overview and discussed in the Economic Resilience section.

Starting on the western edge of the region, the Creede School District is located just south of Creede in Mineral County. Traveling southeast down CO Highway 149 to the convergence with US Highway 160, the Upper Rio Grande School District serves students from South Fork to Del Norte, with the school in Del Norte. Rio Grande County also has the rural Sargent School District south of Center and the Monte Vista School District in Monte Vista. Traveling north from Monte Vista on US Highway 285, the Center School District is on the far south end of Saguache County, and part of the district reaches into Rio Grande County. 30 miles further north on US Highway 285, the Mountain Valley School District is in Saguache, which is also the county seat of Saguache County. Fifteen miles east of Saguache, the Moffat School District, located in Moffat, serves students in northern Saguache County from Moffat to Villa Grove to Crestone.

Alamosa County has three school districts, starting with the rural Sangre de Cristo School District between Hooper and Mosca. Alamosa School District in Alamosa serves most of the county's student population and has the largest enrollment in the region. North Conejos School District, located in La Jara, crosses into southern Alamosa County and has the second largest enrollment in the region. Conejos County has two other school districts, including the Sanford School District in Sanford on the eastern edge of the county and the South Conejos School District in Antonito on the southern edge of the county, just 5 miles from the border with New Mexico. On the southeast edge of the region, Costilla County has two school districts, the Centennial School District in San Luis and the Sierra Grande School District in Fort Garland.

The region also has two higher education institutions in Alamosa: Adams State University and the Valley Campus of Trinidad State College. Adams State University (Adams) is an undergraduate and graduate level institution and is the largest single employer in the region, with 857 non-student and student employees. Originally established as a rural teacher's college in 1921, the school enrolled over 3,100 undergraduate and graduate students in the Spring of 2026, according to census data assembled by Public Tableau. Adams offers multiple academic programs as well as athletic programs and is well known for its teaching, counseling, and exercise science/kinesiology programs. They also secured federal funding in 2023 to build a Mechanical Engineering lab to solidify that program and partnership with Colorado State University. The school became a Hispanic Serving Institution in 1998. This designation and related federal funding have furthered their ability to produce more first-generation college graduates than any other university in the state. Adams also offers a concurrent enrollment option for high school students in local school districts, where students can graduate from high school with an associate's degree.



Adams State University campus in Alamosa, Alamosa County/ASU website

Adams recently quantified their economic impact in a study published in 2025. The study confirmed that the University has a $107 million-dollar economic impact annually in the San Luis Valley, which includes $25.5 million in student and visitor spending.

Trinidad State College (TSC) is also an undergraduate institution with a campus in Alamosa focused on trade programs, including cosmetology, criminology, nursing, automotive, and welding. Although the school's main campus is in Trinidad, the Valley Campus in Alamosa offers a convenient, affordable option for non-traditional students who often have families, business, or both but are seeking either an additional credential or an associate's degree. The Valley Campus has 70 employees and a student body of 1,022 in Spring 2026, with 433 considered full-time. TSC is also a Hispanic Serving Institution, and according to their most recent strategic plan, their focus continues to be increasing student completion towards a credential or graduation, as well as a similar concurrent enrollment option for high school students, as at Adams State.

DEMOGRAPHIC AND ECONOMIC OVERVIEW

Population

The official population estimate produced by the Colorado State Demography Office (SDO) is based on hard data for births and deaths and follows a strict methodology for estimating net migration based on net changes in occupied housing units, job growth, and other factors. This is intended to focus as much as possible on the year-round resident population, and to exclude seasonal residents who should be included in the population counts of their home area or state.

San Luis Valley Population Change- 2000-2025				
	San Luis Valley		Colorado	
Year	Population	% Change From 2000	Population	% Change From 2000
2000	46,424		4,338,801	
2005	47,376	2.1%	4,662,534	7.5%
2010	46,138	-0.6%	5,050,332	8.3%
2015	46,047	-0.8%	5,446,593	7.3%
2020	46,130	-0.6%	5,786,877	6.3%
2025	46,577	0.3%	5,989,883	3.5%

Figure 1 Source: *State Demography Office, October 2024 - 2025 B01001*

Colorado's growth rate has slowed significantly compared to the previous decade. Meanwhile, the growth rate in the San Luis Valley has been flat or declining since 2005. The estimated population of the San Luis Valley in 2025 is 46,577 compared to 47,376 in 2005. The growth rate for the San Luis Valley between 2020 and 2025 was 1% percent compared to 3.5% percent for the State of Colorado. A long-term look from 2000 to 2025 shows the Valley population fluctuating within 1,000 people, with the population peaking in 2005 and stabilizing or declining since. By contrast, Colorado grew 32.8 % during the same period.

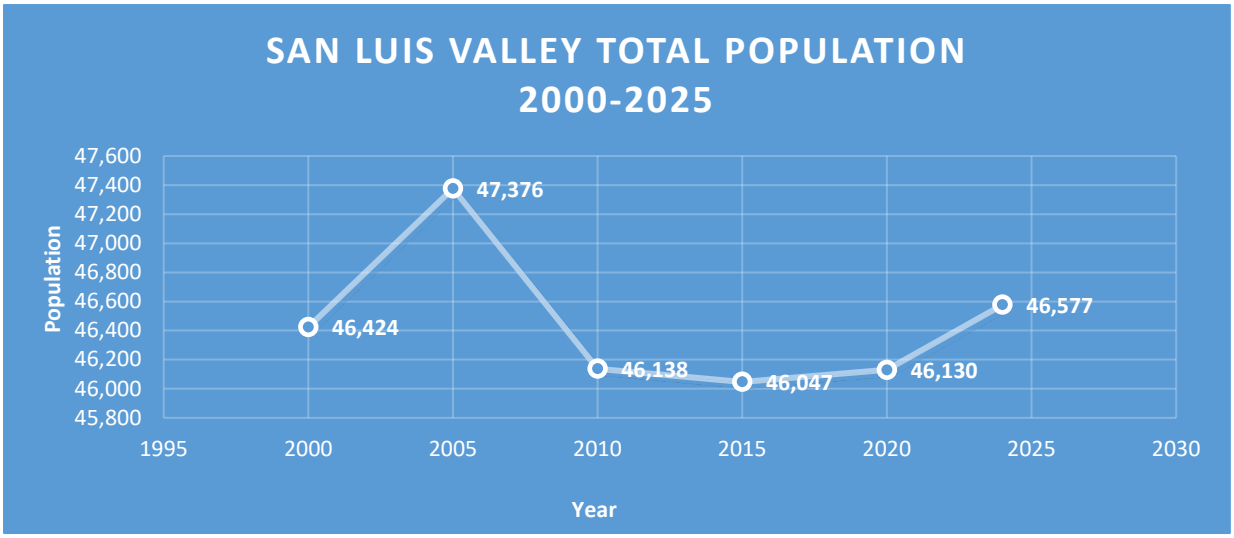


Figure 2 Source: *Colorado State Demography Office State, Substate Regions, County Population Estimates, 2000 to current year*

According to the State Demography Office, the San Luis Valley population peaked at 47,615 in 2004 and has been in slow decline since. The population is forecast to decrease to 46,570 by 2030, with a slightly more rapid decline to 43,986 by 2050.

San Luis Valley Population Forecast, 2030 to 2060				
	2030	**2040**	**2050**	**2060**
San Luis Valley	46,570	46,390	45,343	43,986
Alamosa	16,749	17,145	17,436	17,681
Conejos	7,616	7,707	7,603	7,426
Costilla	3,628	3,395	3,163	2,944
Mineral	946	924	873	823
Rio Grande	10,895	10,379	9,395	8,152
Saguache	6,736	6,840	6,873	6,960

***Figure 3 Source**: State Demography Office Population Forecasts for Colorado Regions, 2000-2060*

Births, deaths, and net migration are the main components of population change. Net migration is the difference between the number of people moving into an area and the number of people moving out. Change in net migration typically causes most of the changes in population trends because migration is more likely to experience short-term fluctuations than births and deaths. Migration also tends to be highly correlated to job growth or decline in communities where most of the residents work where they live. For many counties with negative natural increase (more deaths than births), this makes migration especially important for population stability and growth.

From 1970 to 2024, the San Luis Valley has seen a decline in births and a slight increase in deaths. During the same period, net migration reached 520 in 2021 and is projected to slightly increase by 2045 and then level off. The components of population change indicate the region is in a period of little growth in population.

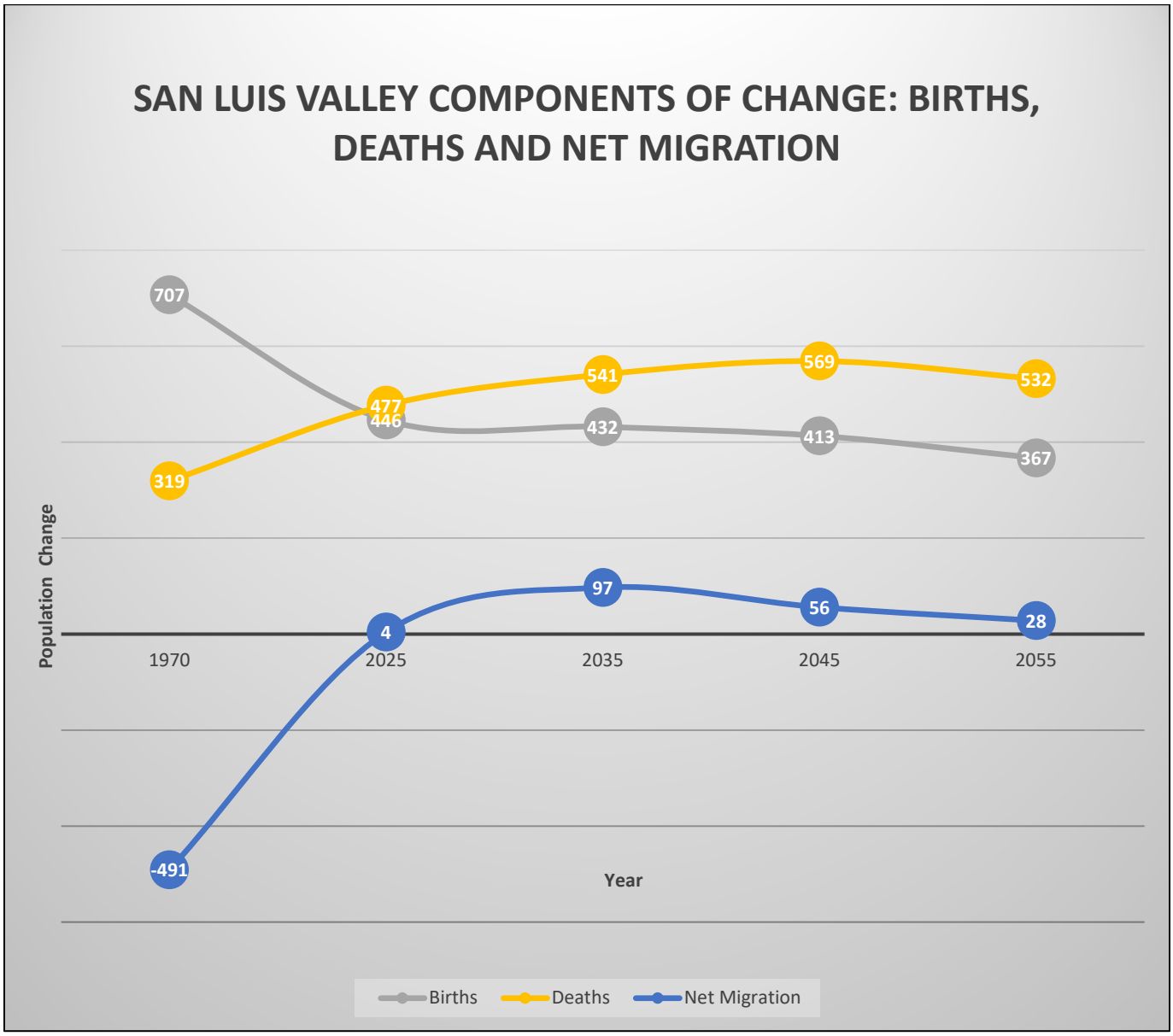


Figure 4 Source: *Colorado State Demography Office County Components of Change for Colorado 1970-2060*

Aging

Every community or region has a different age profile and is aging differently. People in different age groups work, live, shop, and use resources differently, and these differences will impact the economy, labor force, housing, school districts, day care facilities, health services, disability services, transportation, household income, and public finance. An aging population may put downward pressure on local government tax revenue due to changes in spending on taxable goods.

The changing age distribution of the population of the San Luis Valley for the period from 2020 through 2060 is shown below. Overall, the region has a higher percentage of people over fifty than the state of Colorado, and that trend is projected to continue. In 2020, 39% of the San Luis Valley's population was over fifty, versus approximately 30% in Colorado. That percentage in the region declines slightly by 2030 to 38%, but then slowly increases again to 40% of the overall population in 2040, 42% in 2050, and 44% by 2060.

This trend highlights a future "cliff" where there are more people in retirement in a community than of working age, and magnifies the need for future planning and service provision. Many areas have a larger share of older adults, indicating the need to evaluate housing, transportation, and other needs of the senior population. For the San Luis Valley, this reality appears to be about 15 years away, but even in the present time, a concern for the current and future workforce.

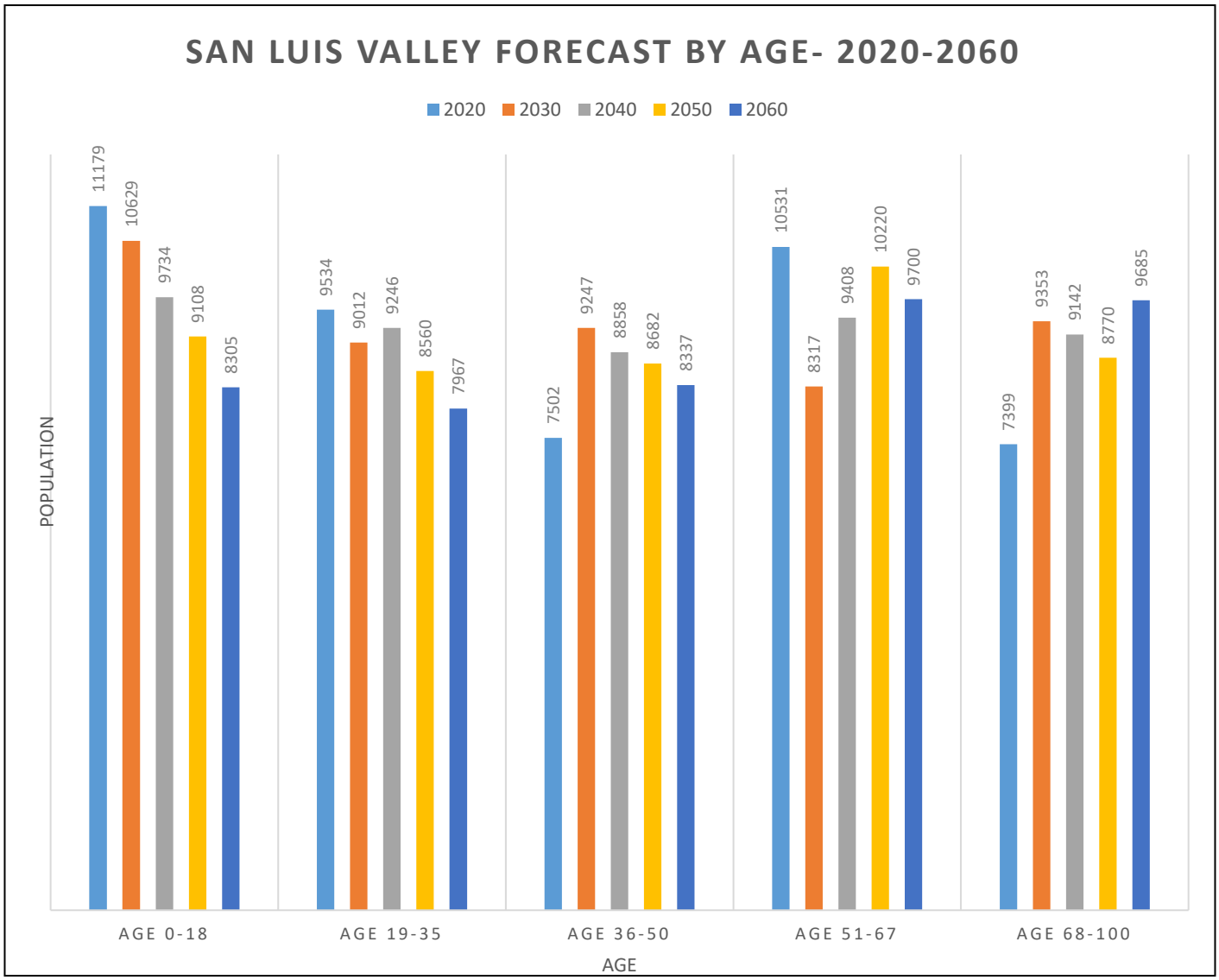


Figure 5 Source: *Colorado State Demography Office County Population Estimates by Single Year of Age, 1990 to 2060*

Net migration is important to highlight by age in the San Luis Valley. Colorado typically draws many young adults as migrants. Areas with colleges and resorts draw 18- to 24-year-olds. Areas with a growing economy tend to account mostly for 25- to 35-year-olds, and areas attractive to retirees tend to attract both workers and older

adults. Like the rest of Colorado, the San Luis Valley loses its young people starting in their late teens, but by their early 30's, they return to raise families. Then we see another migration out of the region starting in the late 60's, likely tied to limited aging services and long-term care facilities.

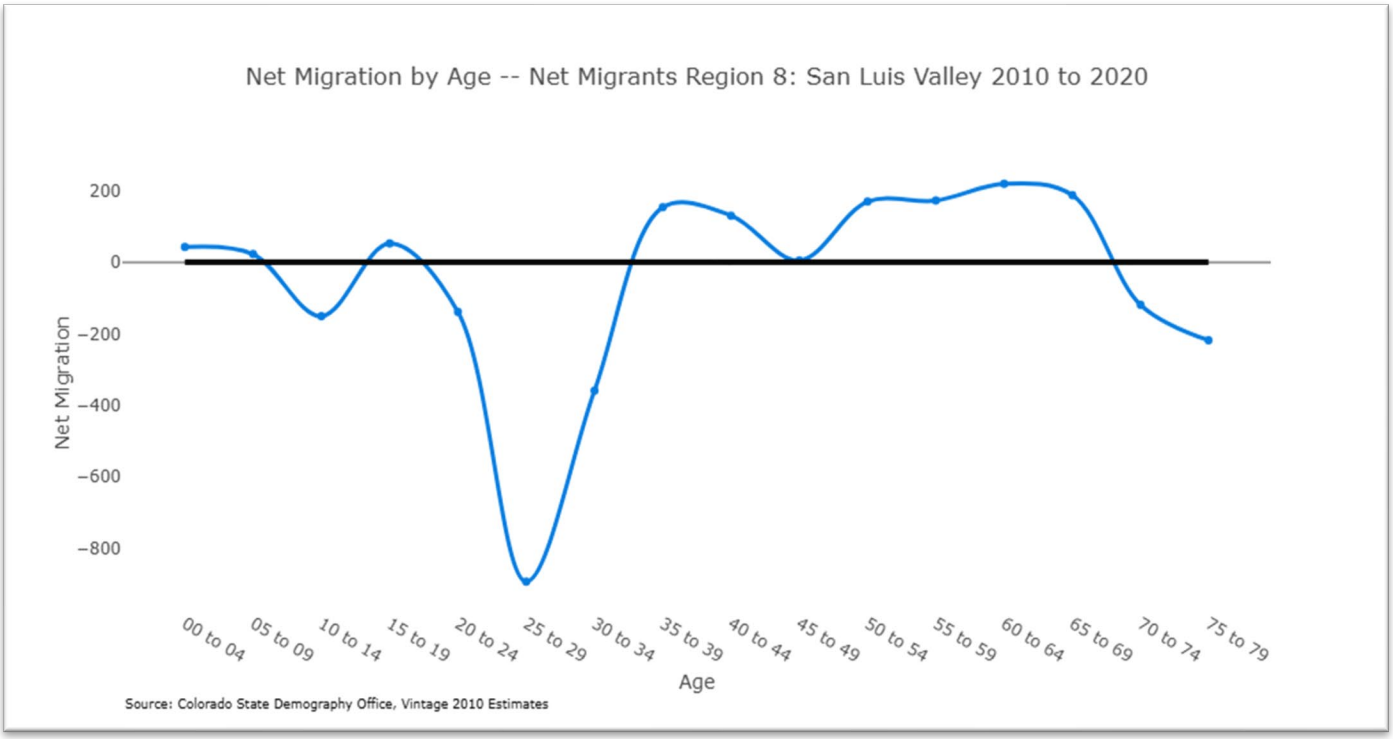


Figure 6 Source: *Colorado State Demography Office Births, Deaths, and Net Migration Spreadsheets, 1970-2060*

Household Income

The last CEDS update incorporated household income distribution and source data from 2015-2019. Since 2019, the region's households have increased in number and in wealth. Household income comes primarily from work, but government transfer payments such as Social Security and Temporary Aid to Needy Families (TANF), and unearned income from dividends, interest, and rent are also included. Income and education levels are highly correlated; areas that have lower educational attainment than the state will typically have lower household incomes.

Below are two charts capturing San Luis Valley Household Income Distribution data, the first from 2019 and the second, an updated chart from 2023, compiled from American Community Survey data. Although the income ranges are slightly different, some analysis is possible.

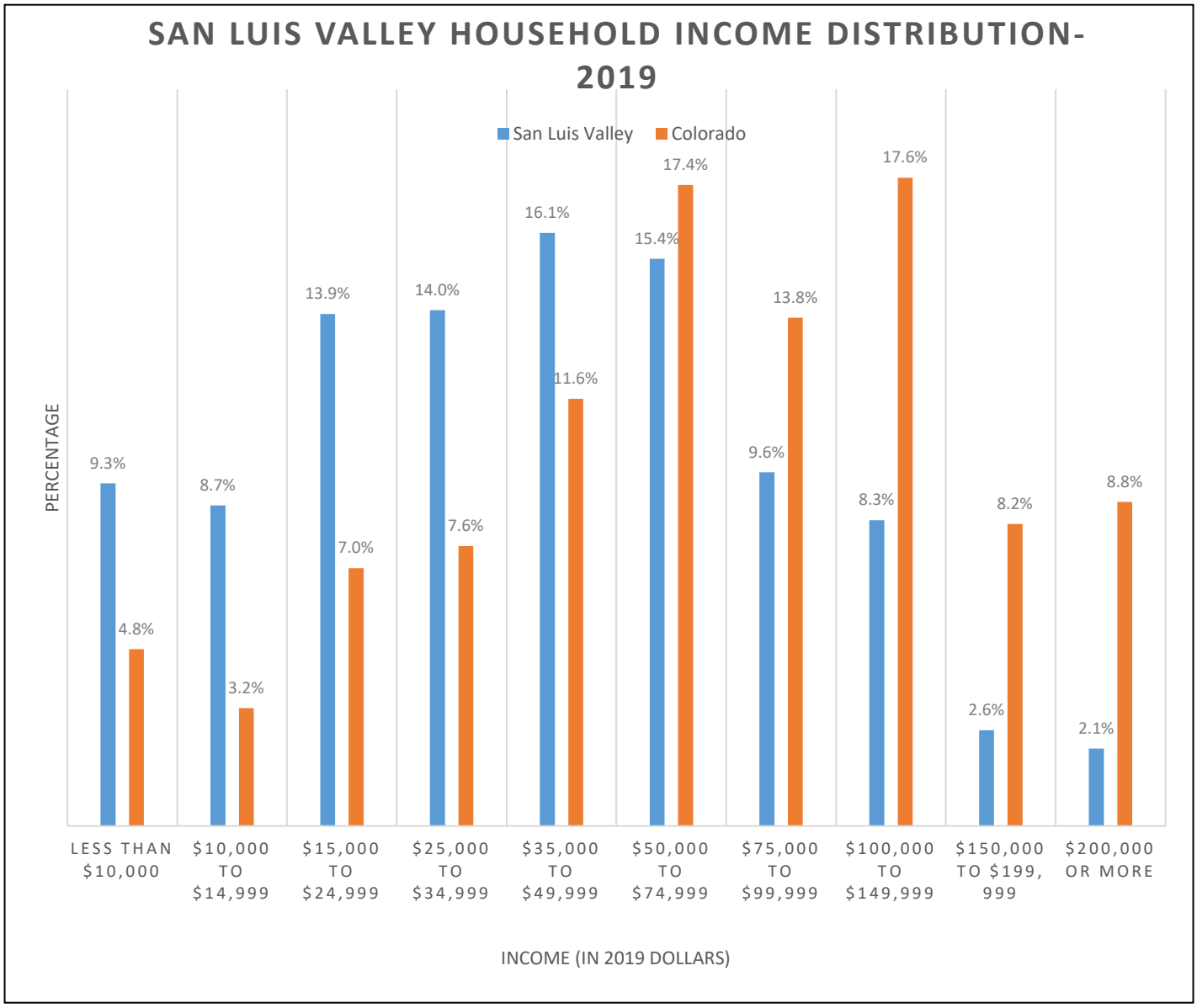


Figure 7: *Source: U.S. Census Bureau, 2015- 2019 American Community Survey*

Between 2019 and 2023, there was a slight decrease in households earning less than $10,000, from 9.3% to 6.9%, as well as a decrease in households earning $10,000 to $25,000 from 22.6% to 16.4%. Households earning $25,000 to $49,000 also decreased slightly from 30.1% to 24.4% in 2023. A favorable income trend starts to show up in households earning $50,000 to $75,000, increasing from 15.4% to 17.1%. This favorable trend continued in households earning $75,000 to $99,000, increasing from 9.6% to 11.1%. This trend was even more dramatic for households earning $100,000 to $199,000, increasing from 10.9% to 19.5%. Households earning more than $200,000 a year doubled from the last CEDS update, increasing from 2.1% to 4.6%.

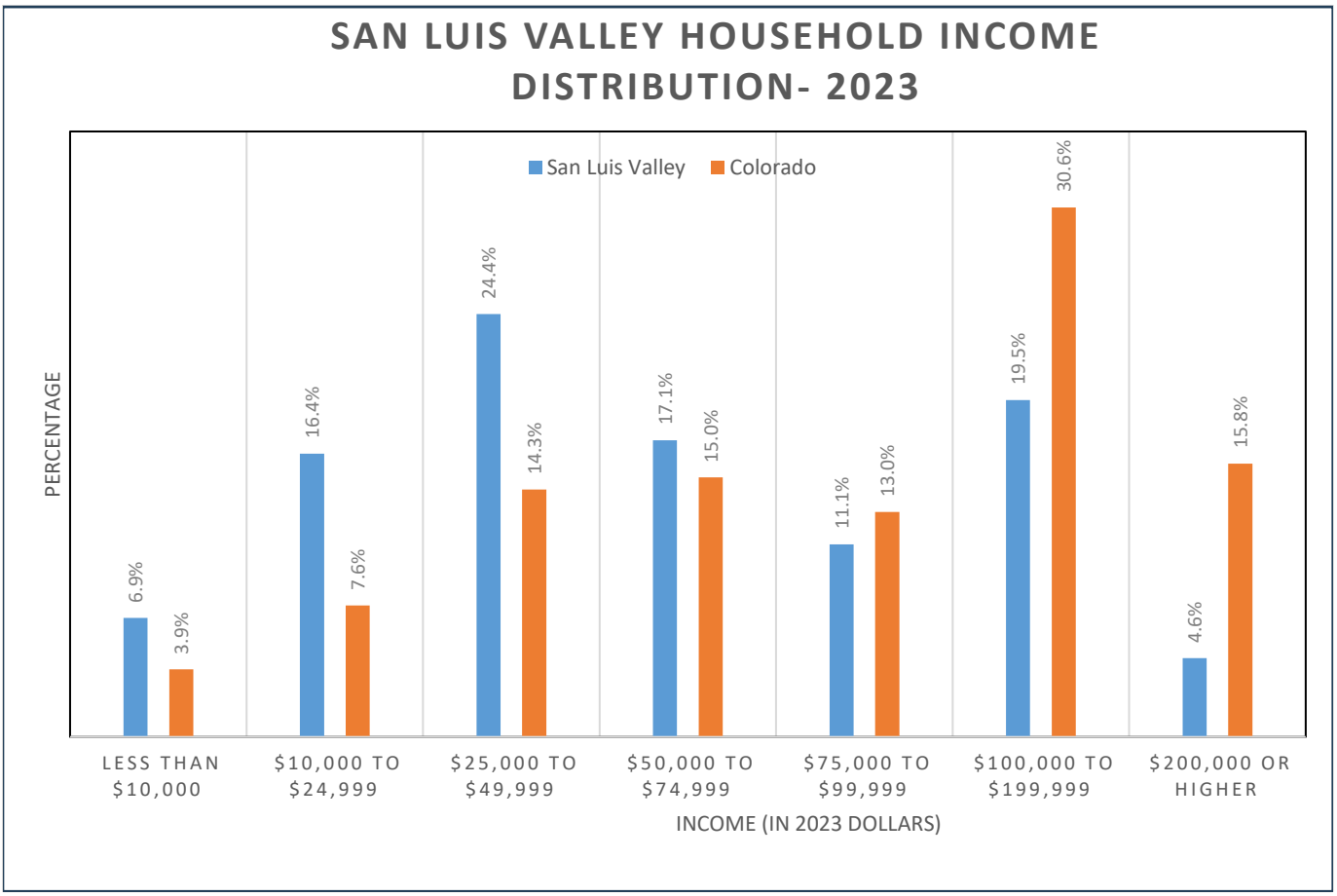


Figure 8 Source: *Colorado State Demography Office American Community Survey B19013 2019-2023*

The San Luis Valley has also seen a slight increase in the number of households overall, from 19,141 in 2019 to 19,983 in 2023, as well as an increase in households with earnings from 69% to 74%. Social Security income declined slightly from 36% to 35%, as well as SSI income from 9.9% to 7% in 2023. Retirement income increased, however, from 18.3% to 23.5% in 2023, as well as households using SNAP or public assistance, increasing from 21.3% to 23.2%.

San Luis Valley Household Income Sources 2023	
Income Sources	**Households**
All Households	19,983
With earnings	74.2%
With interest, dividends, or net rental income	17.9%
With Social Security income	35.7%
With Supplemental Security Income (SSI)	7.1%
With cash public assistance income or SNAP	23.2%
With retirement income	23.5%
With other types of income	11.5%

Figure 9 Source*: Colorado State Demography Office American Community Survey Spreadsheets 2023 B19001*

The 2025 federal poverty level (FPL) for an individual is an annual income of $15,650, or $32,150 for a family of four. These guidelines are used to determine eligibility for programs like Medicaid and other federal health insurance subsidies. The chart below illustrates how, in 2024, 17% of the population in the San Luis Valley lived in poverty, which was almost twice the statewide average of 9%.

At the county level, Costilla County had the highest percentage of persons living in poverty at 22.3% in 2024, followed by Alamosa County at 18.2%, Saguache County at 17.6%, Rio Grande County at 14.9%, Conejos County at 13.8%, and Mineral County at 13.0%.

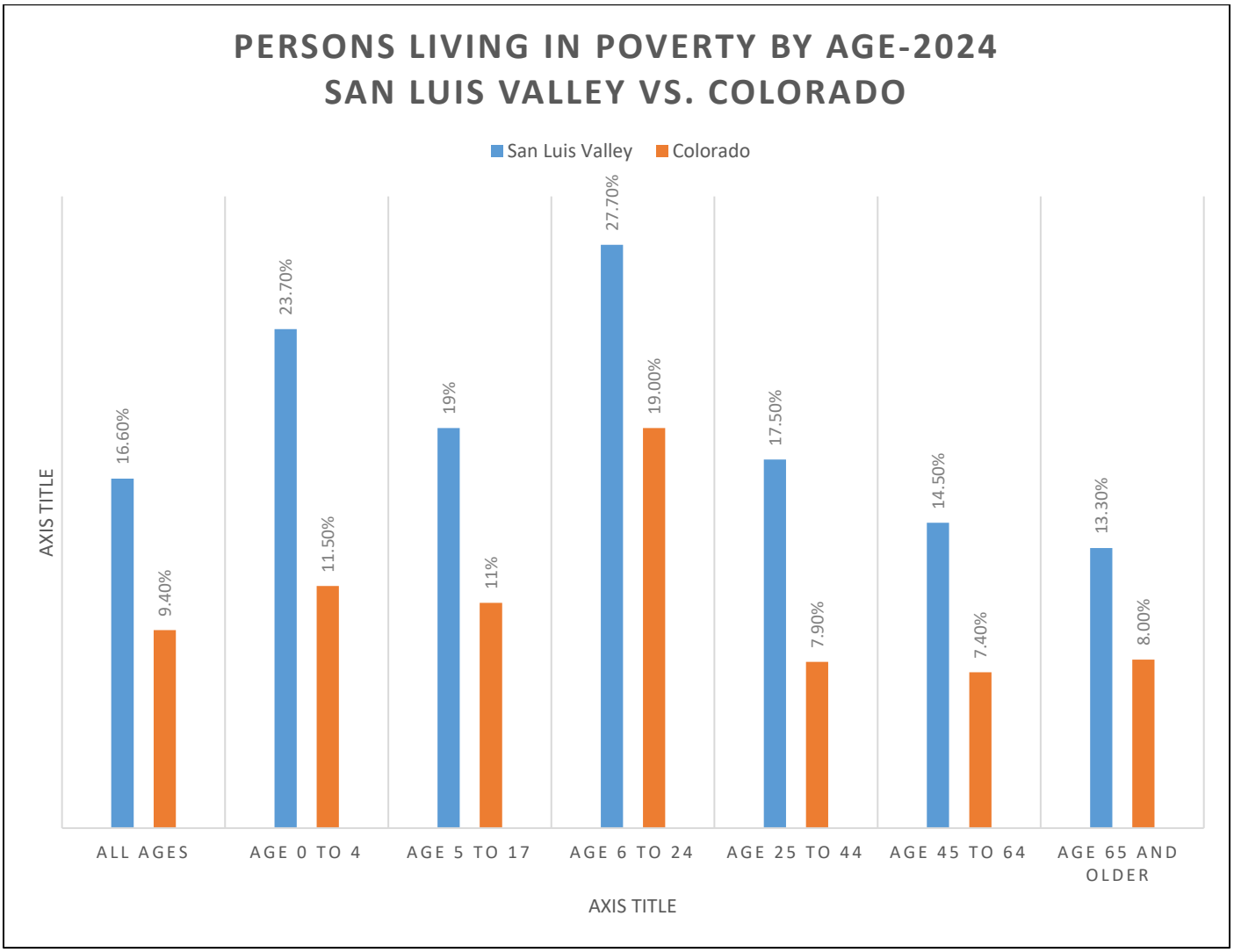


Figure 10 Source: *Colorado State Demography Office American Community Survey 2024 B17001 Poverty by Age SLV*

Educational Attainment

Educational attainment, or the level of education reached by working adults in a community, has an important relationship with workforce readiness and economic mobility. As discussed in the education section, the San Luis Valley benefits from two higher education institutions for people seeking education beyond high school.

Professional degrees, however, often require people to relocate out of the region, where it can be harder to get them back.

As the charts below indicate, when compared with the State of Colorado, the adult population in the region has a lower percentage of people without a high school diploma or even a bachelor's or advanced degree. However, 2024 data show an increase in people completing high school and completing degrees, whether it's an associate, bachelor's, or advanced degree.

In the 2021 CEDS working from 2019 data, 43.8% of the region's population hadn't finished high school or were high school graduates. In 2024, that number dropped to 35%. The number of high school graduates saw a slight decline from 30.0% in 2019 to 26.4% in 2024, likely because those young people pursued further education.

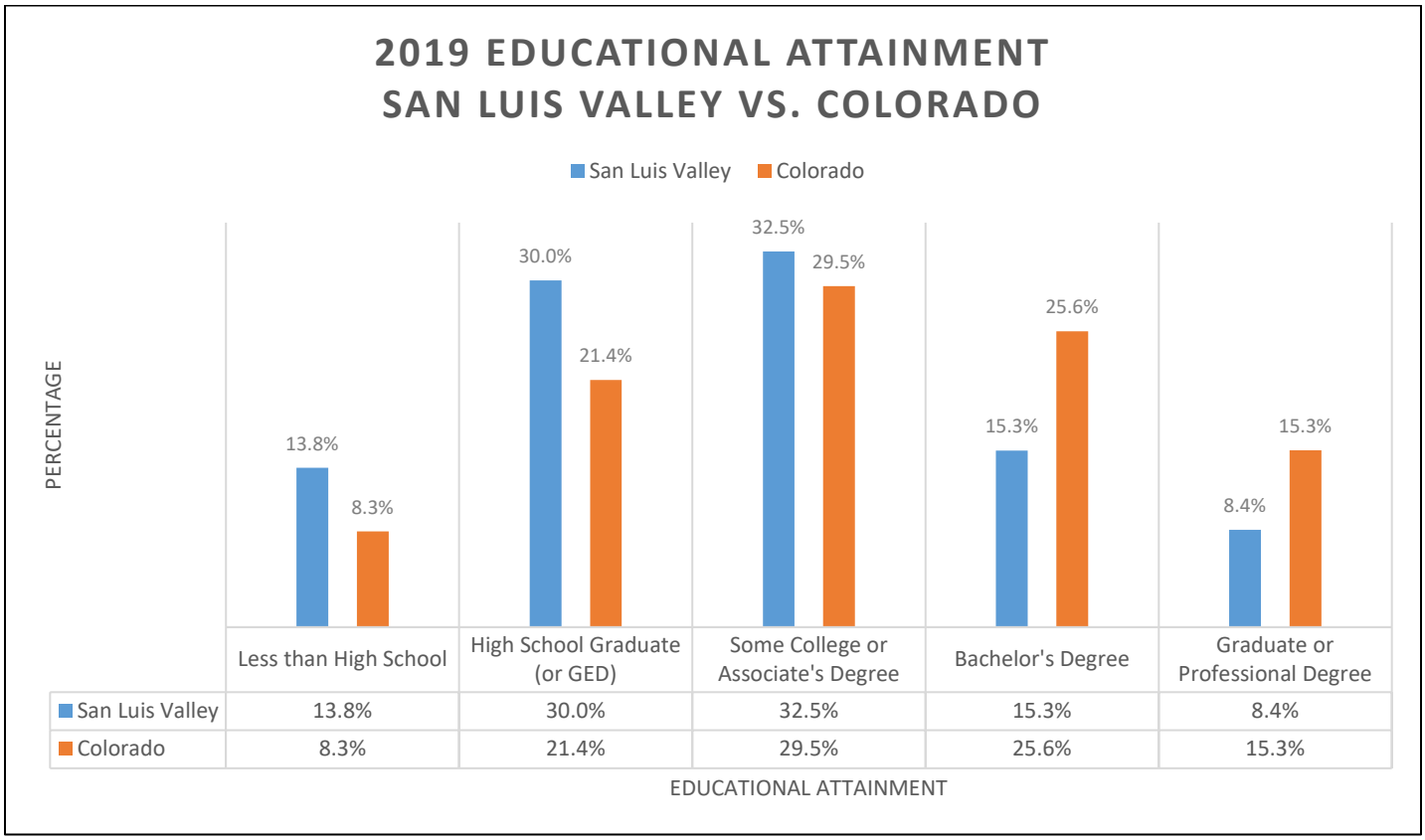
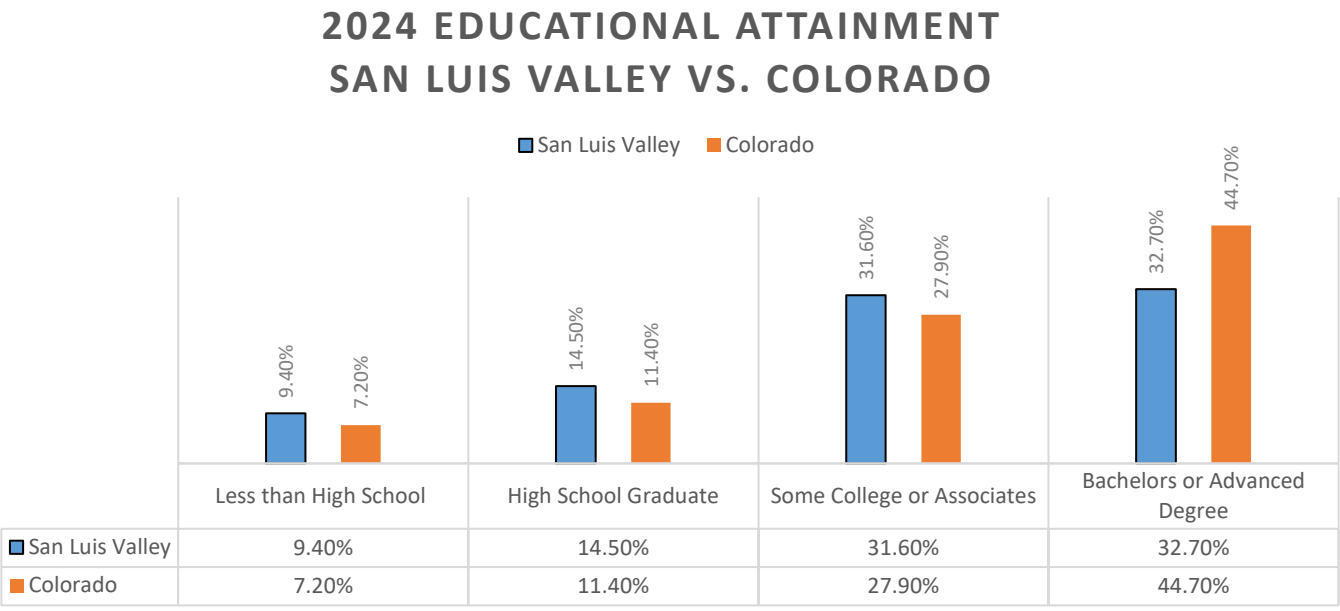


Figure 11 Source: *U.S. Census Bureau, 2015-219 American Community Survey*

Even more noticeable differences are found in those pursuing higher education. In 2019, the percentage of people with some college or an associate's degree was 29.5%. In 2024, that percentage increased slightly to 31.5%. The data shows an even larger increase, however, in individuals attaining bachelor's or advanced degrees from 23.7% in 2019 to 33.4% in 2024.



	Less than High School	High School Graduate	Some College or Associates	Bachelors or Advanced Degree
San Luis Valley	9.40%	14.50%	31.60%	32.70%
Colorado	7.20%	11.40%	27.90%	44.70%

Figure 12 Source: *Colorado State Demography Office, American Community Survey, 2024 B15002*

Race and Ethnicity

Population in the Census is reported on both racial and ethnic dimensions, wherein race includes White, Black/African American, American Indian/Alaska Native, Asian, Native Hawaiian/Pacific Islander, and other races. Hispanic/Latino includes all persons of any race who declared Hispanic or Latino affiliation. Since 2010, the San Luis Valley's Hispanic population has decreased by 18% while its non-Hispanic population has increased by 14%, with individuals of two or more races increasing slightly from 1.3% to 3.6%. Compared to the State of Colorado, the San Luis Valley is more diverse overall, with 10% smaller non-Hispanic population and 16.7% larger Hispanic population.

San Luis Valley Race/Ethnicity Trend

Race/Ethnicity	Census 2010	2015-2019 ACS	2019-2023 ACS
Hispanic	46.9%	46.3%	38.9%
Non-Hispanic	53.0%	53.7%	61.1%
Non-Hispanic White	49.0%	49.3%	55%
Non-Hispanic Black	0.4%	0.5%	1.04%
Non-Hispanic Asian	0.6%	0.6%	0.6%
Non-Hispanic Native American/Alaska Native	0.8%	1.4%	0.7%
Non-Hispanic Native Hawaiian/Pacific Islander	0.0%	0.2%	0.2%
Non-Hispanic Other	0.2%	0.43%	0.43%
Non-Hispanic, Two Races	1.3%	1.7%	3.6%

Figure 13 Sources: *Colorado State Demography Office, American Community Survey; 2023 B03002 Population by Race and Ethnicity*

San Luis Valley Race/Ethnicity Trend			
Race/Ethnicity	**Census 2010**	**2015-2019 ACS**	**2019-2023 ACS**

San Luis Valley Race/Ethnicity Comparison		
Race/Ethnicity	**San Luis Valley**	**Colorado**
Non-Hispanic Other	0.4%	0.4%
Non-Hispanic Native Hawaiian/Pacific Islander	0.2%	0.1%
Non-Hispanic White	55.0%	65.7%
Hispanic	38.9%	22.2%
Non-Hispanic Black	1.04%	3.8%
Non-Hispanic Native American/Alaska Native	0.7%	0.4%
Non-Hispanic Asian	0.6%	3.2%
Non-Hispanic, Two or More Races	3.6%	4.2%

Figure 14 Sources: *Colorado State Demography Office, American Community Survey; 2023 B03002 Population by Race and Ethnicity*

Housing

Understanding the current housing stock is critical for understanding how the community can best address current and future demands. The projection of households is derived from county-specific headship rates for the population by age. Beyond the numbers and characteristics, understanding the value and affordability of housing units is vital. Are the housing prices prohibitive to new families? Are the housing prices so high that once the current workforce ages and sells, those housing units will most likely go into the vacation seasonal markets? Or, are housing prices reasonable, and suddenly the community is experiencing growth in families with children? How many total housing units are there? What types of new units are being built – multi-family vs single-family?

Since March 2021, the region's housing discussion has intensified, fueled by the completion of the San Luis Valley Housing Needs Assessment. Although this study was originally focused on the effects of the pandemic on the region's economy, the larger theme remains around the need for middle-income, higher-quality housing to meet the needs of a future workforce. Housing vacancy rates vary across the six counties, ranging from over 65% in Mineral County to 9% in Alamosa County, but overall, the quality and affordability of housing continue to be a challenge, as well as the cost of construction.

Figure 15 below illustrates the projections of households in the San Luis Valley from 2020 to 2050. Starting with 18,968 households in 2020, overall numbers increase slightly until 2035, when they plateau at 19,872 and gradually decline to 19,683 by 2050. The number of people per household can offer insights into the composition of the households. Areas with a larger number of people per household often have more families with children under 18 or several roommates living together to share housing costs. Those with a smaller number of people per household likely have a larger share of single-person households.

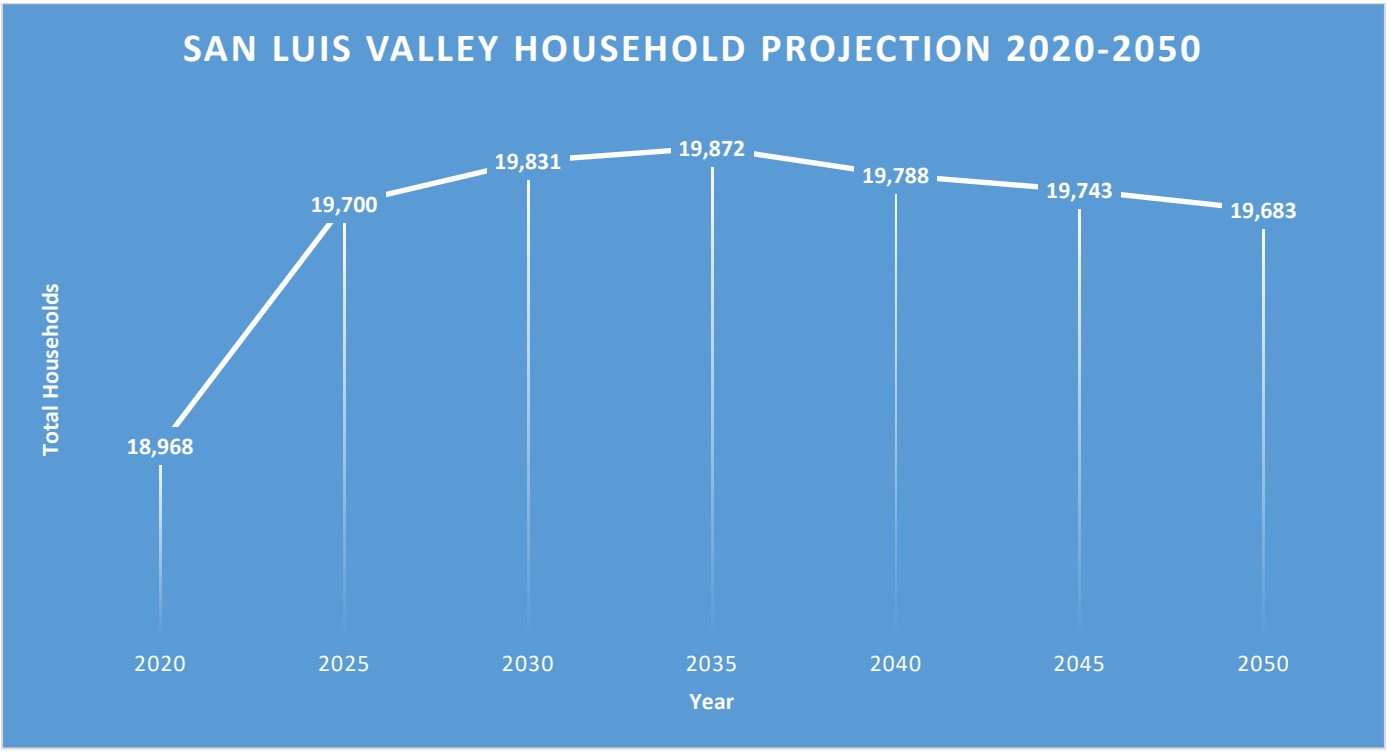


Figure 15 Source: *Colorado State Demography Office Regional Household Data 2010-2050*

San Luis Valley Housing Units 2023	
Housing Type	**Units**
Total Housing Units	25,287
Occupied Housing Units	19,732
Vacant Housing Units	6,390
Vacancy Rate	31.4%
Total Population	46,604
Household Population	45,409
Group Quarters Population	1,195
Persons per Household	2.26
Owner-Occupied Housing	13,470
Rental Housing	6,513

Figure 16 Source: *Colorado State Demography Office American Community Survey 2023 B25002, B25004*

San Luis Valley Characteristics of Owner-Occupied Housing

	Units	Percent
Owner-Occupied Housing	13,771	100.0%
Single Unit Buildings	11,590	84%
Buildings with 2 to 4 Units	52	0.004%
Buildings with 5 or More Units	29	0.002%
Mobile Homes	1,879	13.6%
RVs, Boats, Vans, Etc.	97	0.007%

Figure 17 Source: *Colorado State Demography Office American Community Survey 2023 B25032: Tenure by Units in Structure*

San Luis Valley Characteristics of Rental Housing

	Units	Percent
Rental Housing	6,608	100.0%
Single Unit Buildings	3,038	46%
Buildings with 2 to 4 Units	982	15%
Buildings with 5 or More Units	1,508	23%
Mobile Homes	870	13%
RVs, Boats, Vans, Etc.	0	%

Figure 18 Source: *Colorado State Demography Office American Community Survey 2023 B25032: Tenure by Units Structure*

Figure 19 below breaks out the number of owner-occupied versus rental-occupied housing units in each of the region's six counties in 2023. Like other rural areas, most households in the region live in homes they own, and rental options are scarce. Alamosa County has the highest overall number of households, with a total of 6,570. 56% percent of those households are owner-occupied, with 44% rentals. Rio Grande County has the second-highest number with 5,032 households. 68% of those households are owner-occupied, with 32% as rentals. Saguache County has 3,261 total households, of which 75% are owner-occupied. Conejos County follows in number, with 3,112 total households of which 75% are also owner-occupied and 25% rentals.

The two counties with the smallest number of households are Costilla and Mineral. Costilla County has 1,574 total households, 78% percent owner-occupied and 22% rentals. Mineral County has 434 total households, with 74% owner-occupied and 26% rentals.

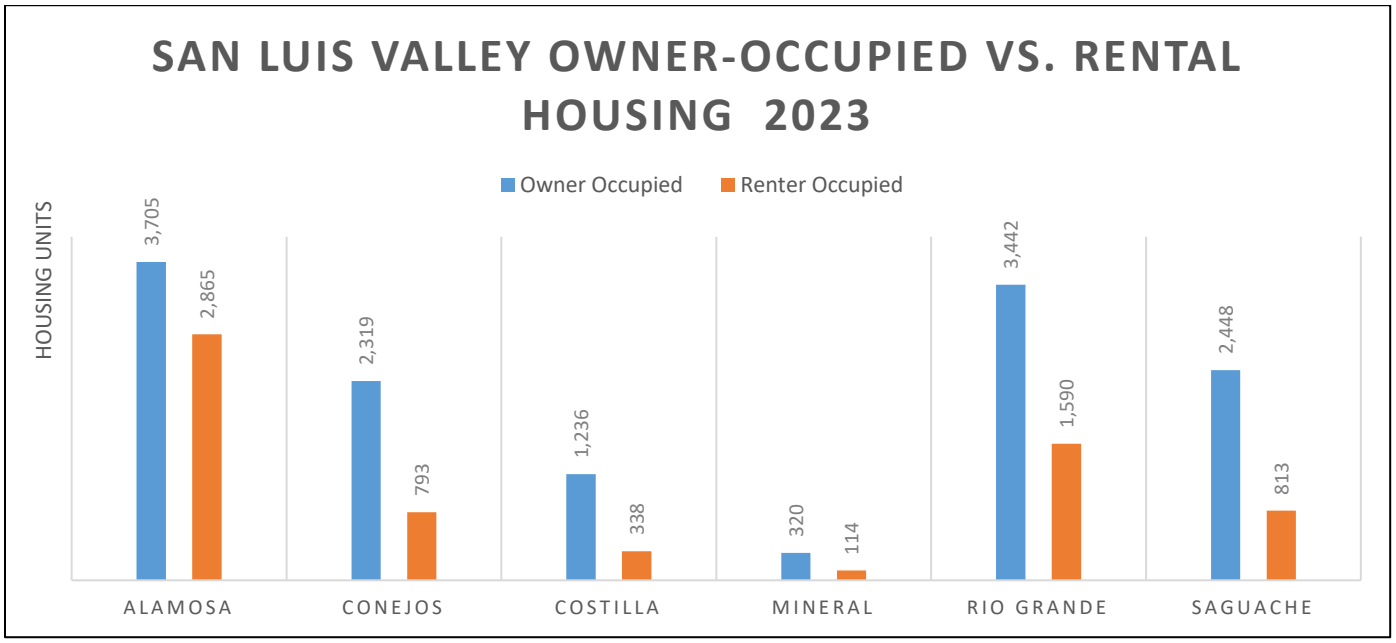


Figure 19 Source: *Colorado State Demography Office*

Median home values have increased dramatically in Colorado and the San Luis Valley since 2021. As the chart below presents, all counties have seen an increase of over $50,000, and some counties have increased by more than $100,000. Meanwhile, over that same time, the State of Colorado has seen a nearly $200,000 increase.

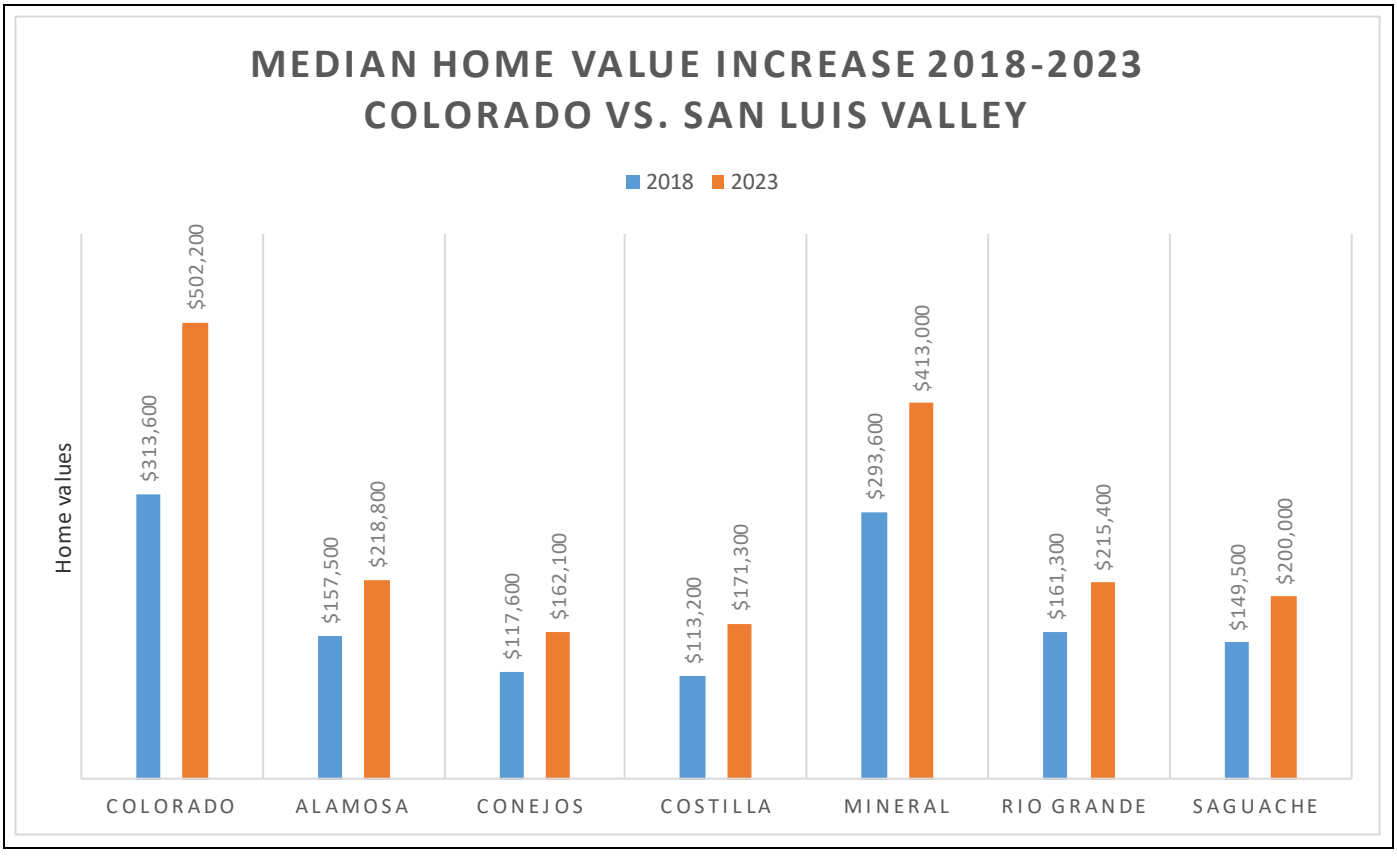


Figure 20 Source: *Colorado State Demography Office American Community Survey 2017-2023 B25077*

Employment

Figure 21 below shows the total estimated jobs in the San Luis Valley from 2005 to 2050. Jobs are defined broadly and capture wage and salary workers as well as most proprietors and agricultural workers. Here we see first a slight decrease from 20,068 in 2005 to 19,879 in 2010, but then a recovery and increase to 22,415 by 2025.

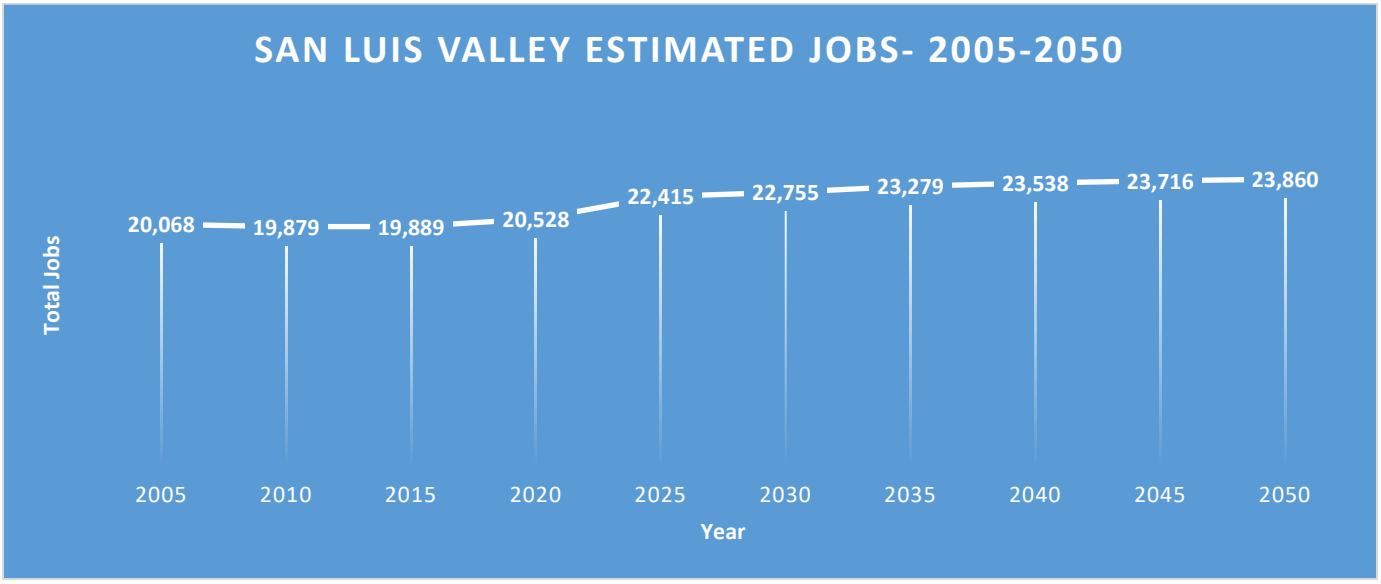


Figure 21 Source: Colorado State Demography Office Total Number of Jobs: Estimates and Forecasts by Region 2001-2050

When looking at the employment trends recently and after a recession, it's important to look at the current share of employment by industry. Areas dependent on a single industry, such as agriculture, mining, or tourism, can suffer from prolonged downturns due to drought, shifting demand for commodities, and the health of the national economy. Overall, a more diverse economy is typically more resilient, too.

Identifying the industries which drive growth and change in a community is a vital part of understanding community dynamics. Growth in jobs results in growth in residents from migration to a community. Identifying the trends of growth and decline of jobs and the types of jobs available within the community is important.

The relative rank of high-paying sectors, such as mining, information, and financial and insurance services, versus mid-range jobs (e.g., construction, health care, and government) and lower-paying industries such as retail trade and accommodation and food services, will have an impact on a region's overall economic health.

As Figure 22 illustrates, local government and health care and social assistance are the two largest types of jobs by sector in the region in 2024. The local government category includes school districts, counties, and municipalities, and employs 3,077 people. The health care and social assistance category ranges from medical professionals at a hospital, caregivers in a home, and non-profits, and employs 3,069 people. The next largest sector is retail trade, which employs 1,948 people. The fourth largest sector is agriculture, forestry, fishing, and hunting, and employs 1,921 people.

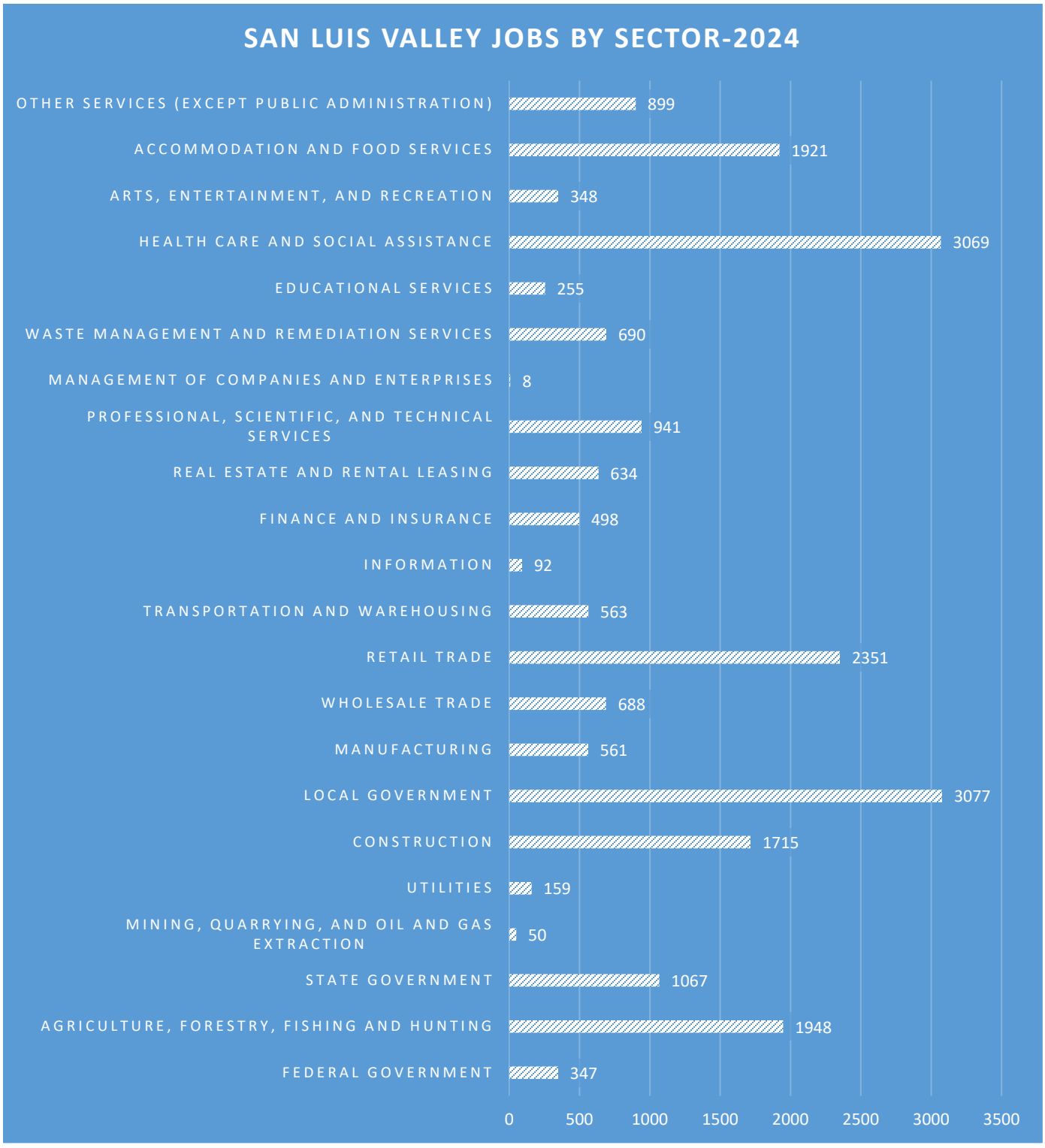


Figure 22 Source: Colorado State Demography Office Total Number of Jobs by Sector by Region, Current Year

Base Industries

These types of jobs can be considered jobs that bring money into the community, which then circulates locally. There are 3 categories of base industries:

• *Direct Basic:* jobs that bring outside dollars into the community by selling goods or services outside the county, such as manufacturing or engineering services,

• *Indirect Basic:* jobs that are created as the result of goods and services purchased by direct basic, such as accounting services or raw material inputs, and

• *Local (Resident) Services:* jobs that are supported when income earned from the base industries is spent locally at retailers or are supported by local tax dollars to provide services like education and public safety.

San Luis Valley Jobs by Industry Category, 2024

Industry Category	Jobs	Percent
Direct Basic Jobs	17,716	71%
Indirect Basic Jobs	2,111	9%
Local Services Jobs	5,098	20%
Total Jobs	24,925	

Figure 23 Source: *Colorado State Demography Office Total Number of Jobs by Industry Category*

Like industry employment, areas with large amounts of diversity in their base industries tend to suffer less during downturns and recover more quickly. *Regional Services* is a diverse base industry that encompasses all services and goods that a region sells to those in surrounding areas. Examples include specialized health care, construction, air or rail transportation, and large item retail purchases like autos or appliances. *Retirees* are considered basic since they spend money earned from Social Security or other pensions, Medicare, and savings. *Government* typically only includes employment in the federal government and the state government. *Tourism* not only includes traditional tourist services like accommodation and food, but also includes second homes, property management, and transportation of tourists by airlines, car rental, car sharing, and shuttles.

In Figure 24, agribusiness stands out as a major base industry in the San Luis Valley, with 5,029 industry jobs. Retirees and health care and education services are the next highest, each with about 2,500 jobs.

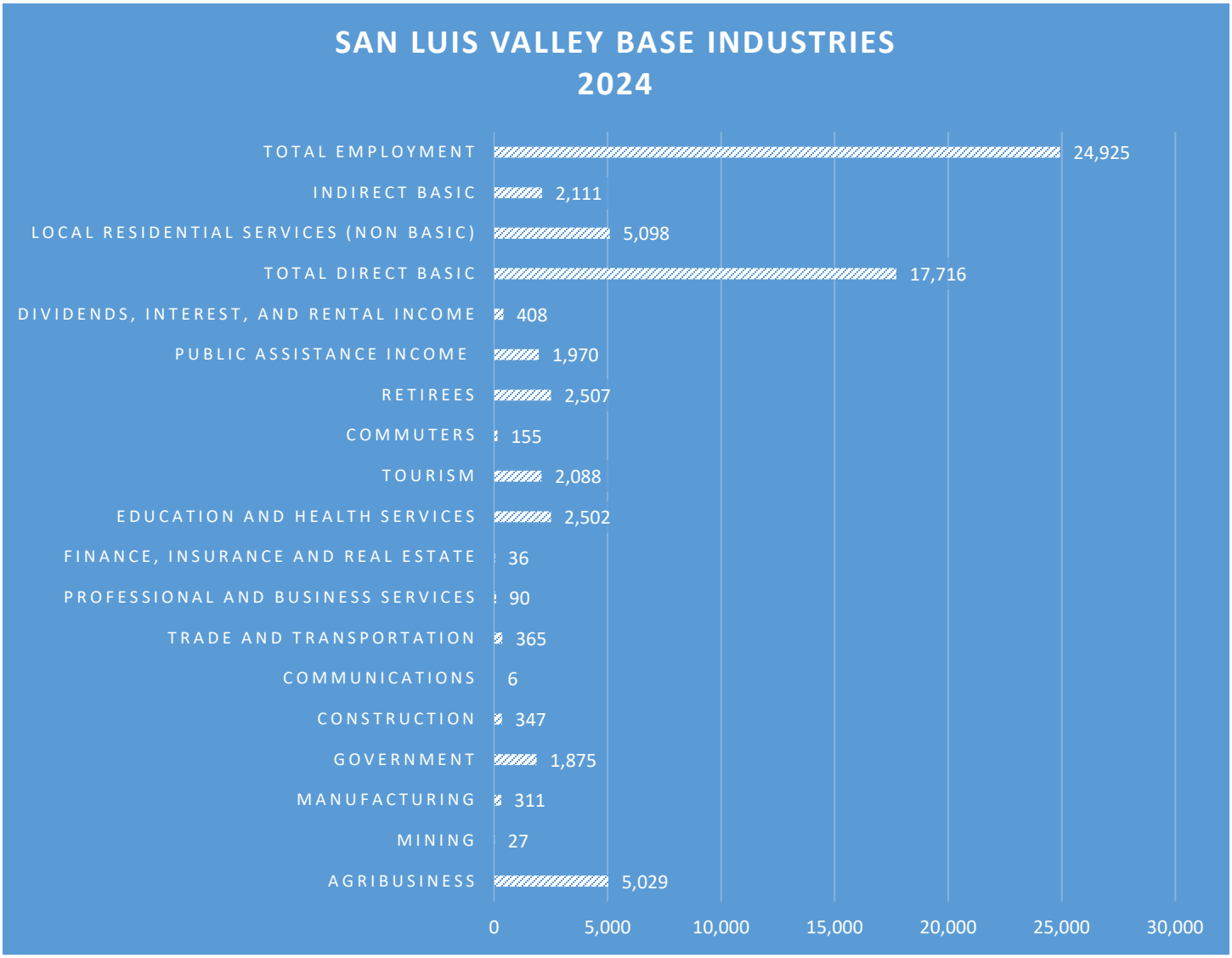


Figure 24 Source: Colorado State Demography Office State and Regional Base Industries Lookup

Employment Forecast

Understanding the types of jobs forecast to grow in a community, if jobs are forecast to increase, will aid in further understanding potential changes in population, labor force, housing demand, and household income. Important questions to ask include: What is the current forecast for job growth based on the current industry mix? What types of jobs are forecast to grow? What are the wages for those jobs? What are the labor force trends for the community?

The two lines diverge over time due to the aging of our population and continued growth in our under-18 population – two segments of the population that are less likely to be employed. Growth in the 65-plus population in the labor force through 2040 compared to the universe population of those over the age of 16, since labor force participation declines with age, especially among those eligible for pensions or social security.

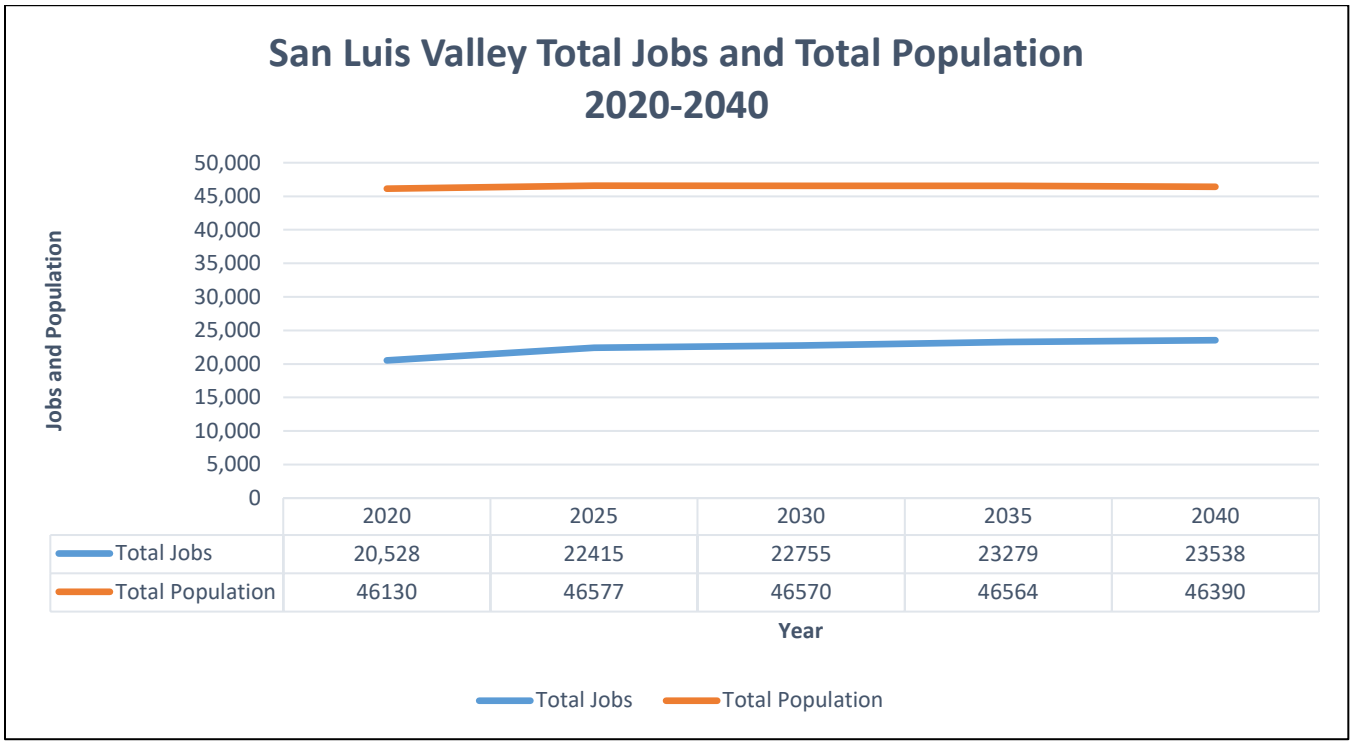


Figure 25 Source: *Colorado State Demography Office Economy and Jobs Data Spreadsheets*

Place of Work

Residents in the San Luis Valley drive a lot between communities for work, family, and activities. The City of Alamosa and Alamosa County are home to Adams State University and San Luis Valley Health, two of the region's major employers. Many people in neighboring counties, therefore, commute to Alamosa for work, especially from Conejos and Rio Grande counties.

Figure 26 illustrates the percentage of people who work out-of-state, outside and inside their county of residence in the San Luis Valley, compared with Colorado overall. Conejos, Costilla, and Mineral Counties have a higher percentage of people working out-of-state than the state average. All the counties in the region, except for Conejos County, work at a higher percentage in their home county than the state average. Conejos and Saguache Counties have the highest percentage of commuters, or people who drive to work in another county.

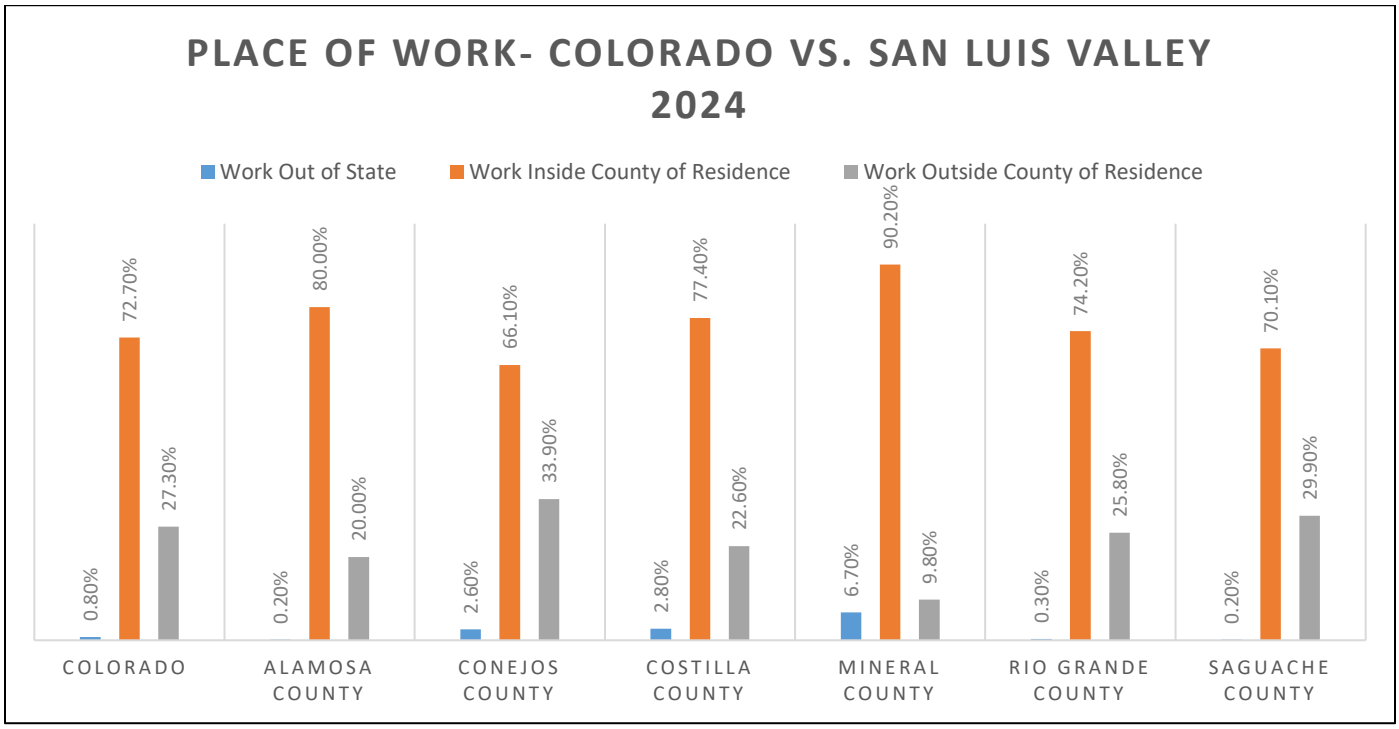


Figure 26 Source: *Colorado State Demography Office American Community Survey B08007 2024- Place of Work- State and County*

Remote Workers

The US Census Bureau's American Community Survey (ACS) offers more detail on the increase in people working from home since 2021. The pandemic normalized remote work and transformed how people show up to work each day. The Colorado State Demographer compiled spreadsheet B08301, incorporating the percentage of people working from home in municipalities and places, or census tracts in each county. In the San Luis Valley, although the entire workforce wasn't captured and often the sample size is so small that numbers can jump dramatically, some numbers stand out.

In Alamosa County, the City of Alamosa went from 1.5% people working from home in 2019 to 4.3% in 2024. East Alamosa CDP, or the census tract just east of city limits in the county, went from 4.1% people working from home in 2019 to 15.1% in 2024.

Conejos County communities saw big increases in remote workers. The Town of Antonito went from 4.2% of people working from home in 2019 to 9.8% in 2024. Sanford and La Jara had more dramatic increases, with Sanford jumping from 9.4% in 2019 to 29% in 2024, and La Jara going from 2% in 2019 to 26% in 2024. Costilla County communities were less dramatic. The town of Blanca reported a decrease from 5.9% in 2019 to 2.3% of the town's residents working from home. San Luis reported 5% in 2019 and again in 2024.

In Mineral County, the City of Creede showed a slight decline from 3.8% in 2019 to 2.6% in 2024. In Rio Grande County, the Town of Del Norte showed the most dramatic increase in remote workers, from 5.2% in 2019 to 10.7% in 2024. The City of Monte Vista showed a nominal increase from 5.4% in 2019 to 6.4% in 2024. The Town of South Fork has the most remote workers in Rio Grande County, but saw a slight decline between 2019 and 2024, from 34% to 20%. In Saguache County, the Town of Crestone saw a major increase in remote workers from 18.8% in 2019 to 45% by 2024.

ECONOMIC RESILIENCE



Identifying the major economic sectors in the regional economy helps to illustrate the region's economic resiliency – where diversity lies and where the economy is susceptible to external shocks and larger economic trends.

The San Luis Valley is a rural economy with agriculture as its major economic driver – as goes agriculture, so goes the region. Nearly one-third of the Valley's direct base industry income comes from agriculture production, processing of agricultural products, and inputs to production and processing.

Household income from unearned sources such as retirement plans, public assistance, and interest, dividends, and rents, makes up nearly a quarter of the regional direct base industry income.

Government, from all levels, also plays a major role in the region, with it accounting for about 15 percent of base industry income.

Regionally, tourism is also important, although seasonal in nature. For example, in Mineral County, tourism accounts for almost 70 percent of the county's base industry income, through direct spending, tourism-related industries like the Creede Repertory Theater and outdoor outfitting, as well as short-term rental income.

Economic Conditions since 2021

Over the past five years, the Valley has experienced expanded broadband investment, growth in tourism and remote work opportunities, and continued importance of agriculture, healthcare, education, and government services to the regional economy. At the same time, the region faces ongoing challenges related to population decline, workforce shortages, housing affordability, aging infrastructure, and long-term water sustainability. Demographic trends show an aging population and a shrinking workforce base, even as educational attainment has improved and entrepreneurship and innovation continue to grow. Housing costs and limited workforce housing remain major barriers to economic growth and employee retention across nearly every sector.

Specific economic investments include the rebuilt Outcalt-Ski Hi Convention Center, which reopened in Rio Grande County in 2022 following a $10 million investment. Outdoor recreation opportunities and related businesses continue to grow, anchored by the Sand Dunes and neighboring public lands.

Meanwhile, ownership of the local railroad changed with the bankruptcy of San Luis and Rio Grande Railroad in 2022 and subsequent purchase by Colorado Pacific Rio Grande Railroad (see more details in the Background section). The region also experienced the rise and fall of Friday Health Plans and the closure of the Alamosa Mushroom Farm, both major employers in the Alamosa County area. The aquifer and related agricultural economy continued to decline despite focused conservation efforts by the agricultural community. Adams State University and San Luis Valley Health are still the biggest employers outside government, and their stability remains critical to the region. School enrollment continues to decline in over a third of the region's school districts, raising concern about the sustainability of those districts. In the middle of it all, housing prices have almost doubled in some

communities, compounded by a significant increase in assessment rates on commercial and residential properties since 2021.

Despite these challenges, the San Luis Valley remains a resilient and diverse rural economy with strong regional partnerships, cultural heritage, and natural assets that continue to support long-term opportunity.

Influences on the Regional Economy

National Economic Trends

The San Luis Valley economy is generally less affected by national factors than other regions and is resistant to boom and bust cycles. An exception was the Great Recession of 2008, when unemployment rose significantly in all counties of the Valley; housing construction, particularly second homes, came to a halt; and lending tightened.

The region was affected by the COVID-19 pandemic, but less so than the Great Recession. Some segments of the economy were indeed impacted – entertainment, restaurants, gyms – but the region saw increases in tourism and retail sales over the previous year. An increase in domestic and in-state travel meant campgrounds were full and attractions experienced capacity numbers. The pandemic also prompted a wave of short-term and long-term rental housing pressure from people moving into the region seeking a more rural lifestyle, which was bolstered by additional government investment in broadband infrastructure.

These post-pandemic trends have continued since 2021. Retail sales across all six counties continue to grow, increasing by 12.35% from 2021 to 2025, from 1.5 billion in 2021 to 1.7 billion in 2025.

Demographic Trends

As also presented in the Demographic and Economic overview, the San Luis Valley region is seeing its population plateau, get older, and in some age groups, decline. This trend is particularly noticeable in the school-age population. Of the fourteen school districts presented in the background section, five face a 20% decrease in enrollment. And of those districts with stable or slight increases in overall enrollment, elementary enrollment is still declining by 10%, or in some cases 30%. An interactive map built by the Keystone Policy Center and published by the Colorado Sun in February 2026 provides detailed breakdowns of each district.

Another challenging trend is the increase in the percentage of the population over 50, either at or near retirement age. As also presented in the Aging section of the Demographic and Economic Overview, by 2040, 40% of the region's population will be over 50.

Economic Sector Trends

Agriculture

The Valley remains under severe drought conditions. Surface and ground water for crop irrigation is in short supply, affecting crop yields and further depleting the Valley's underground aquifers. During the 2025 irrigation season, ag producers used less water than at any time since the creation of special water conservation sub-districts in 2006, charging themselves up to $150/acre-foot through the process. Despite those conservation measures, the aquifer dropped to the lowest level ever recorded.

The most significant agricultural industries in the region are livestock, potatoes, alfalfa, and barley, although rye, quinoa, and hemp also hold a notable market presence. In the past years, cattle prices have fluctuated significantly due to a change in national cattle inventories, the price of feed and diesel fuel, constant fluctuation in commodity prices, as well as increased competition from beef imported from Canada, Mexico, New Zealand, Australia, and Brazil. In recent months, however, tariffs on imports and a right-sizing of inventory have raised

prices in a positive direction. Steers in October 2025 were selling for $602 per hundred-weight compared to $339 in September 2024, according to the USDA Ag Marketing Service.

Potato prices are dependent upon production in other states like Idaho and Washington, and upon export opportunities. The region's potato industry is also limited by distance to coastal markets compared to other growing regions in the country, which makes access to trade with Mexico beyond 25 miles of the border an ongoing priority. 2025 saw some of the highest potato yields in years in the San Luis Valley, but similar high yields in Idaho left potato prices at historic lows. Total potato acreage was at 51,474 acres, compared with 50,188 acres in 2024, according to the State of Colorado's Certified Seed program. By Spring 2026, a warm winter and oversupply contributed to the largest culling effort in recent memory according to the Alamosa Citizen, with experts estimating at least $60 million in lost revenue for potatoes that would be sold at reduced value or culled to make room for the 2026 harvest. The oversupply issue also serves as a reminder of the importance of researching alternative uses for cull potatoes, as well as attracting businesses in the region that utilize cull potato byproduct.

Alfalfa has held its strong price position with the region's premium dairy hay selling $200 per ton for conventional and $280 per ton for organic large square bales, according to the USDA Ag Marketing Service in October 2025. Diesel prices have continued to increase since 2019, which generally reduces the profit margin for all products that require hauling those products long distances. The average diesel price in Alamosa in October 2025 was $4.05/gallon.



Barley field in Alamosa County/ Brenda Felmlee

Barley has long served as a rotational crop with potatoes in the region, with similar-sized acreage and market share. The region grew over 28,000 acres of barley in the 2025 season, nearly 85% of Colorado's barley crop overall, contrasted with 44,000 acres in 2018, according to the USDA National Agricultural Statistics Service. The increased cost of groundwater, however, as well as a shift in bulk purchasing from Miller Coors away from the region, continues to reduce overall barley acreage.

Energy and Transmission

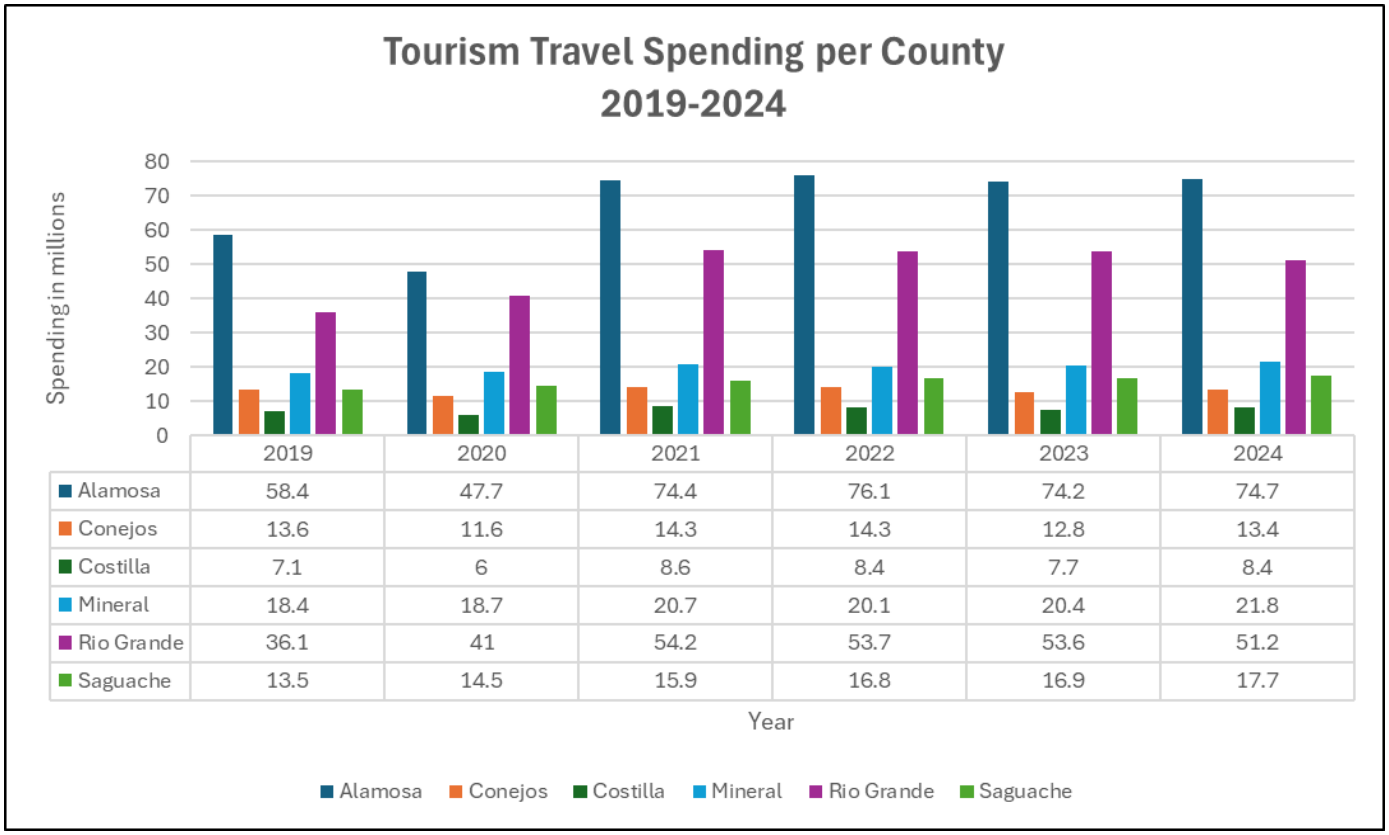
Renewable energy generation continues to grow in the San Luis Valley, despite transmission capacity challenges and concerns from the public. Multiple existing solar facilities generate 150 megawatts in Alamosa County alone. Efforts continue to secure redundant transmission out of the region, and DRG staff participate in those planning and advocacy efforts. The Colorado Public Utility Commission continues to consider whether a Certificate of Public Convenience and Necessity, or CPCN, still stands from 2010, dictating that a route be identified and funded to meet the needs of San Luis Valley customers. Alamosa County secured funding in 2024 from the Department of Energy to help study a redundant transmission route, but those funds are suspended as of this CEDS update. Saguache County and Rio Grande County are also undergoing their own land use regulations updates related to solar projects, with the hopes of identifying siting barriers and public concerns ahead of project submissions.

Renewable Energy development continues to offer a chance to utilize underutilized agricultural land and diversify the Valley's economic base. Some farmers have successfully converted their lands over to solar farms if they're close to existing transmission and at sites with community support. The financial benefits of solar on farm ground depend on each project and the ability of companies to purchase land outright or pay landowners lease payments.

Tourism and Outdoor Recreation

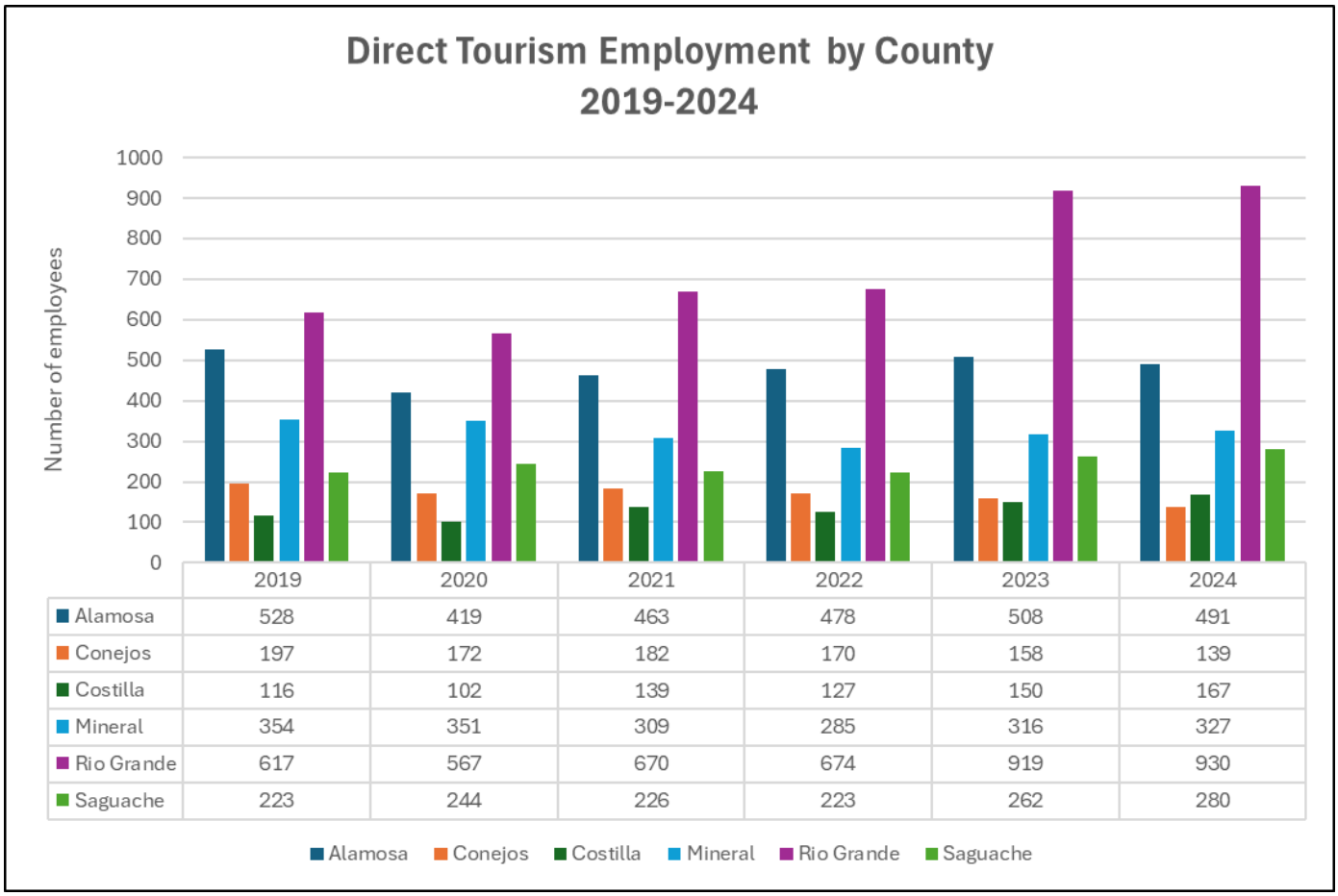
The economic impact of tourism in the San Luis Valley is significant and continues to grow, fueled by increased outdoor recreation, visitation to the Great Sand Dunes National Park, and the vacation rental industry. The Dunes has attracted over 500,000 visitors annually since 2019, where previous averages were half that number.

The table and chart below reflect the overall increase in tourism spending across all six counties since 2019. The pandemic had a dramatic effect on tourism, first almost completely suspending it in 2020, but with a rebound in spending and jobs by 2021, far exceeding 2019 numbers. By 2024, tourism spending had increased in Alamosa County by 28% from 2019; 15% in Costilla County and Mineral County; 29% in Rio Grande County, and 24% in Saguache County.



	2019	2020	2021	2022	2023	2024
Alamosa	58.4	47.7	74.4	76.1	74.2	74.7
Conejos	13.6	11.6	14.3	14.3	12.8	13.4
Costilla	7.1	6	8.6	8.4	7.7	8.4
Mineral	18.4	18.7	20.7	20.1	20.4	21.8
Rio Grande	36.1	41	54.2	53.7	53.6	51.2
Saguache	13.5	14.5	15.9	16.8	16.9	17.7

Source: Colorado Tourism Office Travel Stats Dashboard, Dean Runyan Associates



	2019	2020	2021	2022	2023	2024
Alamosa	528	419	463	478	508	491
Conejos	197	172	182	170	158	139
Costilla	116	102	139	127	150	167
Mineral	354	351	309	285	316	327
Rio Grande	617	567	670	674	919	930
Saguache	223	244	226	223	262	280

Source: Colorado Tourism Office Travel Stats Dashboard, Dean Runyan Associates

The Monte Vista Crane Festival and related bird watching activities also continue to be a major tourist attraction. A 2021 Study commissioned by Colorado Open Lands and the Friends of the San Luis Valley National Wildlife Refuges studied the economic impact of sandhill crane visitors over a 30-day period in mid-February to mid-March. The study found $3.34 million in local and non-local direct spending by visitors coming to see the birds. This impact is notable because it's in late Winter and early Spring, a very different time of year than peak visitation at the Great Sand Dunes National Park. With the completion of the new Outcalt facility and an adjacent hotel pending completion, the Monte Vista Crane Festival has the potential to have an even larger economic impact in early Spring.



Sandhill cranes at Monte Vista Refuge/Brenda Felmlee

San Luis Valley Great Outdoors has grown as an organization since the last CEDS update and plays a critical role in funding and completing outdoor recreation projects across the region. This organization was incubated by Development Resources Group since 2013, and in 2023, it moved to its own office in downtown Alamosa. They have helped secure millions of dollars for trails development near Saguache, Crestone, Alamosa, San Luis, and Del Norte. They are the regional host for the Generation Wild program to get more kids outside, as well as the Embajadores program, which facilitates bilingual adventure trips while promoting active lifestyles and community well-being. Most notable is their role as San Luis Valley's designated regional partner through the Colorado Outdoor Regional Partnership initiative, in coordination with Colorado Parks and Wildlife and Great Outdoors Colorado. They recently finalized their Regional Partnership Strategy in 2025 to inform their work on priorities aligned with the CEDS, including workforce development, rural revitalization, legacy and heritage, and diversification of recreational opportunities.

External Economic Shocks

Natural disasters and the influences of nature seem to have the biggest impacts on the Valley's economy, but it is also influenced by governmental policy and budgetary decisions.

Drought and the Price of Water

As previously discussed in the region background, the San Luis Valley has been in a severe drought for nearly twenty-five years. Lower river flows due to reduced snowpack and earlier runoff have affected surface flows for irrigation, while over-pumping of the region's aquifer faces pending sanction and regulation from the State of Colorado. The result has been higher production costs, reduced production of some crops, and fallowing of land.

Efforts by the region's water users to tax themselves to conserve groundwater are also raising the price of water overall. By the time this report is finalized, Sub-District 1's fourth annual replacement plan may be in effect. Pending the results of litigation scheduled for July 2026, this plan calls for farmers to pay $500 an acre-foot for any groundwater usage that exceeds their surface water supply. Although this price is theoretical at the time of this update, it has cast a chilling effect on the agricultural economy, especially in the Sub-district 1 region northwest of Alamosa and east of Monte Vista and Del Norte. According to multiple interviews, twenty years ago, a farm with five crop circles used to be marginally profitable, but now that scale of profitability has risen to at least 15 circles.

In the Spring of 2025, a study on the value of water in the San Luis Valley across all sectors was published, thanks to the support of many key water and recreation-related partners in the region. The report broke down the economic impacts and outputs of water as well as the economic benefits. Between irrigated agriculture, water-dependent industries, recreation, and habitat, the total direct, indirect, and induced outputs add up to $ 2,541.9 million in economic impacts. The report also found another $1,578.2 million in economic benefits tied to drinking water, recreation, habitat and wildlife, and cultural heritage.

Health Care Workforce Challenges



In 2021, Friday Health Plans insurance was still growing as a major health care employer in the region. Founded in 2015 when owners purchased Alamosa-based Colorado Health Plans, the company employed 400 people at its peak, with most employees based out of their Alamosa office. The company focused on Affordable Care Act marketplace plans and operated in seven states, serving nearly 400,000 customers.

Locally, the company enticed doctors, nurses, and health care admin staff from existing providers with attractive salaries, creating a workforce scramble at San Luis Valley Health, Valley-Wide Health Systems, and Rio Grande Hospital. In the Spring of 2022, the company was committing to a major construction project in downtown Alamosa, but by November, they announced they were reducing their footprint from seven states to five, laying off 55 employees. By next March, an additional 98 employees were laid off, and by June 2023, the company was insolvent and laid off its remaining 323 employees. As the company shared in one of their last press releases, "Friday Health Plans has grown incredibly quickly but has been unable to scale its financial infrastructure to match the pace of their growth and secure the additional capital to run their business."

Since the collapse of the company, the health care employment sector in the region has returned to its previous fragile condition. Local nursing and training programs at Adams State University and Trinidad State College generate graduates each year but retention of highly skilled medical professionals remains a challenge.

Payment In Lieu of Taxes (PILT) and Secure Rural Schools (SRS)

The federal government pays counties for untaxable federal land within their boundaries. They also make a distinction between payments for forest land through the Secure Rural Schools program and other federal lands through the Payment In Lieu of Taxes programs. SRS funds are also intended to be spent on road maintenance and schools. In 2024, that meant over $6.4 million in income to the region, a critical portion of county budgets. In the past, delays by Congress to pass legislation authorizing PILT and SRS payments negatively impacted local governments. In 2025, however, SRS funding lapsed, resulting in a reversion to payments reflecting 25% of timber receipts. These payments were a fraction of previous numbers, resulting in a reduction of funding to counties to only $4.6 million. For Conejos County, the loss was over $300,000, and in Saguache, the loss was over $1 million, directly impacting those counties' road and bridge services and school districts.

Fortunately, on December 9, 2025, following extensive lobbying and education efforts by counties and school districts, Congress reauthorized the Secure Rural Schools Program for two years and provided back payments to affected counties. By April 2026, the Forest Service restored payments to the five counties in the region with significant forest service acreage. Those payments were $29,884.30 to Alamosa County; $388,271 to Conejos County; $234,685 to Mineral County; $205, 943 to Rio Grande County, and $1.45 million to Saguache County. Although this funding came through in the end, this case study illustrates the uncertainty for counties and school districts to rely on these funds for long term planning or significant projects.

STRENGTHS-WEAKNESSES-OPPORTUNITIES-THREATS

On February 2, 2026, the CEDS Committee and DRG staff conducted a two-hour discussion on the previously identified strengths, weaknesses, opportunities, and threats in 2021. The committee evaluated what was still relevant and identified new themes and topics that should be added to the list. Overall, while much of the 2021 list was still relevant, many topics were added and integrated into the updated list below. The SWOT discussion also informed the Economic Resilience and Action Plan in this CEDS update.

Strengths

Unique culture and history

Outdoor recreation opportunities

Diverse agricultural economy

Two higher education institutions

Renewable energy resources

Sense of community

Underutilized land

Not overly regulated

Local decision-making

Abundant natural resources

Dark skies

Lower cost of living

Geographic isolation, including mountains as a boundary against radio frequency disruption in the aviation and aerospace industries

Low traffic volume

High quality of life

Strong systems overall



Saguache Hotel, Saguache County/Brenda Felmlee

Weaknesses

Economies of scale

Freight – logistics

Isolation – cost driver

Persistent poverty

Limited career opportunities

Limited gas, electric, and tech capacity

Lack of affordable housing

Low Median Household Income

Limited transit services

Duplication between services

Competing events between communities

Maturing workforce

Perception of high crime rate even though Alamosa is lower crime rate than Denver

Market volatility and lack of market study analysis

Challenge in attracting capital investment

Limited access to fresh food in food deserts

Wind, dust, and occasionally poor air quality



Lane Six and Sangre de Cristo Mountains, Alamosa County

Opportunities

Demand for natural and local food products

Expanded healthcare services

Value-added agriculture, including dry beans, rye, and wool pellets

Growing outdoor recreation economy

Revegetation economy tied to reduction in ag production

Incentivizing local ownership in housing, utilization, and rehab of vacant buildings

AI: Improvement in services compared to non-AI jobs for traditional workforce

Excess energy capacity tied to a reduction in agricultural production

Increased housing availability and affordability compared with the rest of Colorado

Investment in the workforce

Expanding tourism economy

Solar development at the distributed and utility scale, including improving storage technology

Proximity to Texas, New Mexico

Excess fiber and energy capacity to sustain a data center of a particular scale



Sheep herding with Mt. San Antonio and Mogote Peak in the background, Conejos County/Brenda Felmlee

Threats

Drought and water resource management

Lack of utility redundancy

Capacity – population

Political leadership

Aging demographic

Shortage of adequate housing

Unfunded mandates

Lack of workforce retention

Loss of revenue to utility providers with declining ag productions (also an opportunity)

Limited growing season

Medicare/Medicaid cuts and increased work requirements for SNAP

Generational poverty mindset

Centralized capitalization

2026-2031 ACTION PLAN IMPLEMENTATION NARRATIVE

Building Regional Prosperity Through Infrastructure, Workforce Development, Innovation, Resilience, and Manufacturing Expansion

Guided by regional collaboration, strategic investment, and public-private partnerships, this five-year implementation plan outlines how local governments, economic development organizations, educational institutions, businesses, and state and federal agencies will work together to strengthen the Valley's economy and improve the quality of life for residents.

The implementation period from April 2026 through March 2031 focuses on five interconnected goal areas: Critical Infrastructure, Workforce Development, Innovation and Entrepreneurship, Economic Recovery & Resilience, and the complete development of a regional Manufacturing Sector Strategy. Together, these initiatives are designed to position the San Luis Valley as a competitive rural economy capable of attracting investment, supporting business expansion, increasing wages, and creating sustainable employment opportunities.

Regional Vision

The San Luis Valley seeks to build a robust, diversified economy rooted in its agricultural heritage, natural resources, entrepreneurial culture, and emerging opportunities in advanced manufacturing, renewable energy, logistics, and outdoor recreation. Through coordinated implementation of this strategy, the region will improve infrastructure capacity, strengthen workforce readiness, expand business development services, and create conditions that support both existing industries and new economic sectors.

The CEDS implementation strategy recognizes that rural economic development requires long-term investment, regional cooperation, and adaptive planning. The actions identified within this document provide a practical roadmap for achieving measurable economic outcomes over the next five years while preparing the region for future growth opportunities.

Goal Area A: Critical Infrastructure

Reliable infrastructure remains foundational to economic competitiveness, business attraction, and community sustainability throughout the San Luis Valley. Investments in utilities, transportation systems, telecommunications, and housing directly support workforce growth, industrial recruitment, and long-term economic resilience.

Electrical Transmission Reliability and Regional Energy Resources

Over the next five years, regional stakeholders will pursue planning and implementation activities aimed at improving energy distribution reliability and increasing redundancy across the Valley's electrical infrastructure network. Led by Alamosa County with support from the U.S. Department of Energy, this effort will address vulnerabilities in rural transmission systems while preparing the region for expanded industrial and manufacturing demand, and be prepared for potential energy export derived from any local energy resources.

Simultaneously, SLVDRG will continue assessing regional renewable energy resources, including solar, geothermal, biomass, and agricultural energy applications. These assessments will support future investment opportunities and provide the groundwork for renewable energy integration into industrial and manufacturing development projects. Renewable energy capacity is expected to become a major competitive advantage for future manufacturing recruitment, particularly for companies seeking low-cost, sustainable power sources.

Transportation and Highway Connectivity

Efficient transportation systems are essential for freight movement, workforce mobility, tourism, and regional commerce. Through ongoing coordination with the San Luis Valley Transportation Planning Region (TPR), SLVDRG will advocate for strategic highway improvements, long-range transportation planning, the establishment of a dedicated regional transportation planning position, and support for expanding railroad freight metrics.

Transportation planning efforts during this cycle will prioritize:

- Freight movement efficiency, including rail
- Industrial site accessibility
- Rural connectivity, including rail
- Safety improvements
- Regional logistics coordination
- Future manufacturing transportation needs, including rail
- GIS capacity and data aggregation to support all the above

These investments will strengthen the Valley's ability to support industrial growth while improving access between communities and economic centers.

Workforce Housing Development

Affordable workforce housing remains one of the region's most significant barriers to economic expansion and employee retention. Over the next five years, SLVDRG will support community-initiated housing studies and assist local governments in pursuing state and federal housing grants.

The housing strategy will focus on:

- Workforce housing feasibility studies
- Development-ready housing sites
- Infrastructure planning for housing expansion
- Public-private housing partnerships
- Financing strategies for rural housing construction

Addressing housing availability is critical to supporting future workforce expansion, particularly within healthcare, education, manufacturing, construction, and hospitality industries.

Goal Area B: Workforce Development

Economic growth depends on the availability of a skilled and adaptable workforce. The San Luis Valley's workforce strategies are designed to strengthen labor participation, align training programs with employer needs, and prepare residents for evolving industry demands.

Regional Workforce Needs Assessment

SLVDRG will coordinate the ongoing collection of workforce input through chambers of commerce, employers, educational institutions, and economic development partner meetings. These efforts will create a dynamic understanding of regional labor shortages, emerging occupational demands, and training priorities.

Workforce data collection will guide:

- Training program development
- Employer partnerships
- Career pathway initiatives
- Industry recruitment strategies
- Educational investments

This process ensures workforce initiatives remain aligned with actual regional economic needs.

Higher Education and Workforce Training Partnerships

Regional educational partnerships will play a major role in workforce development implementation. SLVCOG will expand regional geographic information systems (GIS) awareness and workforce training opportunities, helping residents and students gain skills applicable to geospatial technologies related to sectors such as infrastructure planning, natural resource management, agriculture technology, public safety, and economic development.

Additionally, Trinidad State College curriculum programs will support workforce preparation in the hospitality and customer service sectors while creating scalable models for future manufacturing and industrial workforce training partnerships.

Over time, the region anticipates expanding workforce partnerships into:

- Industrial maintenance training, including Automation and Robotics
- Welding and fabrication, including CNC machining
- Logistics and transportation
- Renewable energy systems
- Agricultural technology, including Automation and Robotics

These educational partnerships will become foundational to the Manufacturing Sector Strategy.

Goal Area C: Innovation and Entrepreneurship

Entrepreneurship and innovation remain essential components of the San Luis Valley economy. This section focuses on strengthening regional business support systems, improving access to information, and creating an environment that encourages investment and business growth.

Core Business Support Programs

SLVDRG will continue administering the Colorado Enterprise Zone Tax Credit and Contribution Projects Program to incentivize private-sector investment throughout the region. The program will support business expansion, job creation, and capital investment in targeted industries.

SLVDRG will also continue promoting Small Business Development Center (SBDC) programming, entrepreneurial education, and technical assistance services. These resources provide critical support to startups, existing businesses, and entrepreneurs seeking to scale operations or pursue new markets.

Colorado Opportunity Zone promotion efforts will focus on attracting private investment into designated development areas. Regional marketing and prospecting strategies will target industries aligned with the Valley's strengths, including advanced agriculture, renewable energy, outdoor recreation, and manufacturing.

Regional Data Repository

Accurate economic and demographic data are essential for informed decision-making and investment attraction. SLVDRG will continue serving as the region's primary economic data repository by producing annual statistical profiles and responding to business and community data requests.

GIS Framework

Concurrently, SLVDRG and SLVCOG will implement a comprehensive regional GIS framework. GIS infrastructure will support many economic development objectives, including transportation and drive-time analysis, housing development analysis, industrial site mapping, utility coordination, and disaster preparedness, response, & recovery.

The GIS Strategic Plan will create a unified regional platform capable of supporting both public planning and private investment decisions.

Strengthening the Regional Economic Development Network

Through partnerships with El Pomar Foundation, Colorado Housing and Finance Authority (CHFA), DOLA, Rural Opportunity Office, OEDIT, and regional stakeholders, SLVDRG will coordinate training, networking, and capacity-building activities for economic development organizations across the Valley.

This collaborative model will improve:

- Regional coordination
- Grant competitiveness
- Shared economic priorities
- Technical assistance delivery
- Investment attraction efforts

The regional approach ensures that smaller communities benefit from shared expertise and collective economic development capacity.

Development-Ready Site Identification

Over the next five years, SLVDRG will use GIS technologies to catalog and evaluate potential development sites for shovel-ready designation.

Site readiness assessments will include:

- Utility availability
- Transportation access
- Environmental considerations
- Zoning compatibility
- Broadband capacity
- Workforce proximity

Prepared industrial and commercial sites are essential to attracting manufacturing, logistics, and renewable energy investment.

Goal Area D: Economic Recovery and Resilience

Economic resilience planning ensures the San Luis Valley can adapt to industry disruptions, environmental challenges, natural & manmade disasters, and changing economic conditions while maintaining long-term stability.

Access to Capital

SLVDRG will continue providing gap financing through the SLV Business Loan Fund while partnering with lenders and government agencies to reduce financing barriers for businesses and entrepreneurs.

Capital access initiatives will support:

- Business expansion
- Equipment purchases
- Startup financing
- Working capital
- Industrial modernization
- Manufacturing upgrades

Loan packaging and government guarantee programs will help local businesses secure financing while reducing risk for participating local lenders.

Agricultural Lending and Value-Added Agriculture (Objectives 2 & 3)

Agriculture remains a cornerstone of the Valley economy. During this implementation period, regional partners will investigate opportunities for specialized agricultural lending and explore the development of revolving loan funds supporting niche agricultural projects and emerging industries.

Additionally, SLVDRG will assess opportunities for value-added agriculture and seek businesses capable of expanding regional agricultural processing infrastructure. These efforts may include:

- Food processing
- Potato byproduct research and utilization
- Cold storage
- Biomass utilization
- Forestry product manufacturing
- Agricultural technology integration

Value-added agriculture strategies directly support manufacturing diversification while increasing local economic retention.

Outdoor Recreation Infrastructure

The region will continue supporting initiatives focused on trail development, recreation infrastructure, and outdoor recreation business growth. Outdoor recreation investments strengthen tourism, improve quality of life, and support talent attraction strategies essential to long-term workforce retention.

Business Disaster Preparedness and Recovery

Strengthening business resilience to natural and manmade disasters is essential to safeguarding the regional economy and accelerating recovery when disruptions occur. Over the next five years, SLVDRG will coordinate with emergency management partners to integrate business recovery priorities into regional hazard mitigation planning, ensuring economic continuity is considered alongside public safety and infrastructure protection.

In partnership with SLVCOG, SLVDRG will investigate a Pre-disaster Recovery Framework that leverages GIS-based vulnerability data to identify at-risk industries, employment centers, and infrastructure exposures across the Valley. Complementing these planning efforts, SLVDRG will deliver business continuity and preparedness education through economic development organizations, chambers of commerce, and partner agencies—helping businesses build continuity plans, access recovery resources, and strengthen their capacity to withstand future disruptions.

Goal Area E: Manufacturing Sector Development

Comprehensive Five-Year Manufacturing Buildout Strategy

The Manufacturing Sector Strategy represents the most significant expansion area within the 2026–2031 CEDS framework. Over the next five years, the San Luis Valley will establish a coordinated manufacturing development ecosystem focused on job creation, industrial diversification, value-added production, and regional competitiveness.

The manufacturing initiative will leverage the Valley's existing strengths in agriculture, renewable energy, transportation access, workforce potential, and available industrial land to create a scalable manufacturing economy.

Manufacturing Vision

The San Luis Valley will become a rural manufacturing hub specializing in:

- Value-added agricultural processing
- Forest and biomass products
- Renewable energy component manufacturing
- Light industrial fabrication
- Agricultural equipment technology
- Packaging and logistics
- Advanced materials opportunities
- Outdoor recreation product manufacturing

The region's manufacturing strategy prioritizes industries compatible with rural infrastructure, workforce availability, natural resources, and long-term sustainability goals.

Establish Regional Manufacturing Recruitment and Planning Capacity

Successful manufacturing recruitment depends on knowing the region's competitive position and the sectors most likely to grow here. During the early implementation phase, SLVDRG will build that foundation through a regional market analysis, identification of target sectors aligned with the Valley's assets, and development of recruitment materials that can be carried into conversations with state economic development partners. This groundwork will position the region to compete more effectively for industrial investment over the remainder of the CEDS cycle.

Develop Manufacturing-Ready Industrial Sites

Prepared industrial sites are critical for attracting manufacturing investment, and most companies will not seriously consider a community where land readiness or infrastructure is uncertain. Working closely with local governments, SLVDRG will identify and prioritize industrial development zones, coordinate land use planning, and pursue shovel-ready certifications for the most promising parcels. Site assessments will evaluate:

- Utility availability and capacity
- Broadband connectivity
- Transportation and freight access
- Zoning and permitting readiness

Bringing a portfolio of vetted sites to market will reduce project timelines for prospective manufacturers and strengthen the region's competitive position.

Build a Manufacturing Workforce Pipeline

A skilled workforce is among the most important factors in manufacturing recruitment and retention. Trinidad State College will lead the expansion of regional technical training in partnership with SLVDRG and area workforce centers, with curriculum aligned to the trades manufacturers most often hire for:

- Welding and fabrication
- Machining
- Industrial automation
- Logistics and supply chain

Parallel outreach in regional schools, paired with internships and employer-based learning, will introduce manufacturing as a career pathway earlier in students' education and build a sustained pipeline of local talent.

Support Existing Manufacturers and Industrial Businesses

Retaining and growing existing manufacturers is just as important as recruiting new ones, since established firms anchor employment, supply chains, and the tax base. SLVDRG's business retention and expansion work will provide a steady touchpoint with local manufacturers, helping them access capital for modernization, navigate tax incentives and grant programs, and identify opportunities for technology upgrades or process improvements. Strengthening supply chain connections within the Valley will be a particular focus, opening opportunities for regional firms to do business with one another.

Expand Value-Added Agricultural Manufacturing

With one of the most productive agricultural economies in the state, the San Luis Valley is well-positioned to capture more of the value its growers currently ship out raw. SLVDRG and CSU Extension will work to recruit processing, packaging, and food manufacturing operations to the region while building out the cold storage and distribution infrastructure these businesses depend on. Encouraging cooperative processing models and stronger producer-to-processor linkages will help keep more revenue circulating locally and create new market access for Valley producers.

Expected Outcomes by 2031

Through implementation of this strategy, the San Luis Valley anticipates measurable progress across multiple economic indicators, including:

- Increased private-sector investment
- Expanded industrial and manufacturing employment
- Improved workforce participation
- Greater regional economic diversification
- Increased availability of development-ready industrial sites
- Enhanced infrastructure reliability
- Expanded entrepreneurial support capacity

- Increased value-added agricultural production
- Strengthened regional resilience to economic disruptions

The Manufacturing Sector Strategy specifically is expected to establish a sustainable framework for long-term industrial growth that extends beyond the current CEDS cycle.

Conclusion

The 2026–2031 San Luis Valley Comprehensive Economic Development Strategy represents a coordinated regional effort to strengthen infrastructure, expand workforce opportunities, support entrepreneurship, improve resilience, and build a modern manufacturing economy.

Implementation of this plan will require continued collaboration among local governments, businesses, educational institutions, nonprofit organizations, state and federal agencies, and community stakeholders. Through strategic investment and regional coordination, the San Luis Valley will position itself for sustainable economic growth while preserving the unique character and strengths that define the region.

This five-year implementation period lays the foundation for a more diversified, competitive, and thriving regional economy capable of supporting future generations throughout the San Luis Valley.

2026-2031 ACTION PLAN IMPLEMENTATION FRAMEWORK

The chart below provides a structure for the implementation of the 2026-2031 Action Plan Narrative as part of the annual reporting and evaluation requirements for the Economic Development Administration. Future annual reports to EDA will include this chart structure and related progress towards meeting the goals, objectives, and strategies described in this Action Plan.

Goal Overview:

CEDS Goal, Objective, Strategy

Goal Area	Active Strategy	Priority Focus	Timeline
A. Critical Infrastructure	3	High / Medium	April 2026 – March 2031
B. Workforce Development	2	High / Medium	April 2026 – March 2031
C. Innovation & Entrepreneurship	5	High / Medium	April 2026 – March 2031
D. Economic Recovery & Resilience	4	High / Medium	April 2026 – March 2031
E. Manufacturing	5	High / Medium	April 2026 – March 2031

A. Critical Infrastructure

Planning or implementing projects supporting public facilities, transportation, or telecommunications infrastructure.

OBJECTIVE 1: IMPROVE ELECTRICAL TRANSMISSION RELIABILITY & RENEWABLE ENERGY

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Support planning & development to improve energy distribution and redundancy	Medium	Alamosa County	DOE	April 2026 – Oct 2028
Assess local energy resource availability, including renewable potentials	Medium	SLVDRG	CO Governor's Office of Economic Recovery	April 2026 – March 2028

OBJECTIVE 2: IMPROVE THE REGIONAL TRANSPORTATION NETWORK

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Coordinate regional transportation planning through the SLV Transportation Planning Region; provide input for the next regional transportation plan. Advocate for a regional TPR paid position.	High	SLVDRG	CDOT	April 2026 – March 2031

OBJECTIVE 3: DEVELOP AFFORDABLE WORKFORCE HOUSING

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Support community-initiated housing studies	High	SLVDRG	DOLA, HUD, EPA, Local banks	April 2026 – March 2031
Apply for state housing grants on behalf of local governments	High	SLVDRG	DOLA	Sept 2026 – March 2031

B. Workforce Development

Projects supporting job skills training aligned with regional hiring needs or promoting labor force participation.

OBJECTIVE 1: DETERMINE REGIONAL WORKFORCE NEEDS

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Gather workforce input from Chambers of Commerce and economic development partner meetings	High	SLVDRG	EDA, Private Sector/CDLE	April 2026 – March 2031

OBJECTIVE 2: ADDRESS WORKFORCE GAPS THROUGH HIGHER EDUCATION PARTNERSHIP

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Support for expanding regional GIS awareness, workforce training, and internships	High	SLVCOG	CCCS, CDLE, DOLA, EDA	April 2026 – March 2031
Strengthen partnerships with Trinidad State College, Adams State University, and healthcare institutions	Medium	SLVDRG	USDOL, CWDC, EDA	April 2026 – March 2031

C. Innovation & Entrepreneurship

Projects supporting innovation infrastructure, business development, and lending, or the commercialization of new technologies.

OBJECTIVE 1: ADMINISTER CORE BUSINESS SUPPORT PROGRAMS

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Administer the Colorado Enterprise Zone Tax Credit & Contribution Projects Program	High	SLVDRG	OEDIT	April 2026 – March 2031
Support and promote the SLV SBDC business education curriculum for entrepreneurs and existing businesses	High	SLVDRG	SBA, Adams State University	April 2026 – March 2031
Support San Luis Valley Small Business Development Center operations	Medium	SLVDRG	SBA, Adams State Univ.	April 2026 – March 2031
Use Opportunity Zones to attract private investment; designate eligible tracts and actively market and prospect sites to potential investors	Medium	SLVDRG	OEDIT, Local Banks, Businesses	April 2026 – March 2031

OBJECTIVE 2: PROMOTE SLVDRG AS THE REGIONAL DATA REPOSITORY

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Produce an annual Statistical Profile of the San Luis Valley region (in years when CEDS is not being updated)	High	SLVDRG	EDA	April 2026 – March 2031
Respond to economic and demographic data requests from businesses, nonprofits, and government	High	SLVDRG	EDA	April 2026 – March 2031

OBJECTIVE 3: BUILD A REGIONAL GIS FRAMEWORK

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Seek funding partnerships for the implementation of the GIS Strategic Plan	High	SLVDRG / SLVCOG	OEDIT, DOLA, SIPA, EDA	April 2026 – March 2031
Implement GIS for economic development projects	High	SLVCOG	State & Federal Funds	July 2026 – Jan 2028

OBJECTIVE 4: STRENGTHEN THE REGIONAL EDO NETWORK

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Leverage El Pomar, CHFA, and DOLA REDI grant to inventory needs, bring in training, and provide networking for economic development organizations across the region	High	SLVDRG	El Pomar Foundation, DOLA, CHFA, SLVDRG	July 2026 – Dec 2028

OBJECTIVE 5: IDENTIFY AND PREPARE DEVELOPMENT-READY SITES

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Inventory potential development sites and assess for shovel-ready designation	Medium	SLVDRG	El Pomar Foundation, DOLA	April 2026 – March 2031

D. Economic Recovery & Resilience

Projects enhancing the area's ability to withstand and recover from adverse economic conditions, industry contractions, or natural/manmade disaster impacts.

OBJECTIVE 1: INCREASE ACCESS TO CAPITAL FOR BUSINESSES

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Provide gap financing through SLV Business Loan Fund, including CDBG, EDA, and Forest Service funding sources	High	SLVDRG	OEDIT, SLVDRG	April 2026 – March 2031
Maintain cooperation and participation with area lenders for business loan packaging	High	SLVDRG	SLVDRG	April 2026 – March 2031
Utilize government loan guarantee programs to reduce risk for local lenders	High	SLVDRG	OEDIT, CSFS	April 2026 – March 2031

OBJECTIVE 2: EXPAND AGRICULTURAL LENDING OPTIONS

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Investigate the need for and potential development of a revolving loan fund for agricultural projects and niche industries.	Low	SLVDRG	SLVDRG, EDA, CSFS	April 2026 – March 2031

OBJECTIVE 3: SUPPORT VALUE-ADDED AGRICULTURE & DIVERSIFY THE ECONOMY

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Assess value-added agriculture opportunities and seek businesses that develop infrastructure for potato byproduct research and utilization, forestry, and value-added agriculture	Medium	SLVDRG	OEDIT, CSU, USDA, CSFS	April 2026 – March 2031

OBJECTIVE 4: GROW OUTDOOR RECREATION INFRASTRUCTURE

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline

Continue support of outdoor recreation through partnering, GIS collaboration, and grant assistance	Medium	SLVDRG	GOCO, CPW, DOLA,	April 2026 – March 2031

OBJECTIVE 5: STRENGTHEN BUSINESS DISASTER PREPAREDNESS & RECOVERY

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Coordinate with emergency management partners to integrate business recovery into regional hazard mitigation planning	High	SLVDRG	EDA, DOLA, CO DHSEM, FEMA	April 2026 – March 2031
Develop a Pre-disaster Recovery Framework or Plan with vulnerabilities & other GIS-based data	High	SLVDRG/ SLVCOG	EDA, SBA, FEMA	April 2026 – March 2028
Deliver business continuity and preparedness education through EDOs and other organizations	Medium	SLVDRG	SBA, EDA, OEDIT, FEMA	April 2026 – March 2031

E. Manufacturing Sector Development

Projects encouraging job creation, business expansion, technology, capital upgrades, and productivity growth in manufacturing and domestic production.

OBJECTIVE 1: ESTABLISH REGIONAL MANUFACTURING RECRUITMENT & PLANNING CAPACITY

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Conduct a regional manufacturing market analysis; identify target sectors aligned with regional assets; develop recruitment materials and coordinate with state economic development agencies.	High	SLVDRG	EDA, OEDIT, USDA, DOLA	April 2026 – March 2027

OBJECTIVE 2: DEVELOP MANUFACTURING-READY INDUSTRIAL SITES

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Identify and prioritize industrial development zones; complete infrastructure assessments; pursue shovel-ready site certifications; coordinate land use planning for industrial growth	High	SLVDRG / Local Governments	EDA Public Works, DOLA, CDOT	July 2026 – March 2031
Foster utility, broadband, and transportation access to industrial sites	Medium	SLVDRG	EDA, CDOT, DOLA	July 2026 – March 2031

OBJECTIVE 3: BUILD A MANUFACTURING WORKFORCE PIPELINE

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Partner with Trinidad State College and workforce centers to develop industrial certification and apprenticeship programs; expand technical training in welding, machining, automation, and logistics	High	TSC / SLVDRG	CCCS, CDLE, EDA, Private Industry	April 2027 – March 2031
Promote manufacturing career pathways in regional schools; create internships and employer-based learning opportunities	Medium	TSC / SLVDRG	CCCS, CDLE, Private Industry	April 2027 – March 2031

OBJECTIVE 4: SUPPORT EXISTING MANUFACTURERS & INDUSTRIAL BUSINESSES

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Provide business retention and expansion services; assist manufacturers with capital access and modernization; connect businesses to tax incentives and grant opportunities	High	SLVDRG	OEDIT, SBA, EDA, Banks	April 2027 – March 2031
Support technology upgrades, process improvements, and promote supply chain partnerships across the region	Medium	SLVDRG	OEDIT, SBA, EDA	April 2026 – March 2031

OBJECTIVE 5: EXPAND VALUE-ADDED AGRICULTURAL MANUFACTURING

Strategy / Action	Priority	Lead Agency	Funding Source	Timeline
Recruit agricultural processing companies; support food manufacturing and packaging operations; develop regional cold storage and distribution capacity	High	SLVDRG / CSU Extension	OEDIT, USDA, EDA	April 2027 – March 2031
Encourage cooperative processing facilities and promote local supply chain integration	Medium	SLVDRG / CSU Extension	USDA, OEDIT, EDA	April 2027 – March 2031

Appendix: Lower Priority & Aspirational Actions

Strategy / Action	Related Section	Priority	Note
Foster a leadership role in CARO (Colorado Association of Regional Organizations)	C	Medium	Ongoing regional relationship

EVALUATION

SLVDRG conducts an annual evaluation of accomplishments achieved in carrying out the goals and objectives of the CEDS. Staff prepare a report covering the calendar year that addresses the accomplishments, changes in economic conditions, changes in resources and funding, and other factors that may affect the performance of the plan. The outcome of this review will be to determine what strategies are working and which are not; where we are getting the best return on investment of staff time and resources; improvements needed in the strategy design or effort placed; relevancy of goals and strategies to current situations; revisions needed in the priority order; and improvements or revisions needed in the evaluation criteria or process itself.

The most recent Evaluation from April 2026 is included in Appendix A.

Performance Measures

Performance measures are critical to evaluating progress made towards meeting the goals and objectives of the CEDS. The performance measures selected may be subject to further refinement and revision as part of the ongoing CEDS process. Those performance measures are:

- Jobs created because of SLVDRG activities, regardless of goal category, objective, strategy, tool, source, or partnership arrangement.
- Jobs retained because of CEDS implementation.
- Quality of jobs created or retained in terms of wages, occupation, skills, benefits, and other factors.
- Amount of private sector investment in the region.
- Notable changes in the economic environment of the region that can be attributed to the programs, projects, and activities being carried out.
- Number and types of investments undertaken in the region.
- Employment and unemployment numbers.
- Changes in the labor force.
- Changes in the number of jobs.
- Poverty rates.
- Per capita and household income.
- Housing statistics.
- Demographics.
- Changes in agricultural production – types of crops planted; acreage planted; prices received.

APPENDIX A: April 2026 Evaluation

We have chosen eight measures against which to review our Economic Development accomplishments and judge the effectiveness in meeting our goals:

Capital investment by new and existing businesses in the San Luis Valley.

During 2025, at least $58.1MM in capital investment was made by 388 businesses in the San Luis Valley. The top five capital investments by the North American Industry Classification System over the years are shown below.

SECTOR	2024	2025
Agriculture, Forestry, Fish/Hunt	$52.9MM	$32MM
Retail Trade	—	$4.1MM
Real Estate, Rental, Leasing	$5.7MM	—
Construction	—	$4.7MM
Transportation and Warehousing	—	$2.6MM
Wholesale Trade	$8.4MM	$5.2MM
Support Activities for Growing Crops	$6.9MM	
UNDISCLOSED	$31.3MM	—

Through the Colorado Enterprise Zone Investment Tax Credit and 744 total contributions, $1.9MM was returned to businesses in the form of state income tax credits to be reinvested in those businesses and their communities. An increase of about $720k from 2024.

New jobs created in the San Luis Valley.

A total of 96 new jobs were created because of Enterprise Zone-qualified capital investments of $58.1MM.

Total jobs created or retained as a direct result of SLVDRG activities.

A total of 29 jobs were retained or created through lending by the SLVDRG Business Loan Fund, and 7 loans were made to new or existing businesses for a total of $1,294,850 funded.

Quality of jobs created or retained in terms of wages, occupation, skills, benefits, and other factors.

Most jobs created in this period are representative of the typical job sectors in the Valley. We saw hospitality, blue-collar positions, professional healthcare, and a couple of executive-level positions as new business owners.

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Amount of private sector investment in the region because of CEDS implementation.

For all active loans during the 2025 reporting period, projects leveraged significant private sector participation through required owner equity and co-investment from financial institutions.

A total of $310,000 in owner equity and $320,000 in private bank financing was documented in key 2025 projects, in addition to other blended financing sources across the portfolio.

All projects we engage in require owner investment.

Notable changes in the economic environment of the region are attributed to the programs, projects, and activities being carried out.

The lending environment in 2025 remained constrained compared to prior years, with businesses facing increased difficulty qualifying for financing due to broader economic conditions and tighter credit standards.

There has been an increase in local funding partnerships (banks).

Interest rates and overall borrowing costs remained elevated, contributing to increased challenges for project feasibility and borrower readiness.

While demand for capital remained present, the number of viable loan closures was lower relative to inquiries, reflecting increased barriers to financing and project readiness within the region.

In partnership with the SLV Council of Governments, SLVDRG helped develop and submit a successful $7.1 million USDOT grant application to improve the Colorado Pacific Rio Grande Railroad along La Veta Pass. The proposed project will reduce derailments, increase freight capacity and operational efficiency, and strengthen regional supply chain infrastructure critical to agricultural inputs and outbound commodities such as potatoes and grain.

Agriculture remains the driving economic force in the San Luis Valley, accounting for nearly 20% of the Valley's base employment. Jobs in the Health Services sector have grown significantly, as evidenced by SLV Health now employing over 740 people.

Number and types of investments undertaken in the region.

The SLVDRG Business Loan Fund made 7 new loans to 7 businesses in 2025, totaling $1,294,850 and leveraging a mix of public funding, private bank participation, and owner equity. These investments supported 29 total jobs (12 retained and 17 projected new jobs). The businesses funded spanned multiple sectors, including restaurants, retail (liquor and firearms), professional services (surveying), hospitality (campground), and funeral services, demonstrating continued diversification of the regional investment portfolio.

Lending is the primary tool used by SLVDRG to encourage economic growth and advance our economic strategy for the region. The SLVDRG Business Loan Fund maintains a loan portfolio of $6.85 million and 62 loans. The SLVDRG BLF is a critical component for funding small businesses as local lending institutions continue to tighten their policies. We continue to work with CHFA using the Colorado Credit Reserve program to assist lenders with collateral shortfalls and insulate ourselves against loss.

The region's tourism economy remains a key component of the local economic base, with the hospitality sector continuing to generate significant employment and visitor-driven earnings. While visitation to Great Sand Dunes National Park and Preserve has moderated from its post-pandemic peak in 2023, when visitation reached 512,692, levels declined by approximately 14.6% in 2024 and a further 1.2% in 2025, based on annual visitation trends from

the IRMA NPS Stats Report. Despite this downward adjustment, overall visitation remains elevated relative to pre-pandemic baselines, indicating sustained regional tourism demand.

As an affiliate of the Colorado State Demography Office, the SLVDRG attends training and annual meetings to keep demographic information up to date. Throughout the year, SLVDRG provided demographic and economic data to local governments, businesses, and non-profits.

SLVDRG serves as the coordinating agency for the San Luis Valley Transportation Planning Region, which includes all six counties in the region and Chaffee County. We provide local jurisdictions and other interested parties with information from the Colorado Department of Transportation regarding transportation issues.

In support of the region's CEDS, SLVDRG was awarded funding from the Colorado Office of Economic Development and International Trade (OEDIT) and the Colorado Department of Local Affairs (DOLA) to support development of a Regional GIS Needs Assessment & Feasibility Study (completed) and a Regional GIS Strategic Plan (completed). These efforts are focused on improving access to GIS data and services to strengthen regional planning and economic development capacity across multiple sectors.

As the coordinating agency of the San Luis Valley Regional Broadband Collaborative, we are seeing a shift from middle-mile funding from government and nonprofits to local and national-level private investment to build out the infrastructure, indicating healthy market growth in broadband.

APPENDIX B: Resources and References

Colorado State Demography Office – https://demography.dola.colorado.gov/

The State Demography Office is committed to increasing data accessibility for the public. This includes informing state agencies, local governments, and the news media of demographic developments and assisting them in understanding and interpreting demographic data and information.

Additional services and products include:

• Community profiles

• Easy-to-use web maps

• Publications and presentations

• Economic and demographic data requests

• User training workshops on how to access and use available data

• Presentations on economic and demographic data and trends

• General data use assistance

Colorado Office of Economic Development and International Trade-

Enterprise Zone Tax Credits

U.S. Census Bureau – https://data.census.gov/cedsci/

The Census Bureau is the leading source of quality data about the nation's people and economy.

San Luis Valley Development Resources Group – www.slvdrg.org

Our online source for data, reports, and projects for the San Luis Valley Development Resources Group.

SLV Region Plans since 2021:

Adams State University Economic Impact Study- July 2025

Rio Grande Basin Implementation Plan Update- 2021

San Luis Valley Hazard Mitigation Plan- March 2023

San Luis Valley Regional Transportation Plan- November 2025

San Luis Valley Coordinated Public Transit and Human Services Transportation Plan

San Luis Valley Housing Needs Assessment

San Luis Valley Community Food and Agriculture Assessment

San Luis Valley Great Outdoors Regional Partnership Strategy- 2025

Trinidad State College 2025 Strategic Plan

Visit Alamosa Five-Year Tourism Strategy

"The Economic Value of Water Resources in Colorado's San Luis Valley, March 2025

Land Use Plan updates since 2021:

Alamosa County Comprehensive Land Use Plan, July 2025

Saguache County Final 1041 Solar Regulations-May 2025.

APPENDIX C: CEDS Public Comment Summary

COMMENT	DATE	HOW CONSIDERED/ RESOLVED
I shared the draft with Tri-State, and they provided the feedback below: In looking at this plan, I just wanted to make sure that you were familiar with the USDA's Rural Economic Development Loan & Grant Program (REDLG). This is a powerful economic development tool that offers non-profit and for-profit entities alike up to $1 million in 0% interest funding over 10 years. The primary eligibility criteria for this is that the entity uses the money to create jobs. This can be through things like, • Business incubators. • Community development assistance. • Facilities and equipment to educate and train rural residents to help economic development. • Facilities and equipment for medical care for rural residents. • Start-up venture costs, including, but not limited to, financing fixed assets such as real estate, buildings, equipment, or working capital. • Business expansion. • Technical assistance. This funding can only be offered through RUS borrowers or RUS-eligible non-profit utilities. There is a grant component to this as well that allows for the lending utility **to reserve up to $300,000 of the repaid loan to begin a local revolving loan fund (RLF).**	**6/5**	Comment considered in program delivery discussions specific to Business Loan Fund.
Excellent work. Your CEDS doc is a great piece of work and useful to us all.	**7/13**	

A last observation: I do not believe I missed any meetings, but the board and steering committee did not have any input on the goals section of the document that I know of. Where did they come from? If I missed the meeting, please disregard, but if this is the strategy for the next 5 years, I think the board or the stakeholders should have had more involvement than just the SWOT.	**6/17**	
From a tone and audience standpoint, I think the document does a good job balancing EDA compliance language with regional storytelling. The local examples and photo captions, including the Crane Festival, Outcalt-Ski Hi, and the Alligator Farm history, help give the document a real sense of place while still keeping it professional. One area where the tone could be tightened is the opening of the Action Plan Narrative. The Introduction and the Action Plan section both begin with similar language about the five goal areas. Since the reader already sees that information in the Introduction, the Action Plan section may be stronger if it opened with a more forward-looking statement about implementation rather than restating the same information.	**6/17**	Considered, edited where needed.
There are also a few formatting and cross-reference items that should be cleaned up. The timeline entries in the Action Plan Implementation Framework tables are inconsistent. Some use “April 2026 – Mar 2031,” while others use “Apr 2026 – Mar 2031.” One format should be used throughout. Appendix A is well written and appropriately honest, but it references the most recent evaluation as being in Appendix B on page 63, when it appears to be in	**6/17**	Considered, corrected where needed.

Appendix A. That cross-reference should be corrected. The Table of Contents and page numbering should also receive a final check, especially around the Remote Workers section.		
The Remote Workers section on page 35 includes some significant changes, including La Jara increasing from 2% to 26% of workers working from home. That may be accurate, but because some of these communities are small, it may be worth adding a sentence noting that small sample sizes can make Census estimates more volatile. That would help prevent the numbers from appearing overstated.	**6/17**	Considered, added a sentence in opening paragraph noting that "often the sample size is so small that numbers can jump dramatically"
On the data side, the household income comparison between 2019 and 2023 on pages 20 through 22 is well done. However, the income ranges in the charts are not exactly the same between the two years. The narrative mentions this, but only briefly. A footnote or short methodology note explaining that direct comparison is limited would strengthen the credibility of the section, especially for EDA reviewers.	**6/17**	Sentence added stating "Although the income ranges are slightly different, some analysis is possible".
One clear correction is needed in the conclusion. Page 54 refers to the plan as the 2026-2030 strategy, but the document is titled 2026-2031 throughout. That should be corrected for consistency.	**6/17**	Corrected.
The Friday Health Plans case study on pages 41 and 42 is useful and provides important	**7/13**	Edits made.

economic context. However, the transition from that discussion back into the PILT and SRS section feels a little abrupt. A short connecting sentence recognizing the healthcare workforce disruption as an ongoing regional challenge would help the section flow better.		
The five goal areas are not developed evenly. Goal Area E, Manufacturing, receives significantly more attention than the other goal areas. That may be appropriate since it appears to be the major new initiative in this plan, but Goals A through D feel thinner by comparison. Goal Area D in particular reads more like a placeholder than a full strategy. The outdoor recreation section is very brief, and the agricultural lending section does not have the same level of detail found in other parts of the plan. There also appears to be some disconnect between the SWOT analysis and the Action Plan. Several weaknesses and threats identified in the SWOT, including generational poverty mindset, limited access to fresh food in food deserts, and potential Medicare or Medicaid cuts, do not clearly carry forward into the action plan objectives. That does not necessarily mean every SWOT item needs its own action item, but the document would be stronger if those connections were either made more clearly or acknowledged.	**7/13**	Considered, no changes made.
Consider a short risk or continuity note. The draft doesn't include a risk register anywhere, and a large share of the Action Plan's High-priority items list a single small nonprofit or county office as Lead Agency. A brief continuity note in the Evaluation section,	**7/6**	Considered, no changes made.

even one paragraph would acknowledge that dependency openly rather than leave it implicit		
Name ScSEED as the Saguache County Economic Development Partner. Several objectives — the Regional EDO Network (Goal Area C, Objective 4) and workforce housing (Goal Area A, Objective 3), list SLVDRG as lead with no named county-level partner. As you may know ScSEED recently signed a five-year MOU, effective May 1, 2026 ith Saguache County to be their economic development parther.. A sentence naming ScSEED as the county-level implementation partner, alongside the existing reference to Liza Marron, would make the regional-to-county connection concrete rather than assumed.	**7/6**	Considered, no additional partners called out in CEDS beyond those previously identified.
Name the value-added agriculture proof points. Goal Area E, Objective 5 (Expand Value-Added Agricultural Manufacturing) reads as aspirational. Saguache already has two working examples: White Rock Specialties' organic potato-packing facility in Mosca, which added 15 jobs, and the San Luis Valley micromalting industry, seeded by Stephan Weiler's malting-barley feasibility work, which turned a water-stressed crop into higher-wage manufacturing jobs. Naming both gives that objective a working model instead of only a direction.	**7/6**	Considered, no changes made.
Fentanyl and behavioral health: add it to the SWOT. The substance-use crisis doesn't appear anywhere in the Strengths-Weaknesses-Opportunities-Threats section, despite being a real economic and workforce issue: 15 homicides and a 20% rise in felony drug cases regionally in 2024, and Alamosa	**7/6**	Considered, related reference already included in SWOT exercise

County alone received more prescription pain pills per resident than anywhere else in Colorado between 2006 and 2019. Hope in the Valley, the region's only full-scale withdrawal-management center, is exposed to the same Medicaid cuts noted above. Colorado's $912 million-plus opioid-settlement Infrastructure Share is a live funding line none of the five Goal Areas currently reference — worth adding, even briefly.		
Medicaid: put a number on the exposure. The Health Care Assets section describes the region's facilities well but doesn't quantify what's coming. H.R. 1, signed into law July 4, 2025, will cut up to $2.5 billion a year in federal Medicaid funds for Colorado once fully phased in by 2032, including roughly $575 million in lost provider-fee revenue. The federal Rural Health Transformation Program offsets part of that — roughly $200 million in Colorado's first year, with a $160 million application pool now open — but remains well short of the loss. Conejos County Hospital, a 17-bed critical-access facility and the only emergency provider for Conejos and Costilla counties combined, is on the University of North Carolina's list of rural Colorado hospitals at risk of closure from these cuts — a list that grew to nine facilities in April. Worth a sentence naming the facility, the study, and the open funding pool.	**7/6**	Considered, no changes made.
Water: name the deadline. The Drought and the Price of Water section is accurate but understates the regulatory hard stop. Subdistrict No. 1's 2011 management plan requires recovery to within 200,000–400,000	**7/6**	Considered, current language found to be adequate, no changes made.

acre-feet of the 1976 baseline by 2031, or the State and Division Engineers must curtail non-exempt wells — ending large-scale irrigated agriculture across much of the Valley. The RGWCD's over-pumping fee is moving in a specific, escalating way: $150 to $500 per acre-foot now, rising to $1,000 if targets are missed — and that fee plan went to trial before the Division 3 Water Court on June 29. Naming the 2031 date and the fee escalation gives the section a fixed timeline rather than a general sense of urgency.		
Throughout the document, we talk about the six counties and name them. It seems repetitive to me. Do we need to continually restate that fact?	**6/16**	Considered, no change made.
There is a weird line break on land ownership in the second paragraph	**6/16**	Edited, resolved.
The population demographic math does not math; 47,376 to 46,577 is a negative number, but the narrative says a growth.	**6/16**	Chart title and related narrative changed from population "growth" to population "change". Population change numbers recalculated and verified.
Goal C of the plan seems underdeveloped when looking at the other goals in the action plan.	**6/16**	Considered, reviewed, no change made.
Economic recovery and resilience have inconsistent formatting for the dates. Some say April 2026-Mar 2031, others say Apr 2026-2031	**6/16**	All dates formatted to match with March, April and July spelled out. All other months still abbreviated to protect page width to ensure for a three-hole punch.

DAC has expanded their interline agreements to include American, United and Delta. https://denverairconnection.com/about-us/	**6/13**	American and Delta added to DAC narrative in Location and Travel section.
From the CBI/uniform crime reporting data I can find, Alamosa is lower crime per capita than Denver. If there's a place to drop in that statistic, it may be worthwhile.	**6/13**	Added to SWOT reference to crime rate in Weaknesses section
Your second and third pages of your Table of contents are labeled 2 and 3, instead of iv and v.	**6/12**	Page numbers corrected to read iv, v.
On page 9: Alliyah Garcia's title is Business Loan Fund Manager.	**6/12**	Title corrected in CEDS from Accounting Manager to Business Loan Fund Manager.
On pages 57 and 59: there are two spots, under comprehensive strategy and the conclusion, the five-year cycle is referred to as 2026-2030.	**6/12**	Dates corrected to reflect 2026-2031.
On page 61, under critical infrastructure, the timeline for Assess local energy is April 2024-Mar 2028. Should it start in 2026? Or if it did start in 2024, should it be mentioned in the timeline that this is carried over from the previous CEDS cycle?	**6/12**	Changed and updated to start in April 2026
On page 66, three of the goals don't start until 2027. Should they start in 2026?	**6/12**	Changed and updated to start in April 2026
The draft mentions evaluating "tax incentives" in a general way under the support for existing	**6/12**	State program website hyperlinked in text, linked in Appendix B

manufacturers, it doesn't really mention the enterprise zone tax credits. Maybe under Goal E, Objective 4 (Supporting Existing Manufacturers) add an action item to actively market Enterprise Zone pre-certification to expanding industrial facilities? This would connect SLVDRG's initiatives with the CEDS goals.		
Under the Threats, Medicare/Medicaid is mentioned, and under Opportunities, expanding healthcare services is mentioned. In the action plan narrative section, under workforce development and economic recovery, the larger economic sectors are mentioned, but not healthcare. Maybe include healthcare in the list under higher education, since there are plans to develop healthcare education and certification pipelines with Adams and Trinidad?	**6/12**	"health care institutions" added to Goal B, Objective 2
Thank you for sending these over – I think they look great and enjoyed going thru it. I think you are all on the right track as far as priorities go. Please let us know here in Center if there's anything we can help with.	**6/12**	Noted
I think the draft looks great. Nothing I would change.	**6/12**	Noted
pg 8, 1st para - "through the winter months" ?	**6/12**	Language reworked.

pg 9, last sentence - 73-124 growing days. This sounds like you get 50 more days of growing at the sand dunes.	**6/4**	Language reworked.
pg 20, graph confusing to me	**6/4**	Net Migration graph on page 20 reworked in a slightly better format although font and design don't match others. Revised version linked here and embedded as a photo in document.