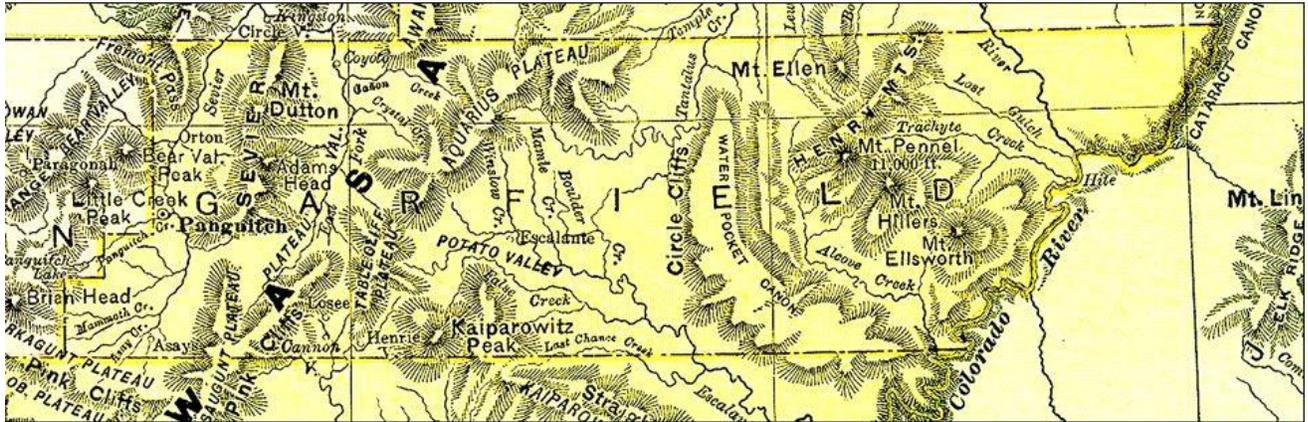


Garfield County Economic Development Plan

September 2018



Garfield County, Utah, 1895

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Garfield County Economic Development Plan

September 2018

Abstract

The purpose of this economic development plan is to guide the creation and maintenance of a vibrant rural economy in Garfield County, Utah that (1) provides living wage jobs to residents while (2) maintaining rural characteristics and a high quality of life.

Garfield County is a large county in southern Utah, with the fifth lowest population among Utah counties, and the lowest population density. Garfield County is 93% federal, one of three counties nation-wide with such a high concentration. Typical of rural counties, Garfield County has had economic swings. On the whole, however, the County was relatively stable and thriving until the 1990s when traditional natural resource-based sectors - grazing, forestry and minerals - began to decline due to a combination of a changing national economy and increased federal land use restrictions spawned by national political pressures. The population has declined as well, as has the school population. Leisure/hospitality is now the leading economic sector, though worker wages are generally low and employment mainly seasonal. Bryce Canyon National Park is the mainstay of the tourism economy and Ruby's Inn is the County's number one employer. Other locations are seeing increased visitation, but not enough to carry the County economy.

Garfield County has considerable assets, including a spectacular environment, outstanding outdoor recreation opportunities, a stable and hard-working residents, and abundant natural resources, including timber, minerals and world class paleontology. Issues that hamper economic development are similar to many other rural areas, including lack of adequate living wage jobs, inadequate access to goods, services and markets, lack of affordable and quality housing and lack of infrastructure. The County must also grapple with declined health of public lands vegetation and lack of economic opportunity on federal lands.

Through this plan, the County establishes a target of between 125 and 150 new jobs within five years and a total of between 200 and 300 jobs over ten years. Strategies to meet economic goals include: (1) maintaining existing enterprises, (2) developing infrastructure, (3) managing public lands to benefit the environment and local communities, (4) diversifying and enhancing tourism and outdoor recreation, (5) attracting new enterprises and (6) initiating special projects. This plan has a 10-year, phased implementation schedule. Successful implementation of these strategies will require active involvement by Garfield County, its towns, businesses and residents, in partnership with the State of Utah and federal land management agencies.

Introduction

In his January 2017 state of the state address, Governor Herbert set a goal of 25,000 new jobs in Utah's 25 rural counties. Garfield County appreciates Governor Herbert's concern over the jobs situation in rural counties and is using the 25K initiative as the motivation to prepare this Economic Development Plan.

Garfield County has a small population, three-fourths of one percent of the total population of all of Utah's rural counties. Using population as the guiding principal for setting job targets, Garfield County's portion of the statewide goal of 25,000 is only 190 jobs. We can, and will, do better than that.

The purpose of this plan is to define objectives for new jobs and a path toward creating these jobs. To establish a foundation for considering what economic development strategies to adopt the plan will (1) describe current economic conditions in the County, (2) identify assets that the County might use to stimulate economic development, and (3) identify the issues that constrain economic development. Based on that information, the plan will (4) define a set of guiding principles, and (5) define a mission statement and set employment objectives. Based on these principles, the mission statement and objectives, the plan will then identify the strategies and specific actions that will lead to new jobs.

Economic Profile of Garfield County

Population. In 2016, Garfield County's year-round population was 4,986, a decline of 186 residents over a six-year period. The County is the fifth least populated county in the Utah. Notably, as a percent of the total population, residents over age 65 is the only age group that is increasing; others are either holding steady or decreasing.

Geography. At 5,175 square miles, Garfield County is Utah's fifth largest county. Its population density of one person per square mile is the lowest in the State and one of the lowest in the continental U.S.

Public Lands. Garfield County is 93% federal lands, the highest percentage in Utah and the third highest in the continental U.S. An additional 3.5% is State owned, leaving only 3.5% in private hands. The high concentration of federal lands is particularly evident in the County's eastern half, where 96% is federal, 3.5% state, and private less than one percent.

Business and Employment. Garfield County has 1,318 full-time jobs and, including part-time workers, a year-round work force of 2,300. Seasonal employees add another 1,000 jobs. Leisure/hospitality is the County's largest sector, followed by local government (primarily schools), federal government, and health care/social services. After 100 years as the economic core, natural resource jobs have declined significantly.

Economic Status of Residents. Garfield County's median household income is \$42,614, with an average wage of \$27,730, two-thirds of the statewide average. The poverty rate is 13.5%, 2% above the State average. Thirty percent of residents fall between the poverty line and 200% of the poverty line, by far the highest in the State. Average unemployment rates are 16% in January and 4% in September, with a year-round average rate of 7.35%. By way of contrast, the statewide average is 3.4%.

Sources of Income. As is the case elsewhere, Garfield County residents receive their income from one on three sources (1) earned income from a job or a business, (2) unearned income from investment, royalties or inheritance, or (3) government transfers, including social security, welfare, Medicare and Medicaid. In a robust economy earned income is the dominant source of income. In Garfield County the three sources are about equal.

Public Schools. There are 909 students enrolled in Garfield County public schools, down from 1,150 in 1996 and less than the school population in 1890. Without intervention this downward trend will continue.

County Assets

People and Communities. The County has a work force that is stable, hard-working, resourceful, and resilient, and communities that are safe, stable, and retain their rural character.

Environment. The County includes 3 national parks (including Bryce, the foundation of the County's tourism industry), a proposed new national park ((Escalante Canyons), a national recreation area, a national forest, a national monument, 3 state parks, Lake Powell, 2 national historic districts, a national and a state historic trail, world-class paleontological, archeological, and geological resources, and a wide range of wildlife species, including significant populations of elk, mule deer, pronghorn, black bear and desert big horn sheep.

Infrastructure. Installation of in-ground fiber optics is in progress and cell service is being upgraded. Garfield County also has high-quality rural healthcare facilities.

Road Network. Roads of particular interest include SR 12 (an All-American Road), Route 89 (a National Heritage Area), SR 143 and SR 95 (both scenic byways), the scenic Burr Trail, and the historic Hole-in-the-Rock Road.

Natural and Cultural Resources. Natural resources of particular economic import include scenic and recreational attractions, forest products, rangelands, paleontological resources and a rich cultural history.

Energy and Mineral Resources. Garfield County has substantial reserves of undeveloped natural gas, oil, coal, uranium, carbon dioxide and non-energy minerals. The Upper Valley Oil

Field, located at the north end of the Kaiparowits Plateau, has long been one of the County's economic mainstays.

County Issues

Rural Realities. As is the case with many rural areas, the County has an aging population, older housing resources, significant loss of young families, and lack of services and infrastructure.

Access. There is no Interstate, rail access, or commercial air service. Significant road closures have been implemented on forest and monument lands; except where road maintenance is the responsibility of the County, Monument roads have not been maintained. ATVs have been precluded from many Monument roadways.

Jobs. There has been a significant decrease in living wage natural resource jobs, replaced by tourism-based jobs that are typically lower paying and seasonal. Living wage jobs in other sectors are limited. Business owners report that it is exceedingly difficult to fill service sector jobs, at least during the tourism season.

Housing. The County has a recognized lack of affordable, high-quality housing for residents with young families, prospective residents, seasonal employees, and elderly residents requiring accessibility.

Public Schools. There is a twenty year, County-wide trend of declining public school enrollment that is expected to continue. The current school census is less than it was in 1890.

Infrastructure. Infrastructure improvement needs include (1) culinary and irrigation water supply, (2) remote area livestock/wildlife watering facilities, (3) housing, (4) cell service, (5) federal lands road access, (6) access to natural gas and (7) electricity for remote areas and industrial applications.

Commercial Areas. With the exception of Bryce Valley City, the County's major commercial service areas are bisected by wide, high speed highways; Panguitch and Escalante are the County's largest commercial districts, each has several downtown vacant storefronts.

Access to Eastern Garfield County: The only connection from western Garfield County is a steep, winding, unpaved road through the Waterpocket Fold.

Tourism. Issues include seasonality, limited diversity of visitors, a "pass-through" mentality, and limited visitor services in some areas. On the GSENM, management practices constrain visitor access, with detrimental effects on the County's overall tourism economy.

Percentage of Federal Lands and Shifting Management. Extensive federal lands and increasingly restrictive management of these lands have resulting in (1) lack of private land

available for economic activity, (2) lack of economic uses on federal lands, and (3) a small property tax base.

Federal Payments in Lieu of Property Taxes. PILT and SRS payments are unpredictable, unreasonably low and not in line with private lands property taxes. PILT formulas discriminate against Garfield County.

Political Pressures. Regional and national special interest organizations are blocking economic uses of federal lands (93% of the County) and communities are increasingly polarized.

Forest and Range Health. Threats include Invasive plants, senescent sage and grass communities and overstocked vegetation and diseased timber, which increase the risk of wildfire and adversely affect timber production, livestock, wildlife habitat, and water resources. The 2017 Brian Head Fire, largely the result of poor vegetation management, led to extremely high run-off during a 2018 flash flood event soil that severely damaged the Panguitch municipal water supply system.

Large Number of Federal Land Management Units. The County must contend with 15 distinct federal land units, far too many to effectively monitor or engage.

Drought. 2018 brought extreme or exceptional drought to 27% of Utah, with the hardest-hit area being Garfield, Piute, San Juan, Sanpete, Sevier and Wayne counties. Of these counties, the drought was the most widespread in Garfield, San Juan and Sanpete counties. In Garfield County the central portion of the county was especially hard-hit. This was the worst drought in at least 40 years. Fortunately the monsoon season brought some relief, but central and eastern portions of the County continued to receive inadequate rainfall. Residual effects of drought on municipal water supply, agricultural water supply and potential for catastrophic fire are of continuing economic concern. Also of considerable concern is the potential of a 2019 repeat of the 2018 drought.

Underlying Principles for Guiding Economic Development

The County's economic development strategy is built on a set of principles, which provide the departure point for establishing concrete economic development strategies. These principles (1) respond to Garfield County's demographic conditions, (2) take into account the aforementioned assets and issues, and (3) draw from best management practices related to the disciplines of rural planning and rural economic development. These principles are as follows:

Rural Character and Quality of Life. Rural character and quality of life are fundamental values that are critical to retention of existing residents and attraction of new businesses, tourists and residents. Quality of life factors that are particularly important in rural Garfield County include living wage jobs, quality and affordable housing, quality public schools and opportunities for advanced training, access to quality healthcare, vital, attractive and livable communities, the

availability of goods and services, a healthy and resilient environment and access to outdoor recreation opportunities. Garfield County's future is in retaining and strengthening its rural character and rural economy, not in conversion to an urban or suburban economy or, the other extreme, to a natural landscape devoid of sustainable communities.

Infrastructure. Garfield County lacks essential infrastructure needed to create a sustainable rural economy. The term infrastructure refers to the basic underlying physical and organizational systems, services, and facilities needed for an economy to function and be sustainable over time. Narrowly construed, infrastructure includes systems of roads, airports, water supply, communications and power. More broadly it also includes housing, schools, medical facilities and essential services related to health, safety and welfare. Protection from catastrophic fire is a classic example of health, safety and welfare. In a county with such a high percentage of public lands, infrastructure must also include the ability to use public lands as the location for essential infrastructure. Important examples are water, power, road and communication corridors. Currently, Garfield County has deficiencies in several important infrastructure categories, most notably housing, electric power, natural gas, secure sources of culinary and irrigation water and, especially in some areas, communications. Many communities are vulnerable to catastrophic fire, which can adversely affect several types of infrastructure (exemplified by Panguitch's recent culinary water disruption, which was the direct result of the catastrophic Brian Head Fire).

Existing Businesses. The businesses that currently operate in Garfield County are the foundation for moving forward with economic development. There are three reasons: (1) the fact that these businesses continue to operate is indication that there is a need for them, by residents, by visitors or both, (2) the fact that their owners elected to establish and operate these businesses indicates the owners' commitment to Garfield County and suggests a corresponding need for County government and residents to support these businesses and (3) experience and academic research both tell us that it is far more efficient and effective to support the continuation and, when appropriate, expansion, of an existing business than to attract a new one.

Economic Diversification. Diversification within and across business sectors and industries is critical to the health of the local economy. Without diversification the County is vulnerable to unforeseeable occurrences that might severely disrupt a given sector of the economy. If the disrupted sector is dominant (i.e., tourism) the adverse effect is much more severe than if there are a range of viable economic sectors. Economics is similar to ecology. In both disciplines diversification promotes resilience and stability. Economic diversification also prepares the County for unforeseen economic opportunities in the future.

Traditional Natural Resource Industries. Jobs in traditional natural resource industries such as livestock and forestry are important to the County's cultural identity as well as its economy. The fact that they have persisted suggests that the key environmental and socio-economic elements needed to survive are locally available. It is not appropriate to suggest that jobs in

forestry and livestock management are no longer relevant or that they can be replaced by jobs in tourism. The County needs jobs in both traditional natural resource sectors AND tourism. But times are changing, necessitating new approaches and diversification within traditional natural resource industries, specifically including incorporation of “value added” strategies.

Tourism. Tourism is a fundamentally important component of the County’s economy and will remain so into the future. Bryce Canyon National Park will continue to be the major focus of County tourism, bolstered by the increasing trend of visitors to bundle visits to multiple parks in one trip. In this regard, Capital Reef takes on special meaning, particularly as a significant portion of that park is in Garfield County. A remote part of Canyonlands NP is in the County, and Glen Canyon NRA is effectively a national park. The proposed Escalante Canyons National Park offers a once in a lifetime opportunity to significantly strengthen the County’s tourism economy, especially in the mid-county area. A robust, County-wide tourism initiative must seek to (1) expand the length of the tourism season, (2) extend the length of time that visitors stay in our County, (3) extend the range of people who visit the County and the reasons why they come to the County and (4) expand the range of outdoor recreation opportunities. Recreation opportunities are described immediately below.

Outdoor Recreation. Garfield County offers a wide range of outdoor recreation opportunities that are made all the more compelling by the County’s exceptional natural environment. The County’s outdoor recreation assets provide an important underpinning for the overall local economy. Today the focus is mainly on traditional national park sightseeing and backcountry hiking and backpacking. While these are important and should remain so, there are a range of additional recreational activities that have potential for attracting visitors and providing enhanced recreation opportunities for residents. Bicycling is one example of an activity with tremendous untapped potential in the County. Others include OHV riding, viewing of night skies and scientific and historical studies.

Public Lands. With so little private lands in the County, the federal government and the public lands managed by the federal government absolutely must contribute to the economy. While open spaces are important to both environmental quality and the rural character of the County, single purpose management of public lands is environmentally unsound and a detriment to community sustainability and economic development. Measured, responsible multiple use must be a significant component of public lands management and federal agencies must accept that their participation in economic development is crucial to the County’s survival and long-term prosperity. Federal lands must also contribute to paying for essential public services, including education, law enforcement, social welfare and search and rescue, to name just a few. Per acre, federal PILT and SRS payments are far lower than local property tax payments on private lands.

Special Natural and Historical Resources. The Kaiparowits Plateau is a nationally significant repository of paleontological resources. Paleontological resources constitute one of the County’s most distinguishing and valuable assets, and one that must be carefully managed.

Beyond their obvious scientific importance, and their ability to attract researchers who contribute to the local economy, paleontological resources have potential to boost the County's tourism industry and, not to be overlooked, serve as a source of pride for County residents. Initiatives to develop the local economy must respect the need to protect and conserve these extraordinarily important paleontological resources. Archeology, cultural history, geology and biology are additional resources that deserve special management and that should be viewed as economic assets.

Preparing for Future Natural Disasters. The last year or two have been a wake-up call for the County concerning catastrophic fire, drought and flood. Nothing can be done during the actual event to prevent fire or flood, or prepare for low seasonal or multi-year rainfall. This plan identifies needs and actions related to both water supply and fire. We need to plan and prepare now, not wait until it is too late.

Eastern Garfield County. While remote and largely inaccessible from western Garfield County, the eastern-most quarter of the County is an important part of the County's identity and economy. If the County as a whole is to prosper into the future, the portion of the County east of the Waterpocket Fold must be more fully incorporated into county-wide planning.

State Highways. Garfield County's location, geography, undeveloped nature and concentration of public lands all contribute to a situation where state highways are absolutely critical to economic development within the County, especially when other modes of transportation are lacking. The importance of highways is due to the fact that state highways (1) provide access to almost all of the areas where new or enhanced economic development might occur and (2) serve as the major means to transport raw materials, finished products and visitors. State highways directly adjoin the commercial areas of all of the County's cities and towns except Bryce Canon City, and even there provides the only vehicular access. State highways also play a significant role in site-specific development, as highways bisect commercial areas and highway rights-of-way can affect the ability of vehicles to access private lands along these highways. This reliance on state highways indicates the need for the Utah Department of Transportation to be viewed as a vital partner in future economic development.

County/Community Coordination. There is need for a coherent, county-wide vision that articulates shared economic development values and needs. This plan seeks to do that. However, each of Garfield County's incorporated and unincorporated communities is unique and has its own specific needs. The city/town councils and residents of each community must assume the major role in determining how the county-wide economic development vision and plan might best be applied within each community and what specific economic development initiatives should be that community's priorities.

The Roles of Individual Communities and Cities. Not all communities in the County must achieve the same level and type of economic development. Some may wish to have little if any new job creation and, rather, sustain themselves through traditional natural resource-based

livelihoods, local tourism and commuting to jobs and services in communities with more economic capacity. Others may elect to focus on one or a few economic sectors or seek to be local service centers and job providers. Bryce Valley City will almost certainly continue to be a focal point for regional tourism. Panguitch and Escalante are the County's largest municipalities and the County's two main economic engines. To a large extent, the economic future of the entire County relies on the economic vitality of these two cities and it is therefore important that heightened consideration be given in these cities to civic improvements, enhanced services, housing and job creation.

Economic Development Mission Statement and Employment Objectives

Garfield County’s economic development mission is to establish and maintain a stable economy that benefits residents now and into the future. Such an economy will support flourishing and sustainable communities and enhance quality of life. Specific objectives for living wage job creation and the effect of job creation on related demographic factors are shown in the following table. These jobs will come from a combination of re-invigorated natural resource jobs, additional tourism and hospitality jobs, jobs from new enterprises including technology and scientific research, and from increased demand for services and construction.

Table 1 presents county-wide objectives for new living wage jobs and identifies the likely effect of these new jobs on population, housing and schools. Two sets of objectives are presented, a realistic scenario and a stretch scenario. It is the County’s intent to aim for the stretch objectives.

Table 1. Garfield County Job Objectives and Their Effects on Demographic Factors.

	New Jobs per Year	Total Jobs Created	New Residents	Population Increases	Housing Increases	Student Increases
Realistic Objectives						
Years 1 to 5	25	125	83	250	62	83
Years 6 to 10	15	75	50	150	38	50
10 year total	20 (avg.)	200	133	400	100	133
Stretch Objectives						
Years 1 to 5	30	150	100	300	75	100
Years 6 to 10	30	150	100	300	75	100
10 year total	30 (avg.)	300	200	600	150	200

Economic Development Strategies

Garfield County has identified six strategies for meeting job creation objectives, as follows:

1. Support existing enterprises. Bring about conditions that support the continuation and expansion of existing local businesses. The need to protect businesses affected by drought is of particular concern. Target existing business sectors include:

- Commercial businesses and services
- Forest products
- Livestock production
- Tourism
- Healthcare

2. Develop infrastructure. Provide infrastructure to support County-wide economic sustainability. Target areas include:

- Culinary and agricultural water supply; remote area livestock/wildlife water facilities
- Communications
- Roads, especially on federal lands
- Airports and airstrips
- Natural gas supply
- Property-specific and community renewable energy
- Remote area electrification and high capacity (three phase) power for industrial and commercial applications
- Housing for families, seasonal workers and senior citizens, including restoration of older homes
- Downtown revitalization and enhancement, especially in Panguitch and Escalante

3. Manage federal lands to benefit both the environment and communities. Bring about a situation where federal land management agencies make meaningful contributions to County-wide economic stability and expansion, especially in the areas of tourism, forest products, ranching and community infrastructure. Tourism is addressed in strategy 4 below. Other areas needing attention include

- Evaluation and agreement regarding federal actions to support communities
- Modification of GSENM land use plans/policies/operations to support communities.
- Systematic long-term restoration of rangeland and forest health
- Fire prevention, management and control (specifically including protection of communities and municipal water supplies)
- New and enhanced livestock/wildlife water sources
- Public lands grazing reform
- Allow responsible timber harvest
- Road access and improvements
- Access to utility corridors
- County/municipal land acquisition for beneficial public purposes
- Federal hiring practices (fair treatment of local job applicants)
- Reasonable, responsible and equitable PILT and SRS payments.

4. Diversify and expand tourism and outdoor recreation opportunities. Ensure a tourism industry that is sustainable, robust, and serves a diverse range of year-round visitors

- Develop the Hole-in-the-Rock State Park and Parkway
- Develop a museum and multiple use reservoir in Escalante (Strategy 6 below)
- Road improvement and legal road access

- Directional and public safety signage
- Enhanced tourism and economic opportunity in the eastern half of the County
- Opening of Monument roads to ATVs
- Establishment of a Coal Bench ATV trail
- Snowmobiling and ski touring
- Cultural resourced-based recreation
- Access to Lake Powell
- Continued Garfield County Tourism Office outreach
- Prepare a County-level recreation guide
- Enhanced bicycle recreational opportunities, on and off road, including:
 - Active participation in national bike route system
 - A bike shop
 - Extend Red Canyon bike trail to Cannonville, Escalante and, ultimately, beyond
 - Petrified Forest SP mountain bike trail
 - A 100-mile bike hut-to-hut trail
 - A Monument mountain bike trail system

Additionally, and importantly, federal legislation has been proposed that would designate a new Escalante Canyons National Park. Based on experience elsewhere, this designation would significantly enhance county-wide and local community economies. Opportunities to have an area designated as a national park are exceedingly rare and fleeting. In addition, for those concerned with protection of lands, in the United States there is no other scenario that offers the permanence of national park designation. However, it is questionable whether county residents would support a new national park that threatened to disrupt traditional rural values and livelihoods, regardless of the benefits. There are examples of where communities near national parks have, through careful planning, both benefited from the national park and retained their essential character and customary livelihoods. If county residents elect to pursue national park designation it should be with resolve to plan for and ensure long-term local community integrity.

5. Attract New Enterprises. Attract and retain a range of diverse businesses and economic enterprises that offer living wage employment for existing and prospective County residents. Priorities include:

- Computer technical services (including educational opportunities for employees)
- Light manufacturing
- Retail and commercial services
- Visitor and resident commercial services
- Professional services (e.g., veterinary)
- Trades (e.g., appliance repair, plumbing)
- Value-added forest products enterprises
- Value-added livestock products enterprises, specifically including a local meat processing facility

6. Initiate Special Projects. Develop new projects that provide multiple economic and community benefits. While a select number of special projects have been identified, others may be added to the list as need arises and resources become available. Priority near-term projects include:

- Restoration of the Panguitch culinary water supply, including improvements to water conveyance infrastructure and management of the watershed to protect the City's water supply.
- A natural history museum and field station in Escalante.
- A multiple-purpose reservoir near Escalante that would increase retention and availability of irrigation water, conserve culinary water and enhance recreational opportunities

Year One Implementation Priorities

Existing Businesses

- Incentives. Identify incentive opportunities and assist businesses to secure these incentives.
- Enterprise Zone. Gain approval of the Town of Hatch enterprise zone application and assist designated communities in taking advantage of this designation.

Infrastructure

- Housing. Initiate housing programs throughout the County with federal and state partners.
- Water Supply. Survey municipal water supply status, identify issues and corrective measures.
- Downtown Revitalization. Initiate commercial area planning, especially in Panguitch and Escalante.

Federal Lands

- Federal Agency Contributions. Initiate outreach with each federal land unit.
- Vegetation Restoration. Initiate comprehensive WRI program.
- Livestock/Wildlife Water Facilities. Initiate WRI water projects
- Monument Management Plan. Assume an influential lead role in development of new monument management plans.
- RS 2477 and Grazing Reform. Continue State efforts to resolve these critical issues.
- PILT/SRS. Develop a strategy and compile data regarding advocacy for responsible federal compensation policy.

Tourism

- Hole in the Rock State Park and Parkway. Planning with State Parks.
- New Escalante Canyons National Park. Initiate local community discussions.
- 100-mile Mountain Bike Trail. Encourage/facilitate completion of Forest Service NEPA and project facilities.

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|-------------------------|--|
| New Enterprises | <ul style="list-style-type: none"> • <u>Technology Service Center</u>. Initiate project. • <u>Forest Products Processing Facility</u>. Initiate project. • <u>Meat Processing Facility</u>. Initiate project. • <u>Western Garfield County Opportunity Zone</u>. Support, publicize and implement. |
| Special Projects | <ul style="list-style-type: none"> • <u>Panguitch Watershed</u>. Secure funding; implement. • <u>Escalante Field Station/Museum</u>. Conduct feasibility analysis; develop funding strategy, implement first phases. • <u>Wide Hollow Reservoir</u>. Update engineering analysis; initiate development of a funding strategy. |

Federal and State Economic Development Incentives

State of Utah. State of Utah economic development incentive programs that Garfield County believes are likely to most benefit county economic development are listed below. The County will help facilitate businesses and other organizations in participating in appropriate State incentive programs.

- | | |
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| <ul style="list-style-type: none"> • Rural Fast Track • Enterprise Zone Tax Credit • Enterprise Zone Non-profit • Business Expansion and Retention • Targeted Business Tax Credits • Protection tax credit | <ul style="list-style-type: none"> • Utah Rural Jobs Program • Smart School • Tourism Marketing Performance • Rourism (Rural Tourism Initiative) • Outdoor Recreation Grants • C-PACE • High Cost Infrastructure Tax Credit |
|--|--|

USDA Rural Development. USDA Rural Development has a portfolio of programs that provide loan guarantees, direct loans and, in some cases, grants. The County will apply for, or facilitate businesses, cooperatives and individuals in applying for, assistance that is consistent with achieving the County’s economic development plan’s goals and objectives. USDA has a range of specific programs within the following categories:

- Rural Housing Programs
- Rural Community Programs
- Rural Business Programs
- Rural Cooperative Programs
- Rural Utilities Programs

Federal Opportunity Zone Program. A new program that holds promise is the Opportunity Zone Program authorized through the 2018 Federal Tax Bill. This program facilitates investment by individuals and corporations in specific geographic areas designated as “Opportunity Zones.” The portion of Garfield County west of the Paunsaugunt Cliffs (i.e., the Highway 89 corridor communities of Panguitch and Hatch) is a federally recognized Opportunity

Zone. The County will maintain contact with this program and assist businesses and cooperatives in seeking Opportunity Zone investment.

State of Utah Participation in Plan Implementation

Garfield County has productive, ongoing relationships with several State of Utah agencies. For economic development activities our primary contact is GOED's Office of Rural Development. For public land policy activities our contact is the Governor's Public Lands Policy Coordination Office. For on-the-ground natural resource activities our contact is the Department of Natural Resources. Garfield County desires to retain these important relationships and to establish relationships with additional State agencies aimed at advancing economic development. Following are the near term action items where State of Utah participation would significantly increase the potential for success.

Policy Advocacy

Office of the Governor: Advocate for federal laws/policies that support rural sustainability:

1. Funding for water improvement projects.
2. Reasonable, predictable and equitable PILT and SRS payments to rural counties.
3. Adoption of federal legislation to establish the Escalante Canyons National Park.
4. Responsible guidelines for Antiquities Act implementation.
5. Revisions to the Equal Access to Justice Act to halt "get rich" lawsuit abuses.
6. Responsible multiple use of federal lands.

Project Partner

In Progress:

Public Lands Policy Coordination Office: (1) RS 2477 resolution, (2) Dixie National Forest Travel Management Plan revisions, (3) Development of monument management plans.

Public Lands Policy Coordination Office, Governors Grazing Working Group: Reform of public lands range management policies and practices.

Dept. of Natural Resources (State Parks): Hole-in-the-Rock State Park planning.

Proposed:

Dept. of Natural Resources, Watershed Restoration Initiative: Implement large-scale vegetation and water resource restoration demonstration project within the Dixie National Forest and the Monument.

Governor's Office of Economic Development Office: Reaching agreement on federal land agency involvement in county/community economic development.

Technical Assistance

University of Utah, Southern Utah University: Planning for the development of a natural history museum and a scientific research and education center.

Department of Natural Resources (Water Resources Division): Planning for the development of the Upper Wide Hollow multi-purpose reservoir.

USU Extension, GOED, Southern Utah University and/or the Utah College of Applied

Technology: In accordance with the Rural Online Initiative legislation, assist in design and initiation of a digital technology service center/training program.

Dept. of Workforce Services: Assist with planning for (a) affordable housing for families, senior citizens and seasonal workers; (b) business development; (c) downtown revitalization

Department of Transportation: Cooperate in developing strategies/plans for downtown enhancement/ revitalization of commercial centers and access to existing and potential businesses within municipalities and along state highway 89.

Attachments to the Garfield County Economic Development Plan

Attachment 1. Map of Garfield County.

Attachment 2. Demographic and Economic Information for Garfield County.

Attachment 3. Garfield County Earnings by Economic Sector.

Attachment 4. Garfield County's Largest Employers.

Attachment 5. Economic Comparison of Sale Lake and Garfield Counties

Attachment 6. Garfield County Communities.

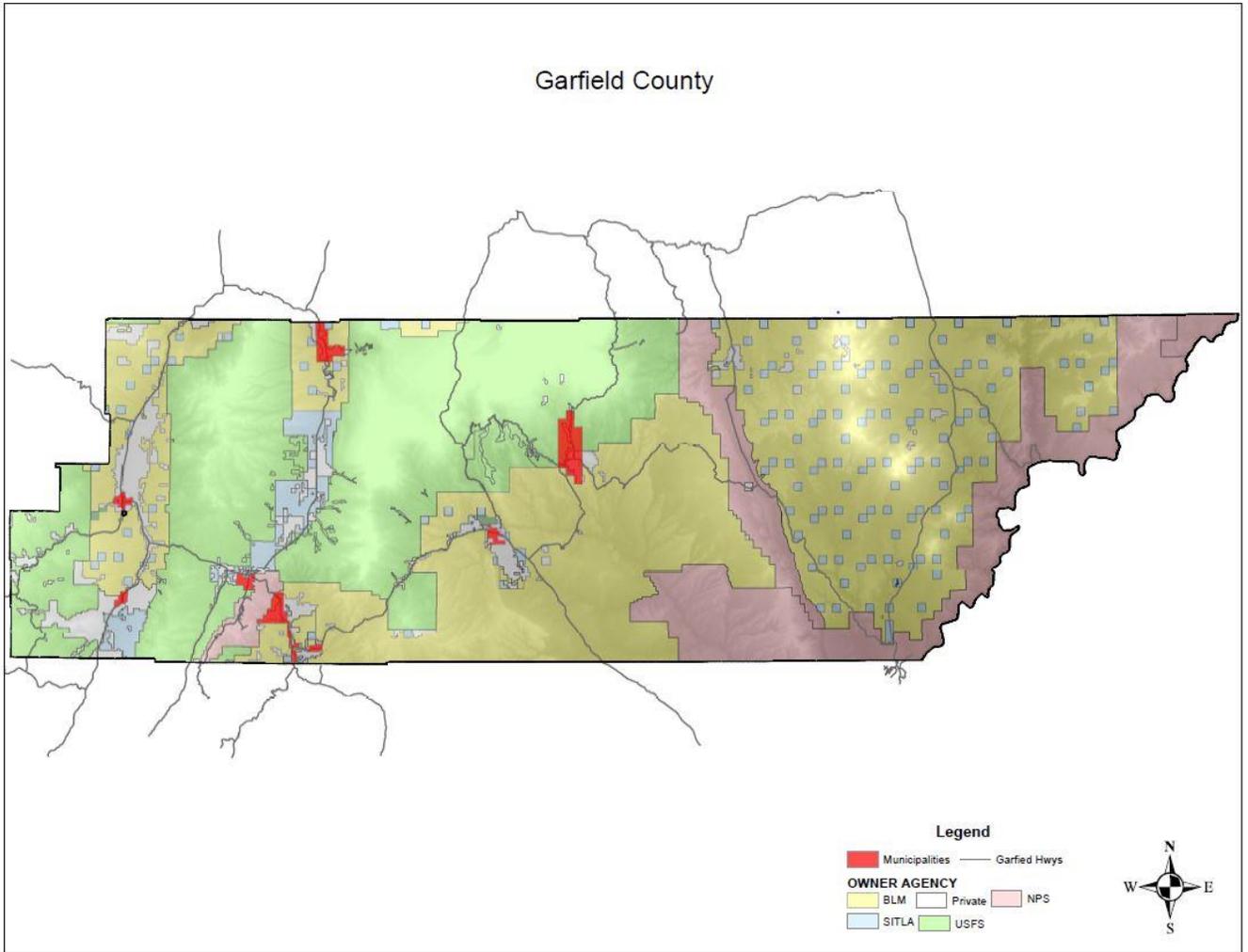
Attachment 7. Tourist Facilities in Garfield County Communities.

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Attachment 9. Comparison of Garfield County to Other Utah Counties Where Federal Lands Exceed 70%.

Attachment 10. Federal and State Land Management Units in Garfield County.

Attachment 1. Map of Garfield County with major roads, municipalities and land ownership.



Attachment 2. Demographic and Economic Information for Garfield County.

Geography	
Land area, sq. miles	5,175
Population per sq. mile	1.0 (lowest in state)
Federally-administered lands, percent	93% (highest in state)
State lands, 2010 to 2016	3.5%
Private lands, percent	3.5% (lowest in state)
Population	
Population, 2016	4,986
Population, 2010	5,172
Population, percent change	-3.6%
Cities/towns with increased population, 2010-2016	0
Age	
Persons under 5 years, 2016, percent	6.0 %
Persons under 5 years, 2010, percent	7.3%
Change, 2010 to 2016, percent changed	-1.3%
Persons under 18, 2016, percent	24.3%
Persons under 18, 2010, percent	26.7%
Change, 2010 to 2016, percent changed	-2.4
Persons over 65, 2016, percent	21.1%
Persons over 65,2010, percent	16.1%
Change, 2010 to 2016, percent changed	+5.0
Race and Gender	
White, percent	93.6%
Hispanic, percent	6.1%
Female,2016	47.4%
Female, 2010	48.3%
Housing	
Housing units, 2016	3,842
Housing units, 2010	3,726
Owner occupied housing, percent	80.5%
Households (families)	1,751
Persons per household	2.75
Education	
High school graduates (over 25 years old), percent	91.3%
College graduate (over 25 years old), percent	19.7%
Economy and Business	
Civilian work force over 16, percent	55.2%
Women in work force over 16, percent	50.2%
Accommodations and food service sales	\$62,859,000
Healthcare and social services receipts	?
Manufacturing shipments	\$2,142,000
Merchant wholesale sales	?
Retail sales	\$29,909,000
Business establishments	153
Total permanent full-time employment	1,318
Year-round labor force	2,300
Summer season labor force	3,300

Permanent labor force unemployed in January, percent	16%
Permanent labor force unemployed in September, percent	4-5%
Financial Status of County Residents	
Median household income	\$42,614
Median household income as percent of statewide average	61%
Average wage	\$27,730
Average wage as a percent of statewide average	65.7%
Persons below poverty level, percent	11.2% (near state average)
Persons just above poverty (poverty x 2), percent	35% (highest in state)
Persons without health insurance, percent	15.2%
Unemployment rate (not adjusted for seasonality), percent	16% - 18%

Attachment 3. Garfield County Earnings by Sector (percent of total).

Accommodations and food services	23.3%
Local government (includes public schools)	14.8%
Federal government	12.4%
Health care and social services	9.6%
All other private (non-farm)	8.2%
State government	4.6%
Construction	4.2%
Retail trade	4.1%
Other services	4.0%
Utilities	3.0%
Farm earnings	3.0%
Arts, entertainment	2.0%
Manufacturing	2.0%
Professional, scientific	1.0%
Transportation and warehousing	1.0%
Other	2.8%

Attachment 4. Garfield County's Largest Employers.

Name	Public sector?	Industry	Location	Jobs	Year-round?
Ruby's Inn		Accom., restaur., services	Bryce Valley City	250-499	X
Garfield County School District	X	Public education	Panguitch	100-249	X
U.S. Government	X	Government	Pang., Escalante	100-249	X
Intermountain Healthcare		Healthcare	Panguitch	100-249	X
Garfield County	X	Government	Various	50-99	X
The Lodge at Bryce Canyon		Accom., restaurant	Bryce Can. NP	50-99	O
South Central Communications		Communications	Pang., Escalante	50-99	X
State of Utah	X	Government	Varies	50-99	X/O
Clarke's Country Market/Inn		Grocery, restaur., accom.	Tropic	20-49	X/O
Bryce Canyon Pines		Accom., restaurant	Bryce Valley City	20-49	O
Turn About Ranch		Residential care	Escalante	20-49	X
Offshore Marina		Marine operations	Bull Frog	20-49	O
New Frontiers for Families		Human services	Panguitch	20-49	X
Hells Backbone Grill		Restaurant	Boulder	20-49	O
Cottam Oil		Gas, store, auto repair	Escalante	20-49	X
Panguitch City	X	Government	Panguitch	20-49	X
K & D Forest Products		Forest products	Panguitch	20-49	X
Perco Rock		Construction	Panguitch	20-49	X
Garkane Energy		Electric utility	Escalante	10-19	X
Rockin R Ranch		Dude ranch	Antimony	10-19	O
Bryce Travel Management		Transportation	Tropic	10-19	O
Flying M Restaurant		Restaurant	Panguitch	10-19	X
Boulder Mountain Lodge		Accommodations	Boulder	10-19	?
N&E Enterprises		Gas, store	Panguitch	10-19	X
Panguitch Drug		Pharmacy	Panguitch	10-19	X
Escalante City	X	Government	Escalante	10-19	X
Bryce Canyon Resort		Accommodations	Bryce Valley City	10-19	O
Stone Canyon Inn		Accom., restaurant	Tropic	10-19	O
Circle D Motel, Eatery		Accom., restaurant	Escalante	10-19	X/O
Escalante Outfitters		Accom., restaurant, store	Escalante	10-19	X/O
Bryce Canyon Nat'l Hist. Assoc.		Book store	Bryce Can. NP	10-19	O
Bryce Zion Trail Rides		Recreation	Tropic	10-19	O
Bryce Subway		Fast food restaurant	Bryce Valley City	10-19	O
C-Stop Pizza		Restaurant	Panguitch	10-19	X
Hatch Town	X	Government	Hatch	10-19	X
Joe's Main Street Market		Grocery store	Panguitch	10-19	X
Bryce Canyon Inn & Pizza Place		Accom., restaurant	Tropic	10-19	O

Bryce Valley Builders & Supply		Concrete manufacturing	Cannonville	10-19	X
Escalante Home Center		Hardware store	Escalante	10-19	X
Wayne Community Health Ctr.		Healthcare	Escalante, Pang.	10-19	X
Flying V Ranch		Livestock	Escal., Johns V.	10-19	X
Canyon Country Lodge		Accommodations	Escalante	10-19	O

X = Operates year-round; O = Closed for one or more months in winter; X/O = Partial winter closure

Attachment 5. Economic Comparison of Sale Lake and Garfield Counties.

	Salt Lake County	Garfield County	Difference (Highest county in parentheses)
Geographic size	807 sq. miles	5,175 sq. miles	4,368 sq. miles (Garfield)
% federal lands	21.4%	93%	71.6% (Garfield)
Population	1,107,000	4,986	1,102,014 (Salt Lake)
Population density	1,387 per square mile	1 per square mile	1,386 per square mile (Salt Lake)
Number of cities	16	2	14 (Salt Lake)
Number of cities with 5,000 or more people	16	0	16 (Salt Lake)
Population of largest city	Salt Lake City, 193,744	Panguich, 1,655	192,089 (Salt Lake)
Median household income	\$64,601	\$42,614	\$21,987 (Salt Lake)
Per capita income	\$44,692	\$34,084	\$10,608 (Salt Lake)
Average weekly wage	\$973	\$570	\$403 (Salt Lake)
Total employment	571,478	1,318	570,160 (Salt Lake)
Largest employer	Intermountain Healthcare (15,000 employees)	Ruby's Inn (250 employees - high season)	14,750 (Salt Lake)
Largest employer as % of total county employment	15,000 = 2.6%	250 = 5%	2.4% (Garfield) 2 times larger
r	CGH Healthcare (2,100 employees)	Several with 10 employees	2,090 (Salt Lake)
Largest natural resource employer	Kennecott Copper (2,000 employees)	K & D Forest Products (20 employees)	1,980 (Salt Lake)
Kennecott/K & D Forest Products employees as % of total county employment	2,000 = .035%	20 = 1.5%	1.465% (Garfield) 4 times larger

This table is included to demonstrate the demographic differences between Garfield County and urban counties. Salt Lake County was chosen for this comparison as it is the most urban of Utah's counties. The following examples demonstrate these differences.

If all Intermountain Healthcare facilities in Salt Lake County and Ruby's Inn were to close, the closing of Ruby's Inn would have nearly twice the effect on Garfield County as would Intermountain Healthcare's closing on Salt Lake County. If both Kennecott Copper and K & D Forest Products were to close, the K & D closure would have four times the effect on Garfield County as would Kennecott's closure on Salt Lake County.

Attachment 6. Garfield County Communities.

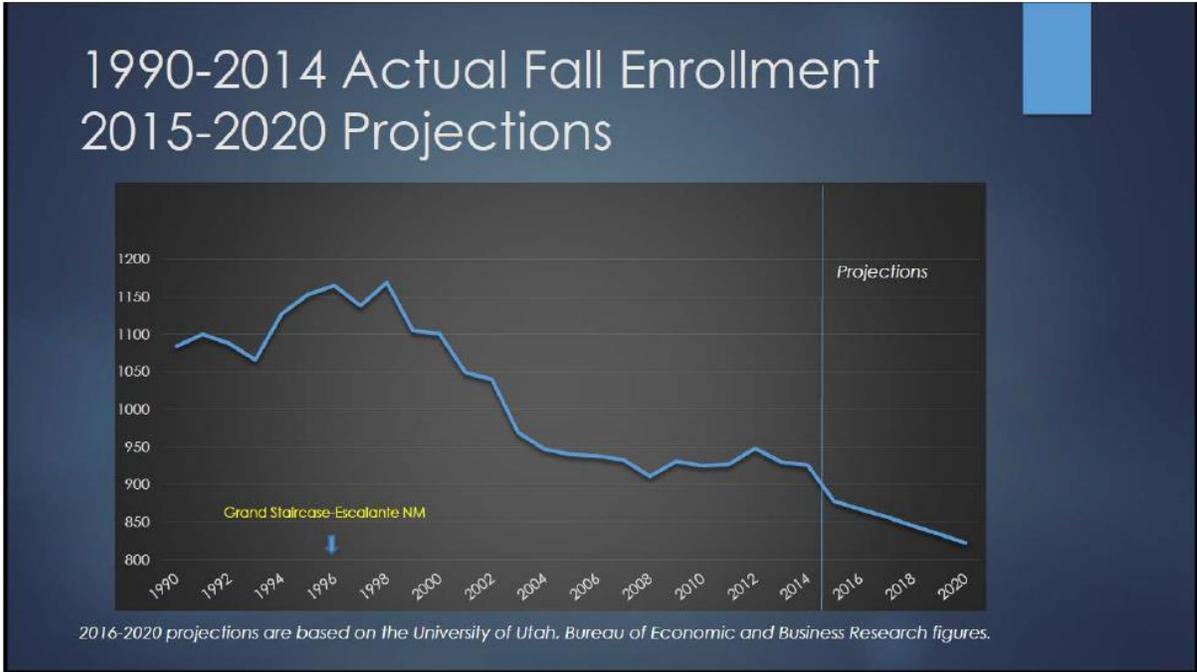
Name	Location	Incorporation	Population	Economy
Antimony	Northwest	Town	122 (2010)	Ranching, Tourism
Boulder	Central	Town	226 (2010)	Retirees, tourism, counter-culture
Bryce Canyon City	Bryce Valley	Town	198 (2010)	Tourism, Services
Cannonville	Bryce Valley	Town	167 (2010)	Tourism, ranching, commuting
Escalante	Central	City	797 (2010)	Services, healthcare, agriculture, ranching, tourism, government
Hatch	West	Town	133 (2010)	Tourism, ranching, commuting
Henrieville	Bryce Valley	Town	230 (2010)	Agriculture, ranching, commuting
Mammoth Creek	Southwest	Unincorporated	Low number of permanent residents. Most dwellings are second homes or vacation rentals	Vacation homes, Recreation
Panguitch	West	City	1520 (2010) 1,481 (2015)	Services, healthcare, agriculture, ranching, tourism, government
Panguitch Lake	West	Unincorporated	Low number of permanent residents. Most dwellings are second homes or vacation rentals	Vacation homes, lake recreation
Ticaboo	Southeast	Unincorporated	12 (est. 2017)	Tourism, self sufficiency
Tropic	Bryce Valley	Town	530 (2010)	Tourism, ranching, services, commuting

Attachment 7. Tourist Facilities in Garfield County Communities.

Name	Lodgings	Restaurants	Campgrounds	Guides, Activities
Antimony	1	1	1	1
Boulder	4	5	2	6
Bryce Canyon City area	7	9	3	8
Cannonville	2	1	1	0
Escalante	18	12	4	6
Hatch	5	5	2	0
Henrieville	0	0	0	0
Mammoth Creek	Homes for rent, no commercial lodgings	0	0	0
Panguitch	14	10	4	1
Panguitch Lake	4	4	4	2
Ticaboo/ Lake Powell	1	2	1	3
Tropic	12	5	1	6
Junction: 89-12	4	2	1	0
Junction: 89-20	0	0	1	0
TOTALS	72	56	25	33

Note: Lodgings include holiday homes that are exclusively used as a business. Numbers for each community include facilities outside of municipal boundaries but near-by.

Attachment 8. Garfield County Public School Fall Enrollment, Actual and Projected.



**Attachment 9. Comparison of Garfield County to Other Utah Counties
Where Federal Lands Exceed 70%.**

County (Listed in order of the % of federal lands)	Size of County (Square Miles)	Percent Federal Lands	Percent of Federal Lands Above State Average	Square Miles of Federal Lands Above State Average
Garfield	5,175	93.0	26.7	1,381
Wayne	2,461	85.6	22.3	549
Kane	3,990	85.4	22.1	882
Tooele*	7,286	81.3	18.0	1,311
Daggett	697	80.6	17.3	121
Emery	4,426	79.8	16.5	730
Beaver	2,590	78.0	14.7	381
Millard	6,572	76.5	13.2	868
Sevier	1,911	76.0	12.7	243
Washington	2,426	74.5	11.2	272
Piute	758	74.3	11.0	83
Juab	3,392	72.6	9.3	315
Grand	3,672	71.7	8.4	308
Total for the State of Utah (29 counties)	84,899	63.3	--	--

* Tooele County's federal lands differ from other counties on the list in that much of that county's 81.3% federal lands are managed by the Department of Defense, while federal lands in all other counties are generally managed by the Departments of Agriculture (Forest Service) and/or Interior (BLM, National Parks Service, Fish and Wildlife Service and Bureau of Reclamation). Technically, all non-military federal lands are "owned" by the U.S. Congress in trust for the American people. Tribal lands are not counted as federal lands. If included, the addition of the Navajo Reservation would have placed San Juan County in the above list.

Attachment 10. Federal and State Land Management Units in Garfield County.

Bureau of Land Management

- Kanab Field Office
- Richfield Field Office
- Non monument lands formerly within the Grand Staircase-Escalante National Monument
- Kaiparowits National Monument
- Escalante Canyons National Monument

National Park Service

- Bryce Canyon National Park
- Canyonlands National Park
- Capital Reef National Park
- Glen Canyon National Recreation Area
- Old Spanish National Historic Trail

US Forest Service

- Dixie National Forest (Cedar City Ranger District)
- Dixie National Forest (Powell Ranger District)
- Dixie National Forest (Escalante Ranger District)
- Fish Lake National Forest (Fremont River Ranger District)
(Legally a component of the Dixie National Forest)
- Fish Lake National Forest (Beaver Ranger District)

Utah State Parks

- Kodachrome State Park
- Petrified Forest State Park
- Anasazi State Park and Museum
- Hole-in-the-Rock State Park (undeveloped)
- Hole-i-the-Rock State Historic Trail (undeveloped)

Utah State Institutional Trust Lands

- While most prominent in eastern Garfield County, the State owns properties throughout the County. SITLA properties are held in trust, with proceeds dedicated to public education. SITLA properties within the existing and former Grand Staircase-Escalante National Monument were previously transferred to the federal government, in exchange for public lands, primarily in other counties.