

## Point of the Mountain Buildout Scenarios Economic and Fiscal Contributions

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### Summary

The Kem C. Gardner Policy Institute has prepared an economic and fiscal analysis assessment of buildout scenarios at The Point of the Mountain, also referred to as “The Point.” The analysis includes conceptual planning scenarios based on inputs and assumptions provided by the Point of the Mountain State Land Authority and RCLCO, a real estate consulting firm under contract with the Point of the Mountain State Land Authority. The first scenario—the current state-led “Framework Plan” development—anticipates a high-density design. The second scenario—named the Baseline development—is a “market-based” approach in which the land at Point of the Mountain is “sold to the highest bidder” and the market guides development.

The Framework Plan spans 24 years—from 2026 to 2048—where steady and thoughtful development is performed to achieve its high density. This development plans for 7,400 residential units and allocates 8.5 million square feet of space for office, retail, hotel, civic, and an “innovation center” that will focus on research and development.

The Baseline begins a year earlier in 2025 and will take an estimated 10 years to complete its buildout, significantly less time than the Framework Plan. The Baseline includes 2,800 residential units and 1.4 million square feet of retail, hotel, and office space.

While the Framework Plan takes longer to unfold, it provides 4,650 more residential units to address housing needs, over 7.1 million square feet of additional nonresidential development, and significantly larger economic and revenue footprints compared to the Baseline scenario. The significant differences are explained by the higher planned density and average earnings under the Framework Plan. Additional scenarios are also plausible.

### Inputs, Assumptions, and Limitations

All model outputs depend upon the data inputs and assumptions made. These inputs and assumptions were made in conjunction with the Point of the Mountain State Land Authority and RCLCO.

These include:

- **Statewide scope** - Results for both Framework and Baseline scenarios represent the statewide economic contributions associated with each buildout scenario. The employment, earnings, and GDP multipliers range between 1.3 to 2.1.
- **Employment** - For both the Framework and Baseline scenarios, employment is based on annual land-use deliveries (nonresidential square feet by zone type and residential units) and square feet per job provided by RCLCO.
- **Job mix** - Jobs by land use type were assigned to industries based on input from Point of the Mountain State Land Authority, RCLCO, Wasatch Front Regional Council, and Gardner Institute judgment.
- **Property taxes** - The Gardner team estimated direct property taxes by applying Draper millage rates (obtained from the Salt Lake County Assessor’s website) to assessed property values provided by RCLCO.

Economists make a distinction between economic *impact* analyses and economic *contribution* analyses. Impact analyses identify the new economic growth derived from an activity based on new monies entering an economic region. Contribution analyses capture the economic footprint from an activity and include recirculated economic activity. This analysis is a contribution analysis. Refer to the Counterfactual and Methods sections for additional information on assumptions and methodology.

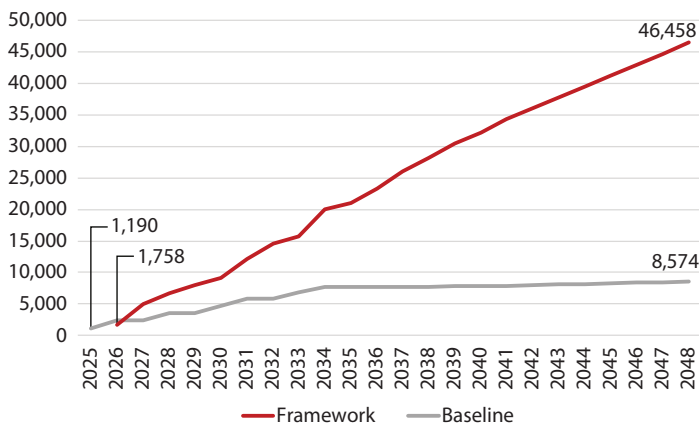
**Table 1: Point of the Mountain Utah Contributions in 2048**  
(Dollar amounts in millions of constant 2020 dollars)

Contribution	Framework	Baseline
Employment	46,458	8,574
Direct	31,510	6,461
Indirect & Induced	14,948	2,113
Earnings	\$4,377.1	\$688.6
Direct	\$3,394.2	\$494.8
Indirect & Induced	\$982.9	\$193.8
GDP	\$7,010.1	\$1,259.9
Direct	\$3,287.5	\$605.2
Indirect & Induced	\$3,722.6	\$654.7

Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The Baseline scenario includes market activity post-buildout to 2048. Contributions are relative to the REMI PI+ baseline forecast.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model

**Figure 1: Point of the Mountain Total Employment Contributions in Utah, 2025–2048**



Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The Baseline scenario includes market activity post-buildout to 2048. Contributions are relative to the REMI PI+ baseline forecast.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model

### Economic Analysis

At buildout, the Framework Plan supports approximately 46,500 jobs, \$4.4 billion in earnings, and \$7.0 billion in GDP for the state of Utah (see Table 1). The Baseline scenario supports roughly 8,600 jobs, \$690 million in earnings, and \$1.3 billion in GDP. The economic multipliers for employment, earnings, and GDP are similar between both scenarios, ranging between 1.3 to 2.1 for Framework and Baseline. The Framework Plan outperforms Baseline about fivefold for each measure, even with Baseline development beginning a year sooner and accounting for the 14 years of “business as usual” economic activity after Baseline’s early completion.

Total contributions are the sum of each scenario’s direct inputs and the indirect and induced contributions generated from the REMI model. Business-to-business activity that supports The Point’s buildout and ongoing operations is the

**Table 2: Point of the Mountain Total Employment Contributions and Average Annual Earnings in Utah by Industry, 2048**

Sector	Framework	Baseline	Average Annual Earnings
Professional, scientific, and technical services	7,976	1,038	\$75,735
State and Local Government	5,239	844	\$64,663
Mgmt. of companies and enterprises	3,826	139	\$73,398
Health care and social assistance	3,624	818	\$58,161
Admin, Support, and Waste Mgmt.	3,559	598	\$44,037
Finance and insurance	3,374	785	\$53,118
Retail trade	3,114	542	\$42,138
Accommodation and food services	2,412	470	\$26,358
Information	2,361	255	\$99,923
Real estate and rental and leasing	2,322	856	\$35,959
Construction	1,993	296	\$72,596
Manufacturing	1,563	197	\$78,413
Other Services	1,325	664	\$48,452
Arts, entertainment, and recreation	1,098	169	\$23,669
Transportation and warehousing	988	161	\$60,928
Wholesale trade	833	138	\$95,033
Educational services; private	674	574	\$37,074
Mining	89	13	\$80,689
Utilities	57	13	\$235,989
Forestry, fishing, and hunting	31	4	\$23,600
<b>Total</b>	<b>46,458</b>	<b>8,574</b>	<b>\$58,180</b>
Average earnings by scenario	\$60,867	\$55,051	

Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The Baseline scenario includes market activity post-buildout to 2048. Contributions are relative to the REMI PI+ baseline forecast.

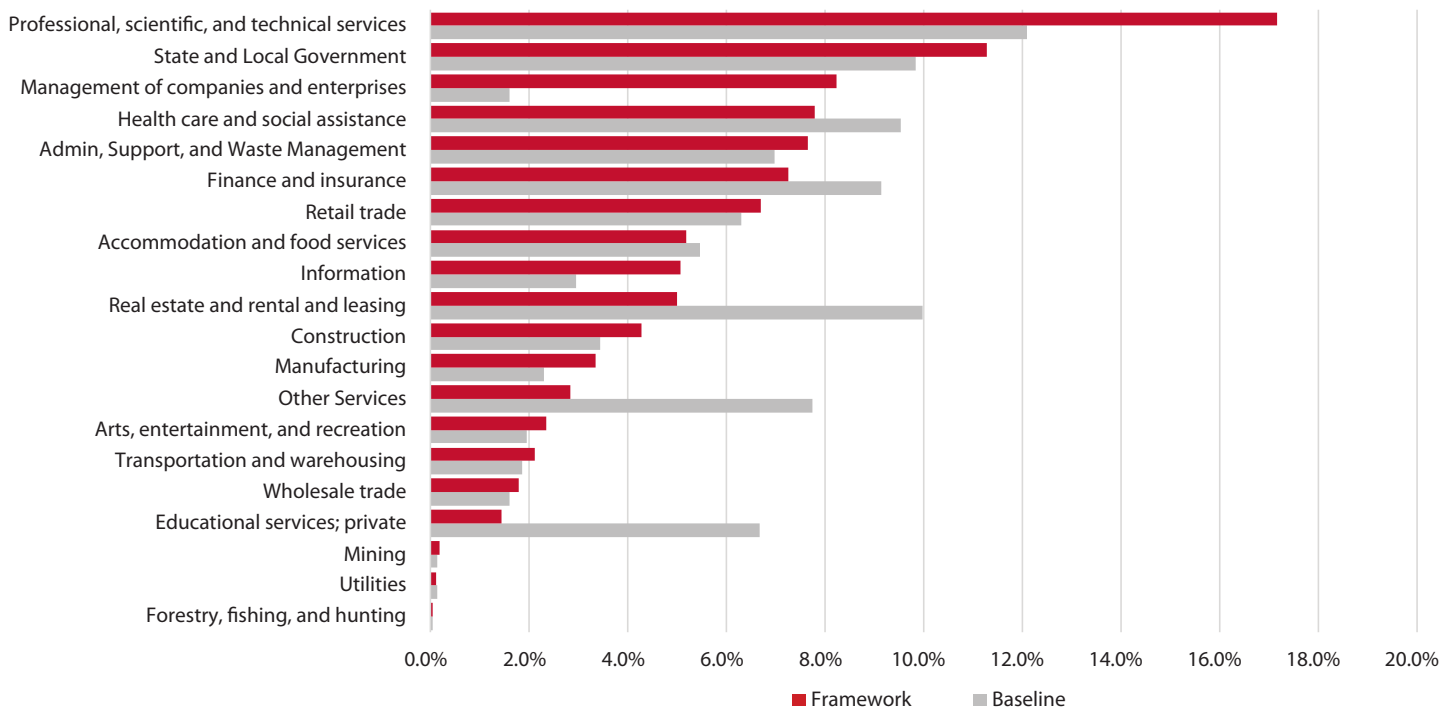
Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model

indirect effect. The additional spending of employees associated with The Point’s buildout and operations, as well as employees of supporting vendors, produces the induced effects. These “multiplier effects” are presented in Table 1.

The large difference between the scenarios stems from a much lower expected development density under the Baseline scenario. The Framework Plan anticipates a total of 8.5 million square feet of office, retail, hotel, institutional, and civic space at The Point versus 1.4 million square feet of office, retail, and hotel space under the Baseline scenario. The Framework Plan also projects over 7,400 residential units versus fewer than 2,800 units in the Baseline. As a result, expected 2048 total direct jobs at The Point under the two scenarios are 31,500 for the Framework Plan and about 6,500 for the Baseline. Figure 1 presents total employment for each scenario.

Figure 1 presents total employment for each scenario from 2025 through 2048. The rate at which the Framework Plan adds jobs is consistently 1 to 1.5 times greater than Baseline until 2034. Annual job growth post-buildout under the Baseline Plan

**Figure 2: Point of the Mountain Share of Total Employment Contributions in Utah by Industry, 2048**



Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The Baseline scenario includes market activity post-buildout to 2048. Contributions are relative to the REMI PI+ baseline forecast.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model

**Table 3: Point of the Mountain Contributions in Salt Lake County, 2048**

(Dollar amounts in millions of constant 2020 dollars)

Contribution	Framework	Baseline
Employment	40,807	7,755
Earnings	\$4,055.3	\$640.8
GDP	\$6,262.4	\$1,142.7

Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The Baseline scenario includes market activity post-buildout to 2048. Contributions are relative to the REMI PI+ baseline forecast.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model

levels off significantly, following REMI’s expected industry growth rates. At the same time, the Framework Plan continues to add employment until its buildout is completed in 2048.

Table 2 and Figure 2 present the industry mix of total jobs supported by the Framework and Baseline scenarios, with average annual earnings in Utah as an indicator of job quality. The Framework scenario is associated with greater employment levels in every industry compared with Baseline, see Table 2. Professional, scientific, and technical services and government are the two industries that see the largest effects from the POTM Framework development, gaining about 8,000 (17.2%) and 5,200 (11.3%) jobs, respectively.

Relative to the Baseline, the Framework Plan produces greater employment concentrations in management of companies and enterprises, professional, scientific, and technical services, and

**Table 4: Net Present Value of Point of the Mountain State Fiscal Contributions, 2025–2048**

(Millions of constant 2020 dollars)

Contribution	Framework	Yearly Avg.	Baseline	Yearly Avg.
State Revenues	\$146.7	\$79.3	\$24.7	\$18.5
State Operating Expenditures	\$116.6	\$60.9	\$16.5	\$14.4
Net State Operating Revenue	\$30.2	\$18.3	\$8.2	\$4.1

Note: A real discount rate of 2.0% was used. The analysis does not account for state expenditures for site preparation under the Framework Plan. Yearly average is a close approximation of the midpoint for each scenario.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model and the Gardner Institute’s fiscal model

information sectors. Conversely, Baseline has greater concentrations in private education, real estate, and other services. The Framework scenario supports a greater concentration of higher-paying jobs than Baseline. Average earnings for all industries are nearly \$60,900 in the Framework and \$55,000 in Baseline scenarios. Earnings within the Framework scenario are \$5,800 (10.6%) higher compared to the Baseline scenario.

The vast majority of economic activity associated with The Point’s development occurs in Salt Lake County (Table 3). Under the Framework scenario, 87% of all employment contributions are located within Salt Lake County; this increases to 90% under Baseline. In addition, the Framework Plan contributes at least one job in every county in the state; this is not the case for Baseline.

## Fiscal Analysis

Figure 3 and Table 4 provide summary state fiscal contributions for the period 2025 through 2048. The net present value (NPV) of state revenues associated with development under the Framework Plan averages \$79.3 million a year and \$146.7 million in 2048—the final year of analysis. This is partially offset by in-state operating expenditures (\$60.9 million and \$116.6 million, respectively), leaving net revenues averaging \$18.3 million per year and \$30.2 million in 2048.

The fiscal footprint for the Baseline scenario is significantly less compared to the Framework plan, with net revenues averaging \$4.1 million per year and \$8.2 million in 2048. The Framework scenario averages 4.5 times more net state revenue per year compared to Baseline. The substantial difference between the scenarios stems from a much larger expected development density and higher average earnings under the Framework scenario.

Table 5 provides summary local fiscal contributions for Salt Lake County for the period 2025 through 2048. Salt Lake County revenues associated with the Framework Plan are partially offset by local operating expenditures, leaving average net revenues of \$12.4 million a year and \$20.1 million in 2048. For Baseline, average net revenues are \$5.9 million a year and \$5.8 million in 2048. The Framework plan averages 2.1 times more net state revenue per year compared to Baseline.

The Methods section provides more information on how the fiscal model estimates state and local revenues and expenditures.

Table 6 provides estimated direct property taxes for Draper City and Salt Lake County from 2025 through 2048. The average present value of property taxes under the Framework Plan is \$13.3 million and \$7.1 million yearly revenue under the Baseline Plan. School levies claim 60% of property taxes, followed by Salt Lake County (21%), Draper City (10%), and Other (9%).

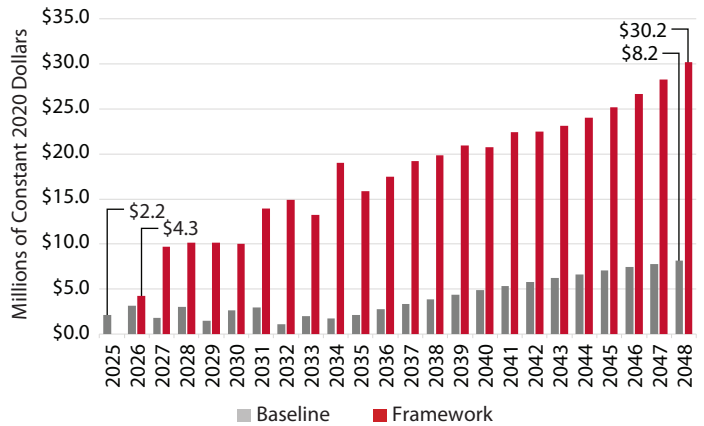
## Counterfactual

Economic impacts occur when new money enters a region from outside; for example, sales of locally manufactured goods to out-of-state customers, nonresident tourists spending their dollars here, or federal government contracts to conduct research at state universities. In economic development projects such as The Point, impacts can also occur if the project attracts out-of-state companies that would not have otherwise located here, or if it prevents existing businesses from leaving the state.

Economic contributions are a broader measure of a firm, industry, or development’s economic footprint in a region. Both impacts and contributions are based on the length of local supply chains and the extent of household spending in the local economy. However, while impacts depend on new money

**Figure 3: State Net Operating Revenue of Framework and Baseline Scenarios, 2025–2048**

(Millions of constant 2020 dollars)



Note: A real discount rate of 2.0% was used. Development for the Baseline Plan begins in 2025 and 2026 for the Framework. The analysis does not account for state expenditures for site preparation under the Framework Plan.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model and the Gardner Institute’s fiscal model

**Table 5: Net Present Value of Point of the Mountain Salt Lake County Fiscal Contributions, 2025–2048**

(Millions of constant 2020 dollars)

Contribution	Framework 2048	Yearly Average	Baseline 2048	Yearly Average
Local Revenues	\$43.6	\$24.1	\$10.3	\$9.2
Local Operating Expenditures	\$23.5	\$11.7	\$4.5	\$3.3
Net Local Operating Revenue	\$20.1	\$12.4	\$5.8	\$5.9

Note: A real discount rate of 2.0% was used. The analysis does not account for state expenditures for site preparation under the Framework Plan. Yearly average is a close approximation of the midpoint for each scenario.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data using the REMI PI+ model and the Gardner Institute’s fiscal model

**Table 6: Point of the Mountain Estimated Salt Lake County Property Tax Revenue of Framework and Baseline Scenarios, 2025–2048**

(Dollar amounts in millions of constant 2020 dollars)

Taxing Entity	Rate	Framework Yearly Average	Baseline Yearly Average
Schools	0.007	\$8.0	\$4.3
Salt Lake County	0.002	\$2.8	\$1.5
Draper City	0.001	\$1.3	\$0.7
Other	0.001	\$1.2	\$0.6
<b>Total</b>	<b>0.012</b>	<b>\$13.3</b>	<b>\$7.1</b>

Note: A real discount rate of 2.0% was used. Refer to the Methods section for details on various taxing entities included in “Schools,” “Salt Lake County,” and “Other” categories. Yearly average is a close approximation of the midpoint for each scenario.

Source: Kem C. Gardner Policy Institute analysis of RCLCO data and Salt Lake County Assessor millage data

entering a region, contributions include local money that recirculates or is redistributed within the region.

The economic impacts of The Point’s Framework Plan depend on the number of firms locating in Utah, and the ensuing jobs and investment, because of the plan. To the extent that development happens at The Point that would have happened elsewhere in the county or the state, it is simply redistributing economic activity. But to the extent The Point’s newly available land and the infrastructure and recruitment efforts provided by the Point of the Mountain State Land Authority attract firms and jobs that would not have come to Utah, then it is generating new economic activity and impacts for the state. Determining the extent of the Framework Plan’s economic impacts would require surveying the firms that decide to locate at The Point as well as existing companies that may have been considering leaving the state before The Point’s development.

The total economic contributions of the Framework Plan include 46,458 full- and part-time jobs, \$4.4 billion in earnings, and \$7.0 billion in GDP for the State of Utah. Within this contribution lies the economic impact (new dollars that enter into the region); however, determining the size of the impact would require further data.

## Methods

### *Estimating Economic Contributions*

The Gardner Institute used REMI PI+ version 2.5.0 to analyze the two development scenarios for The Point of the Mountain. Researchers entered Salt Lake County-level estimated inputs from data provided by RCLCO. REMI PI+, developed by Regional Economic Models, Inc., is a dynamic, multiregional simulation model that forecasts economic, population, and labor market activity for many years into the future. REMI provides year-by-year estimates of the regional effects of specific economic or policy changes. The model incorporates input-output relationships, general equilibrium effects, econometric relationships, and economic geography effects.

New employment was the primary metric used to estimate economic contributions. The Gardner Institute modeled new employment for both the Framework and Baseline scenarios based on annual land-use deliveries (square feet by type and residential units) and square feet per job provided by RCLCO. Table 7 presents total square feet by zone type and total residential units for the Framework and Baseline scenarios. The Framework scenario’s additional planning and longer duration lead to a high-density design almost three times denser than the Baseline scenario. This difference increases to over sixfold when considering only nonresidential zoning. Compared to Baseline, the Framework scenario includes an additional 5.5 million square feet for office space, 515,000 more square feet for retail, 73,000 additional square feet for hotels, and over 3.3

**Table 7: Total Square Feet by Zone and Residential Units by Scenario, 2025-2048**

Zoning	Framework	Baseline	Difference
Office	6,634,014	1,150,000	5,484,014
Retail	670,454	155,000	515,454
Hotel	165,038	92,000	73,038
Residential	7,721,960	4,388,500	3,333,460
Institutional	784,080	N/A	N/A
Civic	255,262	N/A	N/A
<b>Total</b>	<b>16,230,808</b>	<b>5,785,500</b>	<b>10,445,308</b>
<i>Total Residential Units</i>	<i>7,423</i>	<i>2,776</i>	<i>4,647</i>

Note: Buildout is 2048 for the Framework Plan and 2034 for the Baseline. The analysis is based on rounded square footage by zone type.

The analysis is based on rounded total square footage by zone type.

Source: Kem C. Gardner Policy Institute analysis of RCLCO and POMSLA data

million more square feet of residential space. The Framework scenario includes nearly 800,000 square feet for institutions and 250,000 square feet for civic use, whereas the Baseline scenario does not. The Framework plan has a greater residential density of about 4,650 units compared to Baseline.

Jobs by land use type were assigned to industries based on input from Point of the Mountain State Land Authority, RCLCO, Wasatch Front Regional Council, and Gardner Institute judgment. WFRC provided existing industry employment mixes in nearby census tracts.

These scenarios do not directly consider construction expenditures and the cost of demolishing the Utah State Prison in Draper. However, the REMI PI+ model does generate capital investment spending when new employment is modeled.

The Baseline reaches buildout considerably earlier than the Framework Plan, with construction finishing in 2034 versus 2048; this is a 14-year gap. To allow for a comparable analysis period, the Gardner institute includes REMI-generated industry growth rates and market activity in subsequent years after the Baseline scenario’s buildout, spanning from 2035 through 2048. The economic activity captured in this “business as usual” phase represents the benefit of development completing sooner than the Framework scenario, which will be in the later stages of its buildout.

### *Estimating Fiscal Contributions*

In the Gardner Institute fiscal model, revenues are driven by employment, personal income, and industry output results from the REMI PI+ economic model. Expenditures are driven by the population growth that REMI generates in response to the increased economic activity.

State revenue contributions consist of personal and corporate income taxes and sales and use taxes. Expenditures comprise state higher education, public education, and non-education spending. These results do not consider state capital expenditures that would occur in response to the population growth.

State personal income taxes and sales taxes were estimated from personal income impacts calculated by the REMI PI+ model. Corporate income taxes were estimated from annual output (sales) impacts by industry calculated by REMI. These were multiplied by multiyear average ratios of tax revenues to personal income or output.

State government expenditures were calculated on a per-capita basis from the annual population impacts. Non-education expenditures are based on the total population impact and include all state budget operating expenditures except those for higher education and public education. Higher-education expenditures are based on the college-age population impacts, and public-education expenditures are based on the school-age population impacts. Expenditure estimates are based on multiyear averages of per capita budgeted amounts.

The Gardner Institute's fiscal impact model also estimates local sales and property tax revenues, county operating expenditures, and countywide public education expenditures (aggregated from district-level data). Sales tax and residential and personal property tax revenues are estimated from the personal income impacts; commercial and industrial property taxes are estimated from employment impacts. Expenditures are calculated on a per-capita basis from either the total population impacts or the school-age population impacts. As with state revenues and expenditures, county-level estimates are based on multiyear average ratios. Results do not consider local government capital expenditures that would occur in response to the population growth.

The fiscal impact estimates generated in this report should be viewed as broad measures. This methodology relies on historical data and assumes a linear relationship between taxes paid and personal income, industry output, and employment.

#### *Estimating Direct Property Taxes*

The Gardner Institute calculated the total assessed value of development at The Point based on values per square foot or per dwelling unit provided by RCLCO. Analysts then applied millage rates imposed by taxing entities on properties located near the prison site, obtained from parcel data on the Salt Lake County Assessor's website.

We assume all residential properties are owner/renter occupied and qualify for the 45% resident exemption reduction. We found some cases where existing commercial property had resident exemption reductions. However, we assume that no commercial property at The Point is used for residential purposes. When assessing direct property tax revenue, we assume that the city, county, and the state do not offer tax abatement incentives for Point of the Mountain development.

When using the term "property tax" the Gardner Institute recognizes that state property is not subject to property tax. These tax rates are estimated to represent the expected equivalent payment in lieu of property taxes to Draper City and Salt Lake County.

Enacted in 1986, Utah's "Truth in Taxation" system requires taxing entities to follow specified public notice and hearing requirements to increase the dollar amount of property tax revenue they receive, exclusive of "new growth" such as a new home or office building. In other words, Utah's property tax system is revenue-driven rather than rate-driven. Therefore, for simplicity, we kept property tax rates constant from 2025 through 2048 using 2020 millage data.

Taxing entities for Draper locations were grouped into four clusters: Schools, Salt Lake County, Draper City, and Other. Breakouts of each cluster are as follows:

#### *1. Schools*

- a. Canyons School District
- b. State Basic School Levy
- c. Utah Charter School-Canyons
- d. Jordan School Old Debt Service

#### *2. Salt Lake County*

- a. Salt Lake County
- b. Salt Lake County Library
- c. Multi County Assess/Collections
- d. County Assess/Collections Levy

#### *3. Draper City Government*

- a. Draper City

#### *4. Other*

- a. Jordan Valley Water Conservancy
- b. South Valley Sewer
- c. Central Utah Water Conservancy
- d. South Salt Lake Mosquito Abatement

### **Conclusion**

Based on the assumptions and inputs provided, the Point of the Mountain Framework Plan creates a significant economic contribution and offers Draper, Salt Lake County, and the state substantial economic opportunity. The Framework Plan, as specified, would further state objectives to support high-quality development, housing, and jobs. It is associated with about five times more jobs, earnings, and GDP compared to the Baseline development scenario; and its higher density creates about 4,650 additional housing units and about 4.5 times more per year in net tax revenue for the state and Salt Lake County. These conclusions rest upon the assumptions and inputs provided and additional scenarios are also plausible.

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