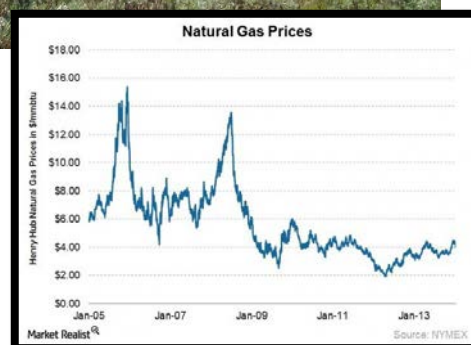


Sublette County Economic Development Master Plan



June 2015

Prepared by:

Community Builders, Inc.

Community and Economic Development Consulting

"Building Communities - One Relationship at a Time"



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INTRODUCTION & PROCESS

Sublette County is an area of clean air and water, vast open spaces, rich natural resources, accessible public lands, and dramatic beauty. Because of its relative isolation, Sublette County's people are independent and resilient to the ups and downs of their extractive economy.

The 2003 Sublette County Comprehensive Plan identified four values in the overall vision:

1. Sublette County's unique, local culture shall be preserved and enriched - characterized by a rural, Wyoming flavor; a thriving private business community; an atmosphere friendly to working families; and the security of friendly, crime-free communities.
2. There shall be an abundance of economic freedom, and diverse opportunities for residents old and new to pursue prosperity and happiness - complemented and sustained by a business friendly atmosphere, reasonable taxation, a low cost of living, limited regulation, wise development of its natural resources and a strong tradition of a good work ethic.
3. Our environment shall reflect the high value Sublette County residents place on clear air and water; the wide open, rural landscape; and a healthy, diverse base of natural resources including water, land, minerals, oil, gas, plants and animals.
4. Sublette County shall remain free from excessive land use regulation and shall continue to be vigilant in the protection of private property rights.

This plan is crafted from a perspective of this vision and CBI has attempted to honor the listed values in making economic development recommendations.

Sublette County has three incorporated and a number of unincorporated communities:

- Pinedale - Pinedale is the county seat for Sublette County. Pinedale has proven popular with retired and semiretired persons, however, since 2000 this trend was eclipsed by those seeking employment in the nearby natural gas fields in the Jonah Field and Pinedale Anticline.
- Big Piney and Marbleton - these two communities are classified as "southern" Sublette County and both are incorporated distinct communities. Distinctly "working class" by nature, they work together on many joint programs and projects, and their children attend one school system. Big Piney and Marbleton are separated geographically and somewhat socioeconomically from Pinedale and the rest of northern Sublette County.
- Unincorporated communities located in Sublette County include:
 - Daniel
 - Boulder
 - Cora
 - Bargerville
 - Bondurant



Marbleton Town Hall



Cora Post Office



Bondurant



Daniel School

Background

In the last twenty years, Sublette County has gone through a period of rapid growth driven by oil and gas development, followed by a rapid decline. Pinedale, the county seat, completed a Wyoming Rural Development Community Assessment in 2002 with a Five-Year follow-up Assessment in 2010. Daniel completed an Assessment in 2009 and Boulder in 2011. Marbleton and Big Piney completed a "Community Development Summary Report" analyzing their Strengths, Weaknesses, Opportunities, and Threats (SWOT analysis). Building on these processes, Sublette County decided to create a countywide Economic Development Master Plan, to aid them in identifying sectors for growth as well as do a better job of capturing tourism dollars and retaining local dollars. Key goals for this plan are to serve as a roadmap towards growth and diversification, leaving Sublette County communities less vulnerable to the wild fluctuations of the oil and gas industry, and establishing a more sustainable and stable tax base.

The economic recession in 2008 – 2009 resulted in steep and rapid declines in drilling activity. Sublette County ranked high on the list of counties experiencing rapid busts. Sublette County has endured many departmental budget declines, and the county continues a downward trend in staff positions. Sublette County has also continued its general hiring freeze, not creating new staff positions.

The grassroots planning effort that has been taking place has generated much data and information, but no clear direction. In late 2009, Sublette County formed the Sublette Economic Resource Council (SERC), which serves as the local economic development organization.



In 2014, after securing a planning grant from the Wyoming Business Council, Sublette County enabled SERC to retain the services of Community Builders, Inc. (CBI), a Wyoming-based consulting firm specializing in community and economic development. Working with SERC, Sublette County, and the various communities in the county, CBI created this plan. If fully implemented, this plan should help mitigate the significant decline in the gas activity, identify effective growth strategies, and provide the framework for assessing economic development success.

Review of Background Documents

To further understand the local economy, CBI reviewed several background documents related to this project, as follows:

- Wyoming Rural Development Community Assessment reports for several communities
 - Pinedale (2002)
 - Pinedale Five-Year Follow-up (2010)
 - Daniel (2009)
 - Boulder (2011)
- Big Piney/Marbleton Community Development Summary Report (2009)
- Sublette County Comprehensive Plan (2003)
- SERC Strategic Plan (2013)
- Pinedale Master Land Use Plan (2007)
- Pinedale Downtown Economic Development Strategy (2013)
- Housing and Real Estate Trends in Sublette County, Wyoming (2007)
- Information regarding past and current economic development plans for the area (local efforts and Wyoming Business Council plans), including any regional plans
- Reports from the Wyoming Community Development Authority (housing), the Wyoming Department of Workforce Services (employment), Wyoming Department of Revenue (sales and use taxes), U.S. Census Bureau (including American Community Survey), and other demographic/economic data sources
- Maps and charts of Sublette County and the surrounding area

Economic Development Building Blocks

This plan addresses each of the “building blocks” of economic development, as characterized by the Wyoming Business Council (WBC) and the Wyoming Economic Development Association (WEDA), as follows:

- Leadership/Civic Development/Public Policy
- Quality of Life
- Workforce Development
- Infrastructure Development
- Existing Business Development
- Entrepreneur Development
- New Business Recruitment

The building blocks are all important, but foundational issues need to be in place before reaching the top goal of new business development. In fact, many people misunderstand economic development and believe that it is only successful when it brings new businesses to the community. The reality is that all of the building blocks must be addressed, and only when all of the underlying blocks are in place can recruitment succeed. Thus, a good way to view the building blocks is in a pyramid shape, as shown in the following diagram.



By creating and implementing a local economic development plan with goals to address all of these building blocks, sustainable success can be achieved and appropriately measured across all economic development efforts, not just business recruitment.

This plan also uses the North American Industry Classification System (NAICS) for analysis of the local economy. NAICS is the standard used by most government agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to

the U.S. business economy. The NAICS nomenclature starts at what is known as the “2-digit” level, where each major industrial sector is broadly defined. The following table lists all twenty (20) of the major industrial sectors.

NAICS	Industrial Sector Description
11	Agriculture, Forestry, Fishing and Hunting
21	Mining, Quarrying, and Oil and Gas Extraction
22	Utilities
23	Construction
31-33	Manufacturing
42	Wholesale Trade
44-45	Retail Trade
48-49	Transportation and Warehousing
51	Information
52	Finance and Insurance
53	Real Estate, Rental and Leasing
54	Professional, Scientific and Technical Services
55	Management of Companies and Enterprises
56	Administrative, Support, Waste Management and Remediation Services
61	Educational Services
62	Health Care and Social Assistance
71	Arts, Entertainment, and Recreation
72	Accommodation and Food Services
81	Other Services (except Public Administration)
92	Public Administration

As additional detail is needed or desired, NAICS shifts to 3, 4, 5, or even 6 digits. For example, Automobile Manufacturing is defined at the 6-digit NAICS Code level as 336111. That subsector is included within the broader NAICS classifications with fewer digits, as shown in the following example.

Code Detail	NAICS	Industrial Sector Description
2-digit	33	Manufacturing
3-digit	336	Transportation Equipment Manufacturing
4-digit	3361	Motor Vehicle Manufacturing
5-digit	33611	Automobile and Light Duty Motor Vehicle Manufacturing
6-digit	336111	Automobile Manufacturing

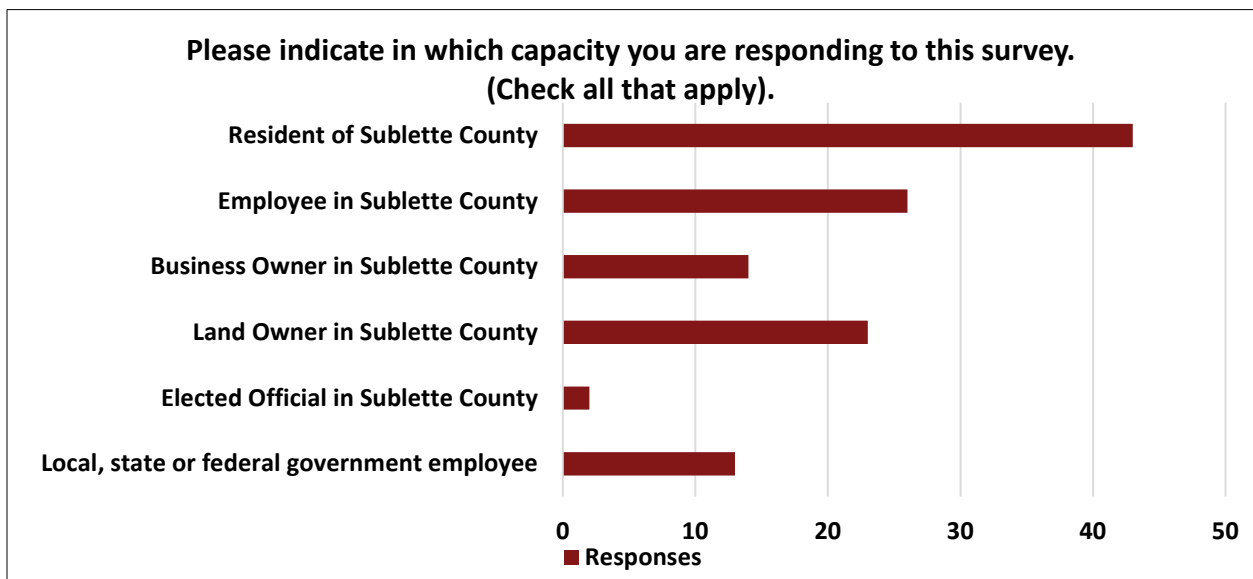
For many local economies – especially in rural Wyoming – data is typically available only at the 2-digit or 3-digit levels, and occasionally at the 4-digit level. The governmental agencies that collect industry information often suppress data to protect business confidentiality. This plan provides as much NAICS detail as is available.

Public Participation



CBI gathered input for this plan in several ways, gathering comments and insight from SERC, Sublette County, municipalities, local businesses, and residents. CBI conducted online surveys at the beginning of this project, however survey responses from the general public were very limited (14 total community surveys and 57 Stakeholder surveys were completed). This survey was not intended to be a random sample with statistically valid results. Rather, it allowed respondents to share their thoughts. The compiled survey results were consistent with the input that CBI received from the various individuals who were interviewed. CBI made several site visits to Sublette County and its

various communities, interviewed business owners/managers, and visited with elected leaders. CBI has also reviewed several studies and plans that were previously completed.



GOALS AND OBJECTIVES

Sublette County needs a comprehensive economic development plan that is reflective of the best practices in economic development. Accordingly, this plan analyzes public input, gathers relevant and objective data, conducts a SWOT analysis, and makes specific recommendations that address all of the building blocks of economic development. Appropriate goals and objectives are summarized below:

- **Leadership/Civic Development/Public Policy**
 - Provide accurate information on the economy
 - Build awareness and support for economic development
 - Develop vision and leadership for future
 - Coordinate and collaborate with others
 - Engage other economic development supports
 - Create and implement responsible development principles
 - Enable and support economic development organization
- **Quality of Life**
 - Enhance and maintain existing community facilities
 - Build new facilities (e.g., Critical Access Hospital) when there is a clear need and a sustainable business model to support them
 - Continue saving
 - Encourage restaurants and accommodations
 - Develop more activities
 - Continue to improve downtowns
- **Workforce Development**
 - Serve as a “clearing house” for employees, businesses, and trainers
 - Engage Wyoming DWS
 - Engage Western Wyoming College
 - Engage key industry sectors
- **Infrastructure Development**
 - Continue highway maintenance and, when possible, consider additional road improvements
 - Enhance telecommunications
 - Engage WBC programs and funding
 - Plan for housing that is affordable for working residents
 - Continue to be involved in public land plans and decisions
 - Consider asking Wyoming to sell certain state lands

- **Existing Business Development**
 - Appreciate and prioritize existing business development
 - Engage local businesses
 - Engage local residents
 - Focus efforts on specific industries
 - Prioritize the tourism and travel industry
 - Leverage all available resources to retain and expand businesses
 - Engage Internet use for sales
- **Entrepreneur Development**
 - Encourage new products/services with local flavor
 - Start an Entrepreneur Challenge/Business Plan Competition
 - Leverage all known resources to support entrepreneurs
 - Create a loan program
 - Provide entrepreneurship training
- **New Business Recruitment**
 - Pursue WBC leads
 - Work local contacts
 - Pursue specific business targets



LEADERSHIP/CIVIC DEVELOPMENT/PUBLIC POLICY

Public Input/Surveys

The online surveys gathered 71 responses (see Survey Summary in Appendix A). The survey responses demonstrate that local residents and leaders understand that the area has gone



through a boom driven by oil and gas development, and that the area is now in a “bust.” Universally, survey respondents recognize the change that tax revenues brought to Sublette County. The survey responses also suggest that those tax revenues have not been used wisely. For example, there is ample criticism that large projects have been funded during the boom, but that there is no means with which those projects can continue to be operated. This criticism may be legitimate, and time will tell whether those investments can be worked to create a return for the community.

Many survey respondents express remorse that local leaders did not effectively use the oil and gas revenues to “bring in” new businesses. There is a perception that local government could attract new business simply by providing financial incentives and a welcome mat. This view of economic development, however, is not realistic. Rather, economic development is only possible when communities pursue a broad set of goals that, together, build the economy. These are the economic development “building blocks” identified above.

Most survey respondents also recognize that the local economy is weaker now than it was just a few years ago. Many surveys identified local elected leaders as part of the problem, not the solution. Many people also believe that the “good ol’ boy system” is still in place even though it is despised. Likewise, there is a common concern that economic development efforts and leadership have been insufficient to appropriately diversify or growth the local economy (beyond oil and gas development). Finally, there were several observations that local codes and ordinances do not adequately keep individual towns sufficiently clean (“too many junk vehicles”, “need to clean up storefronts”, etc.).

One of the most striking observations made by CBI in visiting with people throughout Sublette County is the distinct separation of “north from south” Sublette County. Attitudes are different and the ability to work as a cohesive county seems to be difficult between the two sides. Pinedale is perceived as the tourism and ranching side of the county with the Big Piney/Marble area to the south described as blue-collar, working person-based.

Objective Analysis - Leadership, Civic Development, Public Policy

Sublette County and its municipalities – especially Pinedale – have invested significantly in planning and growth management. In particular, the Sublette County Comprehensive Plan and the Pinedale Master Land Use Plan/Code are robust planning efforts that tackle head-on the many issues driven by rapid economic growth. The focus of these planning efforts has been to identify actions and processes to accommodate growth, especially growth driven by the oil and gas industry. It is clear that local governments have been taking responsibility for their role in the boom, building infrastructure and encouraging development in areas that have the capacity to meet business and residential infrastructure needs.

Sublette County and the many communities within it each have a unique character, and their respective community plans typically reflect a desire to maintain that character. Fundamental values of local residents have been in place a long time, including emphasis on open space, recreation, appreciation for the beauty of the area, agriculture, strong work ethics, and closeness among residents. Some of those values have been challenged or even threatened during the boom years and the influx of new workers. However, those values are clearly instilled in the adopted plans that are used to continue guiding growth.

As with most areas of Wyoming, there are no local television stations in Sublette County. However, there are adequate opportunities for public discourse online and at public meetings. Local media (including radio and newspapers) monitor and report on local government decisions, which tends to increase accountability and transparency. Most local elections are contested (not so much for state offices), and local voters tend to express themselves well by removing leaders whenever residents become unhappy about their leadership. Based on these observations, it would seem that the foundation for effective and democratic representation is in place in Sublette County.

To the extent that economic development planning has taken place (for example, with the Pinedale Downtown plans), efforts are made to create plans that consider all the various building block components of economic development. Good intentions and enthusiasm have been demonstrated by elected leaders with the formation of SERC. Sublette County also enjoys good support from the Wyoming Business Council, including the active and ongoing involvement of the Southwest Regional Director.

Two things appear to be missing. First, a coordinated, countywide economic development strategy has not been created. This plan addresses that need. Second, the inconsistent and inadequate public understanding of economic development has led to a lack of community support, and has even undermined leaders' efforts to strengthen and diversify the local economy. This, too, will be addressed in this plan.

SWOT Analysis - Leadership, Civic Development, Public Policy

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding leadership, civic development, and public policy in Sublette County.

Strengths

- Local residents will speak up, and take action (voting) when they want change
- Local governments tend to embrace sound economic development principles
- Pinedale and Sublette County have created comprehensive plans
- Elected leaders have invested “boom” money in infrastructure and new public facilities
- New people with new depth and breadth have moved into the area

Weaknesses

- Local residents are not necessarily aware or appreciative of sound economic development principles
- The “bust” is now leading many people to second-guess and criticize leaders’ decisions (past and present)
- As with most communities, there are at least a few local residents who are opposed to economic development in any form
- The "North-South" schism is not conducive to building relationships
- SERC, the Countywide economic development agency, has suffered from organizational and leadership vacuums in the past, which has led to a loss of momentum

Opportunities

- Can increase public education about the value (and need) for economic development
- Local communities can revisit local codes and plans to further encourage development
- Development of a funding mechanism for SERC

Threats

- Much of the local economy is at the mercy of global market changes, and is not in the control of local leaders
- As Sublette County has grown, new residents have brought their own values, which sometimes conflicts with existing residents’ values

Recommendations - Leadership, Civic Development, Public Policy

CBI recommends several action steps to improve leadership, civic development, and public policy in Sublette County:

1. ***Provide accurate information on the economy.***

There is far too much speculation about the local economy, particularly since there is good data and fact-based analysis available to explain what is happening. It may be wise to provide a series of new releases and/or media interviews to provide accurate information about the economy. Natural resources can certainly generate a significant economic impact, but local governments have very limited ability to regulate or control resource extraction such as oil and gas. Additionally, the tax benefits of a “booming” economy often lag behind the costs to support the boom (e.g., roads, housing/accommodations, public facilities, construction, environment, etc.). For most rural communities, there is absolutely no way to “bring in” any particular business (it is also not possible to “keep out” most businesses, provided they are operated legally).

Local residents need to know exactly how the oil and gas boom has affected their local economy. Existing businesses have expanded, and new businesses have been created – especially lodging facilities. Yet, paradoxically, the tourism industry has suffered because lodging, restaurant, and other travel services have been overwhelmed by the influx of oil field workers. The local economy is going to continue contracting for the foreseeable future, for at least two reasons: (1) Global oil prices remain low due to increased production; and (2) development of local oil and gas reserves has reached a maturation point.

Economic and demographic information needs to be put into a context that has more meaning to local residents and businesses. The “numbers” rose (and are falling) so fast that many people have become numb to them. This report provides several benchmarks from which successes can be realistically measured. Similar socioeconomic information has been monitored and reported by Sublette County staff; however, the general public needs to better understand the local economy AND needs to have confidence that local leaders are effectively using this information. By engaging local media, local governments can accomplish that task.

2. ***Build broad-based community support for economic development and growth.***

There are many perspectives about business. Some people believe that private enterprise takes action when there is opportunity for profit – plain and simple. Others believe that government can encourage growth with incentives, tax breaks, and a favorable regulatory environment. Truth is that both of those perspectives have merit, though neither is completely correct. Still others believe that the government controls all growth. Most believe that economic development consists entirely of business recruitment efforts (and

therefore should be judged solely by the number of new businesses/jobs that have been recruited).

CBI recommends that Sublette County leaders become educated about sound economic development principles, and then make a concerted effort to encourage local residents and businesses to support a comprehensive economic development effort. This effort needs to address all of the building blocks of economic development (explained above and addressed throughout this plan). A key to developing support for economic development is to adequately define what it is (and is not). This effort requires clear identification of goals and measures of success. Those who receive funding for economic development must be accountable for their activities to those who provide funds, and that accountability must be based on pre-defined measures of success. The return on investment is not always the number of new jobs or the increase in the tax base. In fact, most economic development efforts should be focused on helping existing businesses grow and other building blocks. Building community support will require regular communication, a comprehensive approach to economic development, and a fair system of accountability.

3. ***Provide more opportunities for leadership development.***

Perhaps by necessity, local leaders have become reactionary. They have had to react to rapid growth and, now, rapid decline in the economy. Local governments have been forced into this position by global market forces. Yet, they have done a great job with the tools available to them.

Now, however, they have better resources than they had 15 years ago, and they have the luxury of time with which to make decisions. Sublette County will never go back to what it was in 1990 (or any time before then). It must move forward. Accordingly, current leaders should endeavor to develop new skills. Additionally, new leaders need to be prepared for the future.

Leadership Wyoming, the University of Wyoming Extension Service, and others provide excellent training for community and business leaders. There may be an opportunity to create a Leadership Sublette County program. Even without that type of a program, economic development training should be mandatory for newly elected leaders and local government staff. As a starting point, CBI recommends that WEDA's Economic Development 101 be made available to leaders (PowerPoint presentations and other information is available at <http://www.wyomingeda.org/library.htm>).

4. ***Do nothing without coordination and collaboration.***

Attempting economic development as a solo act is foolish and will likely result in failure. However, when a group of leaders and organizations work together toward common goals, success is often the result. The building blocks of economic development cannot be constructed by one person or agency alone. Instead, Sublette County can achieve its

economic goals by consistently coordinating its efforts with logical partners. Those partners are identified in the following sections of this plan. Even if all of CBI's recommendations are not wholly pursued by Sublette County, the value of collaboration is apparent from the synergy of many people, as well as from the savings created when multiple organizations share the expense of getting projects done.

5. ***Engage relevant associations to improve economic development skills and knowledge.***

Whoever is charged with economic development needs to be engaged with the Wyoming Economic Development Association (WEDA) and the Wyoming Business Council (WBC). [Note: CBI recognizes that SERC is currently a member of WEDA, and that the WBC Regional Director is actively involved with Sublette County.] WEDA is able to support local economic developers, and hosts regular conferences at which economic developers can learn their trade and network with their peers. Such engagement would be particularly helpful now, as other economic developers have experience with boom/bust cycles, and will readily share their experiences and advice with others. Economic developers in Wyoming tend to be very collaborative, which is unusual compared to the typically competitive nature of economic developers elsewhere. Additionally, Sublette County should encourage and enable local economic developers to acquire certified economic development skills (such as those provided by the International Economic Development Council and/or the National Development Council).

Likewise, municipalities should be active in the Wyoming Association of Municipalities (WAM), and Sublette County should remain active in the Wyoming County Commissioners Association (WCCA) and the Wyoming Association of County Officers (WACO).

6. ***Improve communication and transparency with the general public.***

There is a perception among some residents that a “good ol’ boy” club is running local government. While it is doubtful that assertion is true, the perception is reality for at least some people. Sublette County and its municipalities appear to operate quite openly, publishing meeting notices, agendas, and minutes in a timely fashion. SERC can perhaps address this concern by maintaining a similar level of communication and transparency.

CBI recommends that SERC take several steps to improve communication and transparency. First, its website needs to be completed and then maintained. Meetings and agendas should be available online. Second, SERC should allow anyone to attend their regular board meetings. There are times when meetings will need to be closed to discuss sensitive information, but for the most part those meetings should be open. Third, SERC should regularly report its activities, successes, and failures. A quarterly report would be ideal, but many local economic development agencies are able to maintain accountability with an annual report. Again, an active up-to-date website can play a major role. These reports should also include economic and demographic data prepared by state and federal agencies.

7. ***As needed, modify policies, regulations, and codes to be pro-development.***

CBI recommends that SERC work with Sublette County and its municipalities to conduct a review of all development policies, codes, and processes. Where possible, inclusion of local developers can provide current information on issues and concerns. This is a healthy exercise for any local government, and should be conducted every few years.

8. ***Enable and support a flexible and effective organizational structure for economic development.***

Creation of SERC is a great start for economic development in Sublette County. A next step should include open discussions with business and community leaders in southern Sublette County. SERC needs to actively solicit input and then take specific actions that help that part of the county grow.

SERC also needs to annually review its economic development plan to make sure it is always working toward improvement of all the building blocks, not just business recruitment.

Stable funding for economic development is a necessity. If SERC is continually spending time and effort securing money for its operations, less actual work will be completed. Chasing funds will also limit SERC's flexibility and effectiveness. CBI recommends that Sublette County and its municipalities meet to discuss a long-term funding plan (5 – 10 years). That plan should also include specific goals, performance measures, and outcomes (aligned with the economic development building blocks).

QUALITY OF LIFE

Public Input/Surveys

Of all the economic development building blocks, survey respondents identified only Quality of Life as a strength. The survey suggests that all of the other building blocks need at least some help. Likewise, nearly every survey respondent rated the local quality of life positively (only 2 respondents rated it as “somewhat negative,” and no one rated it “very negative.”

Nearly two-thirds of survey respondents said that they most often go to Pinedale for a meal or an evening out. Another 4% go to Big Piney or Marbleton. Jackson (17.3%), Rock Springs (2.7%), and Other (10.7%) were the other destinations noted in the survey. However, in the written comments, it is clear that many survey respondents are not satisfied with the quality and quantity of local restaurants. One response went so far as to say: "Pinedale has lots of restaurants, but nowhere to eat!" Survey respondents also expressed a desire to have a better selection and quality of groceries.

The vast majority of survey respondents (78.4%) stay in Sublette County for entertainment and recreation. Many of the survey respondents also made comments about how wonderful Sublette County’s outdoor recreation can be. Yet, in their written comments, many survey respondents noted the negative impacts that oil and gas industries can have on the things that local residents treasure the most – the outdoors, clean air/water, views, etc..

Additionally, survey respondents are aware of and express support for local actions that would improve other quality of life components (health, education, community organizations, housing, transportation, amenities, etc.).

CBI observed and was repeatedly told that Sublette County has a number of amenities that other communities their size lack - including the Aquatics Center, Ice Rink, Fairgrounds facility, Mountain Man Museum, and state of the art Rural Health Care Clinic. Outdoor activity opportunities (hunting, fishing, public land access, mountain vistas), also create a very high quality of life.



Sublette County Fairgrounds (Big Piney)



Bike Path in Pinedale



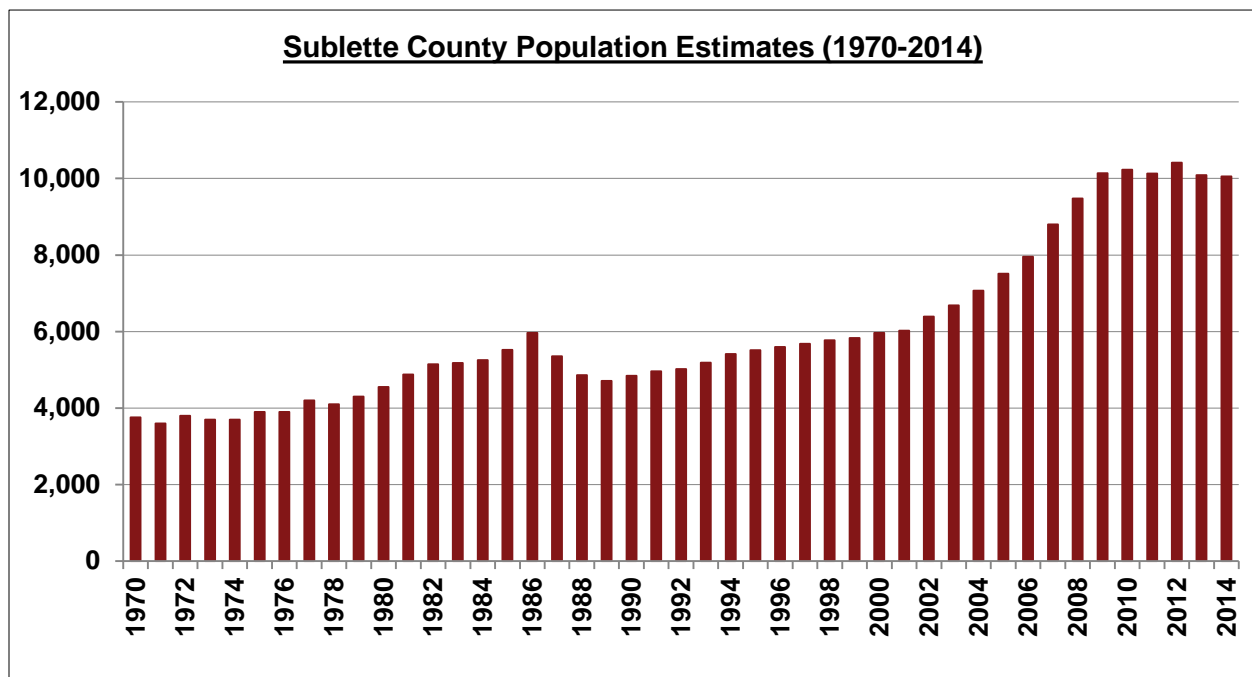
Pinedale Aquatics Center



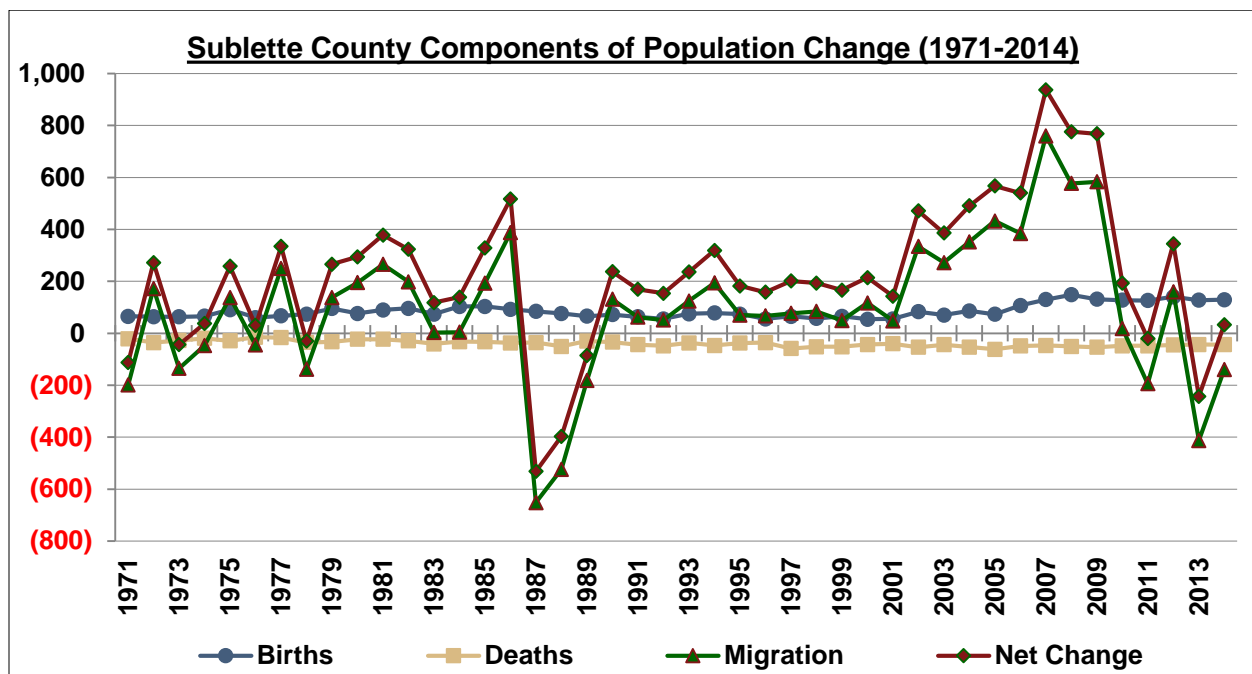
Fremont Lake

Objective Analysis - Quality of Life

Sublette County is a rural county that has grown primarily through energy-driven development. In 1970, the population was 3,755 residents. The population grew quickly in the early 1980's, reaching 5,962 residents, followed by a slump from 1986-1990. The county grew slowly through the 1990's, and then boomed again from 2002-2009. Since then, Sublette County has generally been declining. Population estimates (U.S. Census data) for 1970 through 2014 are provided in the following chart.



The impact of net migration (i.e., the number of people moving in, minus the number moving out) in Sublette County is enormous compared to natural growth (births minus deaths), as shown by the components of population change in the following chart (U.S. Census Bureau data).



As seen in the chart above, the wild swings in population are almost entirely driven by migration. From 1986 (+517 residents) to 1987 (-532 residents), Sublette County experienced a swing of more than 500 people coming and going in less than 24 months. Nonetheless, since 2005,

Sublette County has also seen the number of births jump by 75% (averaging 129 per year since then, versus an average of 74 per year from 1970 to 2005). The current population is estimated to be just over 10,000 people, 54% of which are male (by contrast, males make up 49.2% of the nation's total population).



Given its size and rural location, the retail market in Sublette County has been small. Except for retailers who cater to travelers and tourists, there has generally been leakage of retail sales. The oil and gas boom dramatically increased the sales for most types of retail. In 2014, Sublette County continued its recent trend of retail sales that far exceed local demand. According to Claritas/Nielsen data, local retail demand (including eating and drinking places) was \$223 million, while retail sales were \$326 million, creating surplus sales of \$103 million. However, the largest surplus

industries are those that have been most impacted by the influx of oil and gas field workers (who are now leaving the area).

Sublette County (Pinedale, in particular) is doing an excellent job keeping up with local demand for full service restaurants. Sales for full service restaurants totaled \$8 million, which represents 85% of local demand. Similarly, drinking places (i.e., bars) generated \$708,009 in sales of alcoholic beverages, meeting 90% of the local demand. However, limited service eating places (such as fast food and take-out stores) are virtually non-existent, even though there was local demand for more than \$8 million in sales in 2014. Because there are very few limited service restaurants, and because the full service restaurants were often very busy during the boom, there is a perception among locals that Sublette County needs more eating places.



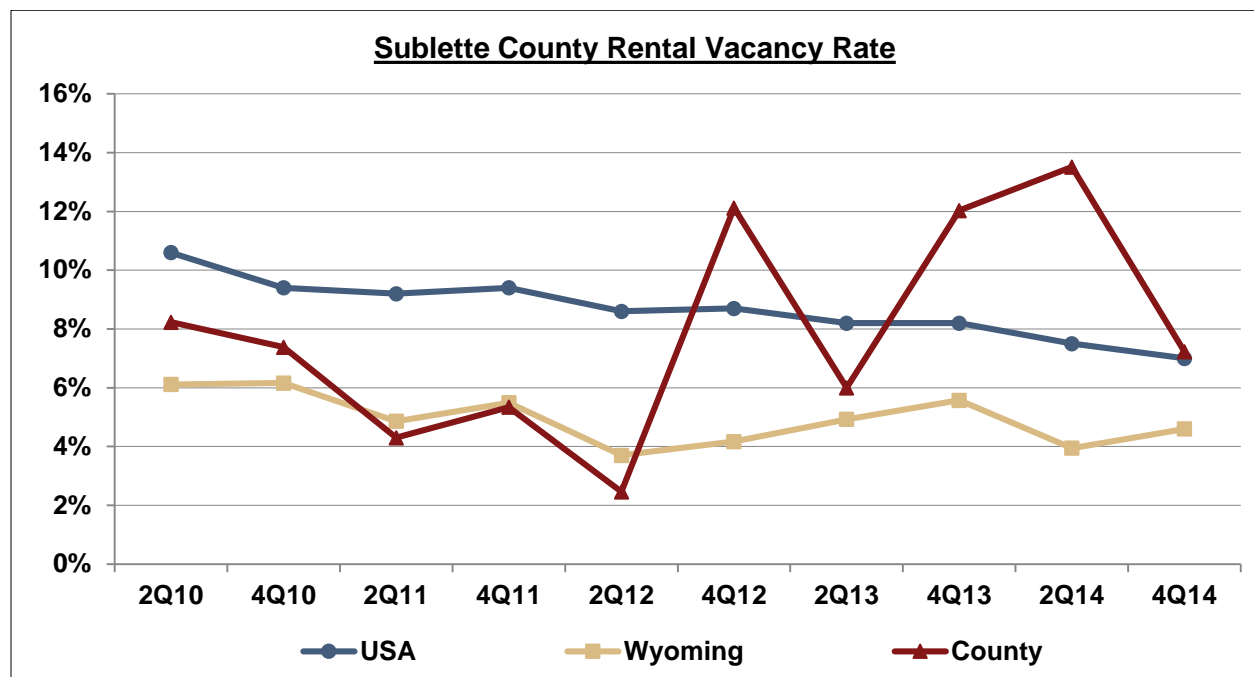
Additionally, one of the best selling merchandise lines in Sublette County is sporting goods. In 2014, retailers sold \$12.2 million of sporting goods, even though local demand was just \$2.4 million, which means that Sublette County generated a \$9.7 million surplus on that merchandise

line alone. For discussion of other key retail sectors, see the retail leakage discussion below in the New Business Recruitment section.

The housing market in Sublette County has been tight, at times, in light of the rapid growth driven by oil and gas production. As production ramps up, temporary housing opportunities become scarce. Hotels, RV parks, and apartments quickly fill to capacity. Landlords are able to charge higher rental prices when there are limited vacancies, and then some homeowners begin exploring options to sell their property at an escalated price. Inflation quickly rises, especially because housing prices are a major component to the cost of living. New hotels and other lodging opportunities seem to spring up overnight. Following the production boom is an inevitable slowdown, or even a bust cycle. At that time, vacancies rise, rental rates fall, inflation slows (or even turns negative), and the lodging industry struggles to survive.

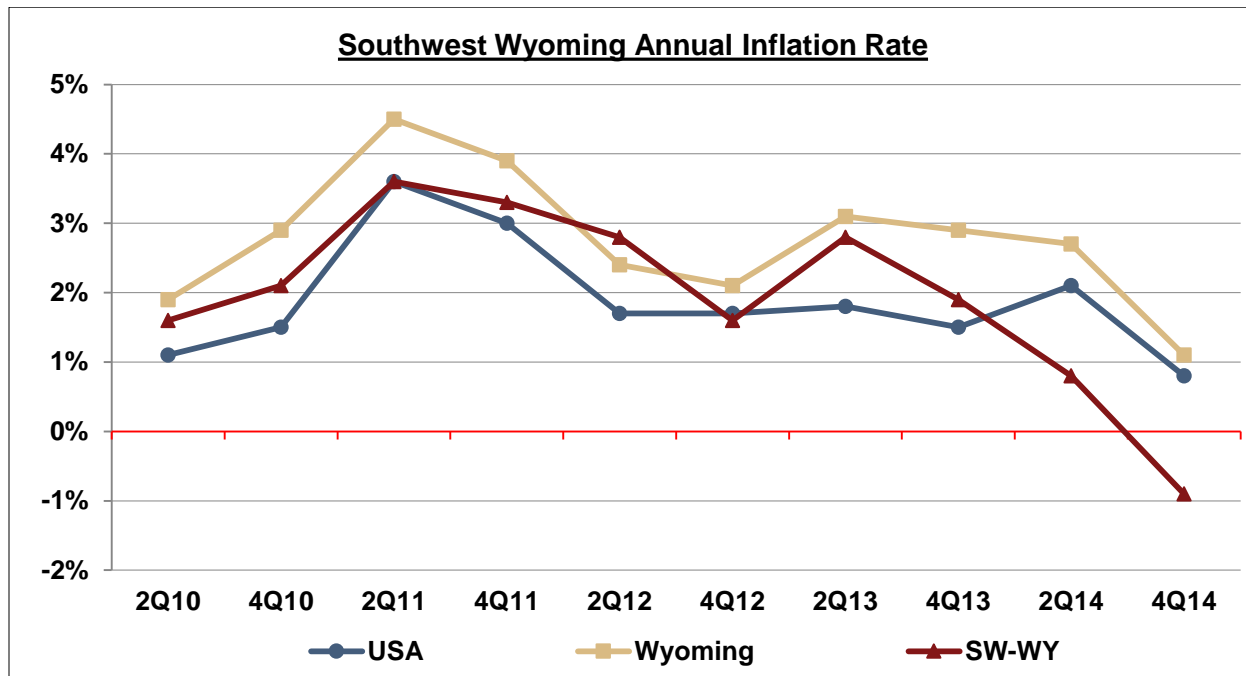


The following graph illustrates the impact that the ebb and flow of energy development has on rental vacancies. At times, vacancies are very low; other times they exceed even the national vacancy rate.

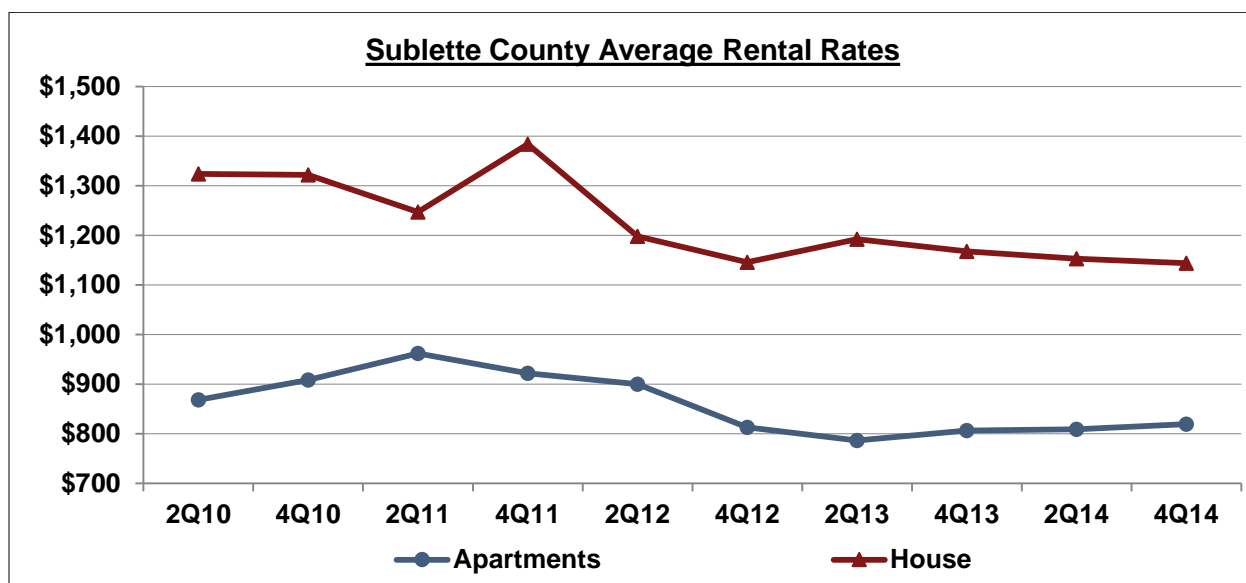


The national recession in 2008-2009 impacted all economies, including Sublette County. In the years after the recession, the economy grew. More recently, Sublette County's economy has

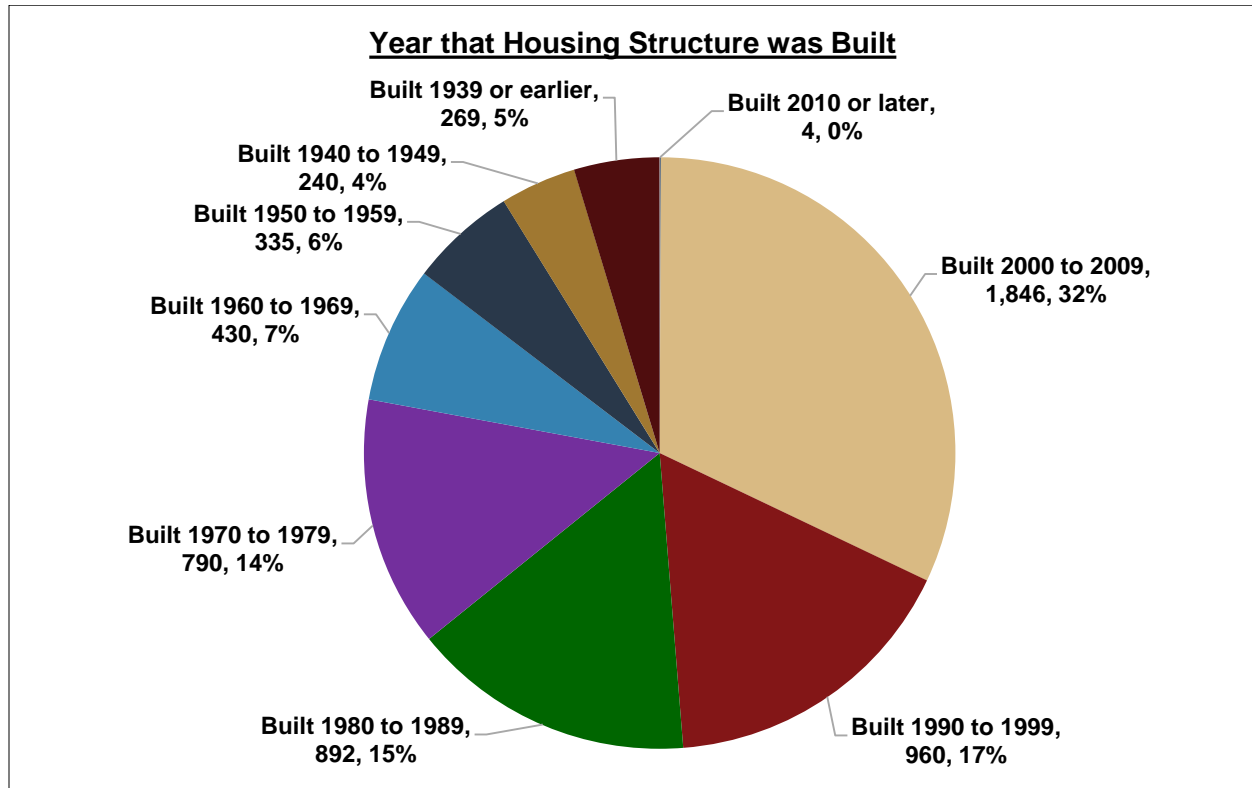
been contracting. The following growth shows how inflation has dropped (and even gone negative) in the Southwest Wyoming region. (Note: Inflation rates are not calculated for individual counties such as Sublette County, due to their small size.)



The other consequence of an economic slowdown is that housing prices tend to drop, especially for rental housing, as shown below.

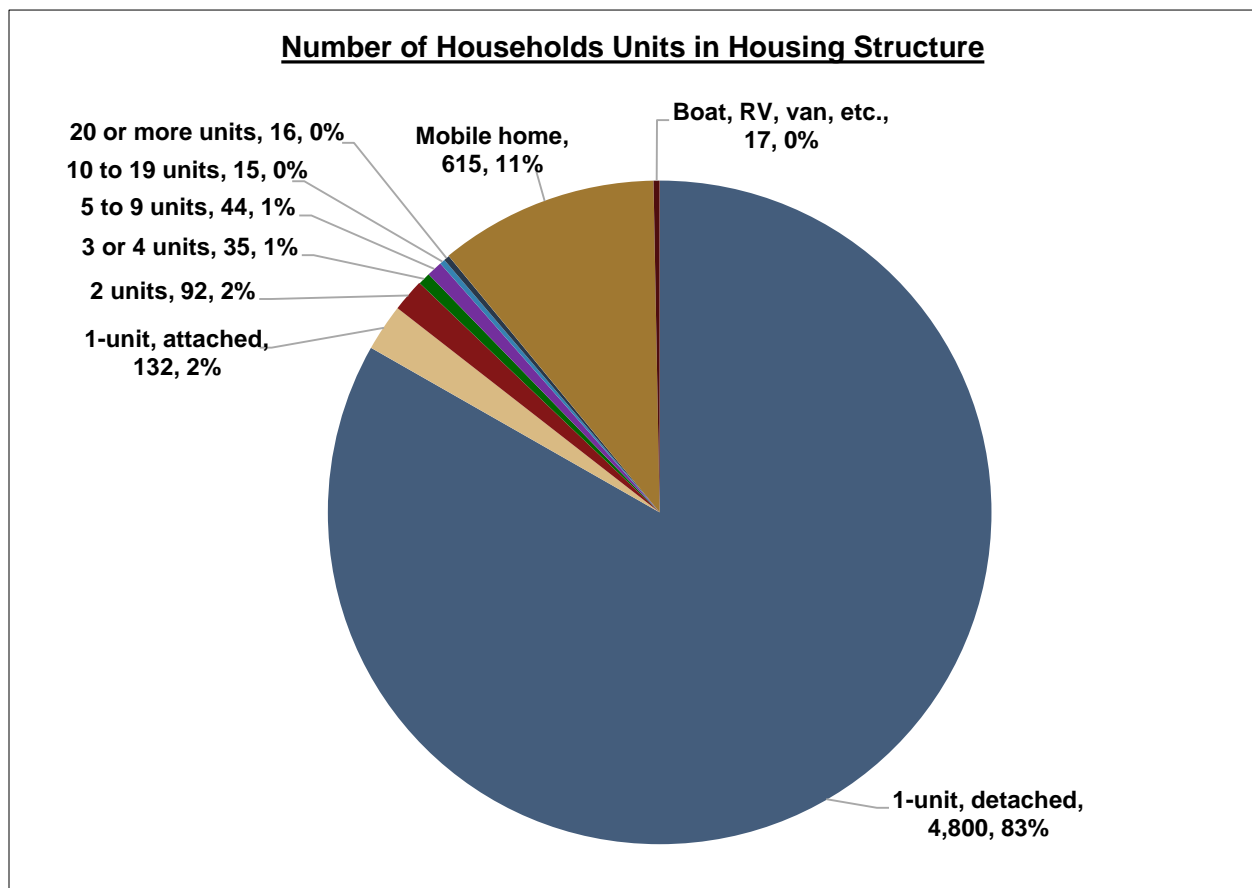


The energy development boom has driven a large percentage of new housing construction. According to data from the U.S. Census Bureau/American Community Survey, about one-third of all homes in Sublette County were built between 2000 and 2009, as shown below.

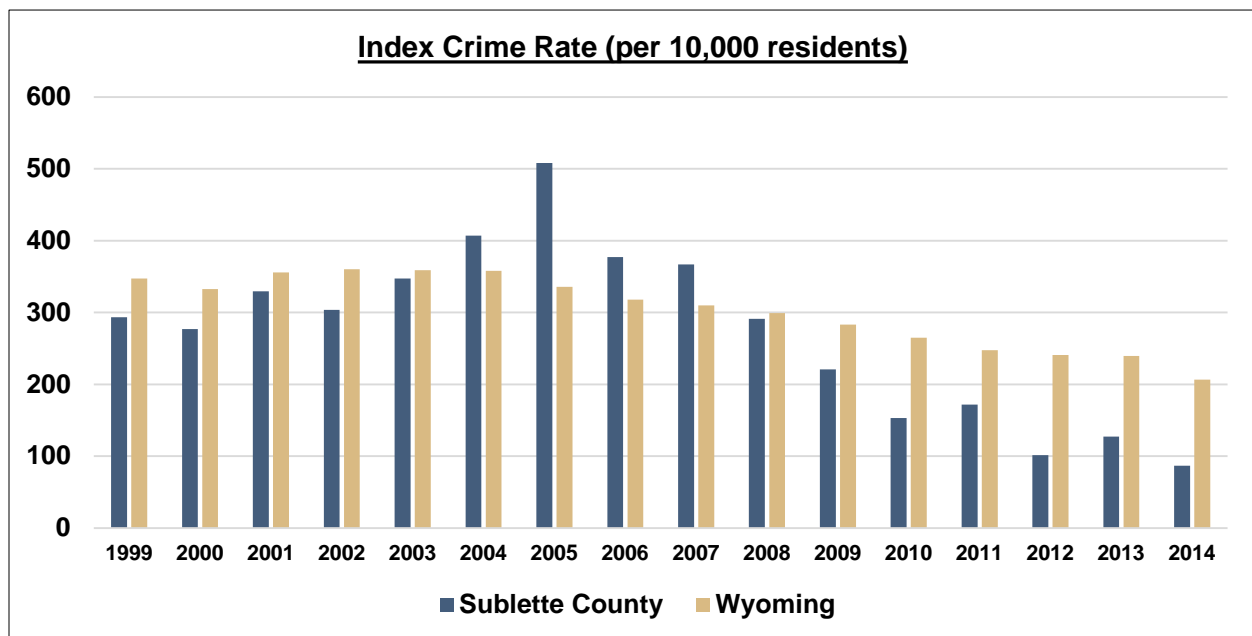


Eighty-three percent (83%) of households in Sublette County are single-family detached homes, 11% are mobile homes, and 3.5% are multi-family households (e.g., apartments, condominiums, duplexes, etc.). The prevalence of these household types is represented in the following graph (data from U.S. Census Bureau/American Community Survey).



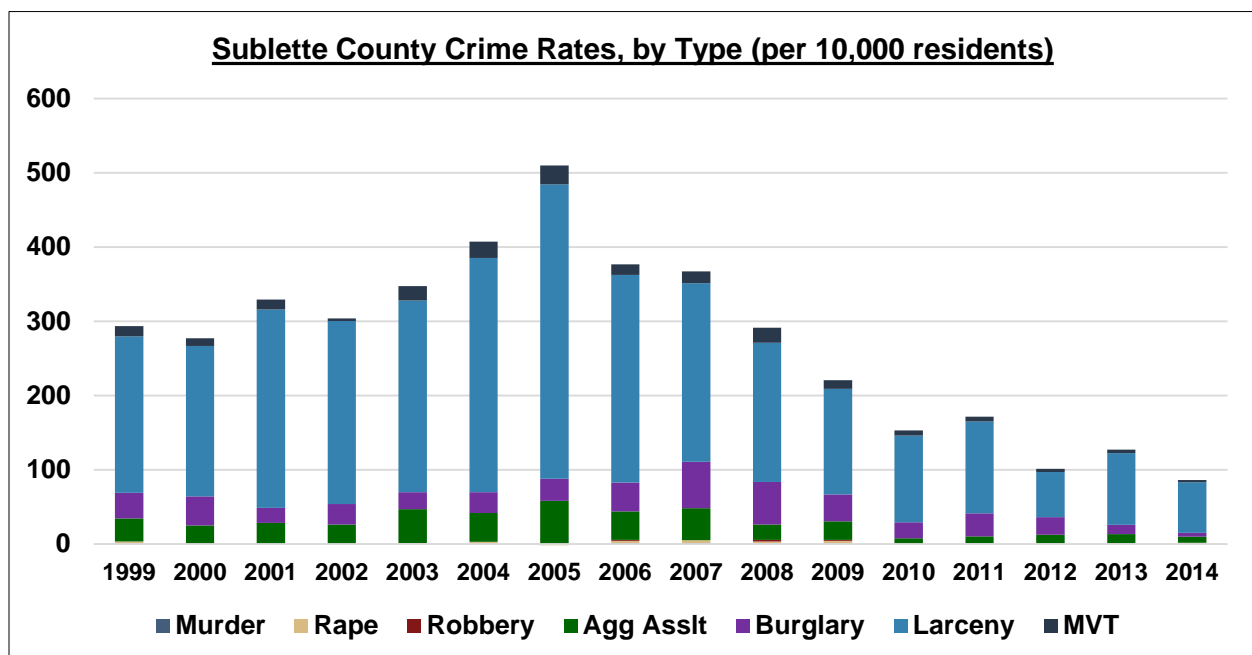


Sublette County experienced an increase in crime from 2000 to 2005. Since then, the crime rate has been dropping. The changes in the crime rate coincide with the cycle of oil and gas development and subsequent slow down. There is a public perception that the crime rate has skyrocketed and has not come down. However, when compared to the crime rate for the entire State of Wyoming, the local crime rate is actually quite comparable, as seen in the following chart (based on data provided by the Wyoming Attorney General's Office/Division of Criminal Investigation, or "DCI").



The Crime Index includes offenses that are serious, either by their nature or by the frequency with which they occur, and each presents a common law enforcement problem. Crimes within the Index are further categorized as Violent Crimes (murder, forcible rape, robbery, and aggravated assault) or as Property Crimes (burglary, larceny, theft, and motor vehicle theft).

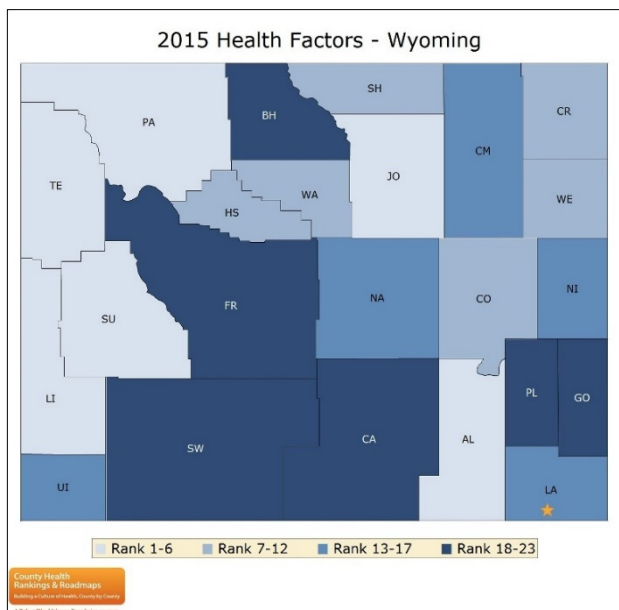
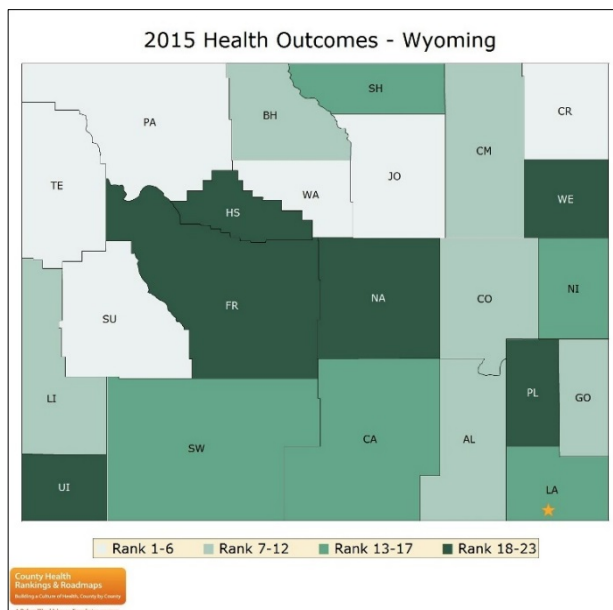
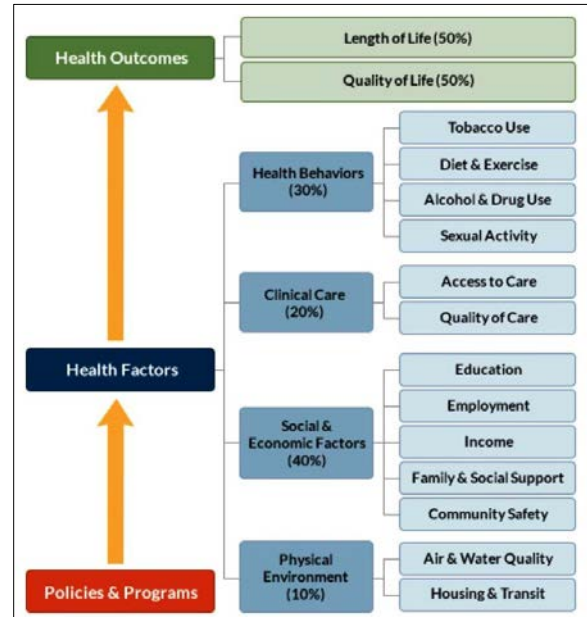
Most of the serious crime in Sublette County is property crime. However, there was also an increase in the number of aggravated assaults in Sublette County in 2003-2007, as shown below (data from DCI).



As crime increased, new officers were hired by the Sublette County Sheriff's Department (the only law enforcement agency in Sublette County; there are no local police departments). From 2002 to 2011, the number of officers increased from 23 to 36 officers.

Sublette County enjoys a good health outcomes and good health factors, which means that local residents enjoy a lengthy and high quality of life. According to data from County Health Rankings and Roadmap (a Robert Wood Johnson program), health factors include health behaviors, clinical care, social & economic factors, and physical environment. Taken together, these factors impact residents' length of life and quality of life (the health outcomes). See chart on right for more information.

Sublette County ranks very high in health outcomes and health factors, especially compared to other counties in Wyoming, as shown below.



SWOT Analysis - Quality of Life

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding the quality of life in Sublette County.

Strengths

- Sublette County has abundant outdoor recreational opportunities and views
- The county's population has grown significantly with the economic opportunities presented by the oil and gas industry
- The birth rate has risen, even with the oil and gas decline (i.e., families are staying put)
- Many homes are single-family residences, built within the last 15 years
- Housing costs are coming down, which also lowers the overall cost of living and inflation
- Although the crime rate spiked during the energy boom, it has been steadily dropping and is now lower than Wyoming's crime rate
- Health factors and outcomes are ranked high



Weaknesses

- The oil and gas industry has changed some views and has had an impact on the environment
- With the oil and gas industry in decline, people/workers are leaving the county
- Occasional perception that there are limited choices to eat out (at least for fast food places)
- Residents are very unhappy about the grocery store in Pinedale (prices, selection, customer service)

Opportunities

- The larger tax base and population have allowed new community facilities to be built, including a new elementary school, the aquatic center, and others
- With oil and gas in decline, hotels and restaurants have capacity to re-engage the local market (as well as re-growing the tourism market)
- Some new community facilities, such as the aquatic center, can become an asset that attracts visitors

Threats

- The lifestyle and character of Sublette County continues to be changed by:
 - Federal regulations
 - Local economic shifts caused by global oil and gas markets
- Population migration (people leaving)

Recommendations - Quality of Life

CBI recommends several action steps to improve the quality of life in Sublette County:

1. ***Continue to enhance and maintain community facilities that meet local needs.***

Sublette County and its municipalities should continue to invest in maintaining and improving community facilities (and services) for residents. For example, there has been much planning and discussion about construction of a critical access hospital. Even though local residents currently enjoy good health, a local hospital (including more doctors), would allow residents to receive better healthcare without having to travel outside the county. However, Sublette County should only proceed with a new facility if there is a clear need and a sustainable business model to support it.

2. ***Continue saving.***

Sublette County and its municipalities must continue saving some portion of the oil and gas revenue to meet future needs.

3. ***Encourage restaurants and accommodations.***

Recruitment and retention of local restaurants is an important economic development goal, and not just to provide a better quality of life. Restaurants and lodging establishments are a critical element of rebuilding Sublette County's tourism market.

4. ***Develop more activities for all residents to enjoy (and market them!).***

Sublette County residents love outdoor recreation. Support for protecting and enhancing access to public lands, creation of new events, bike paths, ball fields, and other developments will further enhance the quality of life. Additionally, many residents have limited awareness of everything that is already available, so some marketing would be very appropriate.

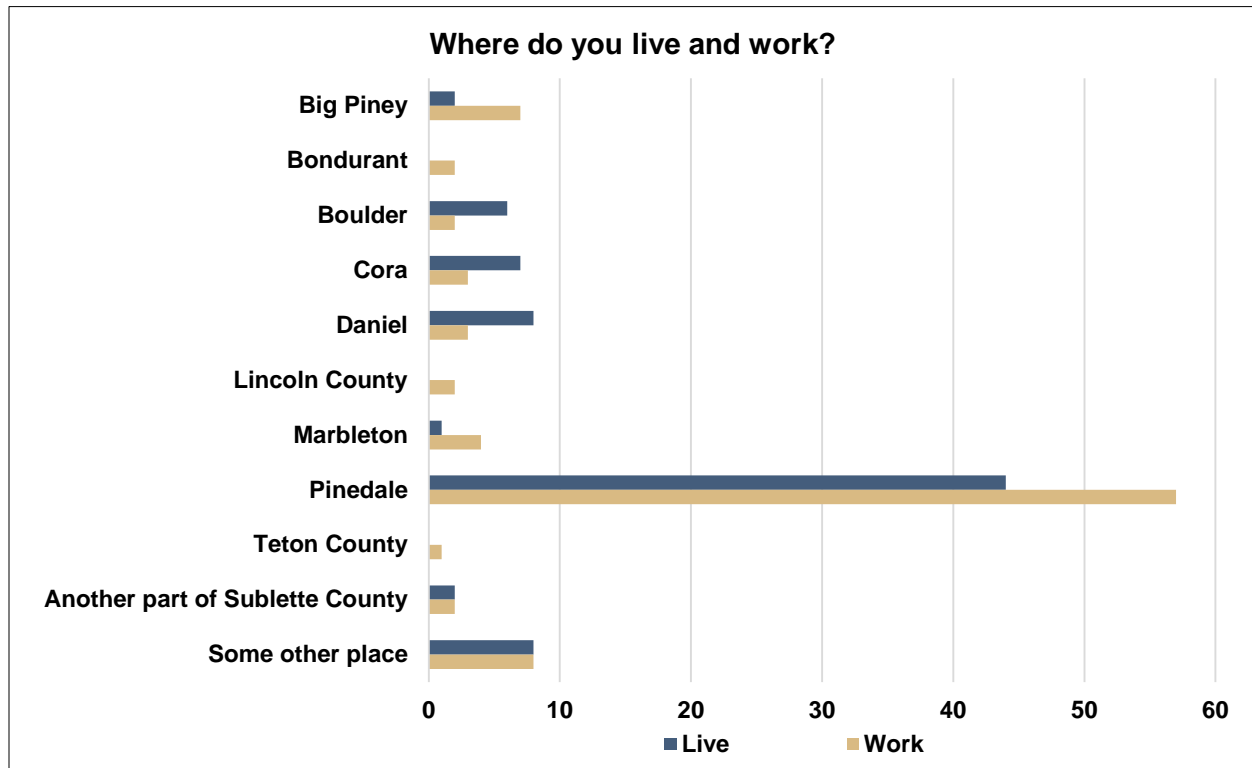
5. ***Continue to make improvements to downtown/Main Street areas.***

Downtown areas represent the character and culture of a town. Sublette County and its municipalities have a rich history, one that can be preserved while growing economic opportunity.

WORKFORCE DEVELOPMENT

Public Input/Surveys

The majority of survey respondents (56.4%) live in Pinedale, though there was good representation from throughout Sublette County. More survey respondents (62.6%) work in Pinedale, as shown below.

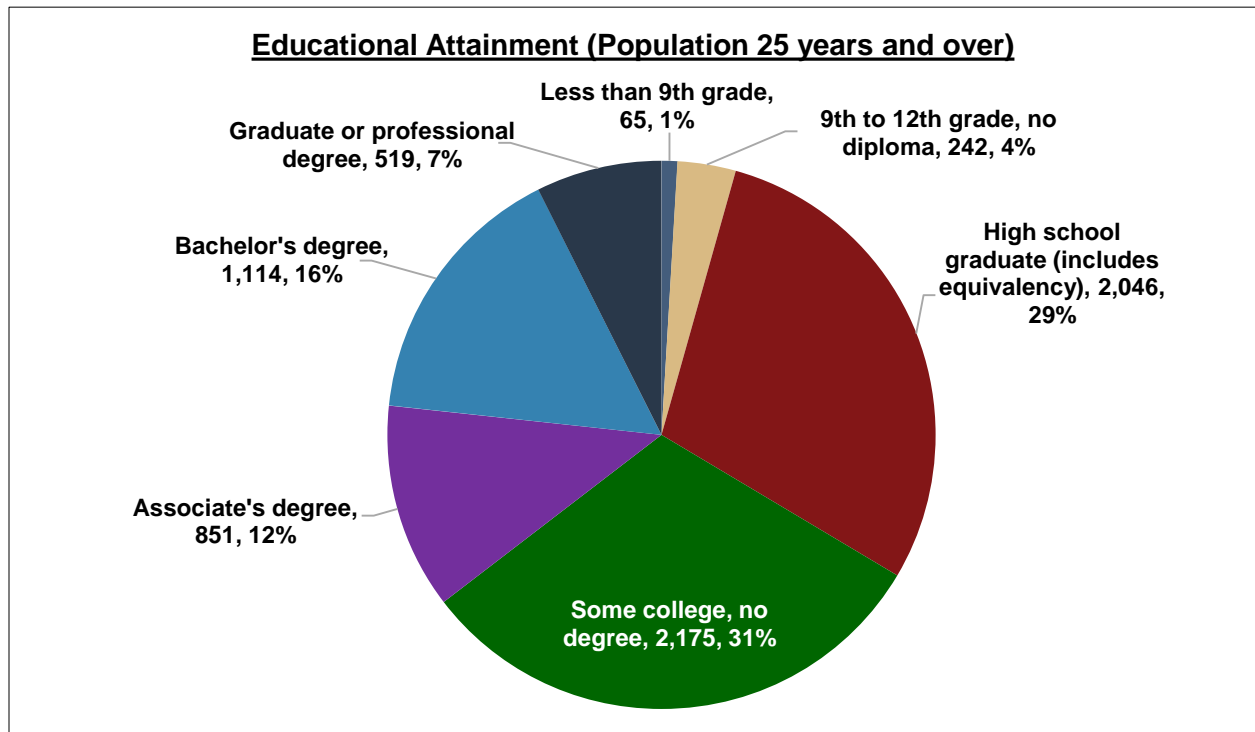


Survey respondents have a wide range of opinions on the quality of the local workforce. Opinions were about evenly split between it being “somewhat positive” and “somewhat negative.” However, when asked whether workforce development needed improvement, most survey respondents said it needed some help, and a significant number said that workforce development was a critical weakness for the community.

Objective Analysis - Workforce Development

According to data from the U.S. Census Bureau/American Community Survey, a very high percentage (95.6%) of the Sublette County population (age 25 and over) is at least a high school graduate, 66.4% has attended at least some college, and 23.3% has earned a bachelor’s degree or higher. By comparison, 86% of the nation’s population (age 25 and over) has a high school

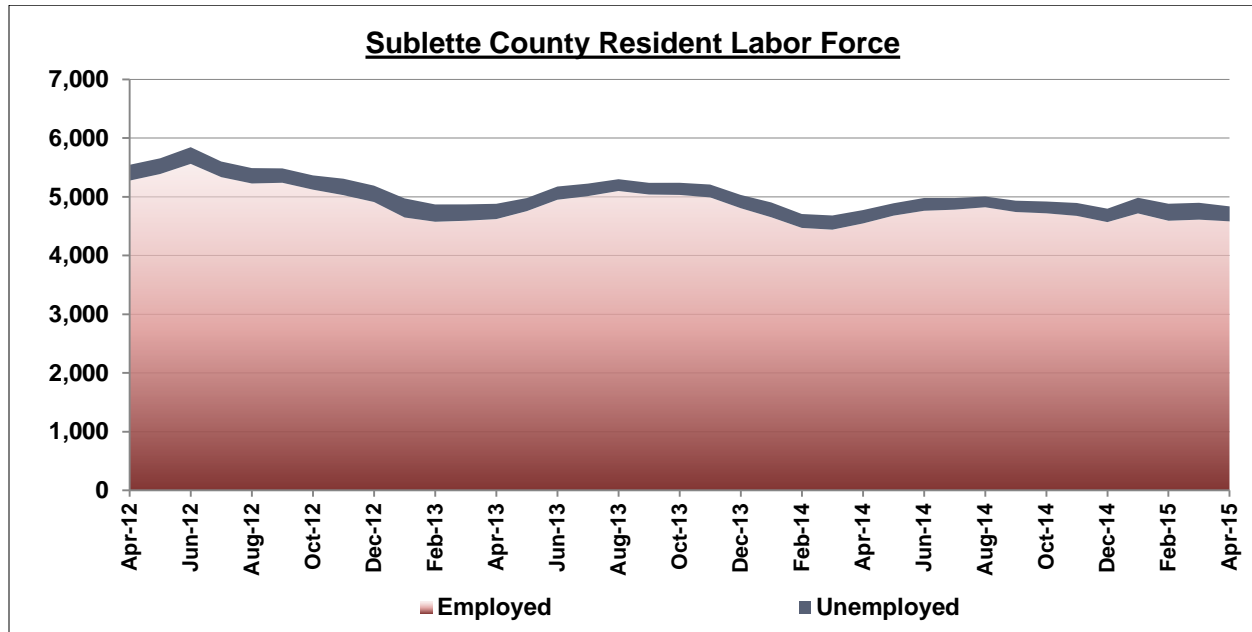
education, 57.8% has attended at least some college, and 28.8% has earned a bachelor's degree or higher.



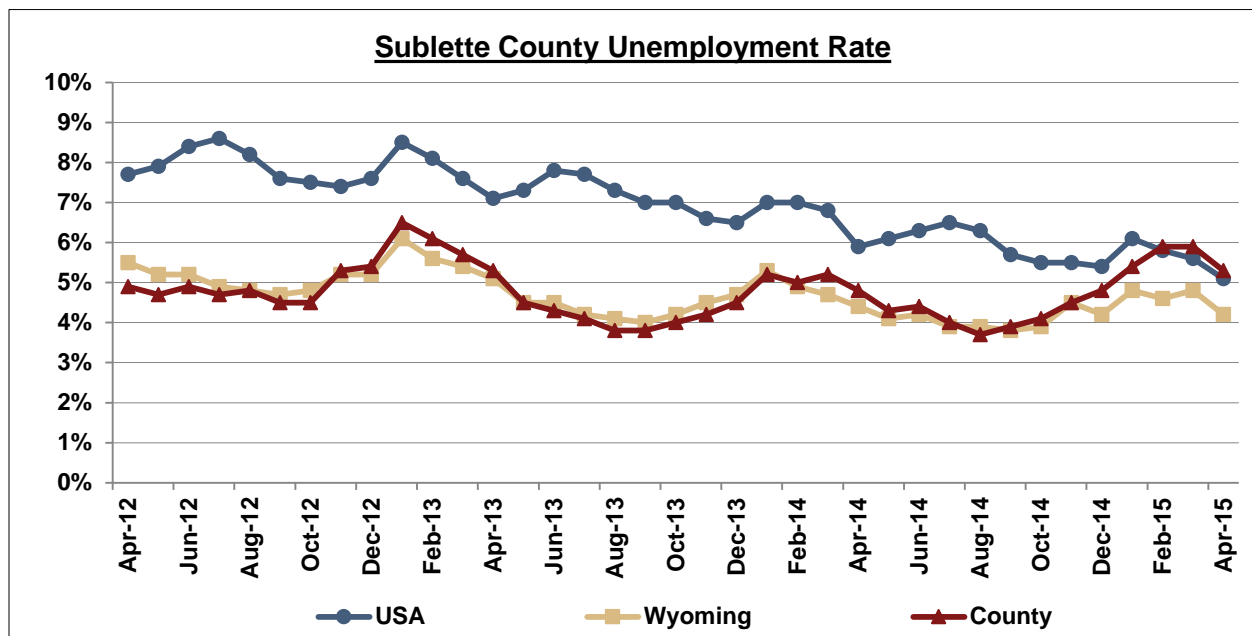
This level of educational attainment is very appropriate for the industries and occupations that are present in Sublette County, and it suggests that many residents may be qualified for more advanced careers.



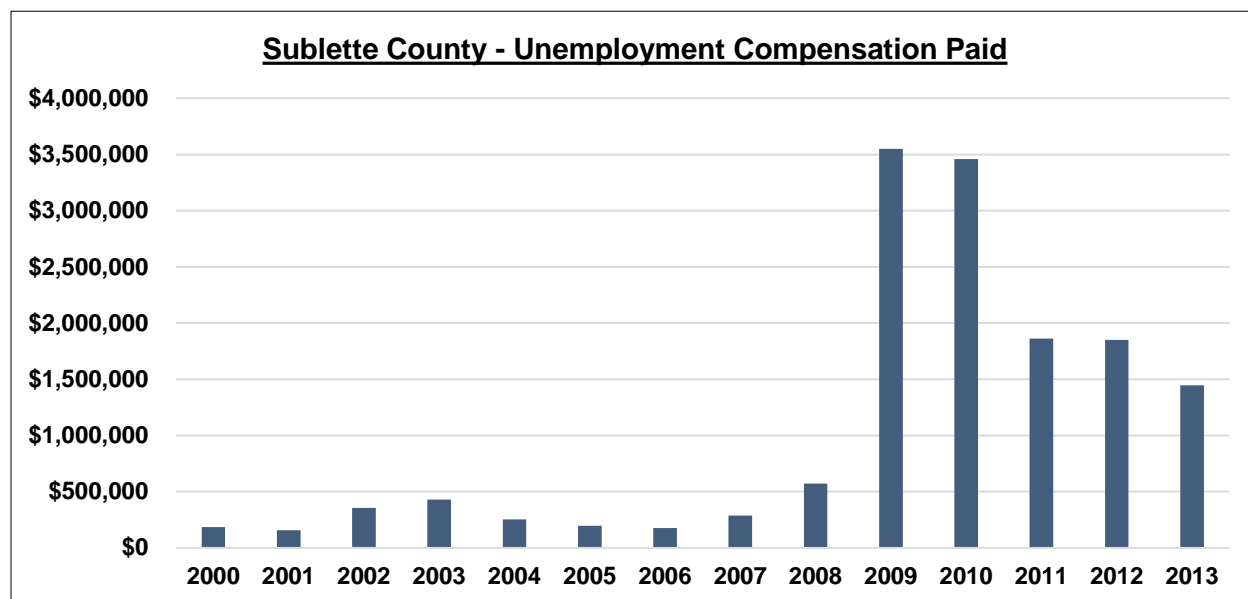
According to the State of Wyoming's Local Area Unemployment Statistics (LAUS) data, Sublette County's labor force has averaged around 5,000 workers the last few years, with some seasonal fluctuations (driven largely by weather and natural resource regulations), as shown below.



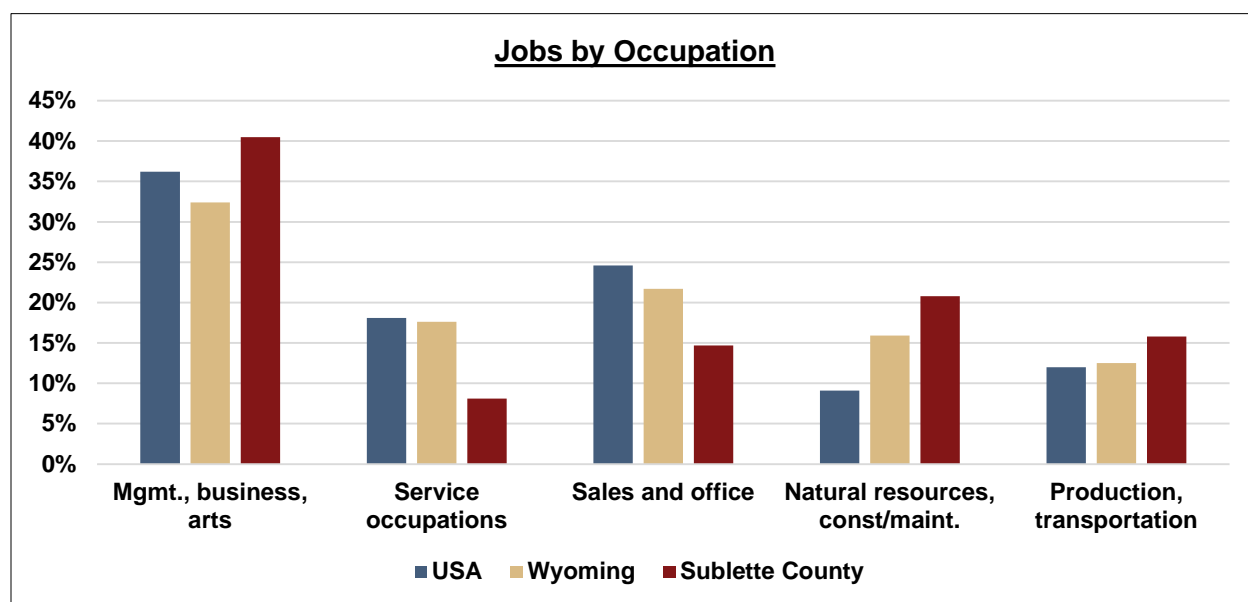
This labor force has generally had low unemployment rates, often leading the statewide unemployment rate. However, more recently, the unemployment rate has begun to rise, and is now higher than Wyoming's and the nation's unemployment rates, as shown in the following chart.



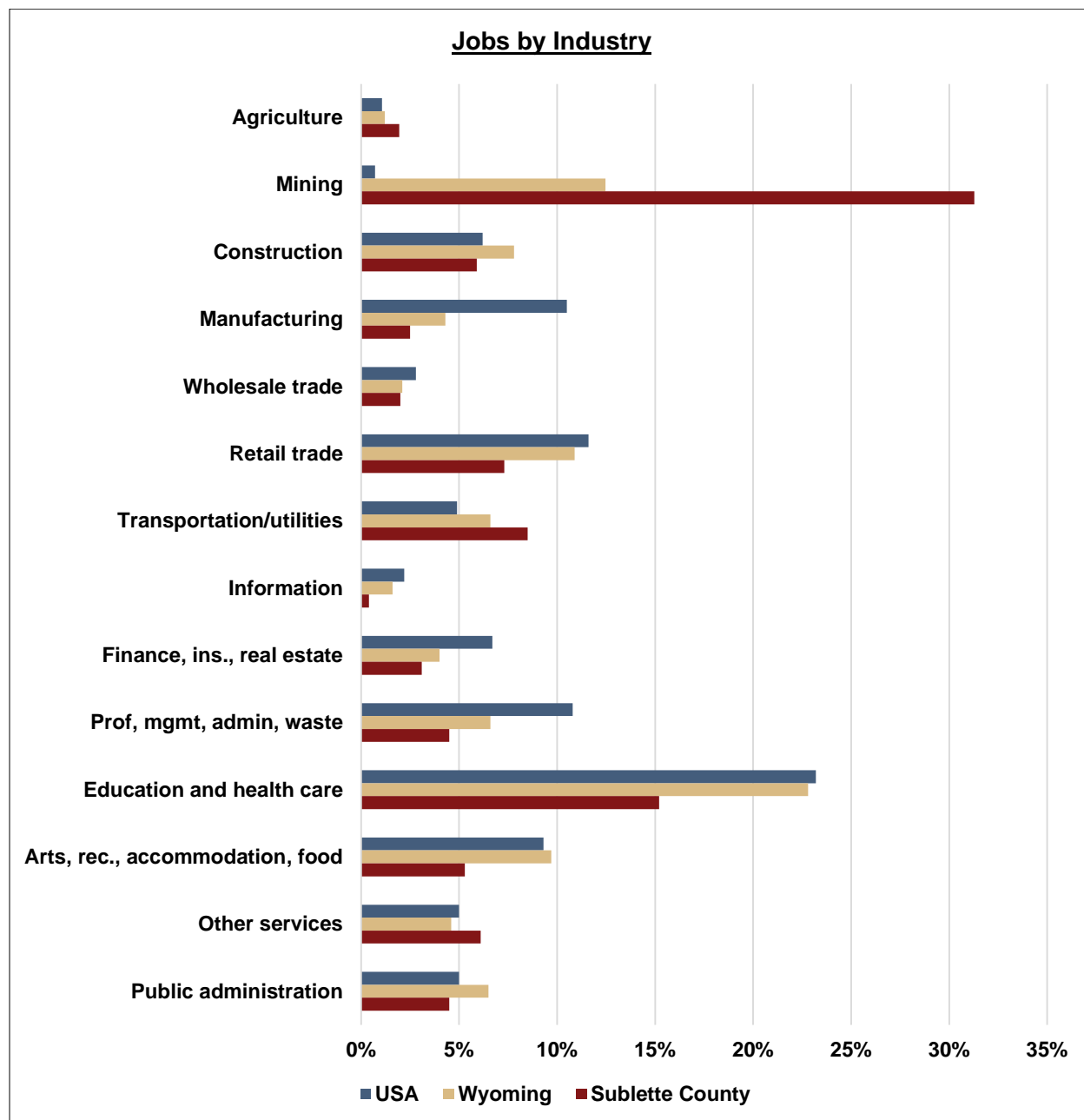
Unemployment has had a significant impact on the local economy, shifting personal income from earnings and wages to unemployment benefits. Until 2009, unemployment compensation was practically irrelevant, but then it jumped to more than \$3.5 million, as seen below (data from U.S. Bureau of Economic Analysis).



Oil and gas extraction dominates Sublette County employment, and the occupations worked by residents reflect the types of jobs typically generated by that industry. Natural resources, construction, maintenance, production, and transportation jobs are more prevalent than they are in Wyoming or nationally. Conversely, there is a limited number of people working in service occupations, sales, and office jobs, as shown below.

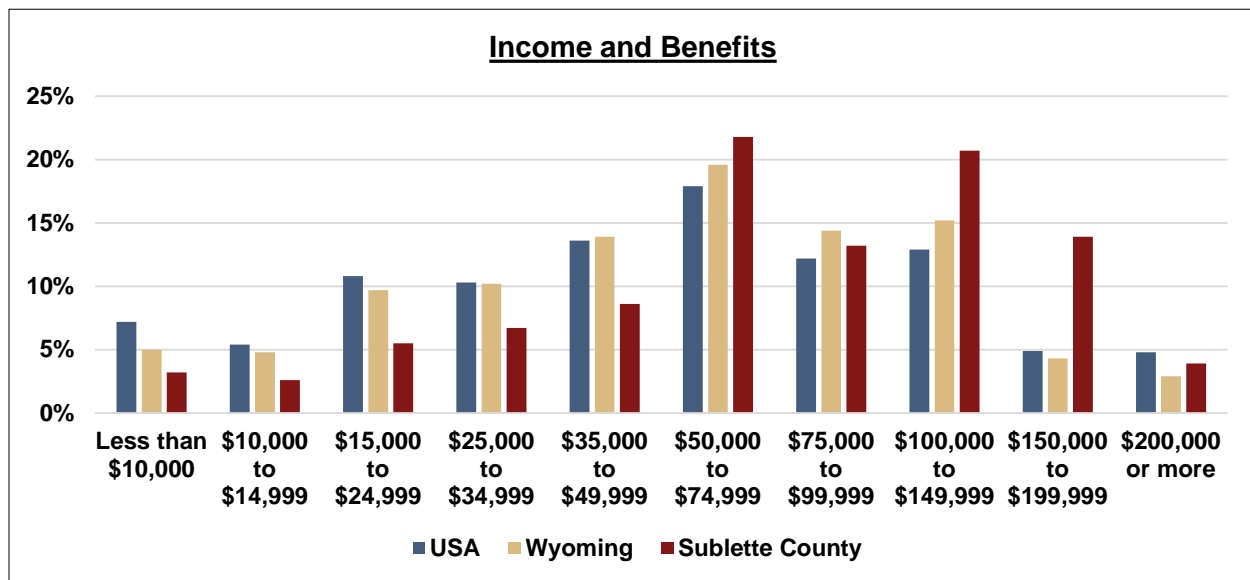


More than one-third of all jobs in Sublette County are in agriculture or mining (which includes oil and gas extraction). There is also a relatively high percentage of jobs in the transportation and utility industries (again, driven by natural resources). The presence of the oil and gas industry is so significant that all other industries appear to be diminished in Sublette County, as shown in the following graph.

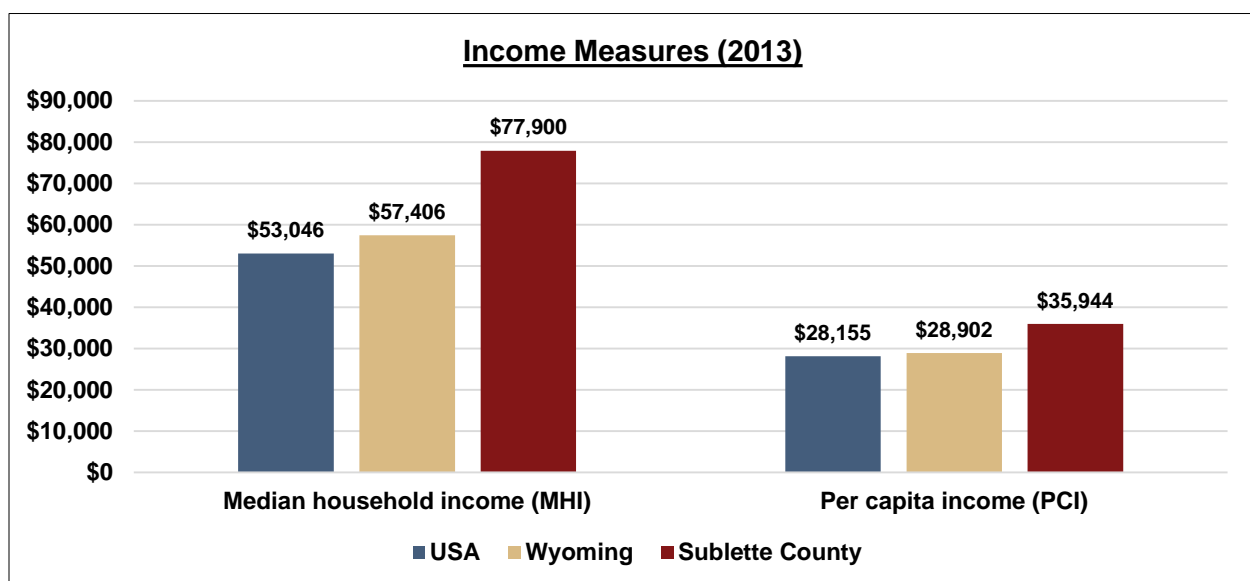


Note that, in the graph above, the ACS data has been supplemented with more detailed data from the Quarterly Census of Employment and Wages (QCEW), so that the Agriculture and Mining industries can be separately presented.

The upper-middle class in Sublette County is very strong. Nearly three-fourths of all households (73.5%) have income in excess of \$50,000. By comparison, 56.4% of Wyoming households and 52.7% households nationally have that much income. More detailed comparisons can be made in the following graph.



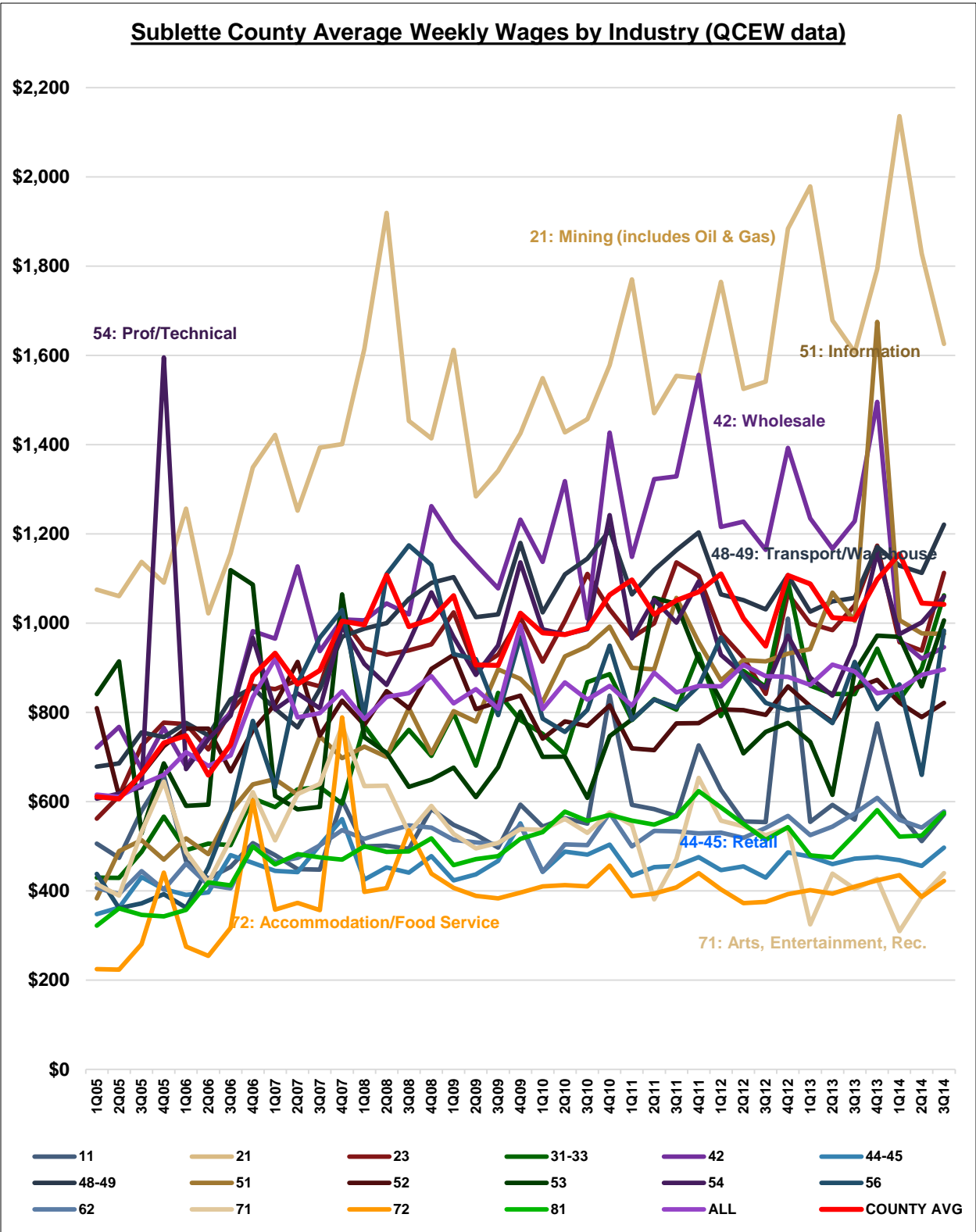
Given these high incomes, the median household income in Sublette County (\$77,900) is very high. Median is not the same as an average. Instead, it reflects the point at which half of the households earn less and half earn more. Per capita income (a true average, which divides all income in the county by the total number of residents), is also very high (\$35,944). Comparisons between Sublette County, the state, and the nation are made below (data from the U.S. Census Bureau/American Community Survey).



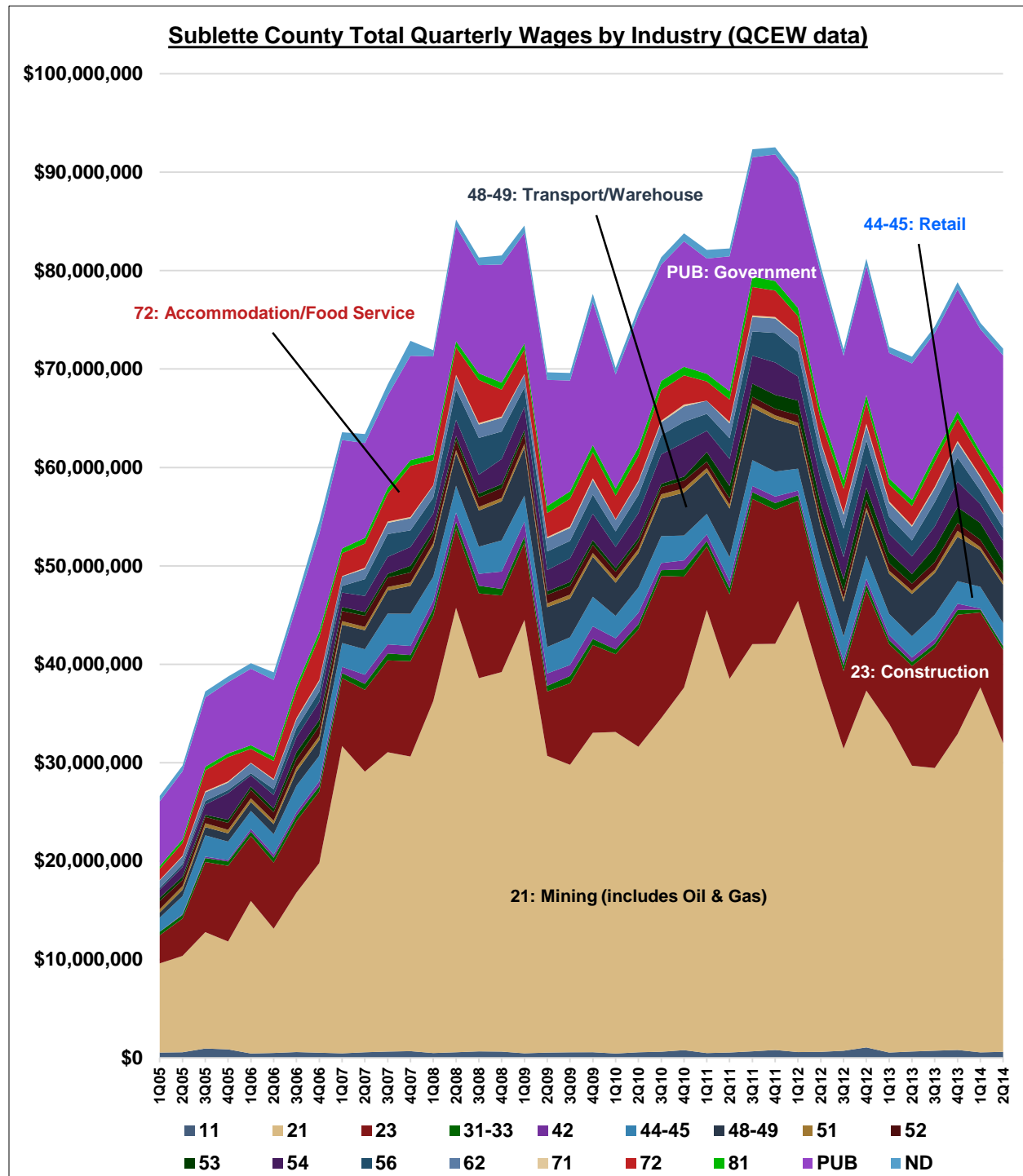
Not surprisingly, poverty rates in Sublette County are very low, as shown in the following table (data from the U.S. Census Bureau/American Community Survey). Only 6.1% of all people in Sublette County are living in poverty, although some situations (e.g., single mom with kids) force high levels of poverty in all areas.

Percentage of Population in Poverty			
	USA	Wyoming	Sublette County
All people	15.4%	11.5%	6.1%
Under 18 years	21.6%	15.7%	7.5%
18 years and over	13.4%	10.1%	5.7%
18 to 64 years	14.3%	10.9%	6.4%
65 years and over	9.4%	6.4%	1.6%
All families	11.3%	7.7%	4.9%
With related children under 18 years	17.8%	12.9%	4.5%
With related children under 5 years only	18.6%	14.4%	0.0%
Married couple families	5.6%	3.7%	3.8%
With related children under 18 years	8.3%	5.7%	1.9%
With related children under 5 years only	7.1%	5.5%	0.0%
Families with female householder, no husband present	30.6%	31.0%	21.2%
With related children under 18 years	40.0%	38.5%	29.7%
With related children under 5 years only	46.9%	51.1%	<i>no data</i>

Average weekly wages have climbed from about \$600 in 2005 to more than \$1,000 as of 2013, according to the State of Wyoming's Quarterly Census of Employment and Wages (QCEW). The mining industry (NAICS 21) is at the top of the pay scale, exceeding \$2,100 per week as recently as the first quarter of 2014. Other strong industries include professional/technical, information, wholesale, and transportation/warehousing. At the bottom of the pay scale are the retail, accommodations/food service, and arts, entertainment and recreation industries, as shown below.



Because the mining industry pays well, and because it employs so many workers in Sublette County, it easily represents the most significant portion of the total wages paid in the county. Construction, government, transportation, warehousing, retail, and accommodations/food service industries are also significant, as shown in the following graph.



SWOT Analysis - Workforce Development

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding workforce development in Sublette County.

Strengths

- Residents have attained the appropriate education level needed for available jobs
- The labor force has grown to meet demand
- Unemployment has been low
- Wages and incomes are high
- Poverty is minimal
- The large mining sector (which includes oil and gas) pays well

Weaknesses

- Educations may not be appropriate for a workforce that will be transitioning away from the mining industry
- Job opportunities are decreasing
- Unemployment rate is rising
- As the mining industry goes, so goes the county

Opportunities

- As the mining industry declines, there will be workers available to grow other industries (e.g., tourism and travel)
- Young, professional demographic, especially women, are present and willing to work
- There is funding available for workforce training and, perhaps, facilities that that could be used for training

Threats

- Loss of jobs due to oil and gas downward cycle
- Workforce is continually exposed to global oil & gas market pressures, shifts, and trends
- The lack of economic diversity makes the workforce vulnerable to boom/bust cycle
- As the oil and gas industry declines, incomes will drop while unemployment and poverty rates will increase

Recommendations - Workforce Development

CBI recommends that SERC serve as a sort of clearinghouse to assist workers, businesses, and trainers to improve workforce development in Sublette County. To accomplish that goal, several action steps must be taken:

1. ***Engage the Wyoming Department of Workforce Services (DWS).***

The mission of DWS is to bridge human and economic development for Wyoming's future. The agency can help residents find jobs, and can help employers find workers. There is a variety of programs that can help Sublette County, including funding for workforce development training.

2. ***Engage Western Wyoming College.***

Western Wyoming College has a great reputation for working with economic developers and local industry. As the college also has significant strengths working with the mining industry, Sublette County should become familiar with college leaders, create an advisory group to identify potential problems and solutions, and work toward increasing the college's presence in Sublette County.

3. ***Engage key industry sectors.***

Wyoming has minimal requirements for employers to provide information about their workforce plans. The best way to identify potential issues and opportunities for growth is to proactively and regularly meet with industry leaders. In particular, Sublette County should create a working advisory group for its leading industrial sectors (i.e., mining, tourism, government, and agriculture). DWS and Western Community College can work with you to create industry-specific efforts that improve the workforce and help to stabilize the economy.

INFRASTRUCTURE DEVELOPMENT

Public Input/Surveys

Survey respondents tend to give favorable ratings to local public infrastructure. However, a significant number of stakeholders recognize that local infrastructure still needs help. Yet, the importance and value of public infrastructure is recognized. A few comments also identified development of infrastructure as being necessary for economic development (e.g., must have shovel ready land with all utilities in place, and then engage in business recruitment).



Big Piney/Marbleton Airport



Survey respondents and community leaders believe that existing water and sewer service (provided by municipalities) is in good shape. Vehicular travel is adequate, though there are few major roads in the county. There is no commercial air service and no railroad service in Sublette County, and the public seems to accept those limitations (if not identify them as strengths, in the sense that the rural nature of the county is much appreciated).

Interviews of elected officials and community leaders suggest that the number one infrastructure concern throughout Sublette County is the lack of sufficient, reliable Internet and broadband telecommunication systems. The County is sorely lacking in adequate broadband to serve current needs and requirements, let alone support business development needs.

Another frequent concern expressed by local leaders is that Sublette County's land ownership is dominated by the federal government, eliminating the potential for private development in much of the county.

Objective Analysis - Infrastructure Development

Most of Sublette County is served with electricity by Rocky Mountain Power, although the northwest part of the county is served by Lower Valley Energy. There appears to be adequate power availability for most development purposes.

Pinedale Natural Gas provides service in the Pinedale area (roughly, a 3-mile radius from the County Courthouse). Additionally, Questar Gas provides natural gas in and around Big Piney and Marbleton. That means that natural gas service is mostly limited to the municipalities and the immediately adjacent land. According to the U.S. Census Bureau, about 29% of all households in Sublette County use natural gas to heat their residence. (Note: About 24% use propane, 22% use electricity, and 21% use wood as their heat source.)



Century Link is the primary telephone (land line) provider in Sublette County, although part of the southwest region in Sublette County receives telephone service from Union Telephone. Union Wireless also provides cell phone coverage throughout most of Sublette County, as does Verizon Wireless (up to 4G service). There are very limited long-haul fiber lines in the county (those that do exist are in the northwest quadrant, coming out of the Jackson area).

Sublette County, as a whole, has inferior internet/broadband capabilities. There are a few areas in Pinedale that provide adequate bandwidth for smaller tech companies. However, there are areas in the County where the service is weak and easily overloaded. One example of this problem is that when students return home from school and get on the internet for schoolwork, communication, and gameplay, Internet service is quickly degraded to the detriment of all (including business and commerce).

For Sublette County, developable land might well be considered a scarce and very valuable infrastructure commodity. There are nearly 3.2 million acres of land in Sublette County, but very little of it is available for private development. According to land records, 81.24% of all land in Sublette County is owned by the state or federal government, as shown in the following table.

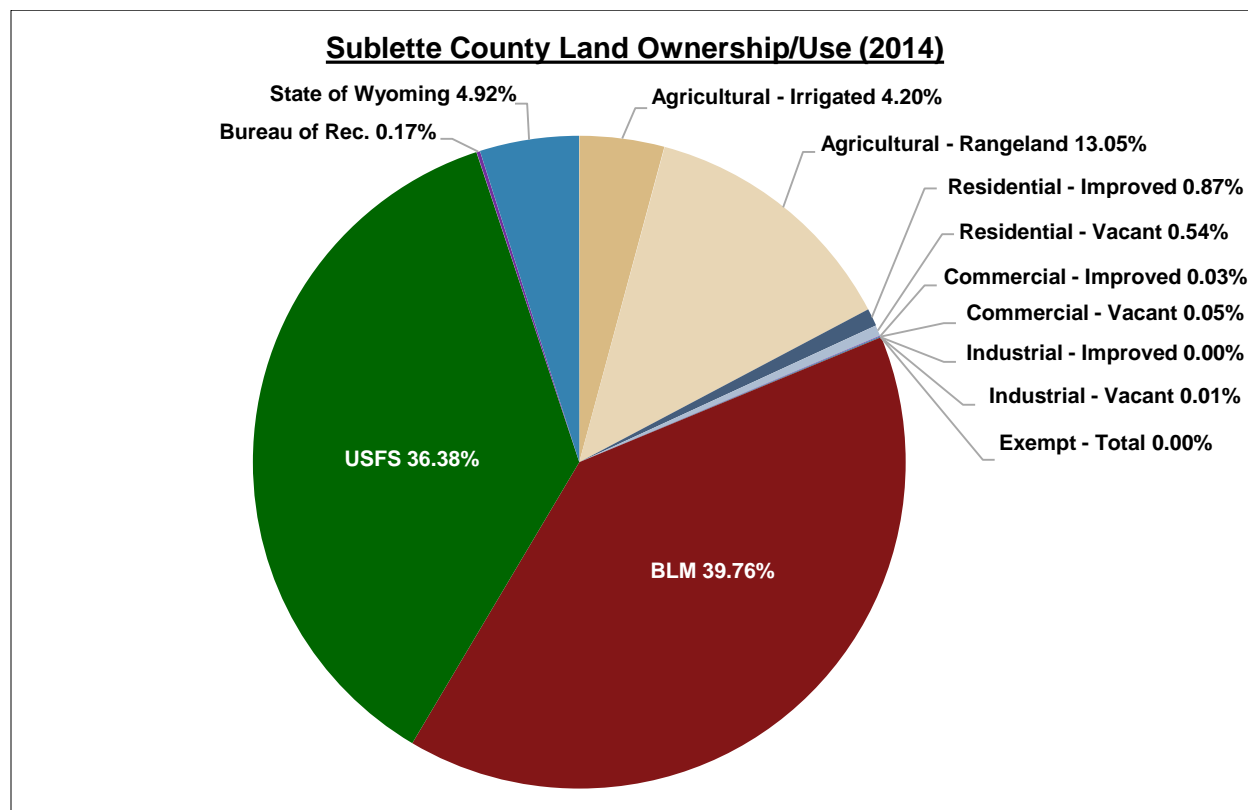
Land Ownership	Acres	Percent
Private	592,747	18.76%
U.S. Bureau of Land Management	1,256,175	39.76%
U.S. Forest Service	1,149,253	36.38%
U.S. Bureau of Reclamation	5,428	0.17%
State of Wyoming	155,437	4.92%
Total	3,159,040	100.00%

In the map below, the small areas within Sublette County that are white represent private land; all the colored areas are publicly owned property.



In addition to being partially landlocked by public lands, Sublette County treasures and wants to protect its agricultural base – which means that another 17.25% of the County’s land mass is not currently available for private development. That means that about 1.5% of land (i.e., 47,468 total acres) in Sublette County is privately owned and not currently used for agricultural production. Sixty percent (60%) of that small allotment is already developed, which leaves just

18,751 acres of developable land, nearly all of which is currently zoned for residential use. The overwhelming public land ownership is best demonstrated in the following graph, which identifies land ownership and vacancy status for all land in Sublette County, as of 2014.



Specific acreage amounts and percentages are provided in the following table.

Land Use	Acres	Percent
Agricultural - Irrigated	132,746	4.20%
Agricultural - Rangeland	412,409	13.05%
Residential - Improved	27,549	0.87%
Residential - Vacant	16,953	0.54%
Commercial - Improved	1,020	0.03%
Commercial - Vacant	1,534	0.05%
Industrial - Improved	149	0.00%
Industrial - Vacant	264	0.01%
Exempt - Total	124	0.00%
BLM	1,256,175	39.76%
USFS	1,149,253	36.38%
Bureau of Rec.	5,428	0.17%
State of Wyoming	155,437	4.92%
Total	3,159,040	100.0%

If not for the high valuations placed on oil and gas industrial sites, the high percentage of public land ownership in Sublette County would push the tax base much lower than other comparably

sized counties in Wyoming. As it is, the oil and gas boom grew Sublette County's tax base from one of the lowest in Wyoming to one of the highest. As of 2014, the total value of private land in Sublette County was nearly \$2.7 billion, itemized in the following table (CAMA data from Assessor's Office).

Private Land Use	Acres	Percent	Land Value	Improvements	Total Value
Agricultural Land	545,155	91.97%	\$108,392,509	Included	\$108,392,509
Commercial	1,020	0.17%	\$53,975,048	\$102,901,316	\$156,876,364
Industrial	149	0.03%	\$1,145,375	\$1,312,759,023	\$1,313,904,398
Residential	27,549	4.65%	Included	\$936,705,911	\$936,705,911
Exempt	124	0.02%	NA	\$4,815,812	\$4,815,812
Vacant	18,751	3.16%	\$133,519,555	NA	\$133,519,555
Total	592,747	100.00%	\$297,032,487	\$2,357,182,062	\$2,654,214,549

The limitations presented by public land ownership and agricultural production are, obviously, significant. With the notable exceptions of natural resource extraction, grazing, and some tourism, very little economic activity can take currently place on public lands.

SWOT Analysis - Infrastructure Development

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding infrastructure in Sublette County.

Strengths

- Lots of open space
- Tax base based on industry and primary jobs
- Enough vacant land to double commercial and industrial development (at least according to data from the Assessor's Office, and notwithstanding cost, location, etc.)
- Municipal services (water, sewer, etc.) are well maintained
- Good cell phone and electrical service



Weaknesses

- Transportation (rail and air)
- Lack of broadband fiber/telecommunications
- Location, market size, and rural nature of Sublette County make it expensive/difficult to attract improved services, especially fiber/telecommunications

- Limited land available for residential development

Opportunities

- Marketing assistance has been requested by some producers (e.g., to create a high altitude marketing tagline for cattle)
- Hunting and fishing outfitting
- Highway and location provide good access to Yellowstone/Grand Teton National Parks, and therefore to tourism traffic

Threats

- High percentage of public land (and federal regulations)
- Climate can be considered cold/harsh by some
- Rapid increase in demand and need for broadband telecommunications threatens ability to attract new companies

Recommendations - Infrastructure Development

CBI recommends several action steps to improve the infrastructure in Sublette County:

1. *Road/Rail/Air transportation improvements.*

The current airports (Pinedale and Big Piney/Marbleton) are important to local residents and industry, and should therefore continue to be supported. More important, Sublette County should continue to coordinate its efforts with WYDOT to make sure that its existing roads continue to be well maintained. The state highways in Sublette County provide a lifeline to services and markets that simply do not exist in Sublette County, and they should receive top consideration for investment.

2. *Work toward improving broadband/fiber access.*

Fiber providers are motivated (mostly) by profit. Sublette County is a small market, by most fiber providers' standard. However, the State of Wyoming has demonstrated a strong commitment to improving telecommunication and broadband service throughout Wyoming. Sublette County should coordinate its efforts to improve broadband access with public schools, Western Wyoming College, all local governments, industry, and key business leaders. A coalition of voices – and perhaps a financial investment – represent the best chance for Sublette County to attract better telecommunication service.

3. *Engage WBC programs and funding.*

The resources of the Wyoming Business Council need to be fully utilized by Sublette County. While there are still reserve funds available, the county should consider leveraging those funds to develop new sites that are “shovel ready” for commercial and industrial development. There are precious few acres available for development, and if an opportune site is available (e.g., on the outskirts of a municipality, within a reasonable

distance from existing water and sewer), Sublette County should be ready to pounce on that opportunity. To do that, some preparatory work should be completed now, such as developing a persuasive argument that explains the need for readily developable land (use this report!).

4. *Plan for housing that is affordable for working residents*

Planning sometimes creates a negative impression, particularly when there is an agenda to control how property owners may or may not develop their property. However, there is a certain urgency for the municipalities in Sublette County to find ways to attract and accommodate housing that is affordable for the people working there. There is a very limited amount of developable land. A similar problem exists in Teton County and the Town of Jackson, where it is now necessary for many workers to be bussed to work every day. If Sublette County were to experience another energy “boom,” there is a strong possibility that it would fail, simply because there is limited available land for workforce housing. Accordingly, municipalities may want to begin planning now for ways to encourage (not require) homes that are affordable for local workers.

5. *Be proactive about public lands.*

Sublette County and its municipalities should remain fully engaged with state and federal agencies that own/control the public lands. Regulations that are hostile to business development or the existing economy, the county needs to continue to be ready to present its case to protect the local economy.

Further, when there is a possibility to transfer lands to private control, or even local government, that opportunity should be pursued. For example, the State of Wyoming has a process in place to propose that it sell state land to provide growth opportunities for a local community. A handful of State land is located along existing highways and/or near municipalities in Sublette County. Propose that it be made available for public auction – and be prepared to bid on it.

EXISTING BUSINESS DEVELOPMENT

Public Input/Surveys

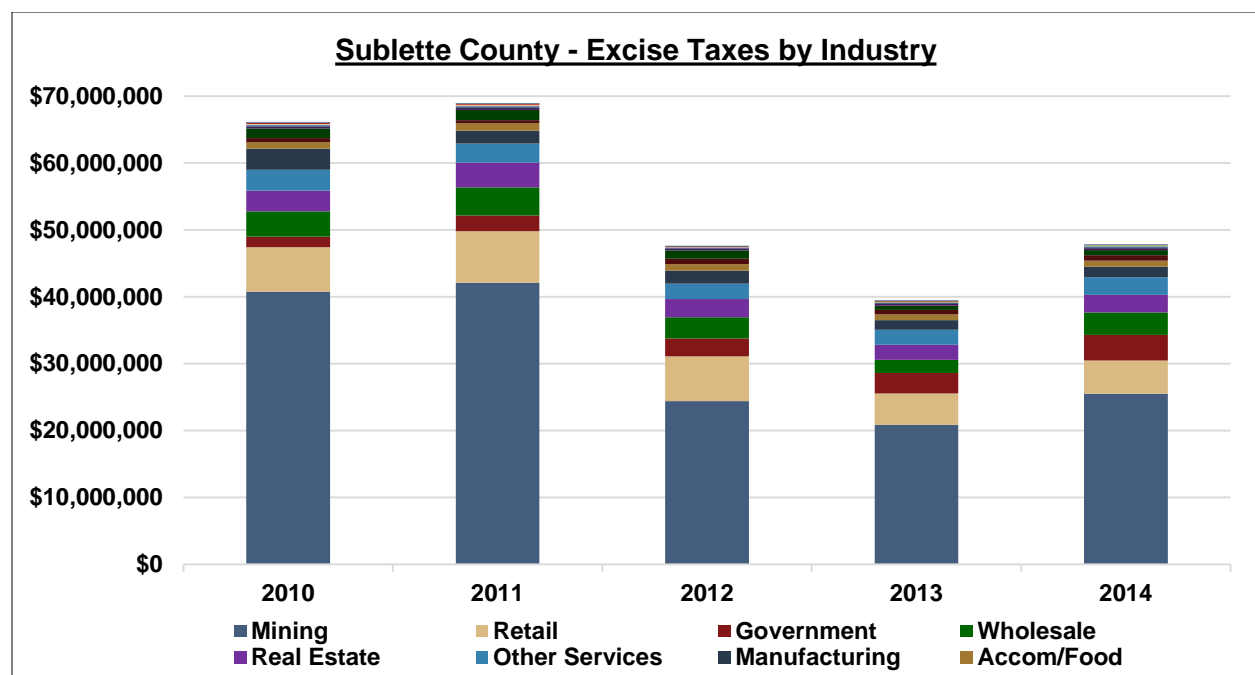
Pinedale is the place most frequently cited by survey respondents as the place to shop, but it is clear that most shopping takes place elsewhere (especially for clothing and motor vehicles). Home furnishings, furniture, and gifts are typically also bought elsewhere. Rock Springs, Jackson, and online shopping are also popular shopping destinations.

A weakness expressed several times during interviews refers to grocery availability, and cost. Many Sublette County residents appear to prefer weekend jaunts to Rock Springs or Jackson to purchase groceries that are fresh, more reasonably priced, and where there is a broader selection available to them. This sentiment is particularly prevalent in Pinedale.

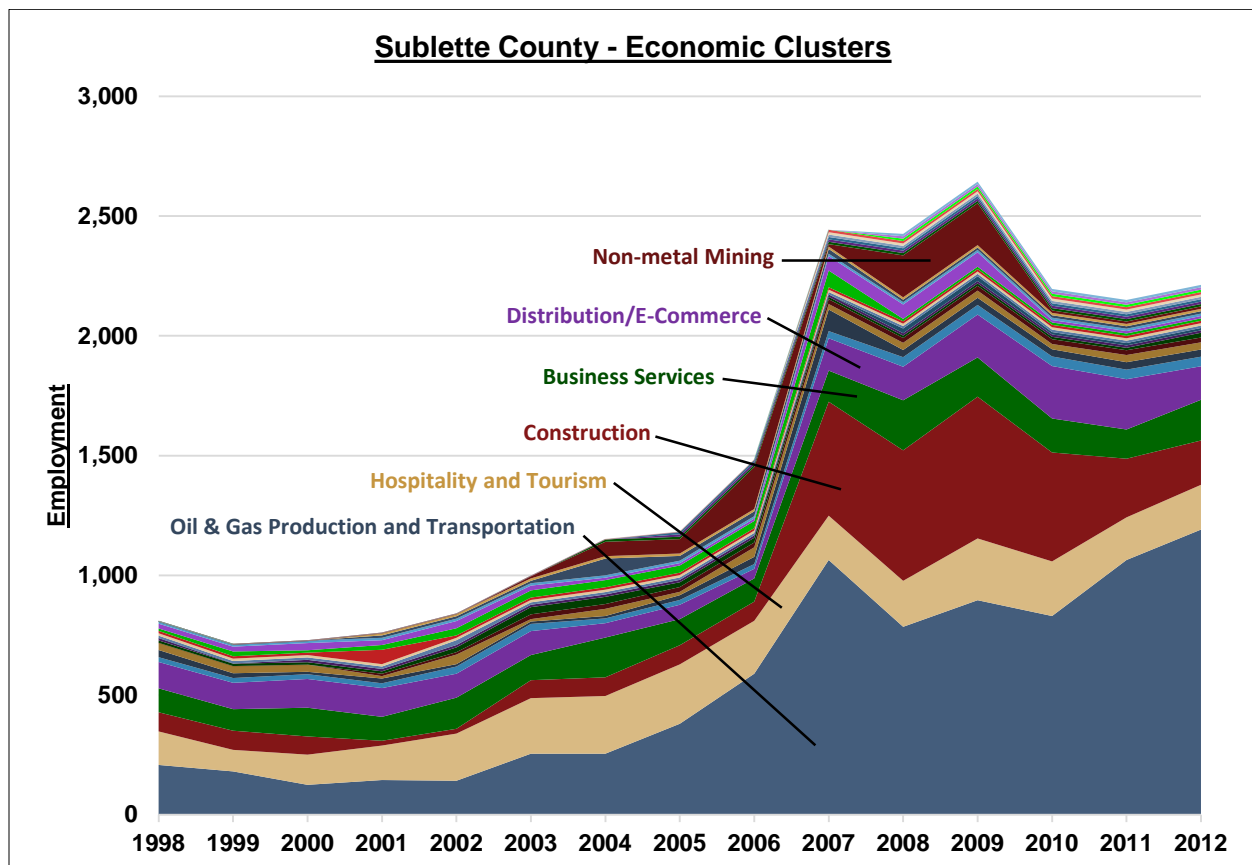
Most residents seem comfortable and satisfied with the retail goods that are available. Amazon.com and other on-line shopping competitors were mentioned by many residents.

Objective Analysis - Existing Business Development

The mining industry (including oil and gas) has generated more than half of all excise taxes for many years. The second largest excise tax generator is local government (although most of those taxes are for vehicles purchased from auto dealers, paid to the County when the vehicle is registered). The most recent five years of excise taxes, by industry, are represented below (data from the Wyoming Department of Revenue/Excise Tax Division).



Similarly, the only significant economic cluster in Sublette County is oil & gas production and transportation, as seen in the following graph. However, there are other clusters on the cusp of becoming significant, including hospitality & tourism, construction, business services, distribution & e-commerce, and non-metal mining. These clusters are represented below, according to the number of jobs that each cluster provides in Sublette County (data from the U.S. Cluster Mapping project).

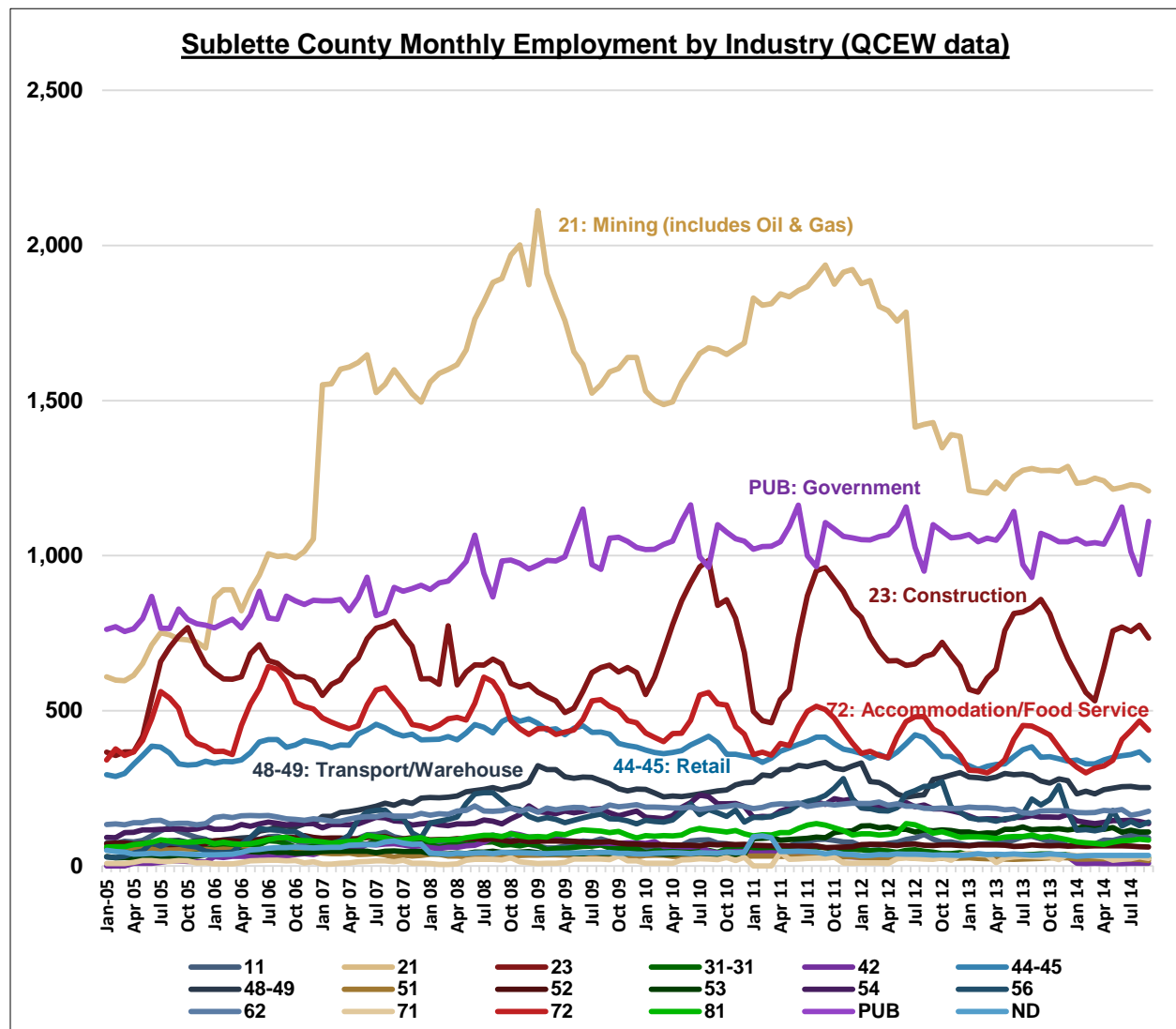


Based on this cluster analysis, it is clear that the oil and gas industry has driven the economic boom in Sublette County. However, it is equally interesting that the hospitality and tourism cluster has held its own (at least with regard to jobs). That suggests that the accommodation and food service industries have grown in response to rapid growth of the energy industry, and that growth represents significant capacity to capture more of the tourism and travel market.

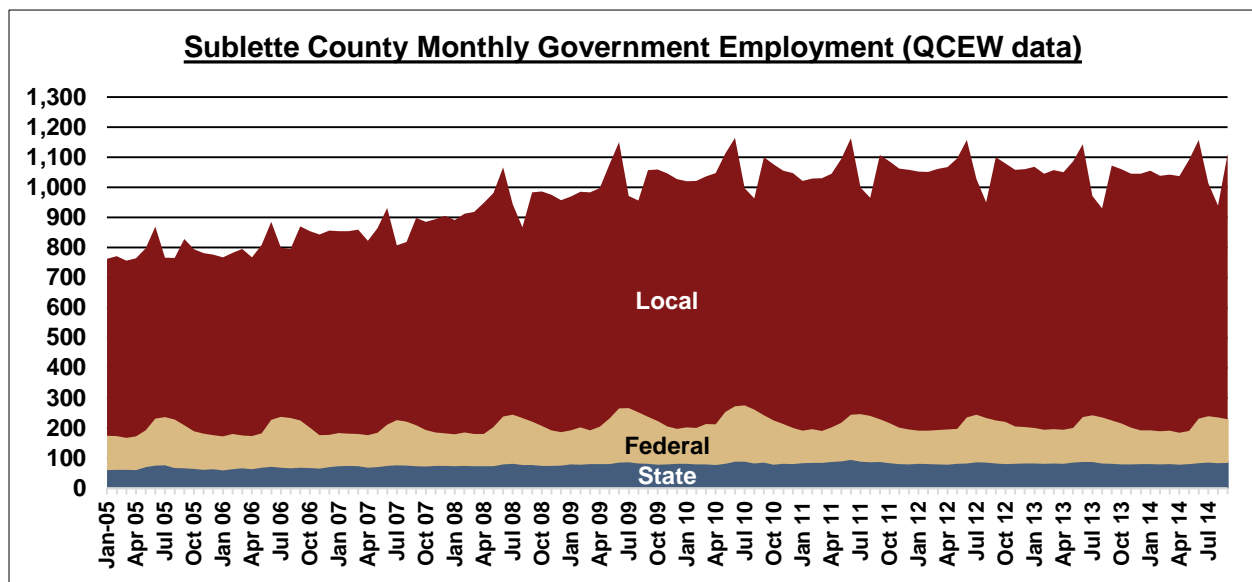
The cluster analysis also suggests that there has been some sustainable growth of business services, the transportation/distribution industry, and electronic commerce. The growth that those clusters have enjoyed since 2007 identifies them as good candidates to help diversify and stabilize the local economy.

In fact, although there have been some seasonal fluctuations, the accommodations and food service industries have remained fairly stable (at least for the number of jobs). Likewise, the

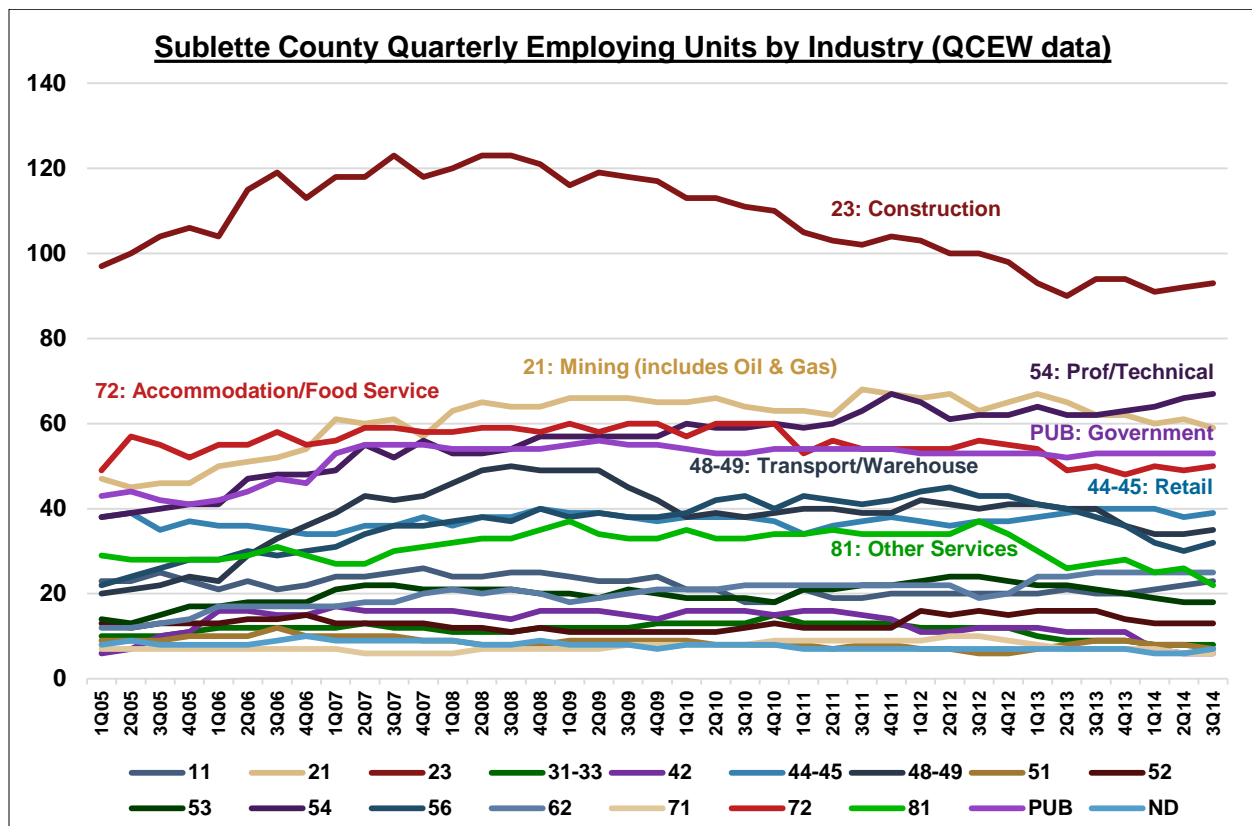
retail sector has remained stable, as seen in the chart of monthly employment below (QCEW data from Wyoming Department of Workforce Services). The fact that those industries have been stable, in spite of the rapid decline in the number of mining sector jobs, suggests that they are able to adapt and shift their efforts to begin recapturing some of the tourism and travel market.



There is a common perception in Sublette County that the energy boom has attracted or enabled significant growth of federal jobs. The QCEW employment data suggests otherwise. The federal government appears to hire more employees for summer work, but other than that seasonal shift, there has been virtually no growth of federal jobs in Sublette County since 2005, as shown in the following growth. The State of Wyoming has added a modest number of workers in Sublette County during the last ten years, but the most significant growth has been driven by local government (which includes municipalities, Sublette County, and the public schools).

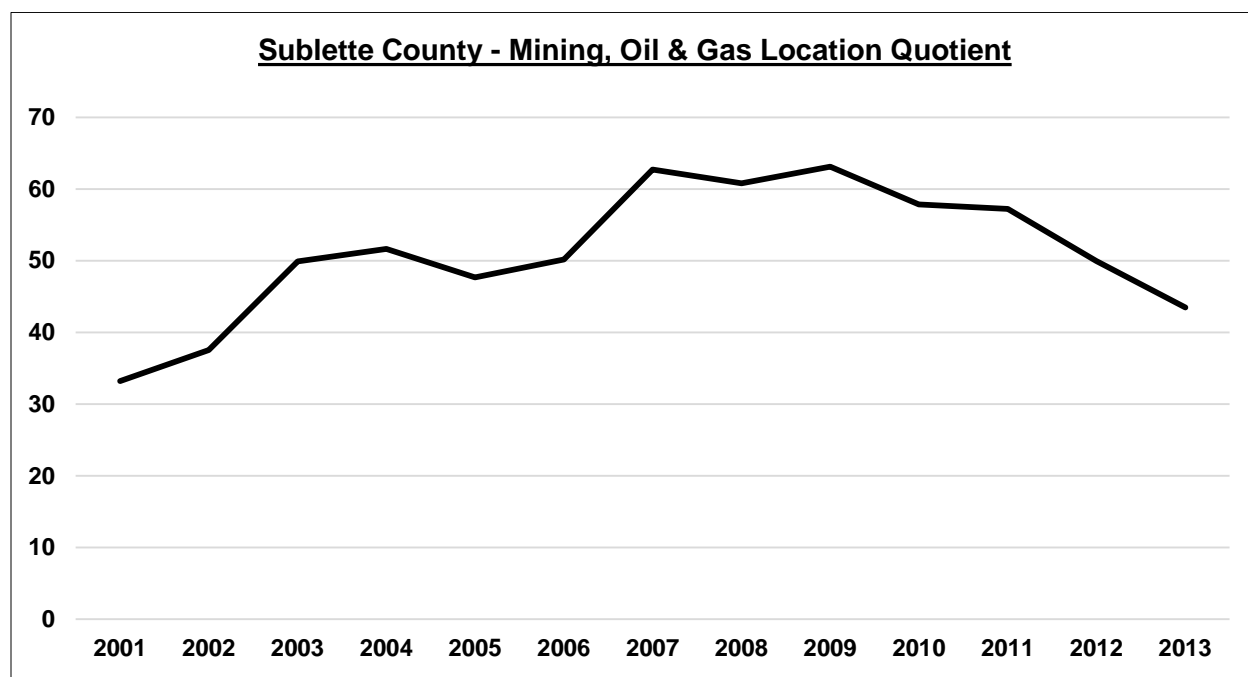


While the mining industry has driven the growth of Sublette County, it is interesting to note that the largest growth of employing units (employers) is actually in the construction industry. Many of these construction firms are providing services to the mining sector. They are rather small firms, but plentiful, and they are an excellent example of entrepreneur spirit driven by the opportunity presented by the booming economy, as shown below.

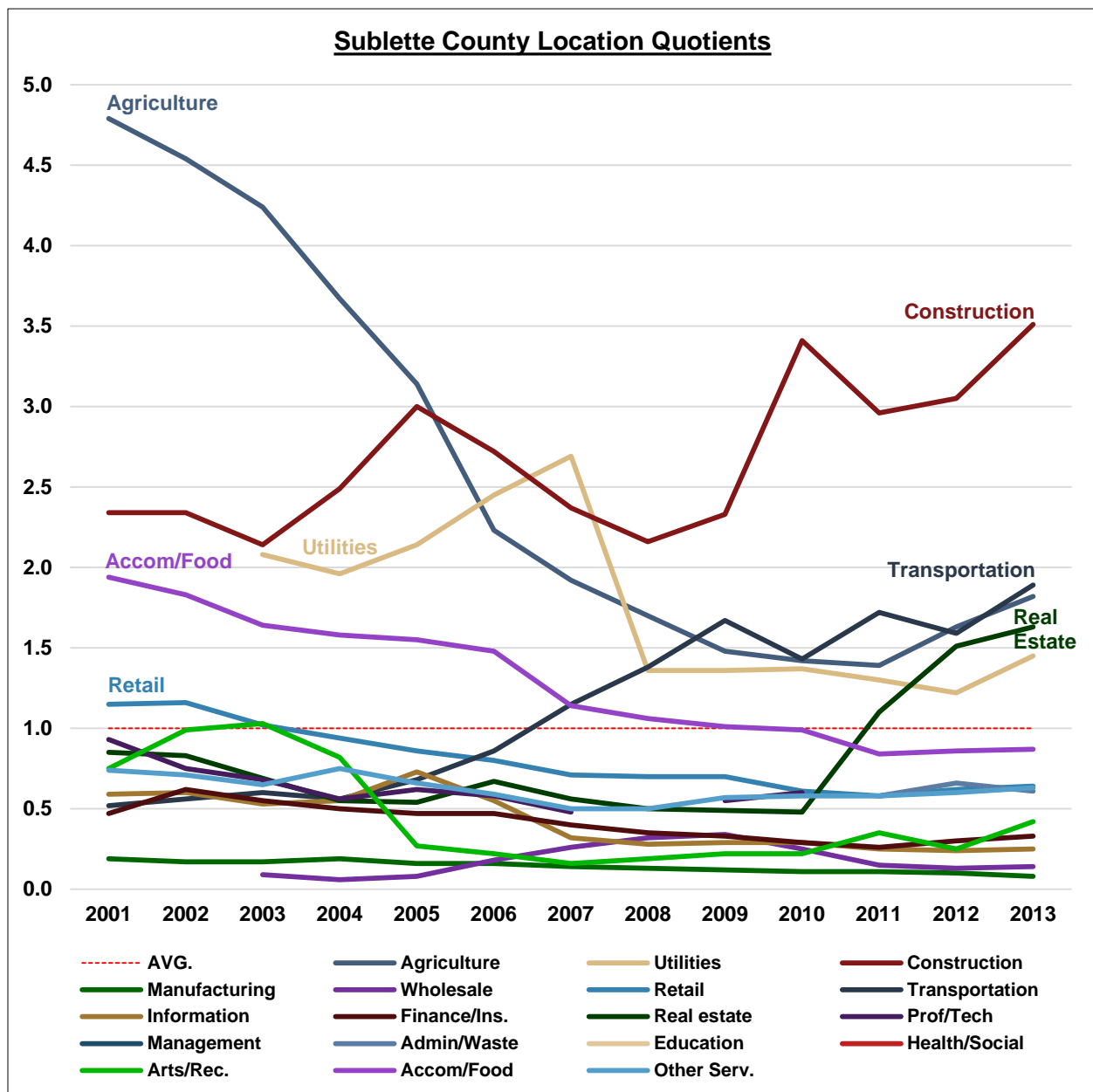


Another way to analyze existing business and industry is with location quotients. For this plan, location quotients compare the Sublette County percentage of each industry to the percentage of that industry present in the national economy. If an industry has a location quotient greater than 1, then it is a relatively strong industry. If it is less than 1, then the industry is not as prevalent in the local economy as it is nationally.

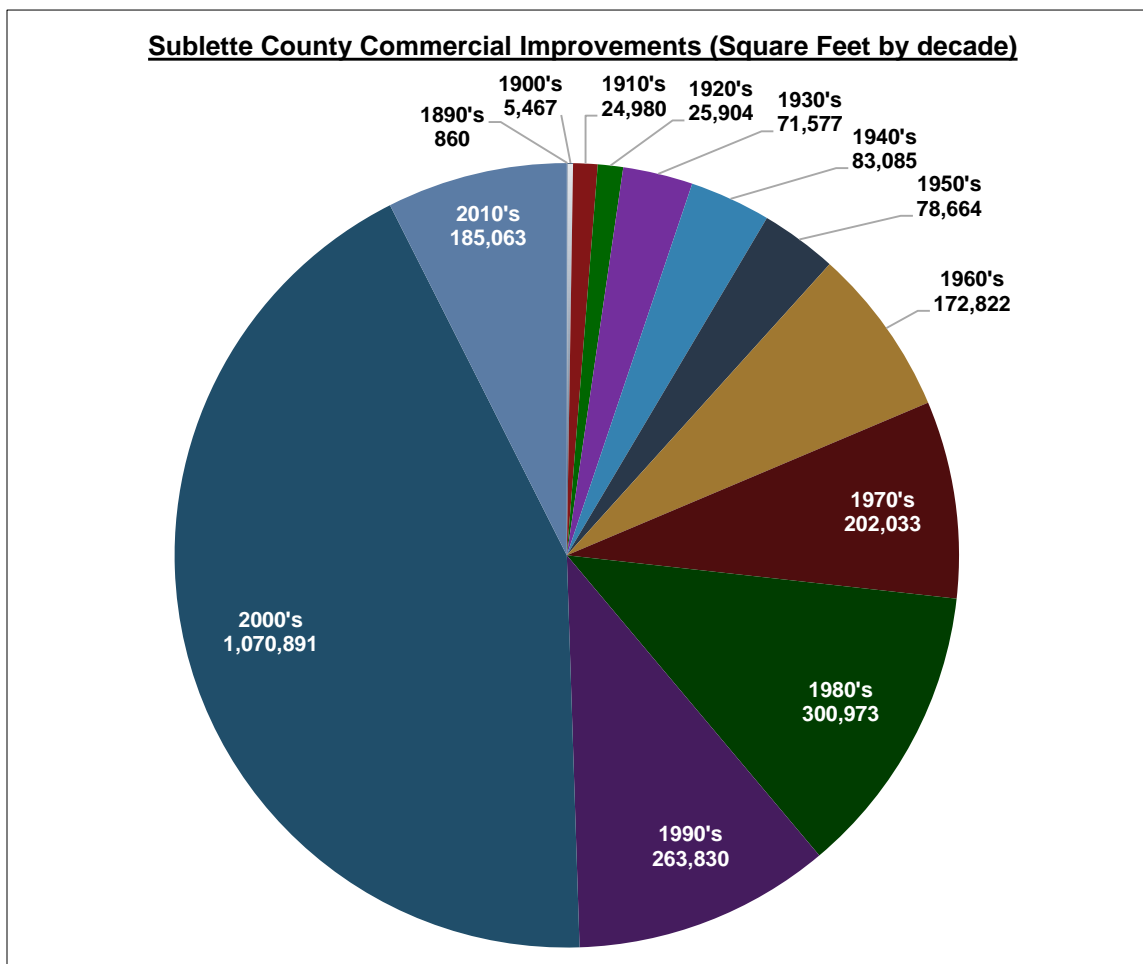
In Sublette County, the mining, oil and gas industry is extremely strong. The mining industry boasts a location quotient ranging from 33 to 63, for the years 2001 to 2013, as shown in the following graph. No other industry comes close.



It is exceptionally rare for any industry in any local economy to be as overwhelmingly significant as the mining industry is in Sublette County. Of course, there are other industries that are also strong. In any other local economy, a location quotient of 2 or more would be significantly strong. Thus, the agriculture, construction, and utility industries must be considered to be doing well in Sublette County. Most other industries in the county are relatively weak, although the mining sector's strength skews the location quotients, shown below.



The historic perspective of commercial development is enlightening. Sublette County currently has about 2.5 million square feet of commercial facilities (according to the County Assessor's CAMA land records). Half of that commercial property was built in the last 15 years. The following chart illustrates the square footage of commercial development in Sublette County, by decade, since the 1890's.



The types of commercial improvements made in Sublette County is diverse, but the most significant types of development are those that support the energy and travel industries, as shown in the following table.

Key Commercial Improvements	SF	% of All Commercial
Light Commercial	398,122	16.0%
Mini Warehouse	229,584	9.2%
Motel	318,781	12.8%
Office Building	315,979	12.7%
Service Garage/Station	230,082	9.3%
Storage	151,941	6.1%
Total - Commercial Improvements	1,644,489	66.1%

SWOT Analysis - Existing Business Development

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding existing business development in Sublette County.

Strengths

- Very strong mining industry (including oil & gas)
- Strong local government sector
- 2.5 million square feet of commercial facilities, recently constructed

Weaknesses

- Government jobs are not primary jobs
- Lack of economic diversity

Opportunities

- Good base from which to build hospitality & tourism industry, business services, distribution, and electronic commerce industries
- As mining sector declines, commercial properties are in place to capture new markets and industries

Threats

- Vulnerability to boom/bust cycle driven by mining sector
- Limited transportation options in Sublette County make other sites more competitive for new industry

Recommendations - Existing Business Development

CBI recommends several action steps for existing business development in Sublette County:

1. ***Understand that most economic growth comes from existing businesses.***

Economic development is a difficult, long-term endeavor. The low hanging fruit is represented by the businesses that are already located in Sublette County (and that is half the battle!). Help them grow. Help them plan and market their business. Help them identify specific problems, and work with them toward solutions. Know that, when the day comes to convince a new business to locate in Sublette County, one of the first things the owner will do is ask existing businesses how you treat them. They will not come if you do not think you will care about them once they are there.

2. ***Engage local businesses.***

It is critical to know local business owners' needs. The Wyoming Business Council uses a structured process (the Synchronist Survey) to measure existing business needs and

growth. That survey is available to you. Make it a monthly goal to visit with one or more businesses in Sublette County, document their needs, and track the success you can enable.

3. ***Respond to local residents' concerns.***

There are businesses within Sublette County with whom there is a lot of dissatisfaction. Sublette County leaders should sit down with these providers, discuss the depth and breadth of this dissatisfaction, and offer to assist however possible. A frequently cited example is the grocery store in Pinedale. If local residents are aware that you are there for them, support for economic development will grow.

4. ***Develop value-added initiatives.***

Another priority should be to help existing businesses take the next step toward adding value to what they are already doing. Agricultural commodities can be processed or manufactured into refined or niche products. Natural resources can be refined to create a higher value resource (e.g., refining gas, making furniture out of lumber, etc.). Similarly, efforts can be made to help retailers expand their merchandise line, or to add the Internet market to their existing customer base.

5. ***Support industry-specific growth initiatives.***

Carbon fuels are under attack. Coal, oil, gas are going to face increasing scrutiny and criticism for perceived harms being done to the environment. Yet, carbon fuels are going to remain a core part of America's energy mix for a long time. Additionally, alternative fuels are not as environmentally friendly as some would claim. Arm yourself with the facts, and support the local energy industry. Help it be accountable, but insist that facts be a key part of the discussion, not speculation or poor science.

Similarly, Sublette County has a small number of manufacturers. Because these companies produce goods that can bring new money into the economy, the jobs they provide are very important. Some of these companies are listed below:

- Badger Daylighting Corp
- Bridger Speed & Sport
- Dire Wolf Studios
- Green River Log Homes
- IPS Optimization Services
- Logcrafters
- Lufkin Industries Inc
- Meadow Canyon Ready Mix Inc
- Office Outlet
- Pickaroon Timber Products Inc
- Pinedale Roundup

- R & D Group LLC
- Rocky Mountain Propane
- Ron's Leather Shop
- Solora Inc
- Son Transformations Inc
- Stitchin' Post
- Sublette Examiner
- Talking T-Shirt
- Top Shelf Arctic Cat
- US Contract Sewing LLC
- Wind River Brewing Co Inc

6. ***Prioritize the tourism and travel industry.***

The tourism and travel industry has made huge capital investments in Sublette County in the last 15 years. Do not ignore the value of that investment! Leverage that investment, and help existing accommodation and food service businesses tap into the travel market. No, those are not primary jobs, but the critical investment (facilities and other commercial development) has already been made, and the tourism market certainly brings new money into the local economy. Create a tourism and travel advisory group (with the Chamber), and support their ideas for marketing and growth.

The existing lodging tax program could be particularly helpful to Sublette County. According to Wyoming Statute 39-15-211, “...at least ninety percent (90%) of the amount distributed shall be used to promote travel and tourism within the county, city or town imposing the tax. Expenditures for travel and tourism promotion shall be limited to promotional materials, television and radio advertising, printed advertising, promotion of tours and other specific tourism related objectives, provided that none of these funds shall be spent for capital construction or improvements...”

According to the Lodging Tax Manual prepared by the Wyoming Travel Industry Coalition, “it is generally accepted that travel and tourism promotion should bring people in from outside the area for an overnight stay in the community. Using this criteria, lodging tax money has been used for specialty gifts, events, office supplies, equipment, vans, and staff. It has also been used to operate visitor centers and convention and visitor bureaus (however, it can’t be used for the construction of these facilities). If deciding whether expenditures are appropriate is a recurring problem for your board, it may help to insert a listing of appropriate expenditures into your bylaws.”

Coupling the existing lodging facilities with the lodging tax funds is a sure fire way to growth that industry. Tourism has been somewhat neglected during the energy boom, but the fundamentals are there to revive and even grow the industry to new levels.

7. Leverage statewide programs that serve existing businesses.

In addition to the Wyoming Business Council, there are several economic development programs at the University of Wyoming that help existing businesses grow. Wyoming Entrepreneur (a collection of programs including the formerly named Small Business Development Centers), Manufacturing-Works, and a variety of services will work with existing businesses to help them grow, often for free or for a reasonable fee. (See Appendix C for contacts).

8. Encourage use of the Internet for sales.

The Internet is a vast and largely untapped market for sales. Sublette County businesses face global competition every day, and it cannot be ignored. Every retailer should know how to use the Internet and social media to compete. Sublette County should assist them with training, and should also consider development of a branded portal to promote local goods and services. If necessary, merchandising software can be purchased to handle credit card sales on behalf of all businesses that use the portal. The Wyoming First program is available to help with that effort.



ENTREPRENEUR DEVELOPMENT

Public Input/Surveys

Survey respondents do not seem to be fully aware of local entrepreneurship efforts. Ratings of those efforts range from slightly positive to slightly negative, with a majority of respondents acknowledging that they did not know how to rate it. Nonetheless, stakeholder surveys clearly identify the cost of doing business as a serious detriment in Sublette County. They also are aware that the local market is very small, and that without adequate transportation it will be difficult to start or operate any business. Yet, entrepreneur development is one of the top three building blocks that survey respondents want improved.

Survey and interview comments about new businesses and new residents are mixed. Some current residents want no growth, others want particular types of growth (more people just like them), and still others want more diversity of residents and businesses. Residents and stakeholders have specific suggestions to improve entrepreneur development, including start-up assistance, financial aid, tax breaks, and development of a business incubator.

One insight that might be reached from the totality of all public input is that assistance for entrepreneurs would be especially desirable and valuable if it focused on people that are already living in Sublette County. Similarly, new start-up businesses that diversify the economy or broaden local retail opportunities would be strongly supported. Most people are aware that land and buildings are very expensive, and that the rural nature of Sublette County results in a small market.

Objective Analysis - Entrepreneur Development

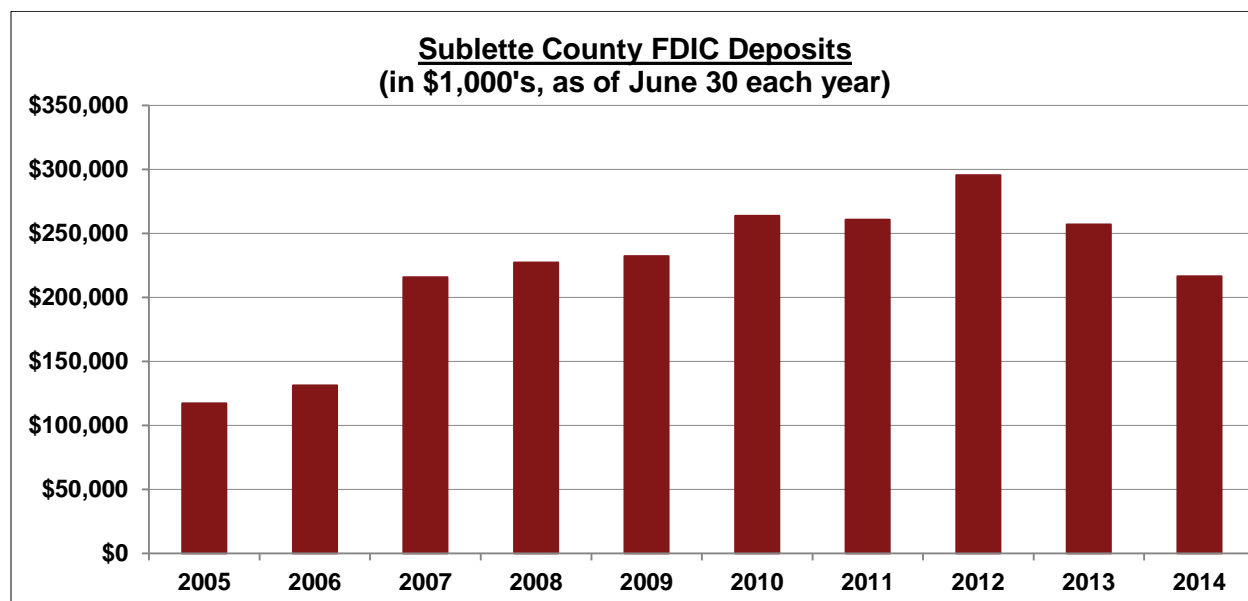
Sublette County imposes 12 mills of against the assessed value of property for its county operations. A mill is \$1 of revenue for every \$1,000 of assessed valuation. Additional property taxes (mostly for education, and some for special districts) increase the full property tax levy, with rates ranging from 59 to 68 total mills, depending upon where property is located in the county. Compared to most other states, this is a relatively low property tax.

Since 1993, the State of Wyoming has imposed a 4% excise tax. Sublette County does not currently impose any of the optional excise taxes (for general operations, special purposes, economic development, etc.). However, the City of Pinedale charges a 3% lodging tax (effective 2010). Compared to other states (and to most other counties in Wyoming), this is a relatively low excise tax.

Sublette County and its municipalities require a building permit for new construction and significant remodels. Although these regulations are standard in most jurisdictions, most of Sublette County is heavily regulated because the federal government owns much of the land. In

addition to these regulations, potential entrepreneurs face difficulty in acquiring land for commercial or industrial development, as there is a very limited amount of vacant land available.

Sublette County banks have a lot of money to lend, if appropriate projects are available. According to the Federal Deposit Insurance Corporation (FDIC), Sublette County banks have more than \$216 million of deposits, as of June 2014, as shown below.



While banks have significant assets, they also have significant regulatory restraints that prevent them from taking risks. They are also motivated to make money, and do not wish to make risky investments. Thus, for business start-ups, bank assets may not be available. There are no known venture capital or angel investor funds in Sublette County.

SWOT Analysis - Entrepreneur Development

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding entrepreneur development in Sublette County.

Strengths

- Low taxes
- Structured and predictable development ordinances in municipalities
- Minimal regulation (at least on private property) outside of municipalities

Weaknesses

- Federal lands are highly regulated
- Bank assets not generally available for start-ups

- Property is scarce and expensive
- Not much evidence of local support for entrepreneurs
- Lack of venture capital or angel investors

Opportunities

- Surveys cite community pride and support for local entrepreneurs
- Sizeable markets available for innovative risk-takers (tourism and travel, restaurants, Internet)
- Economic best practices suggest there is a need for creation of program that actively supports entrepreneurship

Threats

- Shrinking energy industry (may hinder economic opportunities)
- Competition in many industries is stiff, given transportation and telecommunication issues

Recommendations - Entrepreneur Development

CBI recommends several action steps to support entrepreneur development in Sublette County:

1. *Encourage new products and services, with a local flavor.*

Sublette County has a rich history, including cowboys, mountain men, and western culture. Consumers, including travelers, are interested in buying unique items and experiencing local activities. There is a growing demand for such products and services (such as cultural tourism). Local entrepreneurs need encouragement and support to provide these things. Promotion of a local brand helps but, in addition, local entrepreneurs need help creating a sound business plan, finding financing, and pulling together all the other resources they need to succeed (legal, accounting, property, partners, employees, etc.). A sound economic strategy is centered on continual investment in local entrepreneurs (e.g., money, training, mentoring, etc.).

2. *Start an entrepreneurship challenge competition.*

One way to highlight the value of and community support for entrepreneurs is to host an entrepreneurship challenge competition. As noted above, new start-ups need a variety of support to get them going. Secure in-kind contributions for an annual contest, encouraging entrepreneurs to submit a business plan for a new product or service. The in-kind contributions could include volunteer legal or accounting services, free radio/newspaper advertising, office supplies, business checking account, or other support. Business plans could be submitted to a small advisory group that is empowered to select a winning plan, and the reward is the in-kind contributions. The contest will increase awareness of entrepreneurship, and allow the entire business community to participate in the success.

3. ***Leverage statewide resources.***

As noted above, there are many statewide programs that can help with economic development. Some of them, including the Wyoming Technology Business Center, the University Research Products Center, and the Small Business Innovation Research (SBIR) program, are especially useful to entrepreneurs. Get to know those programs, and know when to reach out for help to assist local entrepreneurs. (See Appendix C for contacts.)

4. ***Secure funding for a micro-loan program.***

There are a number of grant opportunities that can provide seed money for a micro-loan program (USDA, Wyoming Women’s Business Center, U.S. Small Business Administration, etc.). Micro-loans provide a small amount of capital to help entrepreneurs get started.

5. ***Provide or support entrepreneurship training and promotion.***

Many economic development organizations are amazed with how many people knock on their door asking for “free” money. Equally amazing is that the person asking for money – almost universally – is completely lost when asked for their business plan. Sublette County should acquire the curriculum and expertise to teach entrepreneurship, or find someone who can provide that service. The public school system (and student-based programs like Future Business Leaders of America) may also be interested in forming a partnership to provide education on the fundamentals of business planning.

NEW BUSINESS RECRUITMENT

Public Input/Surveys

Survey respondents have identified new business recruitment as the building block that is the weakest. Many respondents said that it is the greatest weakness for local economic development. However, there is a range of opinion as to the root cause of the weakness. Lack of effective leaders, inadequate public policy, unattractive sites, limited labor force, high cost of doing business, anti-growth perceptions, and many other factors are cited as reasons that new business recruitment is not working well. (Interestingly, those comments reinforce the notion that business recruitment is possible only when all the economic development building blocks below it are in good shape!)

Many local residents express support for new business development only if it diversifies the local economy. These residents do not want a new business if it might harm the quality of life, nor do they necessarily want competitive businesses to come to town. New retail operations are frequently mentioned as a way to grow and resolve retail leakage problems. Additionally, many survey respondents are pointing to the tourism industry as a way to bring more money into the local economy, without actually having to add more residents.

Objective Analysis - New Business Development

During 2014, four retail sectors generated most (83%, or \$271 million) of the total retail sales in Sublette County. These sectors are the core retailers who cater to travelers and the workers who are temporarily working in the oil fields, and they are largely responsible for Sublette County having a net surplus of retail sales, instead of overall leakage. The 2014 Claritas/Nielsen data for these sectors is tabulated below.

Sublette County - Selected Key Retail Sectors (2014)			
Retail Sector	Demand	Supply	Surplus
Other Motor Vehicle Dealers	\$7,227,497	\$70,832,872	\$63,605,375
Grocery Stores	\$15,635,705	\$72,738,657	\$57,102,952
Beer, Wine and Liquor Stores	\$6,304,055	\$42,811,003	\$36,506,948
Gasoline Stations	\$20,850,271	\$84,607,893	\$63,757,622
Total	\$50,017,528	\$270,990,425	\$220,972,897

If not for these four retail sectors, Sublette County would actually be “leaking” more than \$118 million annually from its local economy. The bad news is that oil field workers continue to leave the area, and these sectors are going to experience lower sales. The good news, however, is that Sublette County’s efforts to build the tourism market will be easier because these sectors are already in place.

Examination of the actual merchandise lines being sold in Sublette County reveals that there are six core merchandise lines that dominate local retail sales (83% in 2014), as follows:

Sublette County - Selected Merchandise Lines (2014)			
Merchandise Lines	Demand	Supply	Surplus
Groceries and Other Foods	\$31,801,797	\$89,669,573	\$57,867,776
Packaged Liquor/Wine/Beer	\$4,663,843	\$29,306,494	\$24,642,651
Cigars, Cigarettes, Tobacco, Accessories	\$4,628,967	\$18,048,219	\$13,419,252
Cars, Trucks, Other Powered Transportation	\$44,116,467	\$52,199,729	\$8,083,262
RVs, Campers, Camping & Travel Trailers	\$4,841,240	\$25,645,976	\$20,804,736
Automotive Fuels	\$15,506,743	\$55,865,792	\$40,359,049
Total	\$105,559,057	\$270,735,783	\$165,176,726

To recruit new businesses, Sublette County needs to compete with other communities. Low taxes and minimal regulation will help. However, the limited availability (and high price) of vacant land will be a restraint. There is even less land available that might be considered “shovel ready” (i.e., land that already has all infrastructure in place and is ready for construction of a new facility).

Nonetheless, there are some recently vacated commercial and industrial properties in Sublette County. More will come available as the mining industry continues to slow down. Those vacant properties present an excellent opportunity to attract new businesses, especially if they are looking for a building that is immediately available for occupancy.

SWOT Analysis - New Business Development

Based on public input and objective analysis, CBI has identified the following strengths, weaknesses, opportunities, and threats (SWOT) regarding new business recruitment and development in Sublette County.

Strengths

- Existing local demand is sufficient for certain targeted industries to succeed, especially in areas of retail leakage
- Growing number of vacant commercial/industrial properties, available for immediate occupancy

Weaknesses

- Shrinking economy
- Small market size
- Poor Internet/broadband connectivity
- Limited availability of vacant commercial/industrial land

Opportunities

- Glaring lack of economic diversity suggests that many types of business are needed
- Existing commodities (agriculture and natural resources) suggest that a recruitment strategy based on finding companies that add value to those commodities is possible

Threats

- Lack of diversity and exposure to energy boom/bust cycle may scare potential companies from relocating to Sublette County

Recommendations - New Business Development

CBI recommends several action steps for new business recruitment or development in Sublette County:

1. *Pursue WBC leads.*

The Wyoming Business Council provides leads for business recruitment. Those leads often provide a very brief time in which proposals must be submitted, and so Sublette County needs to be ready in advance. A template should be created for proposals, including an accurate description of the Sublette County economy (use this plan), the primary rationale for a prospective business to come to the area (make a business/profit driven argument), contact information for key community leaders, etc. Coordinate development of that template and specific proposals with the WBC Regional Director.

2. *Work contacts of local residents.*

Sublette County should not make major investments of time or money in attending site selector shows and industry conferences. Travel is expensive, and unless the targeted industry is very specific, the effort is likely wasted. Instead, Sublette County (like other rural communities) is better served by working directly with local residents, many of whom have relationships with or knowledge about business leaders who might consider coming to Sublette County. The best way for this effort to succeed is by maintaining regular contact with a wide variety of community leaders and groups (local government, Rotary, Chamber, and other organizations). Make sure that your contacts know you are looking for new businesses, and encourage them to come to you with leads.

3. *Pursue specific targets.*

Be selective about what you want. The best targets are the ones that build on your strengths (e.g., energy, travel, tourism, agriculture, etc.) or resolve your weaknesses (e.g., Internet/broadband connectivity and retail leakage). Your efforts should target specific industries, businesses, and individuals.

4. ***Market community's uniqueness.***

A countywide branding effort may be helpful, but each community in Sublette County has a certain uniqueness that can grab the attention of potential visitors. When competing for new businesses, it is important to stand out from the crowd. Every community believes that it has a high quality of life, and that it is a great place to live and work. But not every community can boast of the open spaces that are prevalent in Sublette County, nor can they, for example, lay claim to a mountain man heritage and culture. Own what and who you are, and your uniqueness will attract others.

5. ***Realize that your support for existing businesses and local residents is critical to recruit new business.***

Do not invest any time or money in new business recruitment until you can satisfy existing businesses, and do not attempt to recruit any business that could be developed by a local entrepreneur.



PLAN OF ACTION (Summary Chart)

Goal: Leadership/Civic Development/Public Policy					
Objective: Provide accurate information on the economy					
Action	Outcomes	Timing	Players	Resources	Measures
Provide accurate economic information on website and at meetings	Releases and updates on economy	Short and Mid Term	EDC leaders, WBC Regional Director; media; local government	WBC and WEDA support materials	Updated data on website (at least annually); annual brochure with data; quarterly or monthly news release
Promote economic development at local Chamber, Rotary, and other meetings	Brief discussion at every meeting	Short and Mid Term	EDC leaders, WBC Regional Director	WBC and WEDA support materials	Formal support from all Chamber and consensus support from other organizations
Objective: Build awareness and support for economic development					
Action	Outcomes	Timing	Players	Resources	Measures
Provide Economic Development 101 training to all local leaders	Educated leaders	Mid to Long Term	Municipalities and County government	WEDA, WBC, and local governments	Bi-annual presentations to local governments
Objective: Develop vision and leadership for future					
Action	Outcomes	Timing	Players	Resources	Measures
All Communities	Creation of a locally-supported vision that includes economic growth	Short to Mid Term	Towns, County, WBC	Local facilitator, leadership resources, economic development plan	Clear vision for growth
Support leadership training for all leaders	Improved public administration	Short to Mid Term	Towns, County, WAM, WCCA	Leadership Wyoming?	Completed leadership classes
Objective: Coordinate and collaborate with others					
Action	Outcomes	Timing	Players	Resources	Measures
Reach out to the Chamber, local governments, nonprofits, etc.	Collaborative thinking and actions	Short Term, and ongoing	Chamber, Towns, County, other nonprofits	Time commitment	Either a formal or a consensus decision to work together for growth

Goal: Leadership/Civic Development/Public Policy					
Objective: Engage other economic development supports					
Action	Outcomes	Timing	Players	Resources	Measures
Improve communication methods as needed	Better civic engagement and transparency	Mid to Long Term	Municipalities and County government; media.	Web-based communication, newsletters, media	Increased transparency of decisions and processes.
Objective: Create and implement responsible development principles					
Action	Outcomes	Timing	Players	Resources	Measures
Review and streamline local codes and processes for development	Revised ordinances and processes	Mid to Long Term	Municipalities and County government	WEDA, WACO, WCCA. WBC might fund project.	Reduction in codes and length of development time
Objective: Enable and support economic development organization					
Action	Outcomes	Timing	Players	Resources	Measures
Review and revise SERC organization as necessary	Modify bylaws and policies as needed	Short Term, and ongoing	SERC, WBC	This plan; potential funding from USDA/Rural Development - Rural Business Enterprise Grant	Preparation and adoption of all necessary changes
Secure stable funding	Upon final decisions of all players, establish a 5-10 year budget and request funding	Short Term, and ongoing	WBC, municipalities, county, perhaps private members and corporations	Municipal and county funding (establish a funding formula)	Adequate funding secured

Goal: Quality of Life					
Objective: Enhance or build community facilities					
Action	Outcomes	Timing	Players	Resources	Measures
Support community facilities	More opportunities and things to do	Mid to Long Term	EDC Leaders, municipalities, county, school districts, special districts	Public and private funds	Enhancement of existing facilities; development of new community facilities
Objective: Continue saving					
Action	Outcomes	Timing	Players	Resources	Measures
Build reserves while energy industry continues to generate tax revenue	Stable budget	Mid to Long Term	Local governments	Tax revenues	Increased savings
Objective: Encourage restaurants and accommodations					
Action	Outcomes	Timing	Players	Resources	Measures
Engage existing restaurants and lodging to identify growth needs	Identification of obstacles to growth and expansion	Mid Term	EDC leadership, local business owners	Coordinate with Synchronist Surveys (WBC)	Complete surveys of all existing restaurants and lodging establishments
Objective: Develop more activities					
Action	Outcomes	Timing	Players	Resources	Measures
Support outdoor recreational activities	More opportunities and things to do	Mid to Long Term	EDC Leaders, municipalities, county, school districts, special districts	Public and private funds	Development of new events and activities
Support health services and law enforcement	Healthy, safe communities	Long term	EDC Leaders, municipalities, county, hospital districts	Public and private funds	Reduction in crime; improvement of health status/statistics
Objective: Continue to improve downtowns					
Action	Outcomes	Timing	Players	Resources	Measures
Support Main Street type programs	Historic preservation and economic growth	Short Term, and ongoing	EDC Leaders, local government, state/national Main Street, property owners	Public and private funds	Stronger and more attractive downtowns

Goal: Workforce Development					
Objective: Engage Wyoming DWS					
Action	Outcomes	Timing	Players	Resources	Measures
Become familiar and regularly meet with DWS staff	Better relationships and awareness of needs and opportunities	Short Term and ongoing	EDC leadership, DWS	Time commitment	Monthly visit
Objective: Engage Western Wyoming College					
Action	Outcomes	Timing	Players	Resources	Measures
Become familiar and regularly meet with WWC staff	Better relationships and awareness of needs and opportunities	Short Term and ongoing	EDC leadership, WWC staff	Time commitment	Monthly visit
Objective: Engage key industry sectors					
Action	Outcomes	Timing	Players	Resources	Measures
Become familiar and regularly meet with leaders in energy, tourism, government, agriculture, and other industries	Better relationships and awareness of needs and opportunities	Short Term and ongoing	EDC leadership, business leaders	Time commitment	Quarterly or semi-annual visit with each industry

Goal: Infrastructure Development					
Objective: Transportation improvements					
Action	Outcomes	Timing	Players	Resources	Measures
Support investment of public funds in local roads and highways	Continually improving transportation	Mid to Long Term	EDC leaders, WYDOT, County Commissioners and staff	State and local revenue, WYDOT data and plans	Annual investment in existing roads and highways
Objective: Enhance telecommunications					
Action	Outcomes	Timing	Players	Resources	Measures
Update fiber/telecomm study to identify capacity	Identify opportunities for new tech firms	Short Term, and ongoing	EDC leaders, WBC	WBC funding	Detailed inventory of telecomm assets; options for growth
Improve "last mile" broadband connectivity	Better telecommunications	Short Term, and ongoing	EDC leaders, elected leaders, phone companies	Phone companies; regulatory requirements; Connect America Fund; USDA funding	Faster and cheaper telecommunication service
Objective: Engage WBC programs and funding					
Action	Outcomes	Timing	Players	Resources	Measures
Aggressively pursue BRC grant and loan funds to improve infrastructure to vacant land	Shovel ready sites for commercial and industrial development	Mid to Long Term	EDC staff, local governments, WBC Regional Director	BRC funding, existing plans	Creation of a rolling inventory of 40 acres of shovel ready land
Objective: Consider higher density development					
Action	Outcomes	Timing	Players	Resources	Measures
Monitor local government development regulations and encourage shift to high density	More efficient use of limited land resource	Mid to Long Term	EDC staff, local governments	WAM, planning best practices	Increased development of vacant lots, shift in planning toward higher density
Objective: Be proactive about public lands					
Action	Outcomes	Timing	Players	Resources	Measures
Identify a good candidate for development, and propose that the State sell it	Reduction in public land ownership, increase in vacant land availability	Long Term	EDC staff, local governments, WBC Regional Director, SLIB staff	This plan, BRC funds	Sale of public land to EDC or a private developer

Goal: Existing Business Development					
Objective: Appreciate and prioritize existing business development					
Action	Outcomes	Timing	Players	Resources	Measures
Learn and follow economic development best practices for existing businesses	Knowledge of local needs, support from local business community	Short Term and ongoing	EDC leaders, WEDA, WBC staff, local businesses	WEDA library and training conferences, other industry associations	Completion of training, and knowledge to begin a business retention and expansion program
Objective: Engage local businesses					
Action	Outcomes	Timing	Players	Resources	Measures
Create a business expansion and retention program	Economic stability and growth	Top priority; Short to Long Term	EDC leaders, business and industry leaders	WBC, Synchronist survey	Increased awareness of economic development priorities; commitment to local businesses
Interview existing businesses	Better awareness of local businesses' needs	Short to Long Term	EDC leaders, business and industry leaders	WBC	Number of businesses interviewed/visited; specific efforts to solve problems
Objective: Engage local residents					
Action	Outcomes	Timing	Players	Resources	Measures
Create mechanisms to gather input from local residents, including social media, informal coffee meet & greet, etc.	Knowledge of local needs, support from local residents	Short Term and ongoing	EDC leaders, local residents	Time commitment	Documentation of specific concerns and praises
Objective: Focus efforts on specific industries					
Action	Outcomes	Timing	Players	Resources	Measures
Support Agriculture industry	Industry-specific growth programs; successful Food Hub/value-added programs	Short to Long Term	EDC leaders, Wyoming Dept. of Agric., USDA, WBC, Food Hub project leaders	USDA, WBC funding	Increased production; increased value of products; better market connectivity, etc.
Support Mining industry	Industry-specific growth; improved highways; preparation for economic changes	Mid to Long Term	EDC leaders, WBC, industry leaders	WBC funding; private investment	New jobs; higher incomes; new products; economic diversification
Support Utilities industry	Industry-specific growth; inventory of capacity; shorter development times	Mid to Long Term	EDC leaders, WBC, industry leaders	WBC funding; private investment	Quicker development times; readily available utility info

Goal: Existing Business Development					
Objective: Focus efforts on specific industries					
Action	Outcomes	Timing	Players	Resources	Measures
Support Construction industry	Industry-specific growth; licensing of contractors	Short to Long Term	EDC leaders, contractors, municipal & county building departments (if applicable)	Municipalities and contractors	Consistent quality and construction opportunity
Support Manufacturing industry	Industry-specific growth; multiplier effect of primary jobs	Short to Long Term	EDC leaders, WBC, manufacturers, Manufacturing-Works	WBC, Manufacturing-Works, private investment	New jobs; higher wages; new products; new markets; economic impact
Support Retail industry	Industry-specific growth; address retail leakage	Short to Long Term	EDC leaders, retailers, WBC	WBC, USDA funding	Increased sales; new products and services; less leakage
Objective: Prioritize the tourism and travel industry					
Action	Outcomes	Timing	Players	Resources	Measures
Support Tourism & travel industries	Industry-specific growth; tap into mobile market; improve quality of life	Short to Long Term	EDC leaders, restaurant and lodging owners, attractions	WBC and USDA funding, WLRA guidance and support	New jobs; increased sales; less leakage
Objective: Leverage all available resources to retain and expand businesses					
Action	Outcomes	Timing	Players	Resources	Measures
Engage other resources to help existing businesses	Collaborative and comprehensive effort to grow local economy	Mid to Long Term	EDC leaders, WBC, USDA, EDA, Manufacturing-Works, Univ. of Wyoming programs, Western Wyoming College, etc.	Each player brings resources to the table that can be leveraged	Leveraged funding; new jobs; higher wages; new products and services
Objective: Engage Internet use for sales					
Action	Outcomes	Timing	Players	Resources	Measures
Support efforts to improve broadband, and provide training/guidance to use it	Connection to larger market, and shift toward current technology	Short Term, and ongoing	EDC leaders, telecommunication companies, local government, industry	WBC, USDA funding, State Dept. of Enterprise Technology	Telecommunication improvements, increased retail sales

Goal: Entrepreneur Development					
Objective: Encourage new products/services with local flavor					
Action	Outcomes	Timing	Players	Resources	Measures
Raise awareness of community uniqueness and cultural tourism	New local products and services	Short Term, and ongoing	EDC leaders, Chamber, local entrepreneurs	Wyoming Entrepreneur, WBC, UW Research Products Center, Division of Tourism	Increased sales, increase in business start-ups
Objective: Start an Entrepreneur Challenge/Business Plan Competition					
Action	Outcomes	Timing	Players	Resources	Measures
Sponsor an Entrepreneurship Challenge	Increased awareness and excitement about entrepreneurship	Mid to Long Term	EDC leaders, local business community, WBC	WBC funding; investment of local business community; entrepreneurs	Better business plans; investment in entrepreneurs
Objective: Leverage all known resources to support entrepreneurs					
Action	Outcomes	Timing	Players	Resources	Measures
Develop entrepreneurship program	Collaborative and comprehensive supports for entrepreneurs	Mid to Long Term	EDC leaders, WBC, USDA, UW support programs, entrepreneurs	WBC and USDA funding, UW support programs	New business startups; new jobs; new products and services
Objective: Create a loan program					
Action	Outcomes	Timing	Players	Resources	Measures
Develop micro-loan program	Financial support for expansion	Long Term	EDC leaders, WBC, USDA, local banks	Local banks, revolving loan funds from USDA, SBA or Wyoming Women's Business Center	Increasing amount of financial assistance for expanding businesses
Consider development of an investor/venture capital program to provide seed money for new ventures	Financing availability	Mid to Long Term	EDC leaders, WBC, UW incubator	WBC and USDA funding, UW support programs	Increased financing available to entrepreneurs
Objective: Provide entrepreneurship training					
Action	Outcomes	Timing	Players	Resources	Measures
Provide entrepreneurship training	More knowledgeable decisions	Mid to Long Term	EDC leaders, entrepreneurs, perhaps Western Wyoming College	Entrepreneurship curriculum; WBC funding	Better business plans; better decisions

Goal: New Business Recruitment					
Objective: Pursue WBC leads					
Action	Outcomes	Timing	Players	Resources	Measures
Create and maintain inventory of existing facilities and vacant (developable) land	Improved readiness to respond to new business leads	Short Term and ongoing	EDC leaders, WBC, realtors, business property owners	WBC and existing public resources	Comprehensive inventory of commercial and industrial land/facilities
Create and regularly update a template for responding to local business recruitment leads	Improved readiness to respond to new business leads	Mid Term and ongoing	EDC leaders, WBC Regional Director, local governments and utilities	WBC, WEDA best practices	Updated template proposal sheet
Objective: Work local contacts					
Action	Outcomes	Timing	Players	Resources	Measures
Build awareness of economic development support for local ideas and contacts	Locally produced business recruitment leads	Long Term	EDC leaders, local residents and business leaders	Time commitment, news releases, social media	Specific leads that can be worked; new business recruitment
Objective: Pursue specific business targets					
Action	Outcomes	Timing	Players	Resources	Measures
Develop consensus on companies and industries to be targeted	Collaborative approach to recruitment decisions	Long Term	EDC leadership, community leaders, funding partners	WBC	Final identification of targeted industries and companies
Gather knowledge and identify connections to each industry	Focus recruitment on tourism & travel, retail leakage, manufacturing, mining, and specialty trade contractors	Long Term	EDC leadership, community leaders, funding partners	WBC, industry leaders	Specific plan to contact and recruit targeted industries and companies
Sponsor effort to develop a unique marketing message for economic development	Collaborative effort to identify value and uniqueness of communities in Sublette County	Long Term	EDC leaders, community and business leaders	WBC, WEDA, others?	Consensus on marketing message for Sublette County
Develop multi-pronged marketing effort tied to core message	Coordinated marketing with printed materials, web-based tools, and other media	Long Term	EDC leaders, municipalities and county, nonprofit organizations	WBC, Wyoming Tourism, USDA	Effective media campaign to push core marketing message

APPENDICES

- A. SERC Survey Responses
- B. Public Input
- C. Economic Development Contacts