

GARFIELD COUNTY, UTAH ECONOMIC DEVELOPMENT PLAN



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GARFIELD COUNTY, UTAH ECONOMIC DEVELOPMENT PLAN

2020 VERSION

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. The lands in Garfield County are 93% Federally owned, 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 and student enrollment has declined as well. Leisure/hospitality is 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 largest 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, 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 and services; 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

Population. In 2018, Garfield County's year-round population was 5,080; a decline of 92 residents over an eight-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. 93% of Garfield County is 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 lands. The high concentration of Federal lands is particularly evident in the County's eastern half, where 96% is Federal, 3.5% State, and less than 1% private.

Business and Employment. As of December 2019, Garfield County had 1,300 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 at 47%, followed by government at 22%, trade/transportation/utilities at 12% and education/healthcare/social services at 9%. After 100 years as the economic core, natural resource jobs have declined significantly.

Economic Status of Residents. Garfield County's 2018 median household income was \$51,028, with an average monthly wage of \$2,508 or \$30,096 annually, about two-thirds of the Statewide average. The poverty rate is 11.2%, consistent with 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. For the 2020 school year, there are 973 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 workforce that is stable, hard-working, resourceful and resilient. The communities are safe, stable and retain their rural character.

Environment. The County includes portions 3 National Parks (Bryce Canyon, Capitol Reef, Canyonlands); a National Recreation Area (Glen Canyon/Lake Powell); a National Forest (Dixie); a National Monument (Grand Staircase Escalante); 3 State parks (Anasazi, Petrified Forest, Kodachrome [Kane County]); 2 National Historic Districts (Panguitch, Escalante); National and State Historic Trails (Hole in the Rock, Old Spanish 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, mountain lion, mountain goat, and desert big horn sheep. In addition, the Henry Mountains in eastern Garfield County are home to 250 - 400 bison, and one of only four free-roaming and genetically-pure herds on public lands in North America. The other three herds are in Yellowstone National Park.

Infrastructure. Installation of in-ground fiber optics is complete throughout the incorporated and more populated areas of the County and cell service is being upgraded. A natural gas pipeline exists along Highway 89 to the north of Panguitch and in Panguitch City. Garfield County also has high-quality rural healthcare facilities.

Road Network. Roads of particular interest include National Scenic Byway 12 (Utah's All-American Road), Highway 89 (a National Heritage Area), National Scenic Byway 143 (Utah's Patchwork Parkway), Burr Trail Scenic Backway, Smoky Mountain Road Scenic Backway, Griffin Top Scenic Backway, Bull Mountain Scenic Backway, Hell's Backbone Road 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. Road closures are continuously being 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) improved wastewater facilities 3) access to natural gas, 4) electricity for remote areas and industrial applications, 5) cell service, 6) housing, (7) access to Federal lands and 8) remote area livestock and wildlife watering facilities.

Commercial Areas. With the exception of Bryce Canyon 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 have downtown vacant storefronts.

Access to Eastern Garfield County: The only connection from western Garfield County is a steep, winding, partially paved 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 Monument, 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 City water shed 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.

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, wastewater, natural gas, communications and power. More broadly it also includes housing, schools and medical facilities. It also includes essential facilities and services related to health, safety and welfare, with the ability to prevent and control catastrophic fire a classic example. 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 including 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, 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. Additionally, the Grand Staircase Escalante National Monument (GSENM) and Glen Canyon NRA bring nearly a million visitors a year. A remote part of Canyonlands NP is also in the County. 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, bicycling, sports and leisure activities, 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.

Future Drought. The last few years 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, flood, or prepare for low seasonal or multi-year rainfall. This plan identifies needs related to both water supply and fire. We need to plan and prepare now, rather than 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. 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. 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 Canyon 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.

Measuring Progress. Key metrics that should be used to measure economic progress are 1) an increasing percentage of jobs that pay a living wage, 2) stable to increasing population, 3) the availability of quality housing to meet demand and 4) increasing school enrollment in all public schools.

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 population, housing and school enrollment 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, all of which are key indicators of Community sustainability. 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 Key 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
Optimistic 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; and
- Healthcare.

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

- Water supply.
 - Culinary supply, storage, distribution.
 - Agricultural storage and distribution.
 - Remote area livestock/wildlife water facilities.
- Communications.
 - Cell service.
 - Data transfer.
- Roads.
 - Maintenance of existing County and community roads.
 - Access on Federal lands.
- Airports and airstrips.
- Natural gas supply.
- Renewable energy.
 - Property-specific.
 - Community-level.
- Electric power.
 - Remote area electrification.
 - High capacity (three phase) power for industrial and commercial applications.

- Housing.
 - Affordable and high-quality housing for families, new residents, seasonal workers, people with disabilities and senior citizens.
 - Reuse of vacant and underutilized homes, restoration of older homes.
 - Phase out of older, deteriorated mobile homes.
 - Responsible short-term rental ordinances and practices.
- 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. Specific actions include:

- Evaluation and agreement regarding Federal actions to support communities. Discussion topics with each Federal land unit may include:
 - Land management.
 - Forest management, including timber sale contracting.
 - Rangeland management.
 - Public access.
 - Tourism (see Strategy 4, below).
 - Recreation management.
 - Law enforcement.
 - Utility corridors.
 - Administration.
 - Personnel (access to government contracts, wage grade jobs and career civil service employment for local residents).
- Systematic restoration of vegetation.
 - 11 county intergovernmental restoration initiative aimed at increased environmental health, decreased fire risk for communities, structures and culinary and irrigation water supplies, and providing employment for local residents.
- New and enhanced livestock/wildlife water sources.
- GSENM land use plans/policies/operations.
- County/municipal land acquisition for beneficial public purposes.
- Reasonable, responsible and equitable PILT and SRS payments.

- Modifications in public policies.
 - Public lands grazing reform.
 - Timber harvest reform and contracting.

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. At the same time, expand the range of recreational activities available for residents. Many of the following actions involve Federal lands and correspond to Strategy 3 above.

- In and near communities, development of recreational and leisure opportunities for residents (in-town park enhancements, court sports, ball fields, walking and biking trails, motorcycle courses, rodeo facilities).
- Identification of community-adjacent BLM lands that have especially high community recreation opportunities and acquire these lands in accordance with the Recreation and Public Purposes Act.
- Development of the Hole-in-the-Rock State Park and Parkway.
- 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 cross-county skiing.
- 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 bicycle shop.
 - Extend Red Canyon bike trail to Cannonville, Escalante and, ultimately Capitol Reef.
 - Petrified Forest SP mountain bike trail.
 - A 100-mile bike hut-to-hut trail.
 - A Monument mountain bike trail system.

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 prospective 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.
- Local meat processing facility.
- Value-added livestock products.

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:

- A Dinosaur Museum and Science Center in Escalante.
- A multiple-purpose reservoir near Escalante (Upper Wide Hollow) that would increase retention and availability of irrigation water, conserve culinary water and enhance recreational opportunities.

Year One Implementation Priorities

<p>Existing Businesses</p>	<ul style="list-style-type: none"> • <u>Incentives</u>. Identify and create incentive opportunities and assist businesses to secure these incentives. • <u>Enterprise Zone</u>. Utilize the State’s Enterprise Zone Tax Credit Program and assist designated communities in taking advantage of this designation.
<p>Infrastructure</p>	<ul style="list-style-type: none"> • <u>Housing</u>. Initiate housing programs throughout the County with Federal, State and private partners. • <u>Water Supply</u>. Survey municipal water supply status, identify issues and corrective measures. • <u>Downtown Revitalization</u>. Initiate commercial area planning, especially in Panguitch and Escalante.
<p>Federal Lands</p>	<ul style="list-style-type: none"> • <u>Federal Agency Contributions</u>. Initiate outreach with each Federal land unit. • <u>Vegetation Restoration</u>. Initiate comprehensive WRI program. • <u>Livestock/Wildlife Water Facilities</u>. Initiate WRI water projects • <u>Monument Management Plan</u>. Assume an influential lead role in development of new monument management plans. • <u>RS 2477 and Grazing Reform</u>. Continue State efforts to resolve these critical issues. • <u>PILT/SRS</u>. Develop a strategy and compile data regarding advocacy for responsible Federal compensation policy.
<p>Tourism</p>	<ul style="list-style-type: none"> • <u>Hole in the Rock State Park and Parkway</u>. Planning with State Parks. • <u>100-mile Mountain Bike Trail</u>. Encourage/facilitate completion of Forest Service NEPA and project facilities.
<p>New Enterprises</p>	<ul style="list-style-type: none"> • <u>Technology Service Center</u>. Initiate projects. • <u>Forest Products Processing Facility</u>. Initiate projects. • <u>Western Garfield County Opportunity Zone</u>. Support, publicize and implement.
<p>Special Projects</p>	<ul style="list-style-type: none"> • <u>Escalante Museum and Science Center</u>. Conduct feasibility analysis; develop funding strategy, implement first phases. • <u>Upper Wide Hollow Reservoir</u>. Update engineering analysis; initiate development of a funding strategy.

Federal and State Economic Development Incentives

State of Utah. The County will help facilitate businesses and other organizations in participating in appropriate State incentive programs.

<ul style="list-style-type: none"> • Rural County Grant Program • REDI Grant • Rural Co-Working and Innovation Center • Rural Online Initiative • Enterprise Zone Tax Credits • Targeted Business Tax Credits • Utah Rural Jobs Program 	<ul style="list-style-type: none"> • Smart School • Tourism Marketing Performance • Rourism (Rural Tourism Initiative) • Outdoor Recreation Grants • C-PACE • High Cost Infrastructure Tax Credit • Protection Tax Credit
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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. 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 Partners

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

Attachment 1. Map with Major Roads, Municipalities and Land Ownership.

Attachment 2. Demographic and Economic Information for Garfield County.

Attachment 3. Fourth Quarter 2019 Nonfarm Jobs.

Attachment 4. Garfield County's Largest Employers.

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

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Attachment 7. Tourist Facilities in Garfield County Communities.

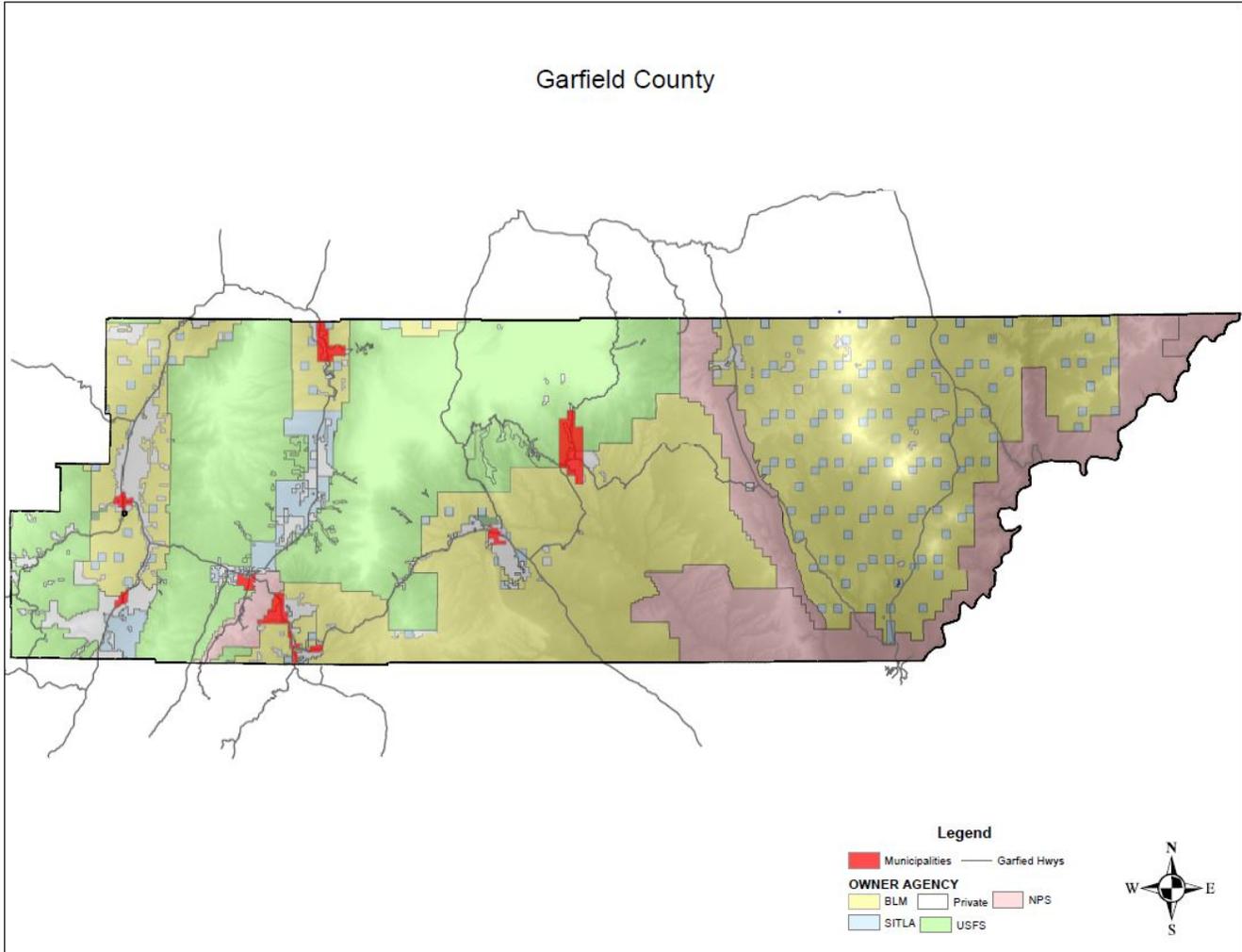
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Attachment 11. Federal and State Land Management Units in Garfield County.

Attachment 1. Map with Major Roads, Municipalities and Land Ownership.



Attachment 2. Demographic and Economic Information for Garfield County.

Geography	
Land Area, (sq. miles)	5,175
Population Density, (per sq. mile)	1.0 (lowest in State)
Federally-Managed Lands, (%)	93% (highest in State)
State Lands, (2018)	3.5%
Private lands, (2018)	3.5% (lowest in State)
Population	
Population, 2018	5,080
Population, 2010	5,197
Population, (%)	-2.25%
Cities/Towns with increased population, (2010-2018)	0
Age	
Persons Under 5 Years, 2018, (%)	6.0 %
Persons Under 5 Years 2010, (%)	7.3%
Change 2010 to 2018, (%)	-1.3%
Persons Under 18 2018, (%)	24.3%
Persons Under 18 2010, (%)	26.7%
Change 2010 to 2018, (%)	-2.4
Persons Over 65 2018, (%)	21.1%
Persons Over 65 2010, (%)	16.1%
Change 2010 to 2018, (%)	+5.0
Race and Gender	
White, (%)	93.6%
Hispanic, (%)	6.1%
Female, 2018	47.4%
Female, 2010	48.3%
Housing	
Housing Units, 2018	3,842
Housing Units, 2010	3,726
Owner occupied housing, (%)	80.5%
Households (families)	1,751
Persons per Household	2.75

Education	
High school graduates (over 25 years old), (%)	91.3%
College graduate (over 25 years old), (%)	19.7%
Economy and Business	
Civilian work force over 16, (%)	55.2%
Women in work force over 16, (%)	50.2%
Accommodations and food service sales	\$62,859,000
Manufacturing shipments	\$2,142,000
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, (%)	16%
Permanent labor force unemployed in September, (%)	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, (%)	11.2% (near State average)
Persons just above poverty (poverty x 2), (%)	35% (highest in State)
Persons without health insurance, (%)	15.2%
Unemployment rate (not adjusted for seasonality), (%)	16% - 18%

Attachment 3. Fourth Quarter 2019 Nonfarm Jobs.

Industry	October 2019			December 2019		
	Total Jobs	Year Numeric Change	Year Percent Change	Total Jobs	Year Numeric Change	Year Percent Change
GOODS PRODUCTION	112	4	3.7%	111	10	9.9%
Construction	45	5	12.5%	50	15	42.9%
Manufacturing	55	-1	-1.8%	49	-5	-9.3%
SERVICE PRODUCTION	2,571	85	3.4%	1,831	100	5.8%
Trade, Transportation & Utilities	311	16	5.4%	238	10	4.4%
Wholesale Trade	10	-1	-9.1%	10	-1	-9.1%
Retail Trade	226	14	6.6%	191	11	6.1%
Transportation & Warehousing	48	2	4.3%	10	0	0%
Utilities	27	1	4.2%	27	0	0%
Information	90	7	8.4%	91	9	11.0%
Financial Activities	32	2	6.7%	32	2	6.7%
Finance & Insurance	25	1	4.2%	25	2	8.7%
Real Estate & Rental Leasing	7	1	16.7%	7	0	%
PROFESSIONAL & BUSINESS SERVICES	55	3	5.8%	51	3	6.3%
Professional, Science & Technical Services	30	-3	-9.1%	32	-2	-5.9%
Admin Support & Waste Management	25	6	31.6%	19	5	35.7%
Education, Healthcare & Social Services	226	11	5.1%	221	4	1.8%
LEISURE & HOSPITALITY	1,287	55	4.5%	670	63	10.4%
GOVERNMENT	553	-10	-1.8%	513	9	1.8%
Federal	135	-5	-3.6%	124	12	10.7%
State	45	2	4.7%	36	0	0%
Local	373	-7	-1.8%	353	-3	-0.8%
OTHER SERVICES	17	1	6.3%	15	0	0%
TOTAL	2,683	89	3.4%	1,942	110	6.0%

Attachment 4. Garfield County's Largest Employers.

Business Name	Public Sector	Industry	Location	Jobs	Year-Round
Ruby's Inn		Leisure/Hospitality	Bryce Canyon City	250-499	X
Garfield County School District	X	Education	Panguitch	100-249	X
U.S. Government	X	Government	Panguitch, Escalante	100-249	X
Intermountain Healthcare		Healthcare	Panguitch	100-249	X
Garfield County	X	Government	Various	50-99	X
The Lodge at Bryce Canyon		Leisure/Hospitality	Bryce Can. NP	50-99	O
South Central Communications		Utilities	Pang., Escalante	50-99	X
State of Utah	X	Government	Varies	50-99	X/O
Clarke's Country Market/Inn		Grocery, Leisure/Hospitality	Tropic	20-49	X/O
Bryce Canyon Pines		Leisure/Hospitality	Bryce Canyon City	20-49	O
Turn About Ranch		Residential Care	Escalante	20-49	X
Offshore Marina		Services	Bull Frog	20-49	O
New Frontiers for Families		Human Services	Panguitch	20-49	X
Hells Backbone Grill		Leisure/Hospitality	Boulder	20-49	O
Cottam Oil		Service	Escalante	20-49	X
Panguitch City	X	Government	Panguitch	20-49	X
K & D Forest Products		Natural Resources	Panguitch	20-49	X
Perco Rock		Construction	Panguitch	20-49	X
Garkane Energy		Utilities	Escalante	10-19	X
Rockin R Ranch		Leisure/Hospitality	Antimony	10-19	O
Bryce Travel Management		Transportation	Tropic	10-19	O
Flying M Restaurant		Leisure/Hospitality	Panguitch	10-19	X
Boulder Mountain Lodge		Leisure/Hospitality	Boulder	10-19	?
N&E Enterprises		Services	Panguitch	10-19	X

Panguitch Drug		Pharmacy	Panguitch	10-19	X
Escalante City	X	Government	Escalante	10-19	X
Bryce Canyon Resort		Leisure/Hospitality	Bryce Canyon City	10-19	O
Stone Canyon Inn		Leisure/Hospitality	Tropic	10-19	O
Circle D Motel, Eatery		Leisure/Hospitality	Escalante	10-19	X/O
Escalante Outfitters		Leisure/Hospitality	Escalante	10-19	X/O
Bryce Canyon Natural History Association		Retail	Bryce Can. NP	10-19	O
Bryce Zion Trail Rides		Recreation	Tropic	10-19	O
Bryce Subway		Leisure/Hospitality	Bryce Canyon City	10-19	O
C-Stop Pizza		Leisure/Hospitality	Panguitch	10-19	X
Hatch Town	X	Government	Hatch	10-19	X
Joe's Main Street Market		Grocery	Panguitch	10-19	X
Bryce Canyon Inn & Pizza Place		Leisure/Hospitality	Tropic	10-19	O
Bryce Valley Builders & Supply		Concrete Manufacturing	Cannonville	10-19	X
Escalante Home Center		Retail	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		Leisure/Hospitality	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	1,160,000	5,080	1,550,000 (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 Residents	16	0	16 (Salt Lake)
Population of Largest City	Salt Lake City, 200,591	Panguitch, 1,691	193,900 (Salt Lake)
Median Household Income	\$73,619	\$51,028	\$22,582 (Salt Lake)
Per Capita Income	\$52,639	\$36,688	\$15,951 (Salt Lake)
Average Monthly Wage	\$4,512	\$2,508	\$2,004 (Salt Lake)
Total Employment	678,015	2,092	675,923 (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
50th largest employer as % of Total County Employment	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

Attachment 6. Garfield County Communities.

Name	Location	Incorporation	Population	Economy
Antimony	Northwest	Town	122 (2018)	Ranching, Tourism
Boulder	Central	Town	240 (2018)	Retirees, Tourism, Ranching
Bryce Canyon City	Bryce Area	Town	224 (2018)	Tourism, Services, Federal Government
Cannonville	Bryce Valley	Town	175 (2018)	Tourism, Ranching
Escalante	Central	City	802 (2018)	Services, Healthcare, Ranching, Tourism, Federal Government
Hatch	West	Town	143 (2018)	Tourism, Ranching, Utilities
Henrieville	Bryce Valley	Town	224 (2018)	Ranching
Mammoth Creek	Southwest	Unincorporated	Low number of permanent residents. Most dwellings are second homes or vacation rentals.	Short-Term Rentals, Recreation, Storage
Panguitch	West	City	1,691 (2018)	Services, Healthcare, Ranching, tourism, Federal and County Government
Panguitch Lake	West	Unincorporated	Low number of permanent residents. Most dwellings are second homes or vacation rentals	Short-Term Rentals, Tourism, Recreation
Ticaboo	Southeast	Unincorporated	12 (est. 2018)	Tourism, Utilities
Tropic	Bryce Valley	Town	519 (2018)	Tourism, Ranching, Services

Attachment 7. Garfield County Tourist Facilities by Community (Including STR's).

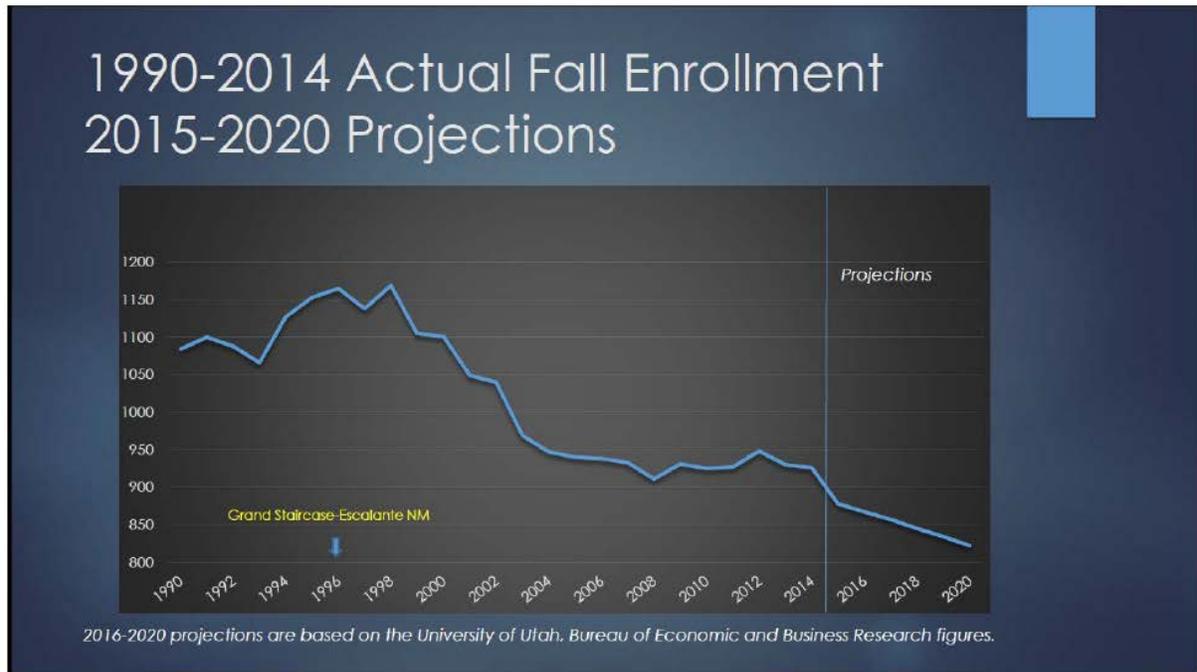
Name	Lodgings	Restaurants	Campgrounds	Guides, Activities
Antimony	6	1	1	1
Boulder	29	5	2	6
Bryce Canyon City	10	9	3	8
Cannonville	14	1	1	0
Escalante	62	12	4	6
Hatch	44	5	2	0
Henrieville	8	0	0	0
Mammoth Creek	5	0	0	0
Panguitch	118	10	4	1
Panguitch Lake	24	4	4	2
Ticaboo/ Lake Powell	6	2	1	3
Tropic	65	5	1	6
Junction: 89-12	4	2	1	0
Junction: 89-20	0	0	1	0
TOTALS	393	56	25	33

Notes:

Lodgings include Short-Term Rentals that are exclusively used as businesses.

The numbers for each community include both facilities that are within municipal boundaries and facilities that are in the immediate vicinity.

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



Attachment 9. Utah Counties with More Than 70% Federal Lands.

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 as Federal lands, the addition of the Navajo Reservation would have placed San Juan County in the above list.

Attachment 10. Counties in Utah with a Population of Less Than 9,000.

Rank in Utah (out of 29)	County Name	2010 Population	2014 Population	2018 Population
23	Kane	7,246	7,254	7,709
24	Beaver	6,417	6,461	6,580
25	Garfield	5,020	5,024	5,080
26	Wayne	2,700	2,696	2,690
27	Rich	2,307	2,293	2,464
28	Piute	1,860	1,484	1,445
29	Daggett	702	1,117	980

Attachment 11. Federal and State Land Management Units in Garfield County.

Bureau of Land Management

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

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

- Petrified Forest State Park
- Anasazi State Park and Museum
- Kodachrome State Park (Kane County)
- Hole-in-the-Rock State Park (undeveloped)
- Hole-in-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.