



City of Rawlins

Economic Development Plan



October 2, 2012



ACKNOWLEDGEMENTS

We gratefully acknowledge the many individuals and organizations who committed time and resources for the development of this Economic Development Strategic Plan.

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INTRODUCTION

One of the most intriguing questions asked during this study was, “What defines Rawlins?” And, “How would you describe Rawlins in the future?” Input obtained as part of this process suggests that the future vision of Rawlins might include statements such as the following:

Future Vision

Rawlins has always been a leader in innovation and today is leading the way in clean and alternative energy sources. The largest wind farm in the Northern Hemisphere, with over 1,000 wind turbines, is planned for just south of Rawlins. Come build your business in an innovative, dynamic community where land and energy prices are inexpensive, recreation abounds and there are no corporate or personal income taxes. We are easily accessible from I-80, which is paralleled by ten long-haul broadband/fiber routes and are working to expand air service at the Rawlins Municipal Airport.

Business-friendly is more than just a buzzword for us. We have a new, state-of-the-art business park with more than 100 acres of shovel-ready opportunities. Wyoming has been ranked #1 in the nation as the most business-friendly state, and Rawlins, with our central location in the State on I-80, is proving to be one of its most valuable assets. We are committed to building community, not just industry, and welcome you to be a part of Rawlins Rising.



Time after time, those we interviewed told us that Rawlins' greatest strength is its people – in other words, its human capital. This leadership, commitment, vision and dedication will be essential in seizing opportunities as well as making needed changes to Rawlins.

Existing strengths and weaknesses, as described in the interviews, are summarized in the table below and are addressed more fully in the body of this report.

TABLE 1: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT) ANALYSIS

Strengths and Opportunities	Weaknesses and Threats
<ul style="list-style-type: none"> ● Good People ● Close-Knit Community ● Outdoor Access and Recreation ● Western Independence ● Energy Industry – Growth Opportunities ● Historic Downtown ● New and Attractive Schools ● Abundant Power – Low Prices ● I-80 Access ● Low Gas Prices ● Community Events ● Historic Prison ● Long-Haul Broadband/Fiber Accessibility ● Lodging 	<ul style="list-style-type: none"> ● Home Prices and Selection ● Poor Visual Appearance (especially entryways) ● Lack of Code Enforcement and Cleanup ● Schools – Low Test Scores ● Lack of Shopping (especially Big Box Stores) ● Lack of Restaurants and Entertainment ● Lack of Leadership and Ambition in Youth ● Economic and Job Opportunities (especially for spouse) ● Low Community Pride ● Vacant Buildings ● No Shovel-Ready Sites for Business Development ● Weather ● Hiring – Shortage of Skilled Workforce ● Availability of Local Medical Services

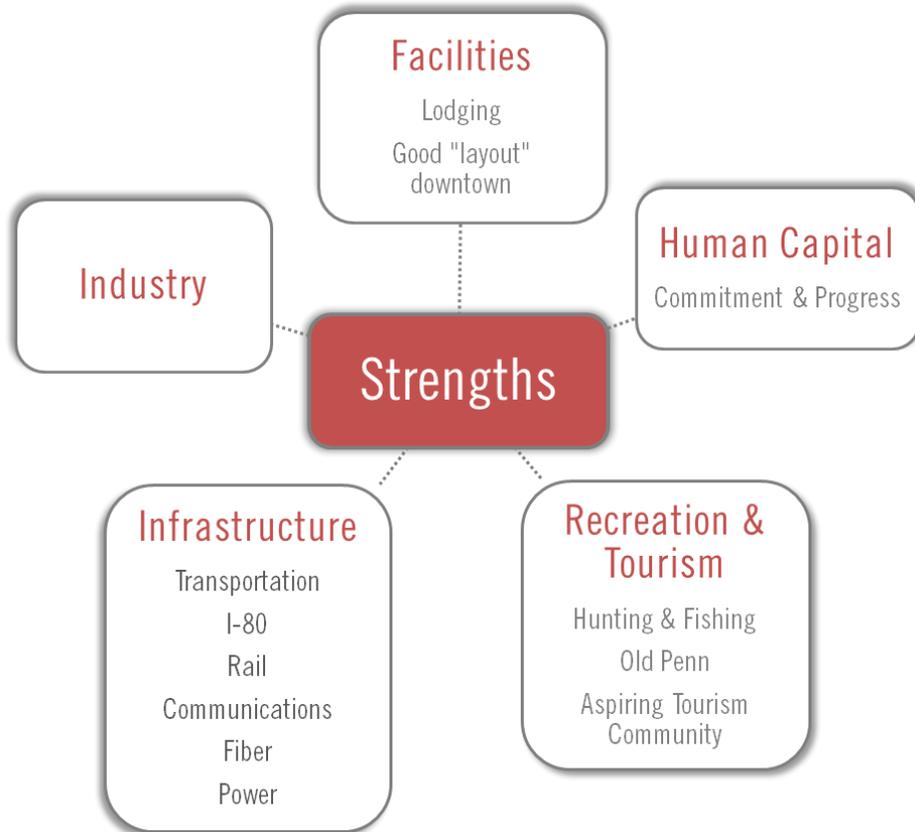
BUILDING ON OUR STRENGTHS

Rawlins has a strong and independent spirit. Framed by a rugged frontier, harsh climate and the energy industry, the community has grown together with a “can-do” and entrepreneurial approach to building the town. Recently, downtown has seen extensive renovations, new schools have been constructed, a state-of-the-art entrepreneurial center is in place, popular music concerts are attracted to town, and a new higher education center will soon be under construction.

In addition, the energy industry is strong in Carbon County and may soon see significant growth – particularly from the Chokecherry/Sierra Madre wind energy project (over 1,000 wind turbines – the largest in the United States) and from the DKRW coal-to-liquids project at Medicine Bow.

This report focuses on building on the community’s many strengths which can be categorized into five major categories: infrastructure, industry, recreation and tourism, facilities and human capital.

FIGURE 1: BUILDING ON RAWLINS' STRENGTHS



1. Infrastructure. Rawlins is well located on major transportation routes – I-80 and US 287. This provides the community with opportunities to capitalize on development opportunities such as distribution, warehousing and manufacturing, as well as tourism opportunities from the many vehicles that pass by each day.

Ten long-haul fiber routes parallel I-80, providing opportunities for more technology-related companies, especially data centers. A major rail line runs directly through Rawlins and serves well the existing energy industry. However, the current lack of rail spurs is a detriment to further economic development that needs such service. It appears that the most promising location for adding rail spurs is to develop a business park at the eastern end of Rawlins.

Rawlins is indeed fortunate in that some of the most expensive infrastructure related to economic development is already in place in the area – freeways, rail and fiber. Rawlins should now focus on adding the piece that it is missing – expanded air service. With its strategic location in the middle of the State, as well as the country, Rawlins is an obvious refueling stop for aircraft, as well as for freight distribution. Charter air service would benefit the tourism industry and capitalize on the tourism opportunities in the area with fly-in recreation

packages. Well aware of this opportunity, Rawlins is looking to replace its fixed base operator at the airport, after the retirement of the previous long-term FBO, and an Airport Master Plan has recently been completed.

2. Industry. With a wealth of natural resources, there is abundant employment in the energy industry. Several large projects are planned in the near future which could increase construction employment by nearly 6,000 persons at its peak, and increase the number of permanent, ongoing jobs in the County by over 700.

The Chokecherry/Sierra Madre, other wind projects, and transmission line corridors passing near Rawlins provide an incredible opportunity for the City to attract complementary business development – businesses that will support the operation and maintenance of the 1,000 wind turbines. There has been tremendous growth in the wind energy industry over the past few years and Rawlins should strive to establish a business park that attracts support services and manufactures smaller parts such as gear drives, bearings, and other replacement parts for the turbines. Cleaning and maintenance support services will also be essential.

3. Recreation and Tourism. Consistently recognized since 2009 by *Outdoor Life* magazine as one of the top 15 towns for sportsmen, Rawlins is a natural hunting and fishing destination. The city also has great recreation amenities and community support. Interviews with local hotels suggest that wealthy hunting and fishing clients are a growing part of their clientele and that the creation of travel packages would be a benefit to this growing market segment.

The community is actively involved in pursuing tourism and was recently the first city in Wyoming to receive the designation of an Aspiring Tourism Community. Rawlins should continue to actively participate with the Wyoming Tourism Council and its Roam-Free Campaign to obtain all of the joint marketing and advertising exposure that it can and to promote its recreation opportunities, as well as its historic niche in the western frontier. The Wyoming Frontier Prison – the Old Pen – is a natural draw for those traveling along I-80.

How can the City pull more vehicles off of I-80 and into the town? Suggestions made as part of this process include the following:

- Improve the signage and visual appearance at the gateways.
- Make a landmark for Rawlins – such as a climbing wind tower that combines the recreation aspects of the community with its increasing reputation for clean energy. This needs to be easily seen from the freeway.
- Have signage advertising an interpretive wind farm, educational museum and tours.
- Add special events, especially in the area of Extreme Sports, that play on the City's unique location on the Continental Divide. These could include an expansion of mountain bike trails around town, and could also involve wind sports, such as paragliding, hot air ballooning, hang gliding, and even kite flying.
- Recruit and attract national chain restaurants visible from the freeway.
- Add signage to hike a Continental Divide trail.

Rawlins truly represents the western frontier. Many visitors, especially international visitors, want to experience the Wild West. Rawlins could become part of a tour package with national parks tours. Bus tours

traveling near the area to national parks should be contacted regarding tour packages that would include the Old Pen, hiking the Continental Divide, viewing a wind farm firsthand, and providing for hunting/fishing options.

Other attributes unique to Rawlins should be expanded and marketed. Wildlife is plentiful in the area. A wildlife viewing area, perhaps as part of a nature preserve/wetlands park, with viewing areas, telescopes, etc., and interpretive signs could be a positive community amenity.

Archaeological, geological and rockhounding workshops and expeditions could also be arranged that would build on the natural geologic features of the area. Rawlins could become a sort of “Adventure Playground” with skydiving at the airport – or paragliding from the rock formations. Rock climbing and bouldering could become popular Extreme Sports activities in the area.

Rawlins has an excellent golf course which is used by the schools as well as the community at large. However, the golf season can be short in Rawlins due to the climate. The City needs to expand its recreational offerings to a more-year round basis, including indoor recreation as well as outdoor winter sports. A recreation center could be developed in partnership with the private sector. Such a development should recognize the large demographic component of young males in the energy industry and plan accordingly with activities such as bowling or virtual golf.

4. Facilities. Rawlins is fortunate to have a good base of lodging facilities from which to expand its recreation and tourism opportunities. The Entrepreneurial Center in downtown is also an outstanding opportunity for business incubation that will nurture young companies. A catering kitchen is one option that was frequently mentioned. Creative options for catering services should be explored including ideas such as preparing healthy meals and placing in the grocery stores. There are many young males in the community for which this could be a valued service.

Dinner theater could be combined with the catering services, as well as the drama department at the high school. Themes such as “Escape from the Pen” could draw in tourists and visitors.

The hospital is a vital facility for the community. In conjunction with the Carbon County Higher Education Center, there are increasing numbers of qualified students who are prepared to enter the medical field. The value of this facility will be felt by not only the existing residents but also by its aging population and by the many people who pass through this area and who need medical care.

5. Human Capital. Rawlins has an exceptional “starting team” that is working on a variety of improvements in the City – education, downtown, tourism, etc. However, the City needs more “bench strength” in order to deepen the core of leadership in the community. This could be developed through a variety of leadership and entrepreneurship programs. These programs would be an asset to economic growth as they could assist in strengthening existing businesses as well as developing new ones. Many cities give an “Entrepreneur of the Year Award” and this could increase enthusiasm and motivation for future business creativity.

Small-business opportunities abound and good information should be provided to current business owners to see where they might be able to increase their current services. The retail sales leakage analysis conducted as part of this study suggests opportunity in the following areas:

- Furniture
- Clothing
- Shoes
- Restaurants

Restaurants show the greatest amount of leakage—over \$4 million annually just from lost purchases by local residents. When the tourist trade is added in, there is significant opportunity for increased restaurant development.

The following list is from a recent survey taken by the Carbon County Higher Education Center (CCHC) that also seeks to identify entrepreneurial opportunities in the City. Perhaps some of these “desired” businesses could be simply an extension of an existing business, or they could locate in the Entrepreneurial Center and share business incubation facilities as they get up and running. For example, a craft and novelty store could add fabric supplies. Or, a gift shop could add a book section with a small coffee/pastry shop. The City and DDA/Main Street can help immensely in this regard by providing joint marketing opportunities, lists of businesses, survey results and sales leakage information in order to get the word out regarding what is available in Rawlins.

- Computer Sales and Service
- Book Store with Coffee and Gifts
- Photographic Studio
- Fabric Store
- Boating Supplies, Parts, and Service
- Trailer/RV Supplies, Parts, and Service
- Additional Grocery Store
- Small Engine Repair
- Handy Man Service
- Health- Food and related products
- Yoga and Exercise Classes
- Art Shop with classes
- Recreational Equipment – biking, hiking, etc.
- Copy and Printing Shop
- Pet Boarding
- Medical – especially pediatrics and OB
- Cobbler (shoe and boot repair)
- Plumber
- Dry Cleaners and Alterations
- Home Energy Efficiency

- Delivery Service
- Temporary Placement Business
- Furniture Restoration and Repair
- Consignment Shop

Finally, the people of Rawlins are its greatest strength. In Douglas, Georgia, a welcoming committee of 500 people met business executives at the airport in order to entice American Insulated Wire to locate in their community. They were successful. One company executive said, “What sold us on Douglas was the people.” Rawlins can do this too.

This Economic Development Plan has not been prepared in a vacuum and cannot reflect the detailed challenges and opportunities that face the community in depth, but we have tried and will continue to allow feedback from organizations involved in addressing the community’s challenges to help the community more to arrive at solutions. The plan builds upon activities and programs that the Rawlins community has pursued to address concerns which have been identified in the past.



GOALS, STRATEGIES AND ACTION PLANS

Goals, strategies and action plans give direction for the future. The following goals, strategies and action plans were developed through input from the City, interviews with local entities, residents, property owners, public meetings, etc. In order to facilitate the implementation of this plan, a “Responsible Party” and “Timeframe” has been suggested for each action item. Undoubtedly, the City and economic leadership group will want to review these suggestions and better adapt responsible parties and timeframes to meet current conditions and circumstances.

Goal #1: Establish a process for implementing key recommendations of this and other strategic plans recently completed for Rawlins.

Strategy #1: Establish an executive leadership group that meets monthly and includes representatives from the City, schools, energy industry, County, major employers, BLM, public works, downtown and tourism. This strategy capitalizes on one of the City’s key resources – its human capital.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Appoint a leader for this group, most likely the head of Community and Economic Development in Rawlins. 	Rawlins City Manager	Year 1	
<ul style="list-style-type: none"> Gain commitments from each leadership group member to be in charge of a specific area of implementation and then establish a committee to refine the goals, strategies and actions plans in their respective areas of expertise by adding responsible parties and timeframes for task completion. 	Head of Executive Leadership Group	Year 1	
<ul style="list-style-type: none"> Establish a format for reporting back at each monthly executive committee leadership meeting. 	Executive Leadership Group	Year 1	



Strategy #2: Establish committees in key areas of implementation.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Assign a specialist in grant writing, including overseeing a schedule for grant applications that coordinate with the plans and purposes of the executive leadership group. 	Executive Leadership Group, CCEDC, Community Development, Industry, County Planning	Year 1	Wyoming Business Council
<ul style="list-style-type: none"> Invite committee members. 	Individual Leadership Group members, CCEDC, Community Development, industry, County Planning	Year 1	

Potential committees and committee members could include:

<p><i>Business Park/Industry Development</i></p> <ul style="list-style-type: none"> City Manager City Public Works Carbon County Economic Development, Planning City Planning* Wyoming Business Council Wyoming Power Company Airport Board Other industry representatives <p><i>Education/Workforce Training</i></p> <ul style="list-style-type: none"> School district representative Department of Workforce Services Higher education representative Energy industry representative Hospitality and lodging industry representative Preschool/Daycare representative Other community or business representatives <p><i>Community Pride</i></p> <ul style="list-style-type: none"> Education representative City officials Community Development Industry representatives Community representatives 	<p><i>Housing</i></p> <ul style="list-style-type: none"> Neighborhood residents Code enforcement City Planning Developer Community Development Real estate representative Aging in Place Committee representative Business/Industrial/Government representatives; examples include Sinclair, Wyoming State Penitentiary, Williams Company, BP, PCW, CCSM, and BLM <p><i>Retail Development</i></p> <ul style="list-style-type: none"> Downtown representative Downtown business owner City Community and Economic Development Marketing representative Non-downtown business representative DDA/Main Street representative Chamber of Commerce representative Carbon County Economic Development Corporation <p><small>*Currently city planning efforts fall under the Community Development department. When development increases, the City may want to consider adding a City Planner and/or City Planning department.</small></p>
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Potential committees and committee members continued on next page.

Potential committees and committee members continued:

Visual Appearance and Quality of Life

City service departments, including Community Development, Planning, Building Inspection, Nuisance Abatement, Public Works, Fire, Police, Recreation, and Legal & Judicial
DDA/Main Street representative
Rawlins Commercial District representative (non-downtown)
Community Pride committee member
Tourism committee member
Health care (Hospital, emergency/ambulance services, clinics, drug abuse)
Industry representatives

Funding

City Manager
Wyoming Business Council
Bank representative
Industry representative
Downtown business owner
Rawlins Commercial District business owner (non-downtown)
Community Development Director
DDA/Main Street representative
Carbon County Economic Development Corporation
Carbon County Higher Education Center representative
Great Divide Economic Development District representative



Goal #2: Increase the job base in Rawlins by attracting companies with good-paying jobs to the area.

Strategy #1: Develop a business park with infrastructure in place so that companies with good-paying jobs are attracted to the area and so that development can occur within a reasonable timeframe for interested companies.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Apply for a \$1 million Business Ready Grant from the Wyoming Business Council to prepare a site for future business development. 	Head of Business Park/Industrial Development Committee	1 Year	Wyoming Business Council \$1 million Business Ready Grant
<ul style="list-style-type: none"> Use the Special Purpose (“6th Penny”) Tax to provide additional funds to create a business park. 	City Manager	1-3 Years	6 th Penny Tax
<ul style="list-style-type: none"> Develop a team of local leaders to begin educating the taxing entities about creating an urban renewal area. A project plan will generate tax increment that can be used for infrastructure and to attract business to a new business park in Rawlins and will be a win-win situation for the entire community. Tax increment can also be used for other community purposes, including the elimination of blight. 	Head of Funding Committee	1 Year	Wyoming Business Council; Legislative leaders

Strategy #2: Pursue smaller data centers as the City has good fiber and power lines that are adjacent to I-80.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Establish a business park with shovel-ready sites. 	City Manager	1-5 Years	Wyoming Business Council Business Ready Grant; 6 th Penny Tax; Urban Renewal Tax Increment
<ul style="list-style-type: none"> Prepare a recruitment flyer that describes the business park, fiber availability, workforce, etc. 	Carbon County Economic Development, Carbon County Visitors Council	1 Year	

Strategy #3: Pursue each and every opportunity associated with the Sierra Madre/Chokecherry and other potential wind energy projects, including the ongoing repair of the wind turbines and the manufacture of parts for repair.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Compile a list of current suppliers of construction and repair parts by reviewing the list in this document and participating in the “Economic Gardening” program that is supported by the State of Wyoming. 	Carbon County Economic Development	1 Year	Mike Lambert, Wyoming Market Research Center
<ul style="list-style-type: none"> Determine incentives that could be offered to attract wind energy suppliers to locate in Rawlins, including tax increment, land writedowns, assistance with relocation costs, etc. 	City Manager; Carbon County Economic Development	1 year	



<ul style="list-style-type: none"> Attend the Windpower Show annually as needed 	CCEDC	Annually, as needed	
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Strategy #4: Pursue the expansion of commercial service at the Rawlins' Municipal Airport.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Pursue the development of a terminal building as outlined in the Master Plan and work to solve the VOR navigation issue. 	Airport Board	1-5 Years	FAA
<ul style="list-style-type: none"> Hire an airport consultant to assess demand and to work with attracting commercial air service and to assist with government regulations. 	Airport Board	1-5 Years	FAA



Goal #3: Increase the sustainability and diversity in revenue generation.

Strategy #1: Encourage the provision of affordable daycare.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Facilitate building space for daycare in high employment areas such as downtown 	Community Development	1-5 Years	DDA/Main Street

Strategy #2: Apply for each and every available grant, each year, from the Wyoming Business Council. Add grant writing capabilities to City staff and resources.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Coordinate grant applications 	Community Development	Ongoing	Wyoming Business Council

Strategy #3: Attract more retail business to Rawlins.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Provide sales gap analysis data to existing business owners. 	Community Development, DDA/Main Street, CCEDC	1-3 Years	Wyoming Market Resource Center

Strategy #4: Increase the population base within City limits.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Annex land at the western and northern edges of Rawlins, and near the golf course. 	City Planning; City Manager	1-10 Years	Public/private partnerships

Goal #4: Improve the visual and physical appearance of Rawlins

Strategy #1: Improve the appearance of the four gateways to the City:

- a) East I-80 freeway entrance
- b) West I-80 freeway entrance
- c) North entrance - road to Casper
- d) Central I-80 freeway entrance

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> • Apply <i>annually</i> for an Enhancement Grant from the Wyoming Business Council that will provide funds for improving the gateways to the City (as well as for enhancement projects in other areas of the City). There is a 50-50 match required for this grant, but the City's match can be "in-kind." Establish a corps of volunteers and use volunteer hours for the City's portion of the match. These funds can also be matched with federal funds. 	Community Development and Tourism Committee	1-10 years; ongoing	Wyoming Business Council Community Enhancement Grants; volunteer groups; CDBG; Eagle Scout projects, etc.

Strategy #2: Increase visual amenities, such as wayfinding signs and banners, and coordinate with the City's branding and logo.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> • Develop a detailed plan for wayfinding sign placement and associated costs 	Community Development; DDA/ Main Street; City Recreation Department	1-5 Years	Wyoming Business Council Community Enhancement Grants; Downtown Development Grants



Strategy #3: Strengthen code enforcement – ordinances and enforcement.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Identify sources of blowing trash and consider measures to control them. 	City Community Development	1-3 Years	General Fund
<ul style="list-style-type: none"> Strengthen code enforcement through increased funding, community awareness and education to ensure that all property is cleaned up 	City Manager; City Council	1 -5 Years	General Fund; Fines
<ul style="list-style-type: none"> Conduct a PR campaign showing successes 	City Community Development	1-5 Years	City newspaper, water bills, City website, Channel 5

Strategy #4: Identify key areas for redevelopment and seek tax increment funds for the redevelopment of these areas.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Pass a resolution that the City, or certain portions thereof, are “blighted” and are an urban renewal area(s). This will aid the City in applying for CDBG grant funds that could be used to fix decaying infrastructure. 	City Community Development	1-3 Years	
<ul style="list-style-type: none"> Begin a program of educating taxing entities about the benefits of a joint partnership to use tax increment funds to revitalize decaying areas of the City. 	City Community Development	1-3 Years	Mayor, legislators, community leaders, school officials
<ul style="list-style-type: none"> Begin a program of educating property owners about the benefits of a joint partnership to use tax increment funds to revitalize decaying areas of the City. 	City Community Development	1-3 Years	Mayor, legislators, community leaders, school officials



Strategy #5: Develop a façade renovation program that focuses on downtown.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Capitalize the program with funds from a Downtown Development or Community Enhancement grant from the Wyoming Business Council. 	DDA/Main Street	1-5 Years	Wyoming Business Council Downtown Development or Community Enhancement Grants

Goal #5: Increase the retail selection available in Rawlins.

Strategy #1: Educate and market what goods and services are available locally.

Action	Responsible Party	Timeframe	Funding/Resources
<ul style="list-style-type: none"> Do a market basket of goods survey to show the comparative cost of goods in Rawlins and Rock Springs (+mileage). Publicize the results in city fliers, mailers, newspaper, etc.; Start a “Buy Local” campaign 	Head of Retail Development Committee	1 Year	City newspaper; Local radio stations as public service announcements, interviews, etc.
<ul style="list-style-type: none"> Compile a list of all existing businesses. 	Community Development and DDA/Main Street	1-3 Years	Wyoming Business Council; Visitors Council
<ul style="list-style-type: none"> Develop a process for business licensing. 	City Finance	1-5 Years	

Strategy #2: Create an economic recruitment/marketing flier showing the many strengths and opportunities in Rawlins.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Hire a marketing and public relations firm to develop a professional brochure using information from this Plan. Information could include traffic on I-80; sales leakage opportunities; existing retail businesses; community events; vacant space available, etc. 	Community Development Department; Carbon County Economic Development; DDA/Main Street	1-3 Years	Downtown Development Association; CDBG Economic Development Grant

Strategy #3: Target retail businesses with large amounts of leakage as shown in this study.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Work with existing businesses to fill sales gap leakage. 	Community Development Department; Carbon County Economic Development	1-10 Years	Downtown Development Association
<ul style="list-style-type: none"> Recruit specific businesses to fill sales gap leakage. 	Community Development Department; Carbon County Economic Development	1-10 Years	Downtown Development Association
<ul style="list-style-type: none"> Recapture lost sales in industry supplies for items such as hard hats, goggles, safety supplies and equipment (now being purchased in Rock Springs). 	Community Development Department; Carbon County Economic Development	1-10 Years	Downtown Development Association
<ul style="list-style-type: none"> Update leakage annually through the Economic Gardening program 	Community Development	Annually - ongoing	Wyoming Market Research Center

Strategy #4: Encourage business incubation at the Rainbow Te-ton Entrepreneur Center or at other sites.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Explore the idea of a kitchen incubator. 	DDA/Main Street	1-5 Years	Wyoming Business Council Downtown Development Grant

Strategy #5: DDA/Main Street is a proven leader in downtown and should continue to receive City support.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Maintain funding support 	City Manager; City Council	Annually	General Fund allocation from DDA/Main Street designation

Strategy #6: Concentrate on strengthening business clusters that are benefitted by close proximity to each other, such as clothing and shoe stores, specialty foods, recreation and sports supplies, fitness and health foods, and gifts and crafts.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Create map of existing businesses 	DDA/Main Street, Rawlins Chamber, Tourism Committee	1-5 Years	Downtown Study
<ul style="list-style-type: none"> Provide leadership for joint marketing opportunities 	Community Development; DDA/Main Street	1-5 Years	

Strategy #7: Capitalize on I-80 traffic by encouraging retail development compatible with tourism, such as restaurants, fast food, auto repair and lodging.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Post list of available sites on City website, along with infrastructure status 	Community Development	1-5 Years	General Fund
<ul style="list-style-type: none"> Actively recruit tourism-related businesses – restaurants, fast food, auto repair, etc. 	Carbon County Economic Development	1-10 Years	



Goal #6: Increase housing opportunities in Rawlins by expanding the product mix in order to encourage more employees to live within the City boundaries.

Strategy #1: Facilitate development of duplexes, condominiums, townhouses and apartments that will serve mid- to higher-end housing and that will meet the quality needs of highly skilled/high earning workers.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Compile a list and approach known developers to pursue housing development opportunities. 	Community Development; Housing Committee	1-5 Years	City – land; Tax increment from urban renewal area
<ul style="list-style-type: none"> Prepare an RFP for housing development, including City assistance and incentives to facilitate the development. 	Community Development		City – land; Tax increment from urban renewal area

Strategy #2: Redevelop existing deteriorating and condemned properties with higher-density development.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Demolish blighted structures 	Community Development	1-10 Years	Tax increment from urban renewal area; CDBG
<ul style="list-style-type: none"> Encourage the development of quality, low income affordable housing 	Community Development	1-10 Years	Tax increment from urban renewal area; CDBG

Strategy #3: Encourage infill of existing properties, but also recognize the need to annex additional land in order to provide room for more subdivision growth within City boundaries.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Work with the BLM to annex land at the western edge of the City, as well as potential residential property north of town and surrounding the golf course. 	City Manager; City Planning	1-15 Years	Public-private partnerships

Strategy #4: Encourage quality residential housing near the golf course that will capitalize on the added property value to surrounding land that is derived from the golf course.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Contact potential developers. 	Community Development; City Manager	1-10 Years	
<ul style="list-style-type: none"> Assist with property aggregation. 	Community Development	1-10 Years	Tax increment from urban renewal area
<ul style="list-style-type: none"> Provide a streamlined permitting process. 	City Planning	1-3 Years	

Strategy #5: Evaluate workforce housing needs.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Conduct a housing assessment (hire consultant) 	Community Development	1-5 Years	CDBG

Goal #7: Increase community pride and cooperation.

Strategy #1: Bring the members of the Industry Roundtable together more frequently – at least quarterly to discuss community issues and to brainstorm solutions that use the various resources this group has to offer.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Set annual schedule of meetings one year in advance 	Carbon County Economic Development	Annually - ongoing	Business donations
<ul style="list-style-type: none"> Provide breakfasts, lunches, etc., to increase attendance 	Carbon County Economic Development	Annually - ongoing	Business donations

Strategy #2: Seek input from the community and community groups in order to spread “ownership” of problems and solutions over a larger group.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Create community and business surveys (website or other means) in order to better track perceptions, issues and concerns by various community groups. 	Community Development	1-3 Years	Website

Strategy #3: Teach leadership skills and community pride in the schools.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Provide service opportunities for K-12 to improve the community. 	Community Development and School District	1-10 Years	Volunteers; non-profits
<ul style="list-style-type: none"> Work with the school district to implement a leadership program. 	Education Committee	1-10 Years	Wyoming Business Council

Strategy #4: Establish “Community Pride” awards with monthly winners and public recognition.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Work with local media to publicize winners through press releases. 	Community Pride Committee	1-5 Years	Private donations; local newspaper and radio station

Strategy #5: Make wide use of the Rawlins logo that was developed as part of the branding study.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Educate business owners regarding the availability of the logo and encourage its use 	Community Pride Committee	1-5 Years	

Goal #8: Improve educational opportunities, including vocational training skills.

Strategy #1: Increase vocational training that will provide those skillsets needed by the energy industry. Be prepared with training that will capitalize on the Sierra Madre/Chokecherry wind energy project.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Coordinate with industry officials regarding current and anticipated vocational and training needs, including certifications 	Higher Education Director	1 Year	Schools

Strategy #2: Coordinate with Western Wyoming College in Rock Springs and Laramie County Community College for industrial skills training where equipment exists that is not available in Rawlins.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Using information from the previous action item, evaluate if demand can be better met in Rawlins or in Rock Springs 	Higher Education Director	1 Year	Schools

Strategy #3: Create a strategic group of business and educational leaders that meet regularly to discuss the needs of industry and how industry and education can support each other. Develop important relationships to further education and business growth.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Invite leaders and set a meeting schedule 	Higher Education Director	1 Year	



Strategy #4: Promote and assist with development of the CCHEC campus in the north part of Rawlins.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Assist with infrastructure needs 	City Public Works	1-3 Years	Grant Funds

Goal #9: Capitalize on tourism opportunities associated with the City's access to I-80, historic past and the old penitentiary, and recreational opportunities.

Strategy #1: As a Certified Tourism Community, receive technical assistance benefits.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Work with the State of Wyoming Tourism to receive benefits and training 	Tourism Committee	1-15 Years	State of Wyoming Tourism

Strategy #2: Pursue more public relations opportunities through avenues such as Sportsmen Magazine and other outdoor-related media.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Write articles and stories, photograph events, etc. and send to relevant magazines 	Tourism Committee	1-15 Years	

Strategy #3: Coordinate with the State of Wyoming's Roam-Free campaign.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Market Rawlins' tourist attractions on the State's website. 	Tourism Committee	1-15 Years	State of Wyoming Tourism
<ul style="list-style-type: none"> List all tourism-related businesses on the State tourism website (free listing). 	Tourism Committee	1-15 Years	State of Wyoming Tourism
<ul style="list-style-type: none"> Submit events to the Wyoming Office of Tourism for selection to the website. 	Tourism Committee	1-15 Years	State of Wyoming Tourism
<ul style="list-style-type: none"> Create tourism "packages" within the County 	Tourism Committee	1-15 Years	State of Wyoming Tourism

Strategy #4: Encourage the development of a family-centered indoor entertainment center.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Prepare an RFP for interested developers 	Community Development	1-10 Years	Public/private partnership City land or building

Strategy #5: Encourage the development of a full-service events center or renovation of the Jeffrey Center.			
Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Conduct a feasibility study for an events center. 	Community Development	1-20 Years	Wyoming Business Council

Goal #10: Establish a marketing campaign that will increase awareness of Rawlins for potential businesses, current residents and tourists.

Strategy #1: Visit key retail and industry-related conferences and trade shows to increase awareness of Rawlins.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Visit key retail and industry (energy, data center, etc.) conferences and take marketing materials 	Community Development, CCEDC	1-5 Years	General Fund – City and County

Strategy #2: Hire a marketing firm to develop marketing materials for Rawlins.

Action	Responsible Party	Timeframe	Resources/Funding
<ul style="list-style-type: none"> Hire a marketing and public relations firm to develop a professional brochure using information from this Plan. Information could include traffic on I-80; sales leakage opportunities; existing retail businesses; community events; vacant space available, etc. 	CCEDC, DDA/Main Street, Chamber	1-3 Years	Downtown Development Association; CDBG Economic Development Grant

SUMMARY OF KEY FINDINGS

This section summarizes some of the major research and key findings of the Economic Master Plan.

POPULATION

- The official 2010 population in Rawlins was 9,259 persons. This number is low because it does not include the temporary construction personnel that are housed in hotels, motels, etc. The population varies significantly at times depending on activity in the energy industry.
- Growth in Rawlins has been slow, with an average annual growth rate of 0.28 percent between 2000 and 2010 for a total increase of 253 persons during the time period.
- Growth in Carbon County has been even slower, with a population increase of 246 persons over the ten-year period, reflecting an average annual growth rate of 0.16 percent.
- Projections made by the Wyoming DAI are for a population increase of 289 persons in Rawlins by 2020. However, the consultants feel that this number is low, given the energy projects planned for the area, and have projected an increase of 934 residents over the ten-year period.¹



DEMOGRAPHIC PROFILE AND HOUSEHOLD CHARACTERISTICS

- The average per capita income in Rawlins is 94 percent of the national average (\$25,645 compared to \$27,334).
- In Rawlins, 14.4 percent of the population lives below the poverty level, compared to 13.9 percent statewide. Rawlins also has 4.2 percent of its residents living below 50 percent of the poverty level, compared to 3.3 percent statewide. This suggests that there is significant disparity in incomes and living standards in Rawlins.
- The median age in Rawlins is substantially lower than the national average (34.3 years compared to 37.2 years). However, the median age in Carbon County, at 38.9 years, is higher than that of the United States. The Carbon County median age is skewed by exceptionally older median ages in several small communities – Elk Mountain, Encampment, Medicine Bow, Riverside and Saratoga.
- The proportion of males to females is greater than the state and nation overall, with 55 percent of the population being male. Interviews indicated that many females feel that Rawlins is a “man’s town,” and that there are insufficient jobs and activities for women.

¹ Note that there will be periods with increased temporary workers who will need municipal services but who are not part of the official population count.

EMPLOYMENT AND INDUSTRY

Energy Employment Growth

- Four energy projects that are planned for the near future are expected to add considerable temporary employment over the next five to ten years. The four projects are: Chokecherry/Sierra Madre wind project, DKRW coal-to-liquids (CTL) project, Lost Creek Uranium and Gateway West and TransWest Express transmission lines. Timing of employment for these projects is difficult, at best, due to reliance on: 1) government approvals and regulatory processes; 2) fluctuating conditions in the energy industry; and 3) availability of financing. If all four projects proceed as scheduled, Carbon County could see an additional 1,000 to 6,000 construction employees annually between 2013 and 2017.
- DKRW has suggested to the regional office of the Department of Workforce Services to start planning for 450 permanent employees. Chokecherry/Sierra Madre should add another 136 permanent employees, with 89 employees for the uranium project.
- Interviews with local industry suggest that it is difficult to hire sufficient employment with appropriate skills and that if the planned energy projects move forward, this problem will only increase.

Industry Sectors

- The largest employers in the area are: Union Pacific, Sinclair Refinery, Department of Corrections, BP, Devon Energy, Merit Energy, Williams Field Services, both school districts in the County, Department of Transportation, BLM, Carbon County Hospital, and the City of Rawlins.
- Lodging and food services forms the largest sector of employment, followed by retail trade. Construction, which includes all of the temporary workers in the mining industry, is in third place. If mining and construction are combined, this would be the second largest category. Professional and technical services comprise the smallest sector of the economy.
- Lodging and food services, which forms the largest sector of the economy, accounts for the lowest average weekly wage -- \$294. Not surprisingly, mining pays the highest wages (\$1,295 average weekly wage), suggesting a real disparity in the overall economic well-being of residents and that there is a large segment of the population with limited buying power.

Employment Rates

- The current unemployment rate in Carbon County is 5.4 percent,² which is good compared to the stagnant national rate of 8.2 percent.
- Carbon County has slightly fewer jobs per household than the state and national average (1.01 compared to 1.15 and 1.08 jobs per household). This reflects the concern voiced in interviews that it is difficult for spouses to find jobs in the community. And, the jobs per household ratio in Carbon County may be artificially high because it does not reflect the temporary construction worker population of the community, yet the ratio includes their jobs.

² <http://www.wyomingatwork.com/vosnet/lmi/area/areasummary.aspx?session=areadetail&geo=5604000007>

- Annual employment rates are highest during summer months when natural resource extraction and construction industries operate at their annual highs. This seasonal employment poses challenges to the City and to business owners who must provide goods and services year-round, yet respond to peak seasons as well.

SUSTAINABLE ECONOMIC DEVELOPMENT

TABLE 2: ECONOMIC STRENGTHS AND WEAKNESSES

Category/Infrastructure	Strengths	Weaknesses	Remedy/Action
Water	Sufficient water rights for economic development	Water distribution infrastructure; extension to areas outside City boundaries	Water master plan to identify key projects
Highway Access	I-80 is major corridor through the US	Gateways do not pull in traffic	Improve gateways and entrances to the City - signage and landscaping
Rail	Major rail line	Lack of spurs and loading points	Establish business park access
Airport	Runway length and weight-bearing capacity	No commercial or charter service available; line of sight issue with VOR navigation; terminal needed	Resolve navigation issue; hire airport consultant to facilitate commercial air service
WY Income Tax Structure	No WY corporate and personal income tax	Provides little property tax increment for cities to use in curing blighted areas	
WY Sales Tax Structure	Sales revenues returned to the County where they originate	Rawlins provides services for a large portion of the County yet only receives sales tax revenues for its portion of the population; Rawlins also houses a large number of temporary construction employees yet receives no sales tax distribution from them	

Category/Infrastructure	Strengths	Weaknesses	Remedy/Action
Business Park		Lack of shovel ready land for business park development	Develop business park at west entrance to City
Commercial	Historic buildings in DT		Market available commercial space - see DT Plan
Commercial	Vacant land by east entrance to City		Promote high sales-tax generating development at this site
Residential		Lack of available land	Annex additional land at north and west edges of City

City Revenues

- Sales tax revenues account for 53 percent of the City's total general fund revenues. These revenues can be volatile, declining by 41 percent between the 2008-2009 fiscal year and the 2010-2011 fiscal year. When all taxes (cigarette, gas, state, federal mineral royalties, severance taxes and state taxes) are included, they account for 73 percent of the total budget. However, 2012 saw a rebound with revenues increasing nearly 12 percent over 2010-2011 and by three percent over 2009-2010 levels. However, revenues for the last fiscal year were still 34 percent below 2008-2009 levels.
- Carbon County saw a 41 percent decrease in sales tax revenues (on the 4 percent tax), the largest of any County in the state. Statewide, sales tax revenues declined by 12 percent from 2009 to 2011.
- Rawlins is required to provide services for three main population groups: 1) City residents and property owners; 2) temporary employees residing in Rawlins; and 3) non-residents from outside City limits who come to Rawlins for goods and services. Rawlins only receives sales tax revenues, its major revenue source, from the first group. This places disproportionate demand on the City which can be severe at peak energy construction periods.
- Rawlins is heavily reliant on sales tax revenues. The City's share of the amount distributed to the County is based on its proportionate share of total County population as of the last Census (58 percent in 2010). Therefore, any significant growth in a community would not be compensated until the next Census period. In rapidly-growing communities, this policy could have a significant detrimental effect. While Rawlins is not growing rapidly, it has shown more growth than the rest of Carbon County (where some communities are seeing declining populations), and therefore may have to bear a greater share of services, with relatively less compensation, as conditions change throughout the next decade.

Retail Opportunities

- A sales gap (“leakage”) analysis shows that Carbon County attracts more than its fair share of purchases in the following categories: gasoline stations, grocery and food stores and lodging. This reflects the County’s location along I-80 and the impact of travelers through the area.
- Significant leakage exists in clothing stores, general merchandise, department stores, furniture, electronics and appliances. Given the size of the County, there will always be some leakage in areas such as clothing, department stores, furniture, etc., as shoppers will travel to areas where there is a greater selection of goods that is sustained by a larger population with greater buying power. However, some of this leakage can, and should be, targeted for expansion and recruitment in Rawlins. The greatest opportunity, in terms of total leakage, is for a general merchandise store.
- Some leakage exists in the following categories which, given the high visitor traffic through the area, should be a target for recapture: eating places and auto dealers/parts.
- Currently, Carbon County residents are supporting an estimated 106,000 to 154,000 square feet of retail space outside of the County. If the City is able to recapture two-thirds of these “lost” sales, it would support 71,000 to 103,000 additional retail square feet in the City



HOUSING

Housing Availability

- Real estate agents report a lack of good housing inventory to meet current housing needs, especially rentals.
- The total number of building permits issued in Carbon County from 2000 to 2010 is 527. Total population growth in Carbon County over the same time period was 246 persons. In comparison, Rawlins grew by 253 persons with only 134 permits issued.³ Current MLS listings show 162 lots and land listings for Carbon County with 36 of those properties within Rawlins. Only 15 of those lots are listed as residential. Over the last ten years, there has been very little property demolition to free up more land within the City.

³ Total growth in Rawlins was higher than in Carbon County because some areas of the County saw populations decline.

- With several new energy projects in the planning stages, the housing shortage will become even more severe. The Chokecherry/Sierra Madre wind energy project suggests a temporary, peak housing demand for 1,644 units, far exceeding current supply.
- Vacancy rates for single-family homes are relatively high at 14 percent. Poor housing conditions could play a significant role in driving that rate upwards. Interviews suggest a shortage of suitable properties.
- Vacancy rates for multi-family housing are less than half that of single-family housing—6.7 percent.

Housing Conditions

- Rental rates in Rawlins average between \$800 and \$1,200 per month.
- The median home value in Rawlins is \$128,600, similar to the median home value countywide.
- Forty-one percent of the housing units are valued below \$100,000, suggesting a lack of quality, although affordable.
- Carbon County has one of the highest rates (35.11 percent) in the State of single-family homes in worn out or badly worn condition.
- Carbon County has the worst rate in the State for the percentage of homes built with low quality materials at 18.85 percent of single-family homes.
- Approximately 75 percent of housing was built in the 1970's or earlier.
- Nearly 90 percent of apartment units are considered low quality. This is one of the highest rates in the State.

Housing Needs

- Housing needs include:
 - Furnished housing and efficiency units for temporary workers
 - 3-bedroom homes with garages
 - Better quality single-family homes
 - Better quality apartments and rentals, especially for middle or high-end markets
 - Assisted living complex
 - More adequate affordable housing
 - More ability by developers to build outside of the City (areas need to be annexed within City boundaries) or to find lots within City boundaries that are shovel-ready with infrastructure in place



EDUCATION AND WORKFORCE SKILLS

- High school dropout rates are high in Rawlins. In 2011, 74 percent of the class graduated – 85.7 percent of the females and 65.5 percent of the males, demonstrating the strong attraction of wages and employment in the energy industry.
- There is stiff competition for educated and skilled employees and companies have expressed concern that they have to compete within their industry for workers. This problem has been exacerbated by the recent expansion of the energy industry in North Dakota. This problem will likely increase with the many energy projects slated for the future.
- The Carbon County Higher Education Center (CCHC) currently provides college level courses, vocational training for Rawlins High School, GED, ESL and other community education courses. Expansion of the CCHC at a new location in the north part of Rawlins is critical to encouraging additional education (including vocational) attainment in the City.

INFRASTRUCTURE

- The Rawlins Municipal Airport has seen increasing demand in recent years, with approximately 5-6 takeoffs and landings per day in the summer. No private charter service is currently available.
- Rawlins has excellent ground access from I-80, as well as major rail connectivity.
- Ten long-haul fiber lines run along I-80 next to Rawlins.
- There is no business park in Rawlins with shovel-ready sites. Several sites have been identified in this study, and development of a business park is a top priority.
- There is no shortage of water resources, although water infrastructure is lacking in some areas and may somewhat limit development.

TOURISM AND RECREATION

- There are ample recreation opportunities near Rawlins, especially hunting and fishing on the North Platte, Miracle Mile and Seminoe.
- Rawlins has been recognized since 2009 by *Outdoor Life* magazine as one of the top 15 towns for sportsmen.
- Opportunities exist to increase recreation-related lodging in Rawlins through guided tours.

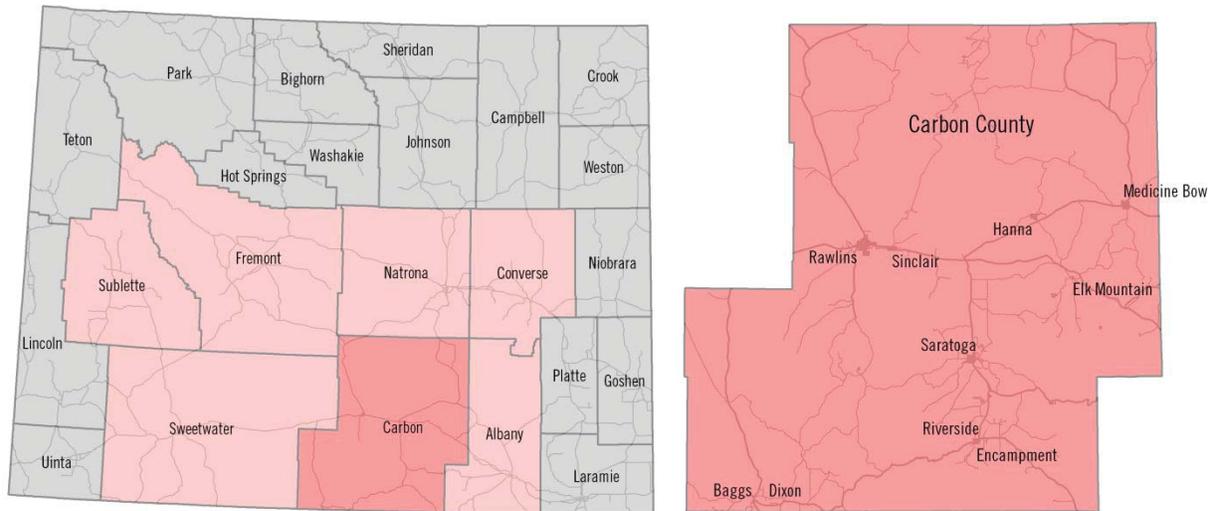


OVERVIEW OF RAWLINS

OVERVIEW

Rawlins is located on the heavily-traveled I-80 corridor, approximately halfway between Salt Lake City and Denver with about four hours travel time from each major center. Rawlins is the largest city in Carbon County and it serves as the county seat.

FIGURE 2: WYOMING AND CARBON COUNTY MAPS



HISTORY OF RAWLINS

Rawlins, Wyoming was officially incorporated in 1882, but its early history predates that year. The first inhabitants of the area were Native American tribes who hunted, fished and made seasonal camps throughout southern Wyoming. These tribes included the Ute, Shoshone, Crow, Arapaho, Cheyenne and Lakota tribes. Beginning in the early 1800's, European and American trappers and traders began traversing and exploring the area as well—though relatively few in number. Beginning in the 1850's large numbers of emigrants en route to Oregon, Utah and California began heading west through the area. An



Rawlins Party, 1867: Back row - Left to Right: Lt. J. W. Wheelan, Lt. Col. J. K. Mizner, Commanding Escort; Dr. Henry C. Terry, Asst. Surgeon; John E. Corwith, Galena, Ill. Front Row: David Van Lennep, Geologist; John R. Duff, Mass., Gen. G. M. Dodge, Chief Engineer UPRR; Brig. Gen. John A. Rawlins, Chief of Staff; Major W. Mck.Dunn, Aide de Camp to General Rawlins.

Photo source: <http://www.wyomingtalesandtrails.com/rawlins.html>

established route through southern Wyoming called the Overland Trail became an important thoroughfare for many of these travelers. Providing resupply points for these emigrants was one of two reasons for some of the first permanent settlements in Wyoming.⁴

As westward expansion and settlement continued, the U.S. government organized several expeditions to survey and map new territories. One such expedition commenced in 1867 with orders to survey a route for the first transcontinental railroad. The commander of this group was General John A. Rawlins, who was then serving as the chief of staff for the U.S. Army. While on the expedition, General Rawlins was reported to have sent a group of scouts to explore the area in search of a clean and cold source of water. These scouts discovered a spring near the present city of Rawlins. After tasting this water himself, General Rawlins is reported to have said it was the most refreshing drink he had ever tasted and stated, "If anything is ever named after me, I hope it will be a spring of water."⁵ The place was named Rawlins Springs and was later shortened to Rawlins. Although the completion of the transcontinental railroad spelled the end for many similar frontier towns, Rawlins remained an important stop as it was a reliable source of water and a regional hub.

The other reason settlers first flocked to the region still remains a major draw: energy. Today large companies extract oil, natural gas, uranium and harness wind power, but the first source of energy to draw investors and laborers was coal.

Rawlins is located in Carbon County which was organized on Dec. 16, 1868 by the Eighth Dakota Territorial Legislature Assembly and was named for the vast amounts of coal which were mined there. Carbon was one of five original counties in the Wyoming Territory. Originally, Carbon County's boundaries spanned the entire state from the Colorado border to the Montana line. However as Wyoming continued to develop, Carbon County was subdivided. Although not the most populous county, Carbon County has more incorporated municipalities than any other county in Wyoming. In addition to Rawlins, these municipalities include Baggs, Dixon, Elk Mountain, Encampment, Hanna, Medicine Bow, Riverside, Sinclair and Saratoga.



Thomas Maghee outside his dental office in Rawlins, Wyoming, Maghee specialized in dermatology, and in 1886 performed pioneering facial reconstructive surgery on George Webb, a sheep herder who had attempted suicide,

Photo Source: <http://ahc.uwyo.edu/features/photos/2005.htm>

⁴ History of Carbon County, Wyoming State Historical Society, <http://www.wyohistory.org/encyclopedia/carbon-county-wyoming>

⁵ History of Rawlins, Rawlins City Website, <http://www.rawlins-wyoming.com/index.aspx?NID=191>

WYOMING BUSINESS CLIMATE – AN OVERVIEW

In many ways, Wyoming is an extremely attractive state for businesses. Wyoming was ranked number one on the Tax Foundation's State Business Climate Index in 2011 and fourth on the Pollina Top Pro Business state rankings for 2011.⁶ In addition, *The Atlantic* magazine selected Wyoming the Best Performing State Economy for 2010⁷ and the online news site *24/7 Wall St.* named Wyoming 2010 Best Run State in America.⁸

TABLE 3: TAX FOUNDATION 2011 STATE RANKINGS

Business Climate	
State	Score
1. Wyoming	7.67
2. South Dakota	7.54
3. Nevada	7.45
4. Alaska	7.36
5. Florida	6.90
6. New Hampshire	6.39
7. Washington	6.36
8. Montana	6.25
9. Texas	6.08
10. Utah	6.04

Source: Tax Foundation Background Paper No. 62

The Tax Foundation's number one ranking of Wyoming on the "State Business Tax Climate Index" is of particular interest. Wyoming received this ranking in large part for its absence of multiple taxing devices. Wyoming does not levy a corporate income tax, an individual income tax, and several smaller taxes commonly collected in other states. Where does Wyoming's tax revenue come from? Wyoming has the fourth highest property tax collection per capita at \$2,321, following New Jersey (\$2,671), Connecticut (\$2,498), and New Hampshire (\$2,424). However, in Wyoming, these high collection rates are not due to highly assessed land values and high property tax rates, but because of coal, natural gas, wind and other energy projects which affect a relatively small amount of the State's land but provide a windfall in property tax revenue.

Wyoming ranked best in the nation for low corporate and individual income taxes, and fairly well for low sales taxes.

TABLE 4: COMPONENT TAX RANKS

State	Overall Rank	Corporate Tax Rank	Individual Income Tax Rank	Sales Tax Rank	Unemployment Insurance Tax Rank	Property Tax Rank
Wyoming	1	1	1	13	29	34

Source: Tax Foundation Background Paper No. 62

⁶ <http://www.pollina.com/top10probusiness.html>

⁷ <http://www.theatlantic.com/business/archive/2010/10/the-best-and-worst-performing-state-economies-in-america/64307/>

⁸ <http://247wallst.com/2010/10/04/the-best-and-worst-run-states-in-america-a-survey-of-all-fifty/>

While Wyoming benefits heavily from the energy industry, it is also subject to large economic swings due to its dependence on the price of natural resources such as natural gas, oil and gas, coal, trona, uranium, etc. This means that the State's distribution of revenues to the cities can vary widely from year to year, with the result that planning for capital and infrastructure needs can become very challenging.



DEMOGRAPHICS AND EMPLOYMENT

Population growth and demographic characteristics are key indicators of economic development opportunities and target markets.

POPULATION GROWTH

Rawlins has seen only modest growth since 1940, when it had a population of just over 5,500 people. The population, due to a boom cycle in the mining industry, peaked in the early 1980s. Since the early 1980s and through the early 21st century, the population in Rawlins has declined. Only recently has the population begun to increase again.

TABLE 5: HISTORIC POPULATION GROWTH

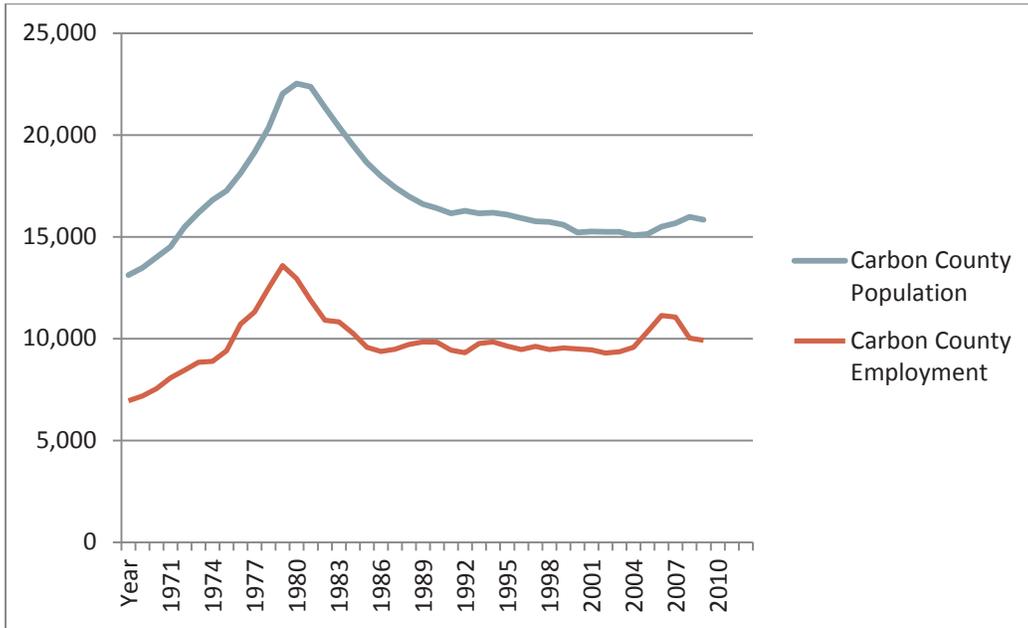
Rawlins and Carbon County		
Year	Rawlins	Carbon County
1940	5,531	12,644
1950	7,415	15,742
1960	8,968	14,937
1970	7,855	13,354
1980	11,547	21,896
1990	9,380	16,659
2000	9,006	15,639
2010	9,259	15,885

Source: United States Census

At the time of the 2010 Census, the population in Rawlins was 9,259. This is 253 persons more than its population in 2000, and represents a 2.8 percent increase over the ten-year period, or an annual average growth rate (AAGR) of 0.28 percent. This growth rate is higher than the average for Carbon County (AAGR of 0.16 percent) over the same time period. Overall, Carbon County is about the same size today as it was 60 years ago – in 1950.

Both Wyoming and Carbon County were both strongly affected by the energy boom in the 1970s and 1980s. However, while both communities have decreased in size from their peak population as shown in 1980, Rawlins has increased its share of the County's total population – from 44 percent in 1940 to 58 percent in 2010.

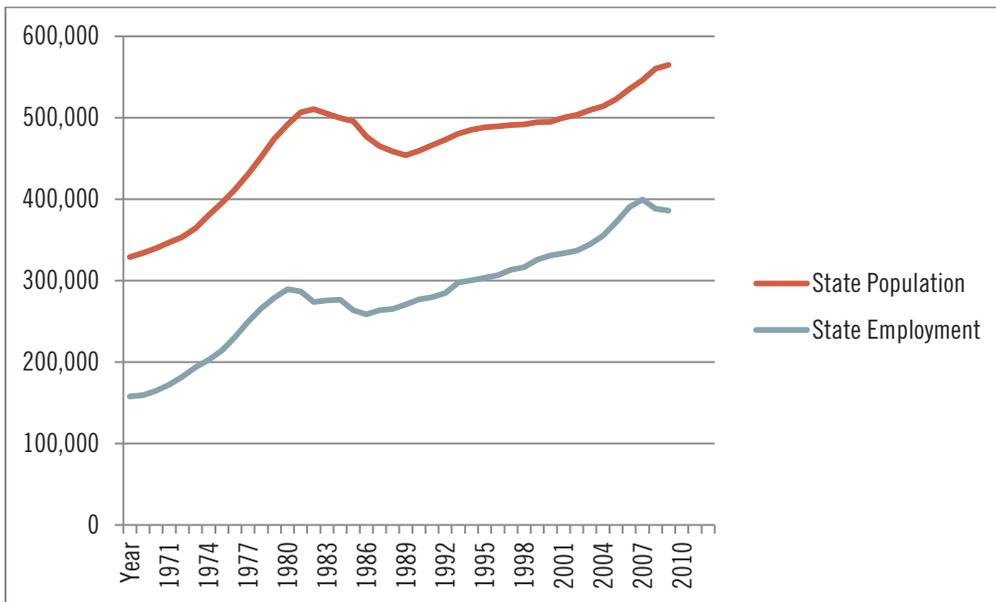
FIGURE 3: HISTORIC POPULATION AND EMPLOYMENT IN CARBON COUNTY



Source: Wyoming Regional Economic Analysis Project, Selected Economic Indicators Carbon County, 1969-2010

The State also experienced a peak near 1980, followed by a drop-off, but has since returned to levels even higher than the previous population peak.

FIGURE 4: HISTORIC POPULATION AND EMPLOYMENT IN THE STATE OF WYOMING



Source: Wyoming Regional Economic Analysis Project, Selected Economic Indicators, 1969-2010

What these numbers do not show are the wide swings in employment attributable to construction of energy-related projects. Because these workers are temporary, they generally are not included in the Census data. And, if construction booms occur in years other than 10-year Census intervals, they are not included with population figures.

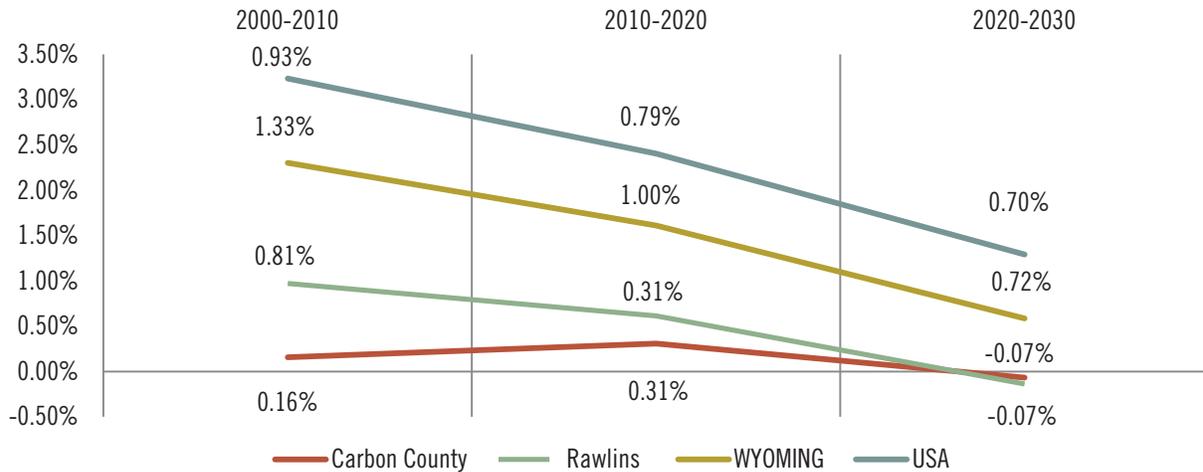
The figures below illustrate the Wyoming Department of Administration and Information's (WDAI) projected future average annual growth rates (AAGR) through the year 2030 for the State, for Carbon County and for Rawlins. The WDAI's methodology does not account for significant economic development but simply applies past growth trends to future projections. Further, Rawlins' growth is officially projected to decrease from 2020-2030 by the WDAI estimate. The many economic development projects planned for Carbon County will likely have a positive effect on Rawlins as the regional hub and county seat; therefore, the projected decline from 2020-2030 should be viewed with caution.

TABLE 6: REGIONAL AND LOCAL COMPARISON OF POPULATION AND GROWTH

	Census		Forecast		AAGR		
	2000	2010	2020	2030	2000-2010	2010-2020	2020-2030
Local Comparison:							
Baggs	348	440	454	451	2.37%	0.31%	-0.07%
Dixon	79	97	100	99	2.07%	0.31%	-0.10%
Elk Mountain	192	191	197	196	-0.05%	0.31%	-0.05%
Encampment	443	450	464	461	0.16%	0.31%	-0.06%
Hanna	873	841	867	861	-0.37%	0.30%	-0.07%
Medicine Bow	274	284	293	291	0.36%	0.31%	-0.07%
Rawlins	9,006	9,259	9,548	9,483	0.28%	0.31%	-0.07%
Riverside	59	52	54	53	-1.25%	0.38%	-0.19%
Saratoga	1726	1,690	1,743	1,731	-0.21%	0.31%	-0.07%
Sinclair	423	433	446	443	0.23%	0.30%	-0.07%
Regional Comparison							
Albany County	32,014	36,299	38,910	40,560	1.26%	0.70%	0.42%
Carbon County	15,639	15,885	16,380	16,270	0.16%	0.31%	-0.07%
Converse County	12,052	13,833	15,950	17,270	1.39%	1.43%	0.80%
Fremont County	35,804	40,123	44,360	47,120	1.15%	1.01%	0.61%
Natrona County	66,533	75,450	82,490	88,320	1.27%	0.90%	0.69%
Sublette County	5,920	10,247	13,880	17,830	5.64%	3.08%	2.54%
Sweetwater County	37,613	43,806	49,280	51,960	1.54%	1.18%	0.53%
WYOMING	493,782	563,626	622,360	668,830	1.33%	1.00%	0.72%
USA	281.4 M	308.7 M	334.1 M	358.4 M	0.93%	0.79%	0.70%

Source: Census 2000 and 2010; Wyoming DAI

FIGURE 5: FUTURE GROWTH RATES



Source: 2000 & 2010 Census & Wyoming DAI

Population projections have been adjusted upward to reflect the significant economic impact from various energy projects currently being planned in Carbon County. Based on industry inputs for numbers of operating employees (not including construction employment), we have adjusted projected population as follows. The analysis assumes that 50 percent of operating employees for the Chokecherry/Sierra Madre wind energy project and the Lost Creek uranium project will live within Rawlins, while 30 percent of the employees for the DKRW coal-to-liquids project and the Gateway West and TransWest Express transmission lines will live within the boundaries of Rawlins.

TABLE 7: ADJUSTED POPULATION GROWTH FOR ENERGY INDUSTRY GROWTH

	2010	2020	2030
Rawlins	9,259	10,193	10,123

Source: ZBPF

The above population projections do not account for temporary construction employment for the above-mentioned projects which are projected to add between approximately 1,000 and 6,000 persons in the local area between 2013 and 2017.

TABLE 8: PROJECTED ENERGY INDUSTRY POPULATION IMPACTS

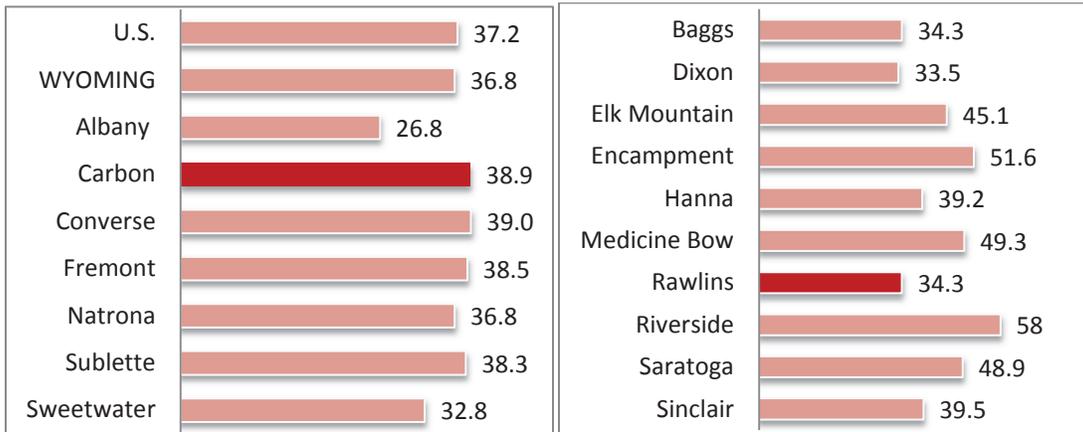
	2013	2014	2015	2016	2017
Construction Employees	2,841	4,372	5,812	3,554	1,134
Operating Employees	-	-	89	592	728

Includes projected employment for Chokecherry/Sierra Madre, DKRW, Lost Creek Uranium and Gateway West transmission.

AGE AND GENDER

According to the 2010 Census, Carbon County has a median age slightly higher than the Wyoming and national averages. Within Carbon County, Rawlins has one of the younger median ages, at 34.3 years.

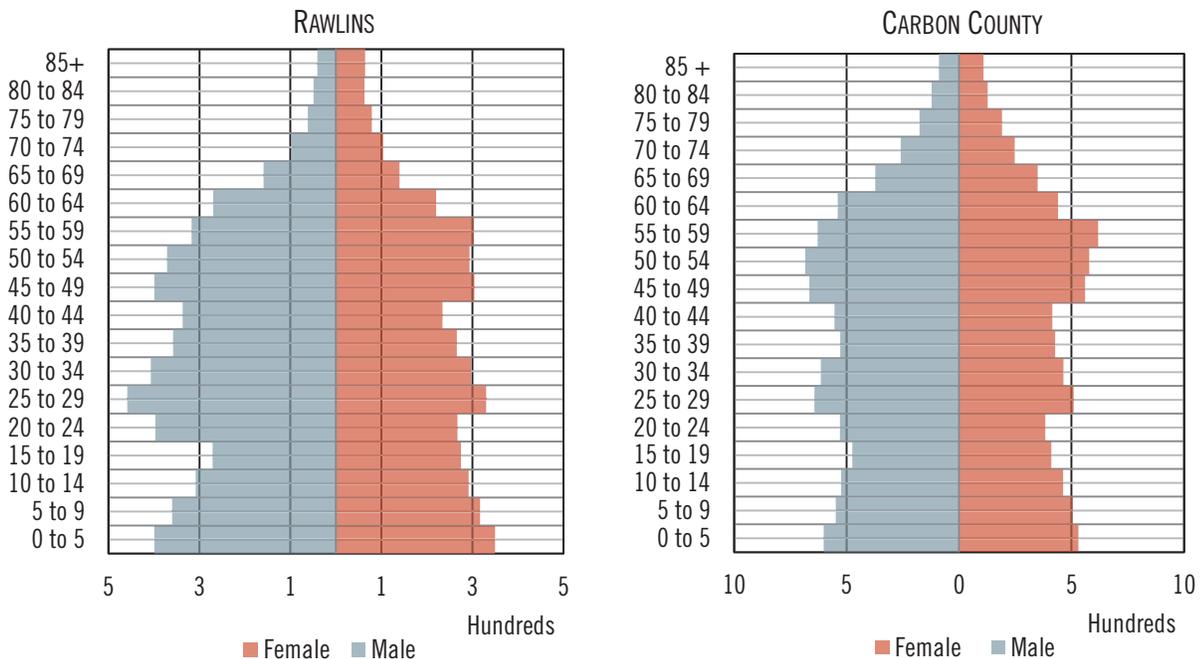
FIGURE 6: REGIONAL AND LOCAL COMPARISON OF MEDIAN AGE

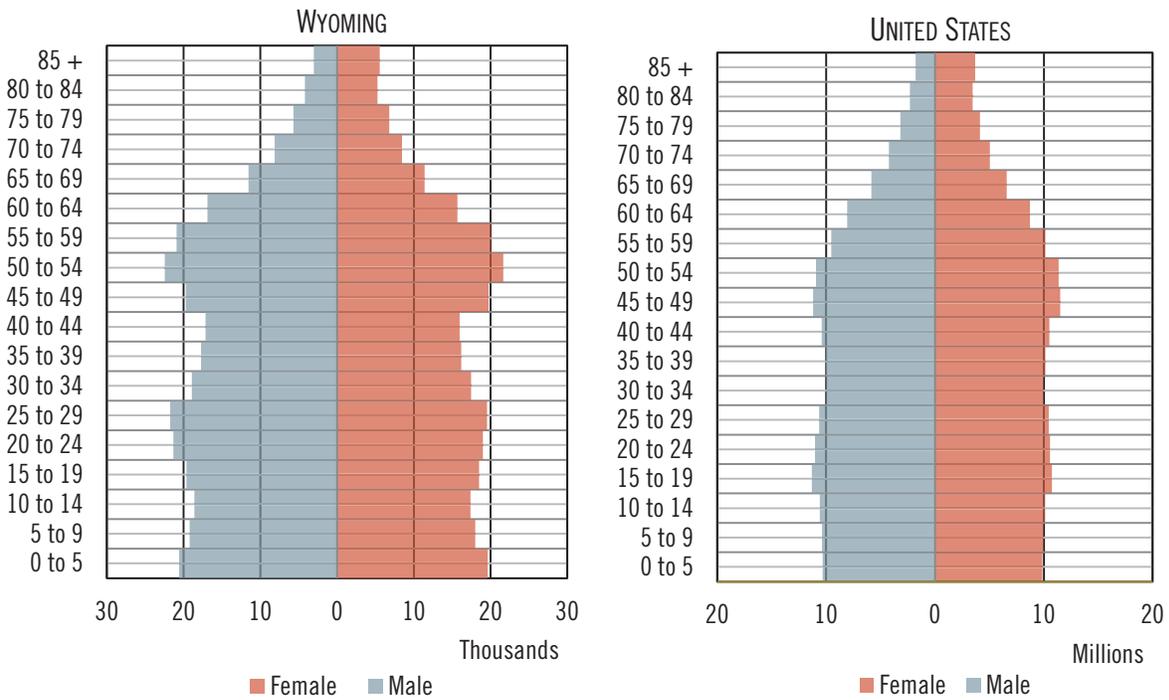


Source: 2010 Census

The following age pyramids compare Rawlins and Carbon County with Wyoming and the United States. An interesting trend is realized when comparing the male population to the female population. Starting with the Wyoming pyramid, the younger age brackets show a slightly higher male population. This can be seen on an exaggerated scale in Carbon County and even more so in Rawlins.

FIGURE 7: AGE DISTRIBUTION OF RAWLINS, CARBON COUNTY, STATE AND NATION

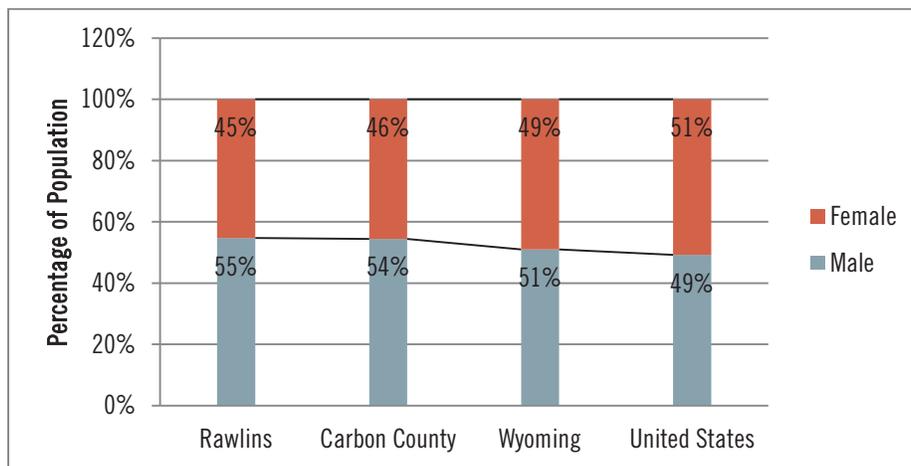




Source: 2010 Census

This data corroborates the story that many young men come to Wyoming seeking work at the strenuous, labor intensive energy project sites, but leave these locations once their employment is finished. The proportion of males to females is higher in Rawlins than in the county, state, or nation

FIGURE 8: MALE AND FEMALE PERCENTAGE OF TOTAL POPULATIONS

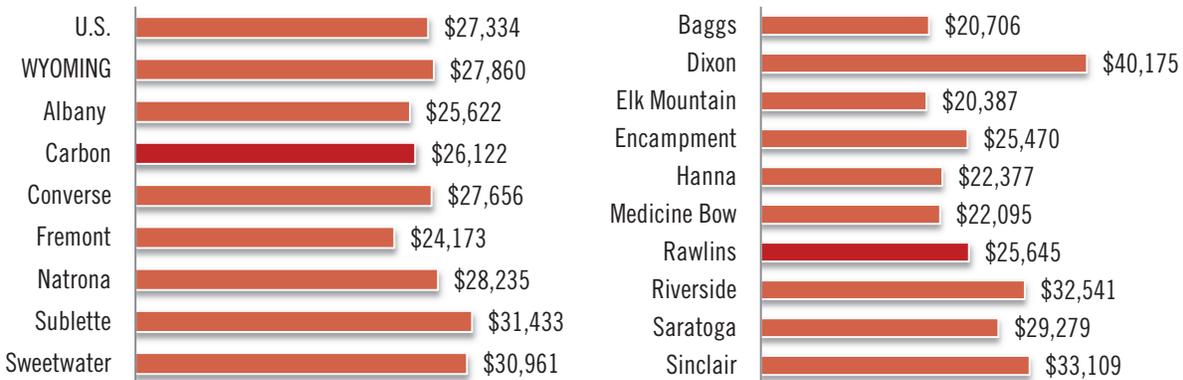


Source: 2010 Census

INCOME

When compared with six neighboring counties, Carbon County is about in the middle of the group for per capita income. And, within Carbon County, Rawlins sits in the middle of the distribution. The per capita income in Rawlins is \$25,645 – 94 percent of the national average of \$27,334. The Carbon County average wage of \$26,122 is 96 percent of the national average.

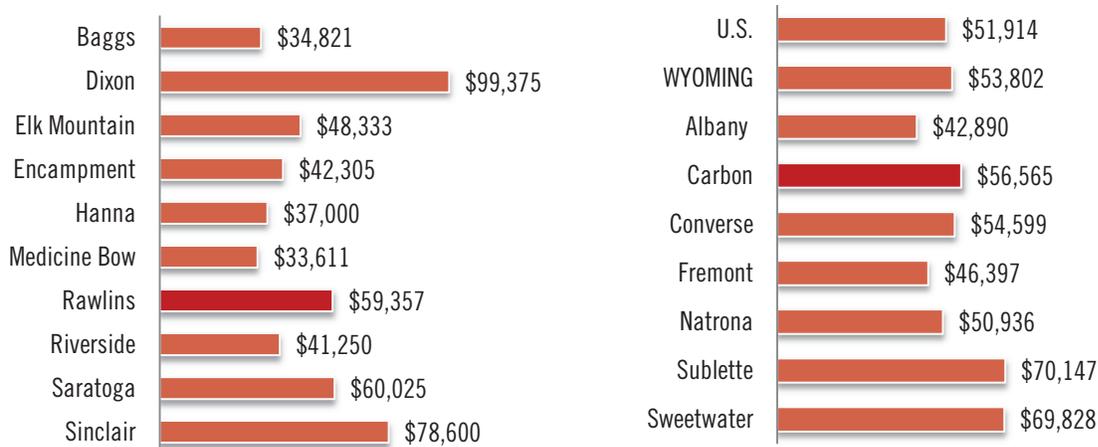
FIGURE 9: PER CAPITA INCOME COMPARISON



Source: ACS 2006-2010

The median household income in Rawlins is \$59,357 – higher than the national average of \$51,914.

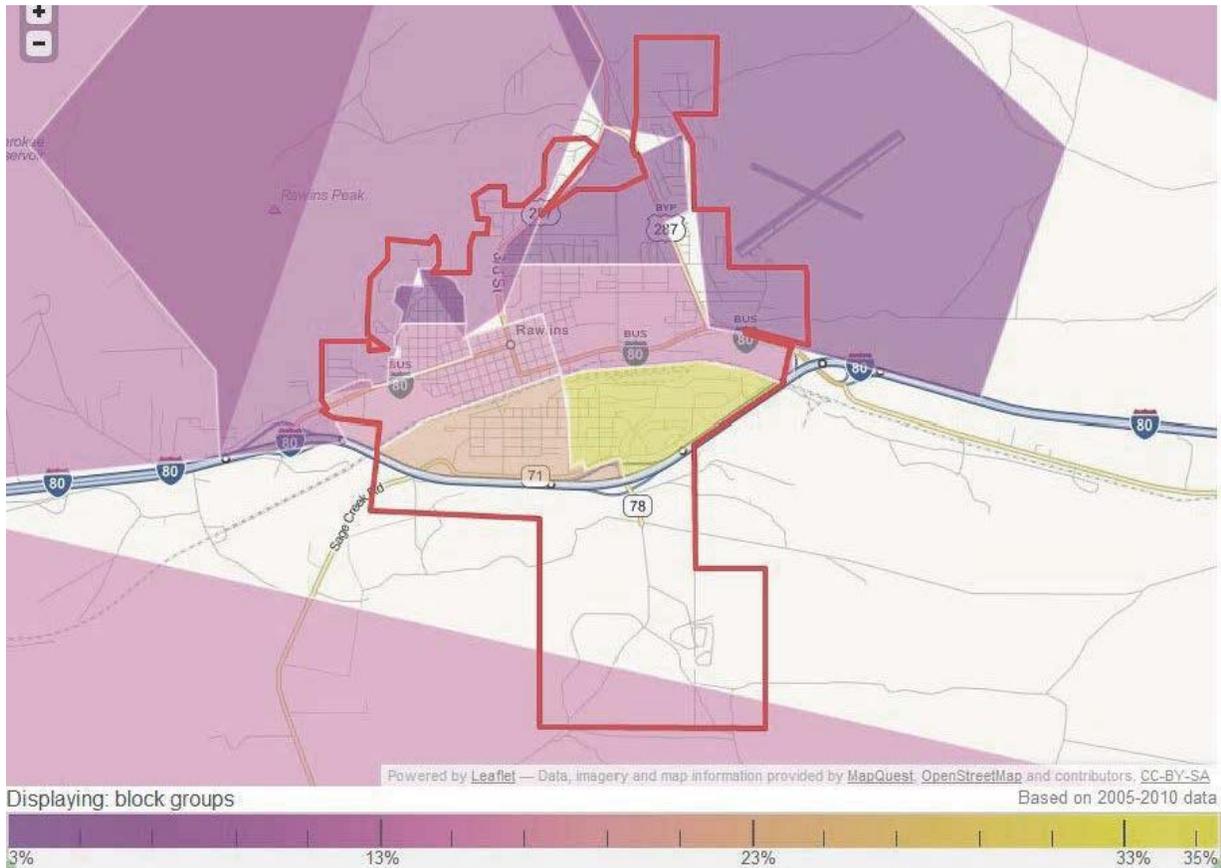
FIGURE 10: MEDIAN HOUSEHOLD INCOME COMPARISON



Source: ACS 2006-2010

There is great disparity in incomes in Rawlins, with the southern part of the City generally having lower incomes than the northern part.

FIGURE 11: PERCENT OF RESIDENTS LIVING BELOW THE POVERTY LEVEL BY BLOCK GROUP

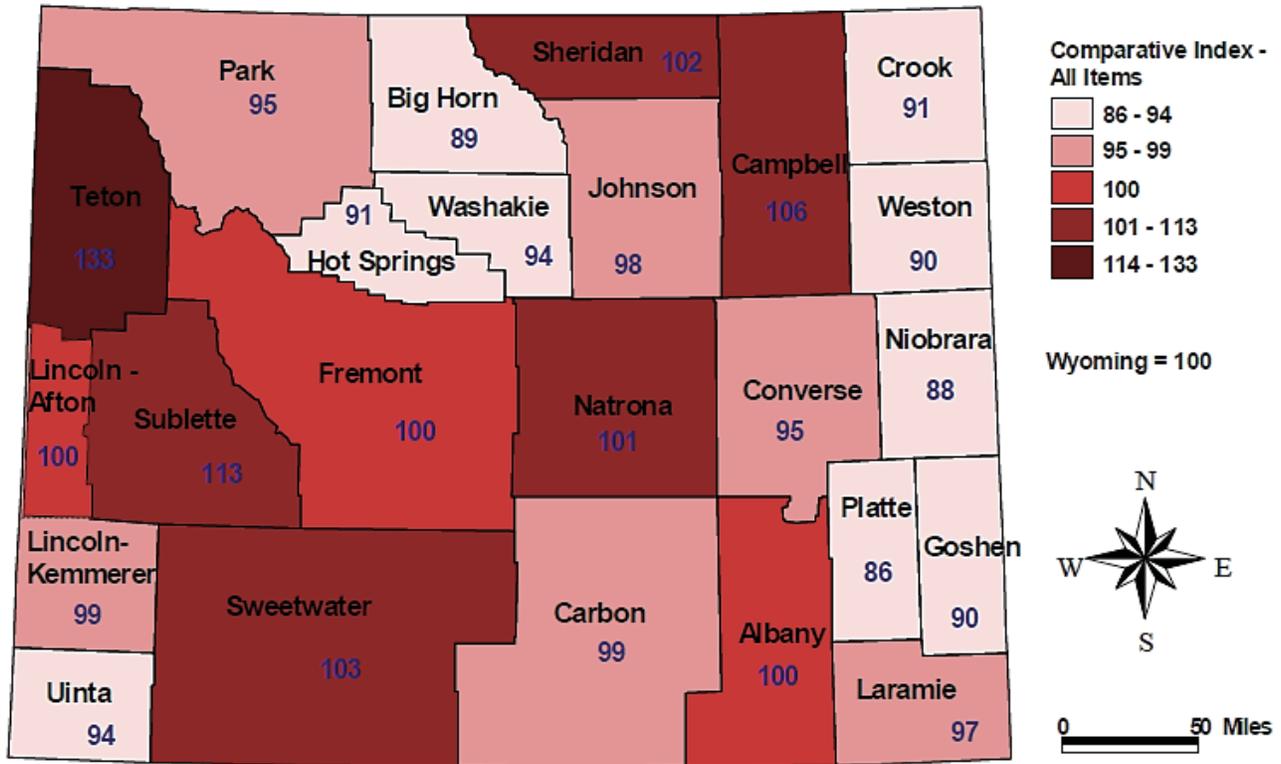


Source: American Community Survey 2009

COST OF LIVING

The following data from the Wyoming Economic Analysis Division provides perspective on the cost of living in Rawlins compared to the rest of the State. These comparisons are made on a mix of goods that impact daily life and normal expenses. If an area's index number is lower than 100, that area or that category of good is less expensive than the State average. On the other hand, if it is higher than 100, then that category is more expensive and might mean it is more costly to live there – thus requiring higher salaries to support a higher quality of life. Although the data shows the indexes on a county level, only Rawlins was surveyed within Carbon County; thus these numbers show Rawlins accurately compared to the State.

FIGURE 12: WYOMING COMPARATIVE COST OF LIVING INDEX – FOURTH QUARTER 2011



Source: Wyoming Economic Analysis Division, "Food Prices Propel Inflation for the Fourth Quarter of 2011," April 3, 2012

Overall, Rawlins has a score of 99, meaning it is comparable to the State average. The next table breaks down these results by categories of goods.

TABLE 9: WYOMING COMPARATIVE COST OF LIVING INDEX – 4TH QUARTER 2011 (STATEWIDE AVERAGE =100)

County	Index Number by Category:						
	All Items	Food	Housing	Apparel	Transportation	Medical	Recreation and Personal Care
Teton	133	108	159	113	104	105	115
Sublette	113	97	123	123	102	108	105
Campbell	106	104	112	102	101	101	100
Sweetwater	102	108	100	128	99	94	103
Sheridan	102	108	100	128	99	94	103
Natrona	101	99	103	100	101	98	98
Albany	100	101	102	101	97	96	97
Lincoln-	100	96	100	98	99	96	112

Index Number by Category:							
Afton							
Fremont	100	97	97	99	103	113	102
Carbon	99	98	98	99	102	101	101
Lincoln-Kemmerer	99	92	101	93	100	91	100
Johnson	98	105	92	121	100	97	104
Laramie	97	100	98	86	97	92	96
Park	95	102	88	104	100	103	98
Converse	95	97	90	86	101	98	102
Washakie	94	100	80	114	104	112	113
Uinta	94	92	90	90	98	103	97
Crook	91	100	81	113	102	97	96
Hot Springs	91	100	77	99	104	112	105
Weston	90	97	81	97	100	103	94
Goshen	90	93	78	116	100	108	96
Big Horn	89	108	73	105	101	99	98
Niobrara	88	97	75	100	101	99	104
Platte	86	97	69	96	103	101	100

Source: Wyoming Economic Analysis Division, "Food Prices Propel Inflation for the Fourth Quarter of 2011", April 3, 2012

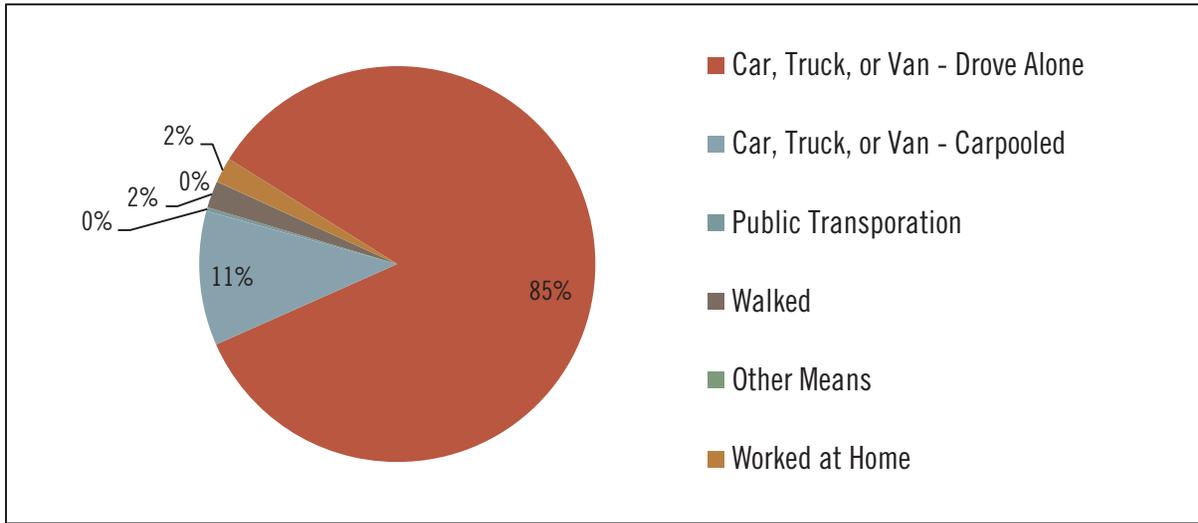
Rawlins remains fairly average in each area of living costs, even when broken apart into categories. The highest average cost of living is in transportation, with an index of 102. Following behind that score is recreation, personal care and medical costs at 101. Housing is slightly below the State average, and is discussed in more detail in the Housing section of this report. However, rental prices have been rising rapidly in the last five years which may have a significant impact on the housing costs and overall cost of living within Rawlins.

COMMUTING TO WORK

The average travel time to work for Rawlins residents is low at 13.8 minutes,⁹ suggesting that most do not go far out of the City to work. In comparison, the national average is 25.2 minutes. The pie-chart below illustrates the mode of transportation that Rawlins residents are using to get to work.

⁹ ACS 2006-2010

FIGURE 13: TRANSPORTATION MODE – COMMUTING



Source: ACS 2006-2010

The Wyoming Department of Workforces Services also compiles commuting data by county.¹⁰ They show low rates of both inflow and outflow commuting for Carbon County compared to other counties in the state, with net flow being positive into the County. These flow rates also seem to be very constant over the last several years. There are more people commuting into the County to work there than are leaving the county to work, which is a positive indication for future economic growth since it shows the area as a regional economic hub.

EMPLOYMENT

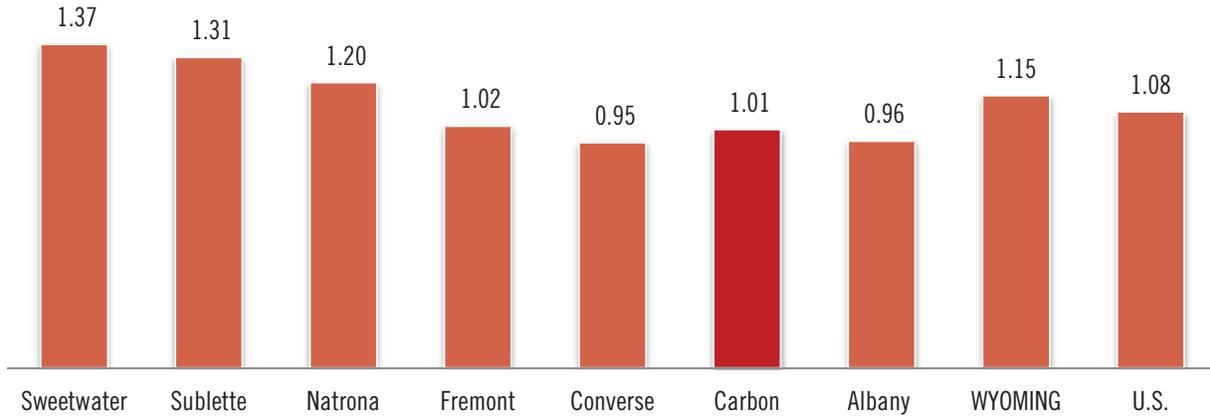
The current unemployment rate in Carbon County is 5.4 percent,¹¹ which is good compared to the stagnant national rate of 8.2 percent and slightly under the Wyoming rate of 5.5 percent.

The number of jobs per household is a standard measure of economic activity and opportunity in a community. As of first quarter 2010, Carbon County had roughly one job for every household. This was only slightly lower than the State and National average, although lower when compared with neighboring counties.

¹⁰ Workforce Services Annual Report 2010

¹¹ <http://www.wyomingatwork.com/vosnet/lmi/area/areasummary.aspx?session=areadetail&geo=5604000007>

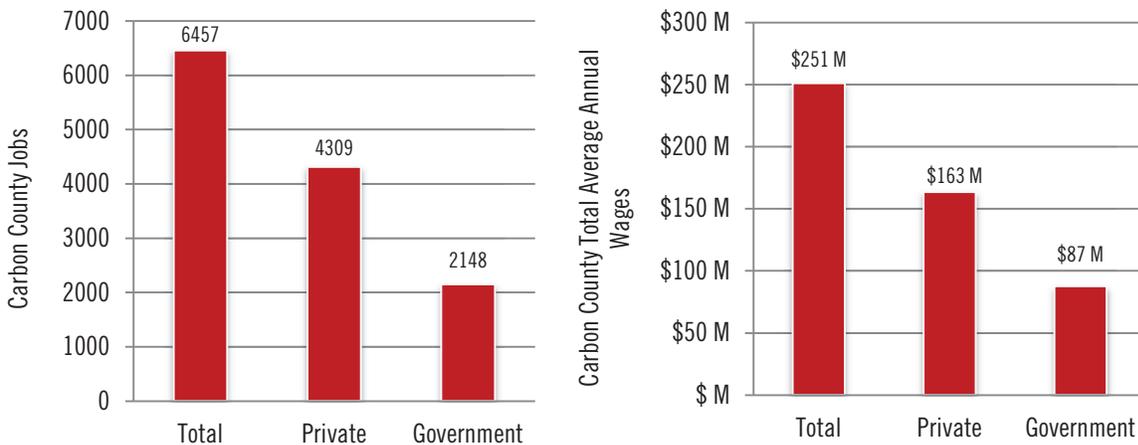
FIGURE 14: REGIONAL COMPARISON OF JOBS PER HOUSEHOLD, Q1 2010



Source: 2010 Census & Wyoming DWS

Interviews with local residents suggest that many households have family members (spouse, partner, etc.) who would like to work but cannot find attractive employment. The numbers above confirm this in Carbon County, with a lower number of jobs per household when compared to the State and surrounding counties. The job ratio in Carbon County may also be artificially high, especially when compared to the national average, because it does not include the temporary worker population, yet it does include their jobs.

FIGURE 15: EMPLOYMENT CHARACTERISTICS OF CARBON COUNTY, Q1 2011

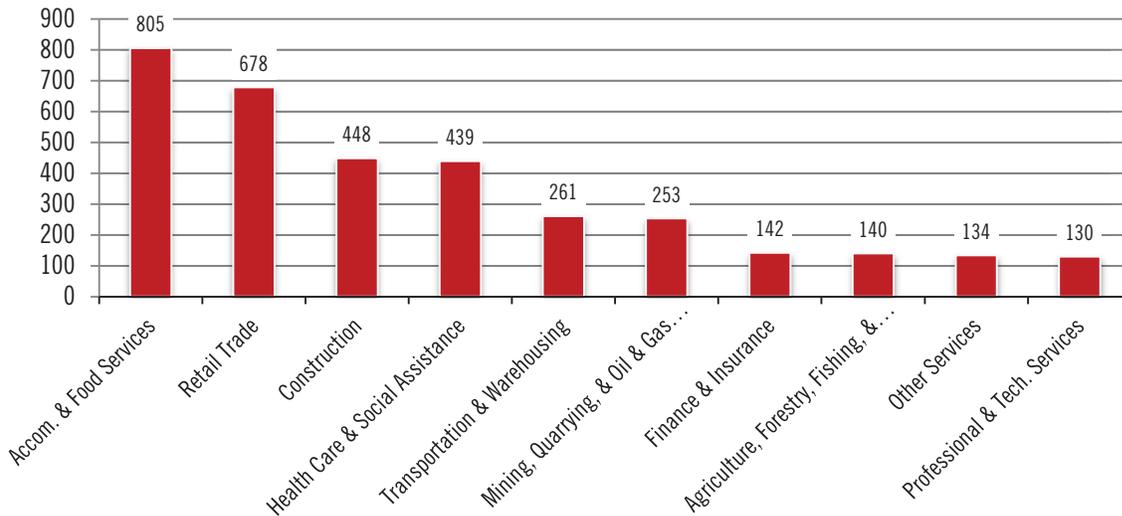


Source: Wyoming Dept. of Workforce Services¹²

The largest industry sector for employment is the lodging industry, followed by retail trade. Construction jobs are high and are associated with the mining industry. Only the permanent, ongoing jobs in mining are shown in that category in the figures below.

¹² http://doe.state.wy.us/lmi/11Q1_QCEW/11q1t120.htm

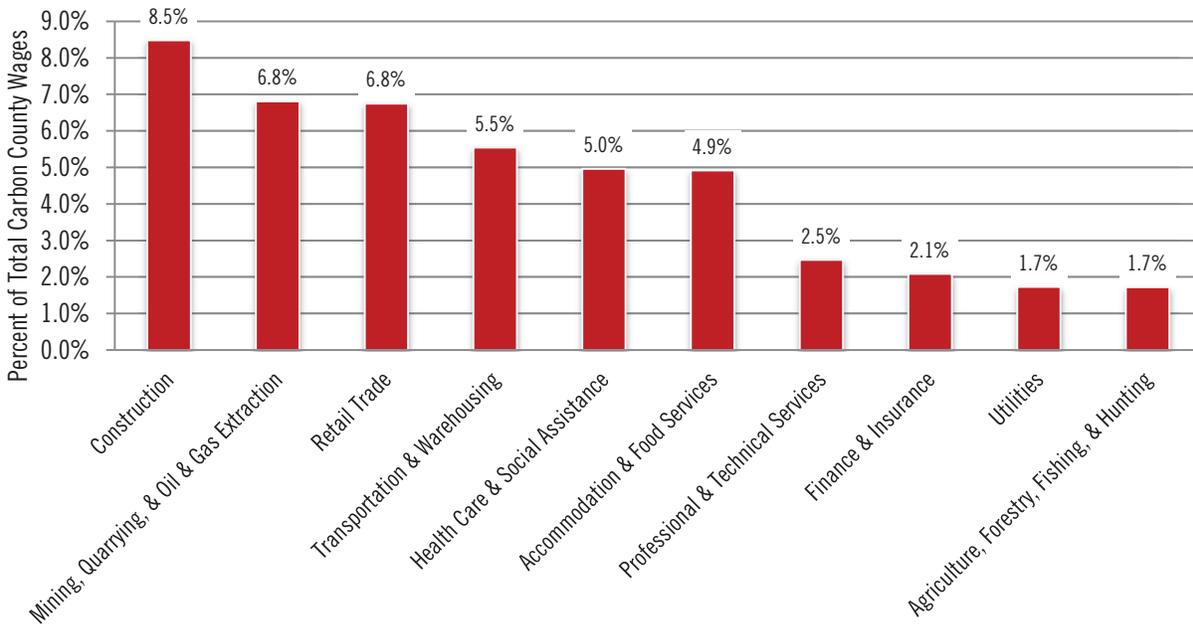
FIGURE 16: TOP TEN SUBSECTORS BY EMPLOYMENT FOR CARBON COUNTY, Q1 2011



Source: Wyoming DWS¹³

The impact of the mining industry is best shown in the table below that indicates that the top two sectors, for total wages paid, are construction (much of it associated with energy) and “mining, quarrying and oil & gas extraction.”

FIGURE 17: TOP TEN SUBSECTORS BY PERCENT CONTRIBUTION TO TOTAL CARBON COUNTY WAGES, Q1-11



Source: Wyoming DWS¹⁴

¹³ http://doe.state.wy.us/lmi/11Q1_QCEW/11q1t120.htm

¹⁴ http://doe.state.wy.us/lmi/11Q1_QCEW/11q1t120.htm

TABLE 10: AVERAGE WEEKLY WAGES BY INDUSTRY – CARBON COUNTY

Employment Sector	11Q1 Average Weekly Wage
Agriculture, Forestry, Fishing, & Hunting	\$594
Mining, Quarrying, & Oil & Gas Extraction	\$1,295
Utilities	\$1,210
Construction	\$911
Wholesale Trade	\$924
Retail Trade	\$479
Transportation & Warehousing	\$1,022
Information	\$559
Finance & Insurance	\$709
Real Estate & Rental & Leasing	\$468
Professional & Technical Services	\$915
Management of Companies & Enterprises	\$1,206
Administrative & Waste Services	\$594
Health Care & Social Assistance	\$544
Arts, Entertainment, & Recreation	\$383
Accommodation & Food Services	\$294
Other Services, Except Public Administration	\$486
Total Government	\$781
Carbon County Total	\$745

Source: Wyoming Department of Workforce Services, QCEW, First Quarter 2011

Location quotient analysis is conducted in order to show how a local area compares nationally in terms of employment in various industry sectors. For example, a location quotient greater than one means that a particular industry sector plays a relatively larger role in this community than it does in the nation as a whole.¹⁵ As the table below demonstrates, Carbon County is particularly strong in construction, hospitality, utilities and mining. In contrast, Carbon County is relatively weak in services – information, technical, business, professional, health, education, etc.

TABLE 11: LOCATION QUOTIENT ANALYSIS

Location-Quotient Analysis								
Private Industry by Super Sector	U.S. TOTAL		Wyoming		Carbon County		Carbon County Location Quotient	
	Jobs	% of Total	Jobs	% of Total	Jobs	% of Total	~ Nation	~ State
Base Industry: Total, all industries	106,201,232	100.0%	205,226	100.0%	4,641	100.0%	1.00	1.00
Natural resources and mining	1,798,592	1.7%	27,507	13.4%	ND	ND	ND	ND

¹⁵ The calculation is made by comparing the ratio of industry employment in the local area to national industry employment. Employment in a local area industry sector is divided by total employment in the local area and the ratio is then compared to the ratio of industry employment nationwide to total employment nationwide.

Location-Quotient Analysis								
Construction	5,489,499	5.2%	22,352	10.9%	550	11.9%	2.29	1.09
Manufacturing	11,487,496	10.8%	8,713	4.2%	ND	ND	ND	ND
Trade, transportation, and utilities	24,442,734	23.0%	49,301	24.0%	1,070	23.1%	1.00	0.96
Information	2,703,886	2.5%	3,881	1.9%	82	1.8%	0.69	0.93
Financial activities	7,401,812	7.0%	10,792	5.3%	228	4.9%	0.70	0.93
Professional and business services	16,712,011	15.7%	17,192	8.4%	220	4.7%	0.30	0.57
Education and health services	18,656,160	17.6%	24,940	12.2%	474	10.2%	0.58	0.84
Leisure and hospitality	13,006,814	12.2%	32,622	15.9%	952	20.5%	1.67	1.29
Other services	4,349,563	4.1%	7,926	3.9%	138	3.0%	0.73	0.77
Unclassified	152,667	0.1%	NC	NC	NC	NC	NC	NC
Private Industry by Sector	Jobs	% of Total	Jobs	% of Total	Jobs	% of Total	> Nation	> State
NAICS 11 Agriculture, forestry, fishing and hunting	1,146,962	1.1%	2,409	1.2%	ND	ND	ND	ND
NAICS 21 Mining, quarrying, and oil and gas extraction	651,631	0.6%	25,098	12.2%	281	6.1%	9.87	0.50
NAICS 22 Utilities	551,287	0.5%	2,484	1.2%	71	1.5%	2.95	1.26
NAICS 23 Construction	5,489,499	5.2%	22,352	10.9%	550	11.9%	2.29	1.09
NAICS 31-33 Manufacturing	11,487,496	10.8%	8,713	4.2%	ND	ND	ND	ND
NAICS 42 Wholesale trade	5,466,463	5.1%	8,460	4.1%	48	1.0%	0.20	0.25
NAICS 44-45 Retail trade	14,481,324	13.6%	29,491	14.4%	711	15.3%	1.12	1.07
NAICS 54 Professional and technical services	7,457,913	7.0%	9,116	4.4%	109	2.3%	0.33	0.53
NAICS 55 Management of companies and enterprises	1,854,778	1.7%	857	0.4%	19	0.4%	0.23	0.98
NAICS 56 Administrative and waste services	7,399,320	7.0%	7,219	3.5%	92	2.0%	0.28	0.56
NAICS 61 Educational services	2,460,150	2.3%	1,716	0.8%	ND	ND	ND	ND
NAICS 62 Health care and social assistance	16,196,009	15.3%	23,224	11.3%	ND	ND	ND	ND
NAICS 48-49 Transportation and warehousing	3,943,659	3.7%	8,866	4.3%	240	5.2%	1.39	1.20
NAICS 51 Information	2,703,886	2.5%	3,881	1.9%	82	1.8%	0.69	0.93
NAICS 52 Finance and insurance	5,486,241	5.2%	6,836	3.3%	147	3.2%	0.61	0.95
NAICS 53 Real estate and rental and leasing	1,915,571	1.8%	3,956	1.9%	81	1.7%	0.97	0.91
NAICS 71 Arts, entertainment, and recreation	1,903,739	1.8%	2,738	1.3%	89	1.9%	1.07	1.44
NAICS 72 Accommodation and food services	11,103,075	10.5%	29,885	14.6%	863	18.6%	1.78	1.28
NAICS 81 Other services, except public administration	4,349,563	4.1%	7,926	3.9%	138	3.0%	0.73	0.77
NAICS 99 Unclassified	152,667	0.1%	NC	NC	NC	NC	NC	NC

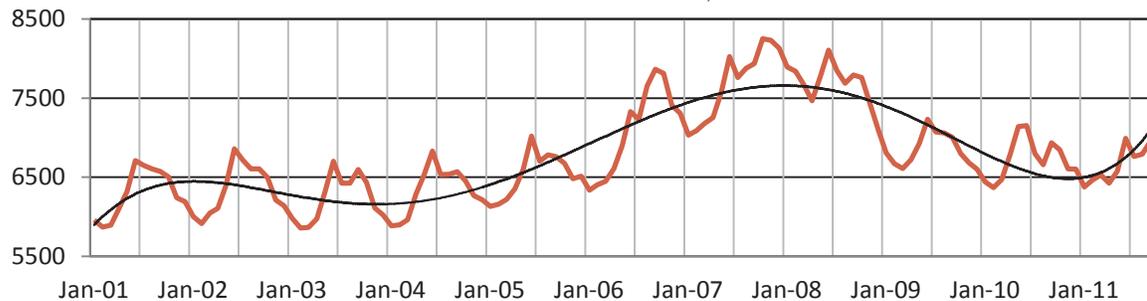
(ND) Not Disclosable, (NC) Not Calculable, the data does not exist or it is zero

Source: BLS

The location quotient analysis is a “snapshot in time” that varies significantly in some sectors based on general economic conditions and, especially in Carbon County, on prices of the energy and extraction industries.

Employment in Carbon County peaked at over 8,000 at the end of 2007, but has dropped since then. However, Carbon County has many potential energy projects that could generate significant employment and impacts in the area.

FIGURE 18: CARBON COUNTY TOTAL EMPLOYMENT, 2001 TO 2011



Source: Bureau of Labor Statistics¹⁶

Carbon County's economy is closely related to the situation of the energy industry. Annual employment rates are highest during summer months when natural resource extraction and construction industries operate at their annual highs. This seasonal employment poses challenges to the City and to business owners who must provide goods and services year-round, yet respond to peak seasons as well.

Occupational Needs

Based on discussions with Carbon County Economic Development Corporation and Wyoming Workforce Services, the following are the challenges in filling occupational needs in Carbon County, along with those occupations that are most needed.

- Positions are hard to fill in Rawlins due to wage competition with the oil/gas industry:
 - Fast-food/Restaurant Services
 - Housekeeping at Hotels
 - City Market
- Highly Skilled Positions are also difficult to fill:
 - Physicians – General and Specialty
 - Engineers for oil/gas

¹⁶ <http://www.bls.gov/data/#employment>

SUSTAINABLE DEVELOPMENT

This section of the report is designed to evaluate Rawlins competitive position in the marketplace and to evaluate how it might increase its economic sustainability, especially in terms of the ups and downs of the economic cycle.

Sustainable economic development builds on economic infrastructure: workforce, roads, transportation, broadband, affordable housing, water, sewer, land accessibility, etc. It is also dependent on government policies that affect taxes, fees, permitting processes, zoning and other regulations.

An evaluation of the strengths and weaknesses of Rawlins in economic terms is as follows:

TABLE 12: ECONOMIC STRENGTHS AND WEAKNESSES

Category/Infrastructure	Strengths	Weaknesses	Remedy/Action
Water	Sufficient water rights for economic development	Water distribution infrastructure is aging and needs to be extended to potential business park sites as well as areas that could be annexed into the City	Water master plan to identify key projects, including cost to extend water infrastructure to proposed business park sites
Highway Access	I-80 is major corridor through the US with good traffic counts and visibility	Gateways to Rawlins do not pull in traffic	Improve gateways and entrances to the City – add signage and landscaping
Rail	Major rail line passes through area	Lack of spurs and loading points that would attract businesses dependent on rail service	Establish rail spurs at a business park, most likely at east end by Sinclair
Airport	Runway length and weight-bearing capacity	No commercial or charter service available; line of sight issue with VOR navigation; terminal needed	Resolve navigation issue; hire aviation consultant to facilitate commercial air service; hire fixed base operator (FBO)
WY Income Tax Structure	No WY corporate and personal income tax; property taxes are low	Low property tax revenues makes cities heavily reliant on sales revenues	No remedy suggested

Category/Infrastructure	Strengths	Weaknesses	Remedy/Action
WY Sales Tax Structure	Sales revenues returned to the County where they originate	Rawlins provides services for a large portion of the County yet only receives sales tax revenues for its portion of the population; Rawlins also houses a large number of temporary construction employees yet receives no sales tax distribution from them	
Tax Increment	Codified in WY law	No precedent for use of TIF in WY; property tax revenues are low, and therefore increment is not substantial	Further explore the use of this tool in order to compete with other states. Educate taxing entities about the advantages of working in partnership to use this tool and increase taxable value for all entities.
Business Park	Potential for location near major infrastructure — I-80, rail and fiber	Lack of shovel ready land for business park development	Develop business parks within City boundaries
Commercial	Historic buildings in DT	Many buildings are in need of renovation	Market available commercial space - see DT Plan; apply for grants to improve the facades and visual appearance of these buildings
Commercial	Vacant land by east entrance to City	Transportation access to properties is confusing	Promote high sales-tax generating development at this site
Residential	Potential for infill development	Lack of large areas of vacant residential land within City boundaries	Annex additional land at north and west edges of City

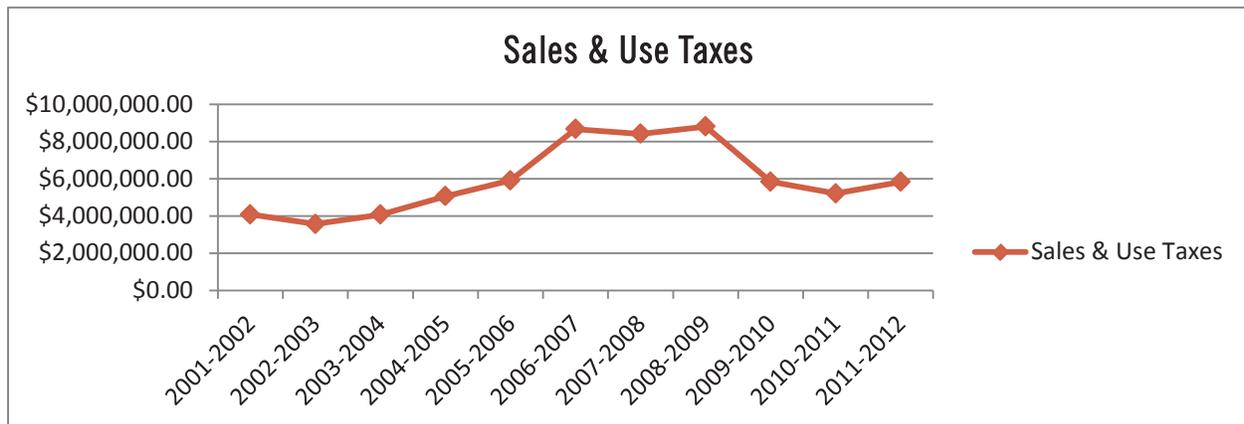
Sustainable development is desirable because it provides more stability in revenues from year to year. Recently, the City has seen significant fluctuations in its general fund revenues. From the 2008-2009 fiscal year to the 2010-2011 fiscal year, sales and use tax revenues declined by over 41 percent. However, 2012 saw a rebound with revenues increasing nearly 12 percent over 2010-2011 and by three percent over 2009-2010 levels. However, revenues for the last fiscal year were still 34 percent below 2008-2009 levels.

TABLE 13: RAWLINS GENERAL FUND REVENUE HISTORY

Account Title	Fiscal YTD 2007-2008	Fiscal YTD 2008-2009	Fiscal YTD 2009-2010	Fiscal YTD 2010-2011	Fiscal YTD 2011-2012
Sales Tax	\$3,387,939	\$3,835,603	\$2,437,593	\$2,241,116	\$2,512,147
County Option Sales Tax	\$3,190,902	\$3,603,312	\$2,307,120	\$2,135,029	\$2,385,684
Sales Tax-Out of State	\$444,571	\$503,314	\$319,865	\$293,697	\$329,648
Total Sales Taxes	\$7,023,412	\$7,942,229	\$5,064,578	\$4,669,842	\$5,227,480

Source: City of Rawlins Finance Department

FIGURE 19: TOTAL SALES TAXES



Source: City of Rawlins

With a more balanced economic base, the City will be less susceptible to economic fluctuations and downturns. Sales taxes are the single biggest component of the City’s budget. Therefore, what can be done to make sales tax revenues more stable? Sales tax revenues are distributed as follows: 1) first, to counties based on total sales in the County; and 2) second, to communities based on their proportionate share of the total population in the County. Therefore, the following events will benefit Rawlins: 1) increase in Rawlins’ population; and 2) increase in taxable sales throughout Carbon County.

The following are strategies designed to increase population and taxable sales in Rawlins.

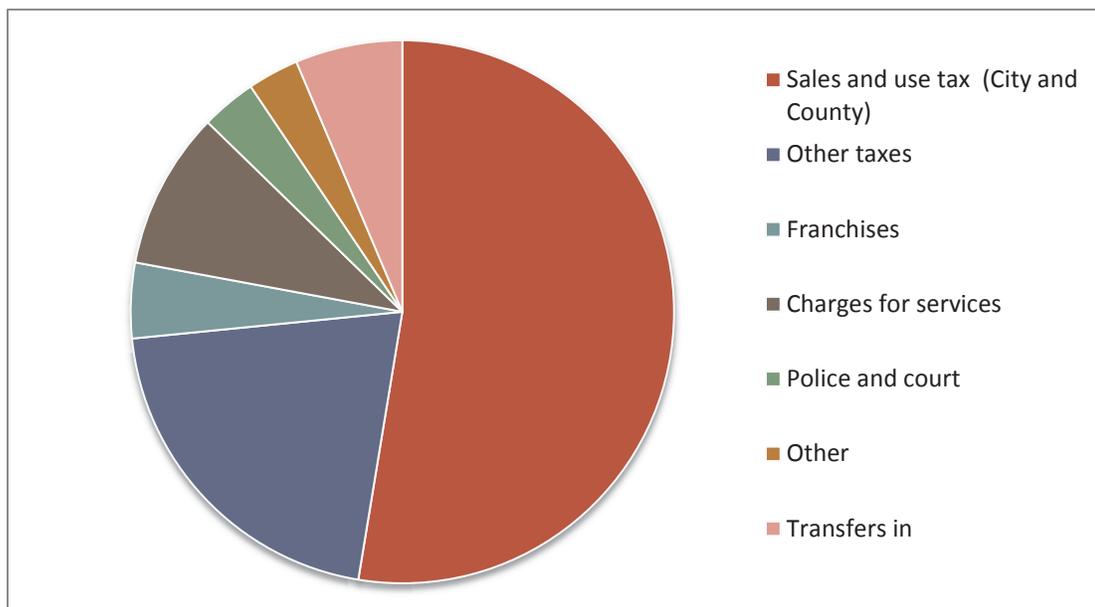
- Increase housing development, housing attractiveness and product mix inside City boundaries. Annex additional land if necessary. Redevelop existing deteriorating properties with higher density development. Sales tax revenues are distributed based on population and it is therefore critical to increase the population living in Rawlins.
- Promote tourism to increase sales tax revenues. Capitalize on the traffic on I-80 by attracting more visitors to the City for recreational, historic, and other amenities.
- Expand the selection of retail goods in order to stem the leakage of purchases currently being made outside of County boundaries.
- Several people interviewed suggested that major energy developers, such as PCW, should require contractors to obtain local sales and use tax licenses so that revenues will be generated within the County.

Interviews also suggest a lack of daycare facilities. Research demonstrates that affordable and secure child care arrangements and work/family support workshops contribute to a more productive workforce and help resolve work-family conflict. The average working parent in America misses five to nine days of work per year because of child care problems. This costs U.S. businesses \$3 billion a year in lost productivity. The high cost of child care is a major factor in work/family conflict. It stretches families financially or can force them to go without consistent care and as a result rely on last minute and inadequate arrangements.¹⁷ Quality child care is also important as a social and educational resource in developing the human capital development of the community. Investments in developing child care will not only help build economic stability now, but will provide a better base in the long term as those children grow up and begin contributing to the local economy themselves. For these reasons, it is suggested that the City pursue a Child Care/Senior Care Grant through the Wyoming Business Council.

ANALYSIS OF REVENUES

Rawlins is heavily dependent on sales and use tax revenues, which make up 54 percent of its general fund revenues. When all taxes (cigarette, gas, state, federal mineral royalties and severance taxes) are included, they account for 73 percent of the total budget. Property taxes are not significant and account for only three percent of revenues.

FIGURE 20: RAWLINS FY 2011-2012 BUDGET REVENUE SOURCES



¹⁷ http://economicdevelopmentandchildcare.org/documents/technical_assistance/work_life/impact1.pdf

RETAIL MARKET ANALYSIS

A retail market analysis is conducted for the purpose of identifying business development opportunities that will: 1) better serve the needs of Rawlins residents and attract more residents to live in the community; and 2) expand the sales tax base of the community.

Opportunities in the retail market have been identified by first looking at historic sales trends and then by analyzing current sales capture rates within the County (sometimes referred to as a sales “leakage” or “gap” analysis).

HISTORIC SALES TAX TRENDS

Similar to Rawlins, Carbon County has seen a rapid decrease in sales from 2009 to 2011. Based on the four percent sales tax collections, sales have decreased from over \$25 million in 2009 to just under \$15 million in 2011 – a 41 percent decrease.

TABLE 14: CARBON COUNTY SALES TAX COLLECTIONS

Industry (NAICS)	FY 2009	FY 2009	FY 2010	FY 2010	FY 2011	FY 2011
	Total Taxes (\$)	4% Taxes (\$)	Total Taxes (\$)	4% Taxes (\$)	Total Taxes (\$)	4% Taxes (\$)
Agr, Forestry, Fishing, & Hunting	19,560	15,452	17,400	11,600	20,159	13,439
Mining	9,676,369	7,616,910	4,762,194	3,179,787	4,113,637	2,744,260
Utilities	1,018,432	798,278	1,339,544	893,029	1,267,933	845,289
Construction	773,371	611,757	704,772	476,259	349,615	225,680
Manufacturing	961,980	766,552	1,006,822	671,397	350,441	232,807
Wholesale Trade	3,125,260	2,482,264	2,317,400	1,544,915	2,445,751	1,629,774
Retail Trade	8,525,866	6,730,469	6,421,826	4,288,335	6,521,857	4,348,050
Transportation & Warehousing	61,102	48,581	36,425	24,754	24,824	16,549
Information	525,781	409,379	730,818	487,261	858,516	572,374
Financial Activities	1,986,746	1,568,627	1,226,590	817,930	1,171,606	781,068
Professional & Business Services	123,867	98,065	82,795	55,228	141,747	94,498
Educational & Health Services	4,835	3,861	4,445	2,959	3,517	2,345
Leisure & Hospitality	2,793,220	2,197,283	2,794,210	1,864,575	2,785,682	1,858,517
Other Services	917,687	726,588	877,773	584,945	847,171	565,120
Public Administration	1,409,260	1,101,069	1,378,917	919,278	1,473,038	982,025
Total	\$31,923,336	\$25,175,135	\$23,701,931	\$15,822,251	\$22,375,494	\$14,911,794

Source: Wyoming Department of Administration and Information

When compared to other counties statewide, Carbon County has seen the greatest decrease of any other county. In second place is Lincoln County with a relatively distant 29 percent decrease. Only six counties, of the 23

counties statewide, saw increased sales during the 2009-2011 time period; 17 counties saw decreases, with 11 counties experiencing double-digit decreases. Statewide, sales declined by twelve percent.

TABLE 15: SALES TAX COLLECTIONS

	Percent Change 2009 – 2011 Based on Total Taxes	Percent Change 2009 – 2011 Based on the 4% Tax
Wyoming	-13%	-12%
Albany	-8%	-4%
Big Horn	21%	21%
Campbell	-13%	-10%
Carbon	-30%	-41%
Converse	2%	2%
Crook	2%	2%
Fremont	-15%	-6%
Goshen	7%	12%
Hot Springs	-2%	-2%
Johnson	-13%	-13%
Laramie	19%	11%
Lincoln	-29%	-29%
Natrona	-12%	-12%
Niobrara	0%	-4%
Park	-22%	-2%
Platte	20%	6%
Sheridan	-20%	-20%
Sublette	-22%	-22%
Sweetwater	-32%	-21%
Teton	-9%	-9%
Uinta	-14%	-13%
Washakie	-13%	-12%
Weston	-8%	-8%

Source: Wyoming Department of Administration and Information

Some industry categories have experienced greater declines than others, with all categories except for utilities and information seeing decreases. Overall, sales have decreased by 41 percent, with the retail category showing a decline of 35 percent over the two-year period. Rawlins has seen a rebound in fiscal year 2012 data, but detailed fiscal year 2012 data was not available at the time of this report.

TABLE 16: CARBON COUNTY SALES BY INDUSTRY CATEGORY

Industry (NAICS)	% Change 2009 to 2011
Agriculture, Forestry, Fishing, & Hunting	-13%
Mining	-64%
Utilities	6%
Construction	-63%
Manufacturing	-70%
Wholesale Trade	-34%
Retail Trade	-35%
Transportation & Warehousing	-66%
Information	40%
Financial Activities	-50%
Professional & Business Services	-4%
Educational & Health Services	-39%
Leisure & Hospitality	-15%
Other Services	-22%
Public Administration	-11%
AVERAGE	-41%

Source: Wyoming Department of Administration and Information



SALES CAPTURE RATE ANALYSIS (“LEAKAGE” OR “GAP”)

Sales leakage is calculated by taking the average per capita sales in Wyoming and comparing to the average per capita sales in Carbon County. The difference is the “gap” or the “leakage.” Average sales per capita in Wyoming are based on total sales divided by the population statewide. Sales per capita in Carbon and surrounding counties are estimated based on the total sales in each county divided by their respective populations. Where per capita sales are lower than the statewide average, we can conclude that there is some “leakage” of resident expenditures as they make these purchases outside of County boundaries. When sales per capita are higher in a particular category than statewide, we can conclude that customers from outside the County are attracted to the County to make these purchases.

TABLE 17: 2010 SALES PER CAPITA IN CARBON COUNTY COMPARED TO WYOMING AND SURROUNDING COUNTIES

	Wyoming	Albany	Carbon	Natrona	Sweetwater
<i>Population</i>	564,460	36,438	15,853	75,507	43,621
Auto Dealers and Parts	\$851	\$633	\$678	\$888	\$1,036
Gasoline Stations	\$705	\$406	\$1,168	\$443	\$1,258
Home Furniture and Furnishings	\$240	\$189	\$148	\$291	\$310
Electronic and Appliance Stores	\$436	\$415	\$163	\$733	\$251
Building Material and Garden Supplies	\$1,582	\$687	\$1,631	\$1,862	\$2,077
Grocery and Food Stores	\$394	\$315	\$626	\$268	\$427
Liquor Stores	\$191	\$194	\$139	\$194	\$169
Clothing and Shoe Stores	\$287	\$191	\$72	\$433	\$433
Department Stores	\$333	\$198	\$200	\$582	\$307
General Merchandise Stores	\$1,538	\$1,590	\$704	\$2,526	\$1,443
Miscellaneous Retail	\$1,561	\$854	\$1,234	\$1,532	\$2,085
Lodging Services	\$825	\$452	\$1,366	\$419	\$620
Eating and Drinking Places	\$1,546	\$1,449	\$1,508	\$1,602	\$1,529
TOTAL	\$10,487	\$7,574	\$9,636	\$11,773	\$11,945

Source: Wyoming Department of Revenue; ZBPF

Capture rates are calculated by taking the average sales per capita in each County and dividing by the average sales per capita in Wyoming. Overall, the capture rate in Carbon County is fairly good – 92 percent of total purchases. However, it is evident that this number is driven by the large number of travelers coming through the area on I-80. Gasoline sales are 166 percent of the statewide average and lodging services are 165 percent. On the other hand, the Carbon County has very low capture rates in businesses that provide everyday amenities for its residents – clothing and shoe stores (25%); general merchandise stores (46%); electronic and appliance stores (37%); and department stores (60%).

TABLE 18: 2010 CAPTURE RATES IN CARBON AND SURROUNDING COUNTIES

	Retail Categories			
	Albany	Carbon	Natrona	Sweetwater
<i>Population</i>	36,438	15,853	75,507	43,621
Auto Dealers and Parts	74%	80%	104%	122%
Gasoline Stations	58%	166%	63%	178%
Home Furniture and Furnishings	79%	62%	121%	129%
Electronic and Appliance Stores	95%	37%	168%	58%
Building Material and Garden Supplies	43%	103%	118%	131%
Grocery and Food Stores	80%	159%	68%	108%
Liquor Stores	102%	73%	102%	89%
Clothing and Shoe Stores	66%	25%	151%	151%
Department Stores	60%	60%	175%	92%
General Merchandise Stores	103%	46%	164%	94%
Miscellaneous Retail	55%	79%	98%	134%
Lodging Services	55%	165%	51%	75%
Eating and Drinking Places	94%	98%	104%	99%
TOTAL	72%	92%	112%	114%

Source: Wyoming Department of Revenue; ZBPF

BUYING POWER ANALYSIS AND SUPPORTABLE ESTABLISHMENTS

A buying power analysis is used to estimate the amount of supportable sales in the local area. Based on the above data, we have calculated the leakage per capita in Carbon County (i.e., the difference between Wyoming expenditures per capita and Carbon County expenditures per capita) and multiplied the leakage per capita by the population of Carbon County. The next step is to estimate the amount of supportable square footage, based on the leakage. This analysis assumes a range of \$220 - \$320 per square foot,¹⁸ resulting in approximately 106,000 to 154,000 retail square feet.¹⁹ Not all of this space would be recaptured in Carbon County as residents will always leave the area for some purchases, for entertainment, to “get away,” etc., but a good portion of it can be recaptured in the local area. Also, Rawlins, as the county seat, and the major city in the county and due to its proximity on I-80, should be able to capture the lion’s share of the leakage. We therefore estimate that Rawlins should be able to capture at least 67 percent of the lost sales, supporting 71,000 to 103,000 additional retail square feet.

¹⁸ The Downtown Plan Rawlins September 2010

¹⁹ Note that this analysis only includes square footage for businesses with taxable sales. It does not include professional office space, wholesale or industrial development, etc.)

TABLE 19: BUYING POWER ANALYSIS

	Wyoming	Carbon County	Carbon County	Carbon County	Supportable SF	Supportable SF
	Expenditures per Capita	Expenditures per Capita	Leakage Per Capita	Total Leakage	\$320.00	\$220.00
<i>Population</i>	<i>564,460</i>	<i>15,853</i>				
Auto Dealers and Parts	\$851	\$678	\$173	\$2,735,319	8,548	12,433
Gasoline Stations	\$705	\$1,168	-\$464	\$0	-	-
Home Furniture and Furnishings	\$240	\$148	\$92	\$1,457,852	4,556	6,627
Electronic and Appliance Stores	\$436	\$163	\$273	\$4,330,436	13,533	19,684
Building Material and Garden Supplies	\$1,582	\$1,631	-\$49	\$0	-	-
Grocery and Food Stores	\$394	\$626	-\$232	\$0	-	-
Liquor Stores	\$191	\$139	\$51	\$813,725	2,543	3,699
Clothing and Shoe Stores	\$287	\$72	\$215	\$3,404,747	10,640	15,476
Department Stores	\$333	\$200	\$133	\$2,113,141	6,604	9,605
General Merchandise Stores	\$1,538	\$704	\$834	\$13,219,734	41,312	60,090
Miscellaneous Retail	\$1,561	\$1,234	\$326	\$5,174,477	16,170	23,520
Lodging Services	\$825	\$1,366	-\$540	\$0	-	-
Eating and Drinking Places	\$1,546	\$1,508	\$38	\$609,204	1,904	2,769
TOTAL	\$10,487	\$9,636		\$33,858,635	105,808	153,903
67% Capture Rate				\$22,685,285	70,892	103,115

Calculated based on the following population figures: State of Wyoming, 564,460; Carbon County, 15,583.

As the table above demonstrates, the greatest potential is for a general merchandise store, also known as “big box” stores. With the addition of a large general merchandise store, Rawlins would enlarge its market area and attract customers from an even greater distance. This would benefit other, existing stores in Rawlins.

Clothing and shoe stores are also in short supply and residents have mentioned the need for greater selection in this area. However, due to the size of the market area, the selection and inventory that can be offered will be restricted. Therefore, it is imperative that there be a good understanding of consumer needs and preferences. A community/consumer survey could be conducted that would provide valuable information in this regard.

In order to more specifically identify business development opportunities, the following analysis calculates the total buying power by Rawlins and by Carbon County residents, based on the average purchases per capita by residents in Wyoming.

TABLE 20: CURRENT BUYING POWER ANALYSIS

Retail Category	WY per Capita	Rawlins Buying Power	Carbon County Buying Power
Auto Dealers and Parts	\$851	\$7,876,608	\$13,486,107
Gasoline Stations	\$705	\$6,525,575	\$11,172,907
Home Furniture and Furnishings	\$240	\$2,218,368	\$3,798,228
Electronic and Appliance Stores	\$436	\$4,035,668	\$6,909,758
Building Material and Garden Supplies	\$1,582	\$14,643,599	\$25,072,360
Grocery and Food Stores	\$394	\$3,645,166	\$6,241,151
Liquor Stores	\$191	\$1,764,527	\$3,021,174
Clothing and Shoe Stores	\$287	\$2,657,370	\$4,549,874
Department Stores	\$333	\$3,082,828	\$5,278,331
General Merchandise Stores	\$1,538	\$14,239,043	\$24,379,690
Miscellaneous Retail	\$1,561	\$14,449,103	\$24,739,349
Lodging Services	\$825	\$7,641,484	\$13,083,535
Eating and Drinking Places	\$1,546	\$14,317,149	\$24,513,421
TOTAL	\$10,487	\$97,096,491	\$166,245,887

Assumes the following population figures: Rawlins, 9,259; Carbon County, 15,853.



How much square footage and how many establishments can the existing buying power support? This depends on the size of each establishment. The following table shows the average square footage of individual businesses by retail type, as well as their average sales per square foot. This analysis only includes the buying power of local residents and is understated because of the increased buying power, in particular categories, from the construction workers in the energy industry and from the travelers along I-80. For example, the County is currently capturing 166 percent of gasoline sales. That means the number of supportable gas stations is closer to 1.5 and two times what is supported by local residents alone.

The table below shows the number of establishments supported by Rawlins' residents. It does not show the number of establishments that could be supported in Rawlins (i.e., not all purchases by residents will be captured in Rawlins). It is assumed that most of the supportable establishments by Carbon County residents would be located in Rawlins. **Therefore, the number of supportable establishments within Rawlins itself is closer to, but somewhat less than, the totals shown in the last column of the table below.** However, it is important to note that there will always be some leakage as residents leave the County for other purposes, including "just to get away." This leakage will be most pronounced in categories like clothing stores, and larger one-time purchases such as furniture, appliances and electronics.

TABLE 21: ANALYSIS OF CURRENT SUPPORTABLE ESTABLISHMENTS

Retail Categories	Average GLA in Square Feet	Average Sales per Square Foot	Avg Buying Power Required per Establishment	Rawlins Supportable Establishments	Carbon County Supportable Establishments
Auto Dealers and Parts	6,944	\$172.90	\$1,200,618	7	11
Gasoline Stations	3,175	\$1,321.30	\$4,195,128	2	3
Home Furniture and Furnishings	7,696	\$156.40	\$1,203,654	2	3
Electronic and Appliance Stores	2,500	\$302.20	\$755,500	5	9
Building Material and Garden Supplies	NA	\$144.44	NA	NA	NA
Grocery and Food Stores	52,376	\$485.75	\$25,441,642	0	0
Liquor Stores	3,074	\$396.27	\$1,218,134	1	2
Clothing and Shoe Stores	4,000	\$89.97	\$359,880	7	13
Department Stores	24,982	\$149.50	\$3,734,809	1	1
General Merchandise Stores	88,026	\$243.25	\$21,412,325	1	1
Miscellaneous Retail	2,133	\$205.64	\$438,630	33	56
Lodging Services	NA	NA	NA	NA	NA
Eating and Drinking Places	2,400	\$250.00	\$600,000	24	41

Source: Urban Land Institute, *Dollars & Cents of Shopping Centers/The SCORE 2008*

RETAIL SITE SELECTION CRITERIA

It will be difficult for Rawlins, without significant population growth, to attract national chain restaurants. However, the City could potentially attract a big box store.

TABLE 22: REAL ESTATE SITE SELECTION CRITERIA FOR SELECTED GENERAL MERCHANDISE STORES

Company	Preferred Tenants	Store Size Square Feet	Traffic Counts (ADT)	Trade Area Population*
CVS	Stand Alone	12,900	High Traffic	18,000
Kohl's	Freestanding, but close to mall or similar	87,410	30,000	
Super Target		150,000	Regional access, freeway visibility preferred	100,000
Costco		145,000	Regional access, freeway visibility preferred	
Wal-Mart Supercenter/Sam's Club		150,000	Regional access, freeway visibility preferred	
<i>*3 – 5 mile radius</i>				

TABLE 23: REAL ESTATE SITE SELECTION CRITERIA FOR SELECTED RESTAURANTS

Company	Store Size Square Feet	Traffic Counts (ADT)	Trade Area Population*	Median Income
Olive Garden	8,500		100,000	\$65,000
Red Lobster	5,880	30,000	125,000	
Longhorn Steakhouse	6,242	30,000		
T.G.I Friday's	7,600	35,000	150,000	\$50,000
Golden Corral	11,661	30,000	90,000	
IHOP	5,000	28,000	115,000	
<i>*3 – 5 mile radius</i>				

Rawlins should encourage business incubation and capitalize on the Rainbow Te-ton Entrepreneurial Center. One specific business type that would do well in shared facilities is a kitchen incubator. Culinary incubators drive new start-up businesses, for which, without a health department licensed commercial kitchen, could not legally produce their food. In addition to producing food, commercial kitchens can be used to shoot TV shows, teach cooking classes, host food tastings, and other events. These shared kitchen facilities provide kitchen and storage space (at low cost rent) for producers of food products. Kitchen incubators are found across the United States and have been a source of economic development that benefit local gardeners, farmers, caterers, event planners, bakers, food carts, startups, aspiring home chefs, and even established restaurant or food businesses as they develop new brands or serve as expert consultants.

Business incubators have grown a wide variety of businesses and an incubator in Rawlins could include anything from food products to technology to historic crafts to social networks. Rawlins has a unique western heritage and the business incubation center could be an opportunity to encourage the arts in the community. It would also prove a draw to tourists who could attend art classes or see demonstration workshops of western crafts, such as weaving, leatherwork, bronze casting, etc.

RETENTION AND EXPANSION

The retention of existing businesses, as well as the expansion of these companies, is a first priority in economic development. These businesses that are currently operating in a community have already made an investment in the local area and demonstrated a commitment to the community, as well as having shown some level of success. In order to support existing businesses, many communities have formed some type of Business Expansion and Retention (BEAR) program or offered services under another program, such as a Main Street program.

Services commonly offered under business expansion and retention programs include the following:

- Joint marketing opportunities
- Demographic and market profiles
- Sales data, including sales leakage information
- Opportunities to participate in special events in downtown, or a particular area, to attract people into the area
- Educational workshops on a variety of topics, including small business accounting, tax reporting, window displays, obtaining financing, etc.

Many BEAR programs are set up with teams of professionals who represent various agencies, governmental entities, and a variety of skillsets. They may approach businesses individually or take surveys in order to better understand needs. The most successful of these programs generally have a very hands-on, one-on-one approach in working with local businesses, and offer customized solutions to individual business challenges.

The resources to support business retention can be costly for communities to fund. Therefore, some programs, such as the Carbon/Emery Counties BEAR program in eastern Utah, is funded annually through the State Legislature. By demonstrating the value of such a program (i.e., number of visits, jobs retained or added, construction investment made, etc.), a convincing case can be made for funding support.

Other programs are funded by the businesses themselves. A business improvement district (BID) could be created where local businesses agree to pay a nominal fee annually to receive a specified set of services. The downside to BIDs is that funding is uncertain from year to year.

DOWNTOWN

DOWNTOWN DESIGN AND DEVELOPMENT

Downtown Rawlins has been undergoing a renaissance in recent years, in part due to the input and guidance of a dedicated corps of advocates, and as part of the implementation of targeted projects identified through recent planning studies. Perhaps the most important of these is the *Rawlins Downtown Plan (2010)*, which was prepared by RDG Planning and Design to provide economic development and design ideas to improve the historic Downtown Development Area. Beginning at Maple Street to the north, the downtown area stretches to Front Street in the south, and from 8th Street in the west to Colorado Street in the east. There is also interest in mixed-use development including second-story residential development. This would encourage 24/7 economic vitality and invigoration. The general vision of the plan is to transform a struggling downtown into a thriving economic zone and a dynamic place for business and other activities.

The *Rawlins Downtown Plan (2010)* breaks downtown Rawlins into distinct districts which are laid out in a modified “pinwheel” fashion, each district addressing specific characteristics and providing a conceptual framework for making downtown improvements. The downtown districts identified in the plan include the Railroad District on the west edge of the area, transitioning to the Traditional Main Street and Civic and Services Districts as one proceeds east. Two Highway 30 Corridor Districts are centered along Spruce and Cedar Streets, with two downtown Neighborhood Districts completing the picture.

As part of the planning effort, historic buildings were assessed, with numerous structures noted as contributing, strongly contributing or providing landmark structure status to the area. Downtown street systems and parking supply were documented and analyzed, and specific ideas for improving access to downtown and parking were part of the study.



SUMMARY OF THE DOWNTOWN DEVELOPMENT CONCEPT

The *Rawlins Downtown Plan (2010)* presents a vision “based on markets, existing projects and priorities, and community-wide needs.” Four main components are laid out for meeting the vision, as follows:

- The Framework – A conceptual diagram that illustrates the relationship between the Railside Corridor, Downtown Core and Civic & Services District.
- Major Project Areas – A detailed plan drawing illustrating individual projects within the downtown study area that are earmarked for transforming the area. Examples of some key projects addressed include the Depot, Depot Park, Depot Plaza, Main Street Park and the Post Office Parking.
- Connections – This section of the Plan describes connections that link features of downtown together and to the rest of the City. These include both physical and institutional connections. Examples of key connections include South Rawlins Neighborhood Connections, Wyoming Frontier Prison and Museum Connections, and Institutional Connections between the City of Rawlins, Carbon County and the Downtown Development Association.
- Policies – Detailed policies have been developed for addressing a wide range of downtown conditions, such as Retail and Service Development, Historic Preservation and Renovation, Housing Development, and a Downtown Public Art Program.

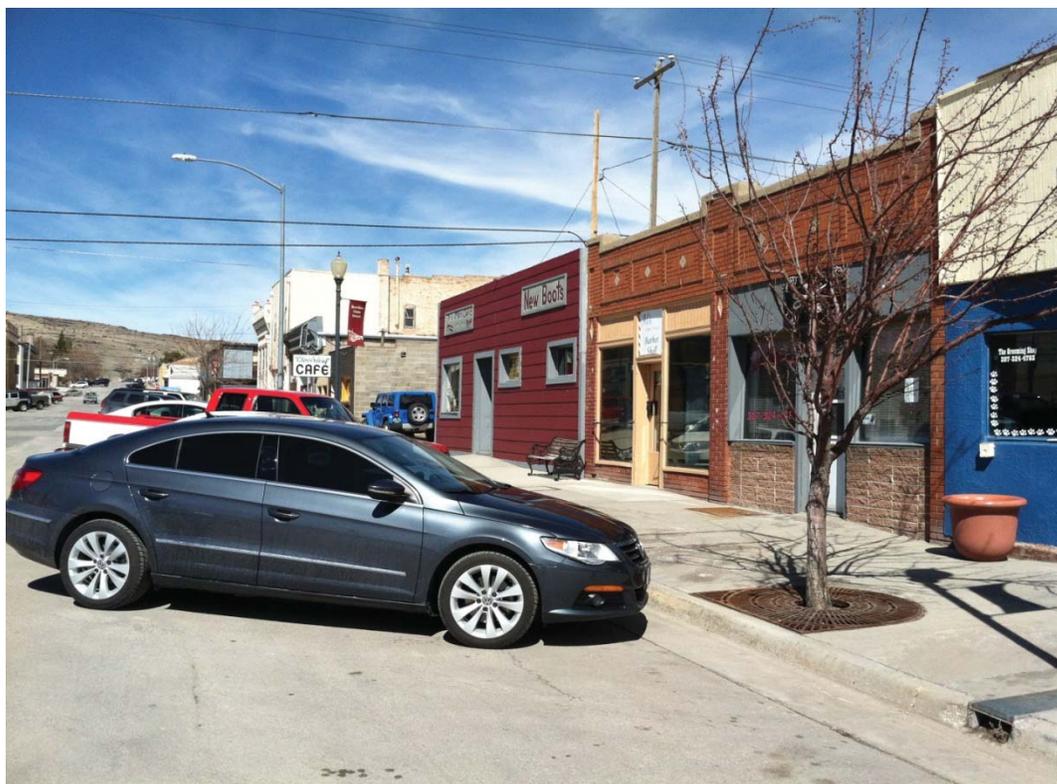
The final component of the Downtown Development Plan addresses Implementation. In addition to providing an Opinion of Probable Cost for executing the various projects described, this section addresses a range of structural frameworks that can help ensure the plan is successfully implemented over time, such as the following:

- Continued support and strengthening of the Downtown Development Authority/ Main Street;
- Implementation of a Downtown Special Improvement District;
- Establishment of a Business-Ready Community Grant and Loan Program; and
- Pursuit of various grant, loan, bond, development and financing programs.

SUMMARY OF DOWNTOWN ECONOMIC DEVELOPMENT PROJECTS

In contrast to other parts of the City, Downtown Rawlins appears to be going through a distinct transformation in recent years. Buildings are being renovated, streets and parks are being developed, and new businesses are moving into the area to replace vacant and underused properties. Much of this change is the result of physical changes to the downtown area, and the renewed sense that downtown is “turning the tide.” Applying a similar approach to other economic districts of the City could result in similar positive change, assuming that the nurturing support and wise leadership provided in downtown Rawlins can be replicated elsewhere in the City.

Downtown Rawlins



INDUSTRIAL GROWTH OPPORTUNITIES

The energy industry is the driving force of Rawlins' economy with significant impacts on other industry sectors. ExxonMobil recently published an outlook report that projects that global energy demand will be about 30 percent higher in the year 2040 than it was in 2010. And, although alternative energy sources will grow, oil and gas are projected to make up the majority of the global energy mix through the year 2050.²⁰ This bodes well for Rawlins in terms of continuing industry growth, but it also reminds the community that it will continue to deal with increasing and fluctuating demand for services.

Trends in the energy industry, as applicable to Rawlins, are shown in the following table:

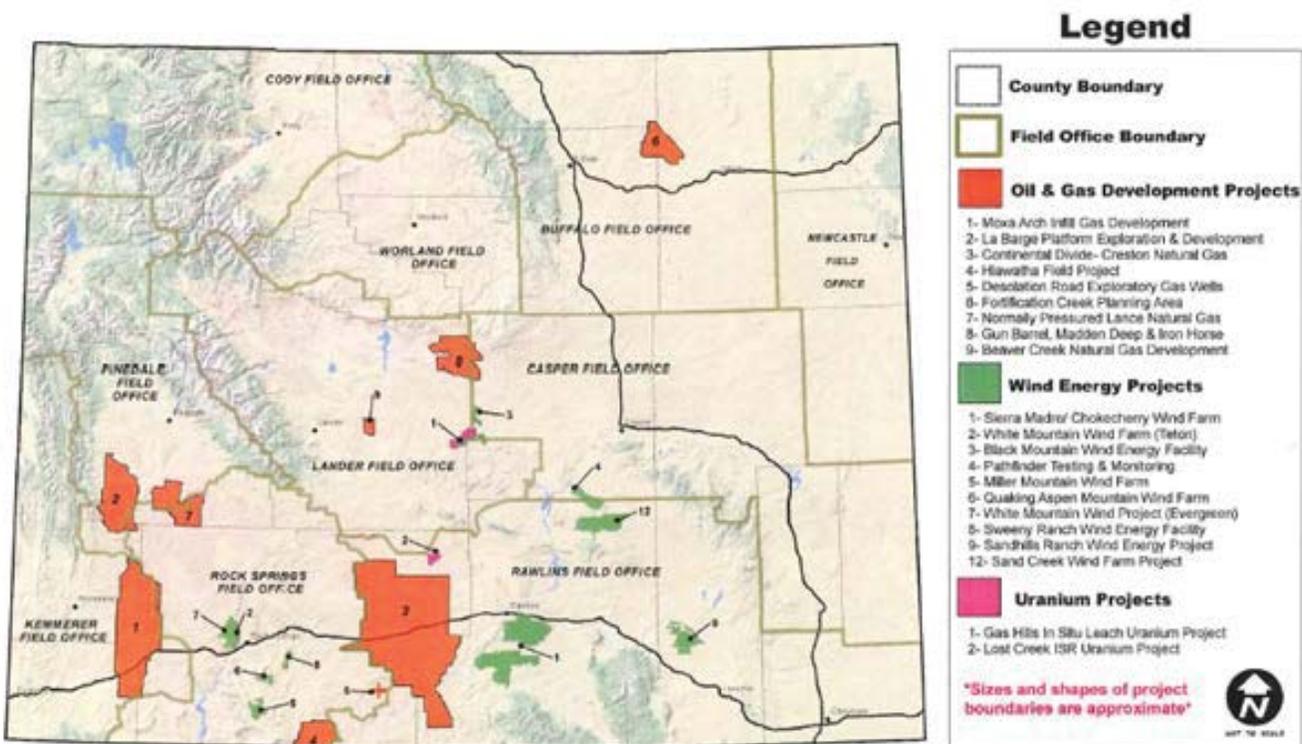
TABLE 24: SWOT ANALYSIS OF THE ENERGY INDUSTRY (INCLUDING EMERGING TRENDS)

Category	Strengths	Weaknesses	Opportunities	Threats	Emerging Trends
Wind	Clean, affordable electricity; Made in USA;	Construction numbers are high; permanent employee numbers are low	Associated manufacturing facilities; 24,000 jobs created in last 4 years - another 400,000 jobs by 2030 (AWEA)	Elimination of PTC (production tax credit) could result in a 50% reduction of jobs nationwide (Navigant Consulting)	The US has added over 35% of all new generating capacity worldwide over the past 5 years
	US wind power represents more than 20% of the installed wind power worldwide	Visual impacts to landscape	Lack of wind generation related manufacturing facilities in WY and Intermountain Region	Uncertainty with federal policies	
	Over 470 manufacturing facilities in the US make parts			Low natural gas prices	
Natural Gas	No seasonality in natural gas production	According to a 2010 report published by Pacific Northwest National Laboratory for the U.S. Department of Energy, costs for installing a CNG fueling station can range from	Cost has declined with discovery of more shale deposits, horizontal drilling techniques and hydraulic fracturing		US Energy Information Agency predicts natural gas consumption to rise by 17% in 2012

²⁰ Deloitte 2012 Outlook on Oil and Gas

Category	Strengths	Weaknesses	Opportunities	Threats	Emerging Trends
		\$10,000 to \$2 million depending on the size and application.			
	Sufficient known supply for 100 years for US		Closest natural gas filling stations are in Rock Springs, Baggs and Cheyenne		Current low prices may discourage further development
	Natural gas plants are relatively cheap to build				
Coal	Potential for rapidly-growing overseas market	Coal's share of the US energy market is shrinking (especially hard hitting in WY and W VA)	Overseas markets	Low price of natural gas	US Energy Information Agency predicts coal use in the US to decline by 10% in 2012
	WY produces 40% of US coal	Older coal plants in US are shutting down		Uncertainties with federal regulations	Coal exports to rapidly-developing Asia are surging - increasing by more than 50% since 2006 and 20% between 2010 and 2011
	New terminals in OR and WA should provide an export outlet for WY coal	Current export terminals are not large enough to meet US export demand		EPA regulations regarding greenhouse gas emissions, mercury and other toxins	

FIGURE 21: BLM WYOMING NEPA PROJECTS, APRIL 2011



Source: Carbon County

Many energy-related projects have been proposed. However, many of them are stalled due to obtaining required permits and approvals, market conditions in the energy industry, lack of financing, etc. As this study has progressed, the projections for employees (both temporary and permanent) at these projects has changed multiple times, as well as construction start dates, construction timeframes, etc. Recognizing that these projections are a moving target, all projections shown in the table are within the “range” of impacts associated with all known projects, along with more specific data for those projects deemed likely to move forward within the next few years.

TABLE 25: SUMMARY OF POTENTIAL ENERGY PROJECTS

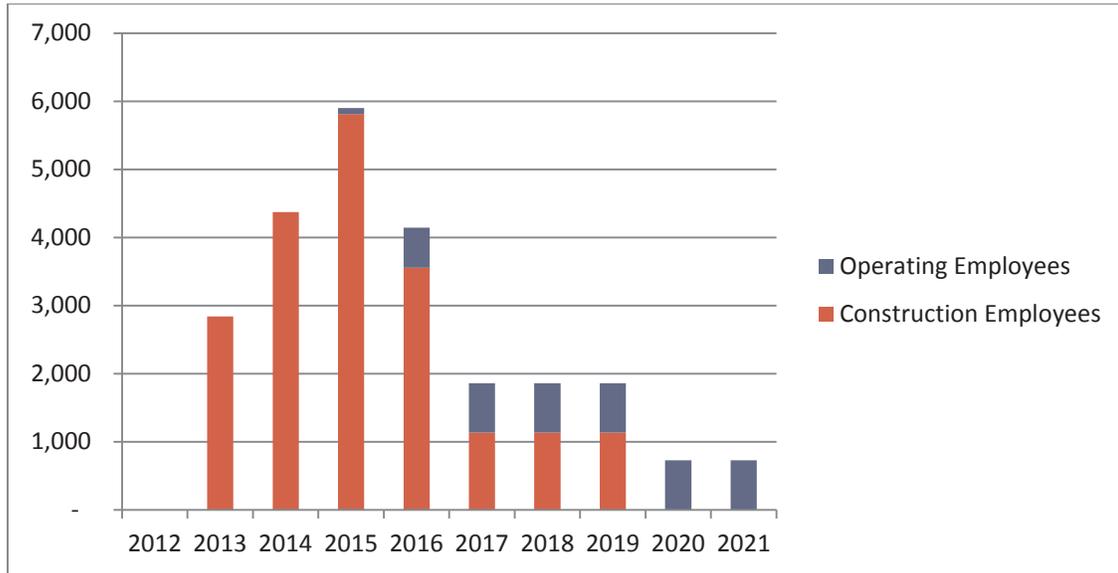
SUMMARY OF POTENTIAL ENERGY PROJECTS	
COAL	
DKRW, partner with Arch Coal	DKRW, partner with Arch Coal
WIND ENERGY	
Chokecherry/Sierra Madre (CCSM)	Power Company Wyoming
Middlewood	BLM-WD-SGCA

SUMMARY OF POTENTIAL ENERGY PROJECTS	
Dry Creek	<i>BLM-WD-SGCA</i>
Sand Creek	<i>Shirley Basin, early BLM</i>
Simpson Ridge – Horizon	<i>Possibly abandoned</i>
Simpson Ridge - Terra Moya	<i>No BLM-SGCA</i>
Whirlwind Pathfinder	<i>SW Rawlins, early BLM</i>
NATURAL GAS	
Continental Divide – Creston	<i>BP+others-BLM, DEIS Summer 2012, 15-yr construction, 30-50 yr operation</i>
Atlantic Rim – Anadarko	
Desolation Road\Flats	<i>Sweetwater, BLM withdrawn</i>
Seminole Road	
South Baggs	
URANIUM	
Lost Creek Uranium Project	<i>UR Energy</i>
In-Situ Recovery	<i>Gas Hills Leach</i>
ELECTRIC TRANSMISSION	
Gateway West-Glenrock to Boise	<i>Rocky Mtn Power</i>
	<i>Segment 1W - Windstar to Aeolus</i>
	<i>Segment 2 - Aeolus to Creston</i>
	<i>Segment 3 - Creston to Bridger</i>
Gateway South	
TransWest Express	
Overland	
Duke	

Potential Cumulative Industry Impacts

Based on conversations with local industry and government officials, construction employment is expected to surge in 2014 and 2015, largely due to the DKRW coal project near Medicine Bow and the Sierra Madre/Chokecherry wind project. There is significant public frustration with DKRW which has encountered many delays and is dealing with difficulties in obtaining financing. Smaller projects (in terms of employment) that have been included in the projections include the in situ uranium mining recovery project and construction of the Gateway West TransWest Express transmission line.

FIGURE 22: PROJECTED EMPLOYMENT FROM ENERGY INDUSTRY PROJECTS



A breakdown of these impacts is based on information provided through review of EIS documents in various stages of the environmental study process, interviews with industry officials, and the input of Carbon County staff and officials, as well as other consultants who are familiar with Rawlins and the energy industry in Wyoming.

TABLE 26: CUMULATIVE EMPLOYMENT IMPACTS – ENERGY INDUSTRY

	2013	2014	2015	2016	2017	2018	2019	2020	2021
COAL									
<i>DKRW, partner with Arch Coal</i>									
Construction employees	935	2,157	2,307	400					
Permanent Employees				450	450	450	450	450	450
WIND ENERGY									
<i>Chokecherry/Sierra Madre (CCSM)</i>									
Construction employees	1,644	1,403	1,184	1,215					
Permanent employees					136	136	136	136	136
OIL AND GAS*									
<i>Continental Divide - Creston*</i>									
			1,008	1,008	1,008	1,008	1,008		
<i>Seminole Road*</i>									
			126	126	126	126	126		

	2013	2014	2015	2016	2017	2018	2019	2020	2021
URANIUM									
<i>Lost Creek Uranium Project</i>									
Construction employees		94	94						
Permanent employees			89	89	89	89	89	89	89
ELECTRICITY TRANSMISSION*									
<i>Gateway West-Glenrock to Boise</i>									
<i>Segment 1W - Windstar to Aeolus</i>									
		81							
<i>Segment 2 - Aeolus to Creston</i>									
	146	146							
<i>Segment 3 - Creston to Bridger</i>									
	116	116							
<i>Transwest Express</i>									
Line construction		375	863	375					
Line operations				15	15	15	15	15	15
Terminal construction			230	430					
Terminal operations				38	38	38	38	38	38
EMPLOYMENT SUMMARY									
Construction Employees	2,841	4,372	5,812	3,554	1,134	1,134	1,134	-	-
Operating Employees	-	-	89	592	728	728	728	728	728

*Oil and gas, as well as electricity transmission employees shown in this table are all construction employees. These projects do not show the increase and decline curves common for oil and gas; start date is very uncertain; estimated that only a portion of these workers would live in Carbon County.

To what extent will this temporary employment impact Rawlins? Many of these employees will not be able to live in Rawlins due to the lack of suitable housing. Lodging in hotels and motels will be difficult to obtain, and rent rates will likely increase.

COAL

DKRW

The DKRW development is an advanced fuels greenfield mine mouth coal to gas project. This concept is based on the assumption that the world is running out of conventional fuels. According to DKRW, given the high price

of oil today, converting coal to gas is a profitable endeavor. Ninety percent of revenues will come from the sale of gas. Other bi-products, such as CO₂ can be sold through enhanced oil recovery programs (EOR).

The DKRW project is estimated to bring in \$1.4 billion in severance taxes over the life of the project. 95% of CO₂ will be available for EOR. International negotiations now taking place will determine the schedule for this project, which is slated to have 400-450 permanent jobs when completed.

There has been a great deal of uncertainty surrounding the DKRW project which appears, at least at the present time, to be stalled for many reasons, including a lack of financing. How successful are other projects of this type around the world? South Africa has been producing coal-derived fuels since 1955 and is one of the few commercial coal to liquids projects in operation today. Not only are CTL fuels used in cars and other vehicles, South African energy company Sasol's CTL fuels also have approval to be utilized in commercial jets. Currently around 30% of the country's gasoline and diesel needs are produced from indigenous coal.

CTL is particularly suited to countries that rely heavily on oil imports and that have large domestic reserves of coal. There are a number of CTL projects around the world at various stages of development. Liquid fuels from coal can be delivered from an existing pump at a filling station via existing distribution infrastructure and used, without modification, in the current vehicle fleet.²¹

Interest in building coal-to-liquid (CTL) plants is highest when oil prices are high and countries are concerned about the cost of their oil imports. When the price of oil drops, the economics of CTL plants are less favorable.

WIND ENERGY

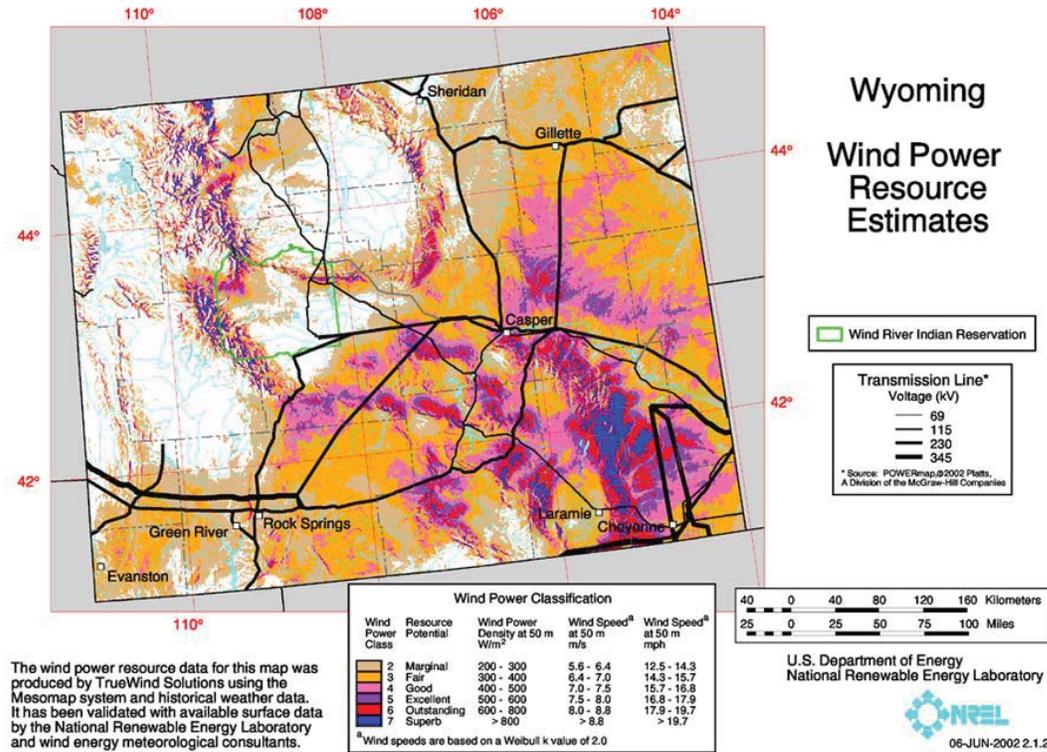
In the past five years, American wind power has:

- Brought in as much as \$20 billion annually in private investment to the U.S.
- Created one of the largest providers of new American electric generation with 35% of all new power capacity, right behind natural gas.
- Driven technology advances that have made wind more affordable than ever. A typical wind turbine now generates 30% more electricity – all while driving down costs.
- Created nearly 500 new American manufacturing facilities and employed 75,000 overall, including 30,000 in the manufacturing sector, from coast to coast.

Wyoming has some of the best potential for wind generation in the United States, and Rawlins is well located to generate this type of renewable energy.

²¹ <http://www.worldcoal.org/coal/uses-of-coal/coal-to-liquids/>

FIGURE 23: WIND POWER RESOURCE ESTIMATES



Source: U.S. Department of Energy

Chokecherry/Sierra Madre

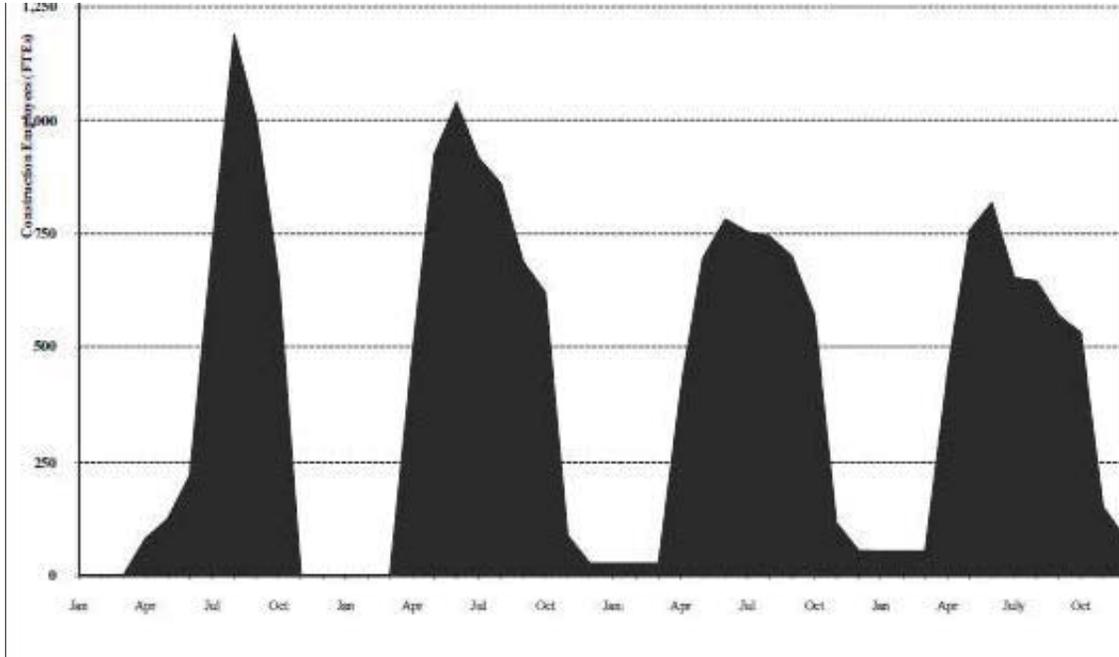
This is a 2,000-3,000 megawatt wind farm consisting of roughly 1,000 wind turbine generators proposed by the Power Company of Wyoming LLC (PCW).²² PCW submitted an application to the BLM in January 2008 for wind energy development on the federal lands that comprise approximately 50 percent of the Chokecherry and Sierra Madre project area. The remainder of the project is located on private lands owned by the Overland Trail Cattle Company LLC. The project will be located south of Rawlins and Sinclair and will produce enough power equivalent to serve one million homes. This project was named by the BLM to its 2012 list of Renewable Energy Priority Projects. Construction of the project is scheduled over four years, with the active construction period concentrated during the months of April through October when weather conditions are most favorable.

Figure 24 graphically displays the challenges associated with construction employment and large energy projects. Not only will the community experience huge employment surges for four years, but the employment is seasonal. Some employees may choose to live in the community year-round, while others may leave during the winter season. According to the EIS, “The project would result in a higher degree of seasonality in the local community than occurs with tourism or hunting. From a community perspective, the seasonal nature of the anticipated construction of the CCSM project would result in dramatic, twice-a-year changes in the level of

²² There would actually be two wind farms, Chokecherry and Sierra Madre, located nine miles apart.

activity, business sales, staffing needs, and hours of operation in the spring when activity ramps up and again in the fall when activity declines sharply.”

FIGURE 24: CCSM PROJECTED CONSTRUCTION EMPLOYMENT – FTEs WITH 60 HOUR AVERAGE WORKWEEK



Source: Chokecherry Sierra Madre EIS

Rawlins should make every effort to capitalize on the long-term needs of the wind energy project. The wind turbines will need to be maintained and repaired, and cleaning, repair and replacement parts should be provided and purchased in Rawlins. Some of the tasks associated with wind turbine services include:²³

Turbine Cleaning and Maintenance

- Cleaning hydraulic & gear box oils from vertical surfaces
- Nacelle and spinner fiberglass cleaning
- Cleaning and removal of smoke residue
- Application of epoxy tower paint
- Application of weather caulking to exterior tower flange

Mechanical Services

- Cable tray and bus bar remediation
- Inspection of cable pinch brackets
- Dent removal on horizontal and erected towers
- Modifications under tower landings
- Conductivity testing of lightning protection systems



²³ Source: Rope Partners, Inc.

- Bolt torque testing and tightening
- Corrosion retrofits

Fiberglass & Blade Repair

- Repairs from lightning damage and leading edge erosion
- Stall strip, vortex generator and Z-tape installations
- Installation and replacement of leading edge protective tapes
- Replacing rotor blade pitch bearing seals
- Nacelle and spinner fiberglass repair

Given the large demand that will come from this project – the largest in North America – as well as other wind energy projects in the State of Wyoming, Rawlins should establish a business park that will assist in establishing Rawlins as a clean energy hub in the West and that will manufacture and provide replacement parts for wind turbines.



How can Rawlins attract manufacturing? Research shows that the following are key components:

- Reduced operating costs
- Access to high potential markets
- Clustering efficiencies
- Regional and local infrastructure
- Workforce characteristics
- Business and government relations
- Financial incentives
- Potential competitors or suppliers
- Quality of life
- Public investment in the broader community
- Public enthusiasm and support

While Wyoming has some of the best wind generation potential in the United States, it is lacking in manufacturing facilities to support that industry. See the Appendix for a map of manufacturing facilities in the United States as well as case studies on the development of the wind industry. With the advent of Chokecherry/Sierra Madre, the time is right for Wyoming to step up and attract these types of businesses.

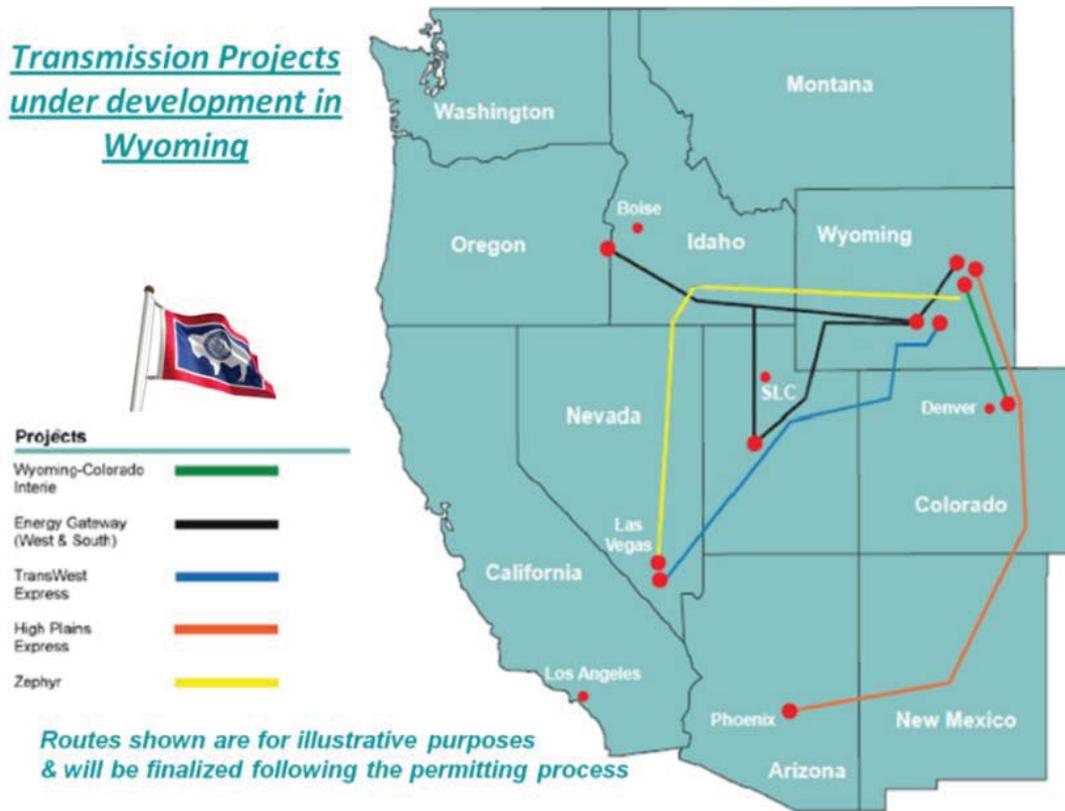
Transmission Line Projects

The Transwest Express (TWE) transmission line projects are designed to deliver clean, sustainable power to more than 1.8 million homes in densely populated areas of the country. Construction of the transmission lines will take place over three years and is expected create between 750 and 1,000 construction jobs at its peak. The average number of construction jobs over the three-year period is 300 to 400 jobs, with a projected 1,000

additional indirect jobs in the project area. The EIS should be finished in Fall 2012, with the ROD anticipated for 2013. Construction in Carbon County could begin in 2013.

When construction is completed, there will be no ongoing, permanent jobs from the transmission lines in Carbon County but the transmission lines will pay property taxes in every county that they traverse.

FIGURE 25: TRANSMISSION PROJECTS UNDER DEVELOPMENT IN WYOMING



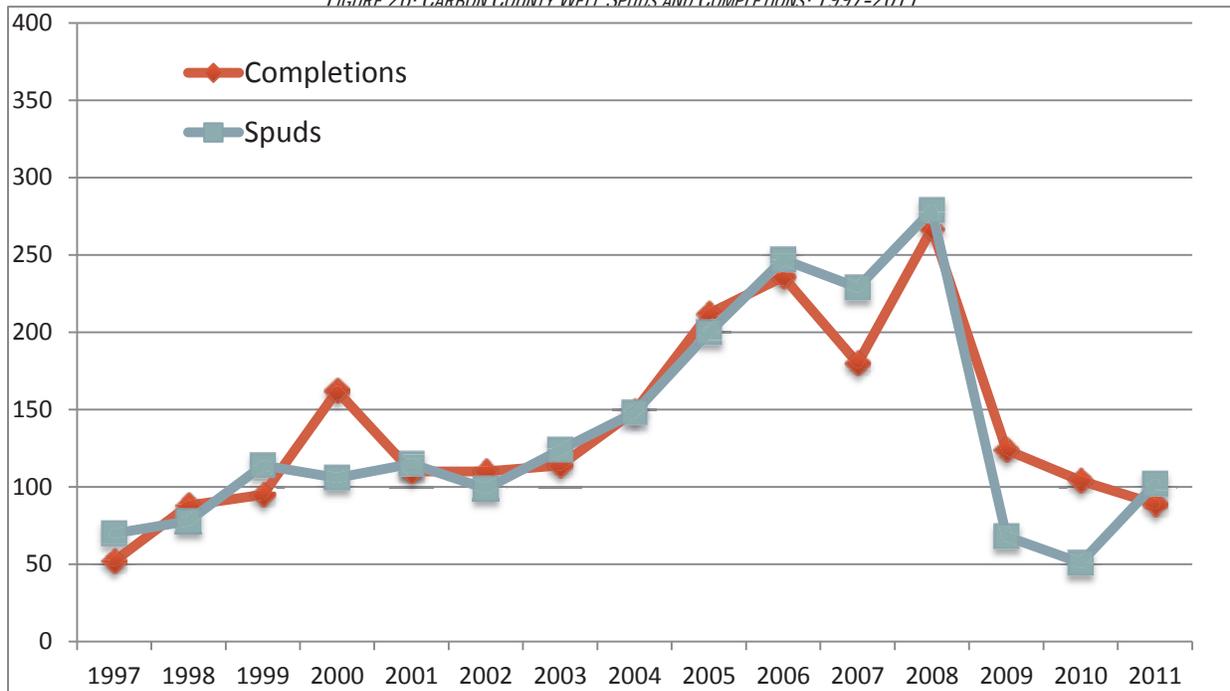
Source: Wyoming Infrastructure Authority

OIL AND GAS

Sinclair is the major player in Carbon County in the oil and gas industry. Sinclair has 400 employees and anticipates growth of three to five percent per year. Pipelines ship 35,000 barrels per day to Denver and Salt Lake City. Crude oil currently comes from Canada, Wyoming and North Dakota. 70,000 to 80,000 barrels per day are refined with plans to expand to 90,000 barrels per day.

Well spuds and completions in Carbon County peaked in 2008, declining dramatically through 2010, but recovering somewhat in the past two years. This graph shows the volatile nature of the oil and gas industry.

FIGURE 26. CARBON COUNTY WELL SPUDS AND COMPLETIONS: 1997-2011



Source: Blankenship Consulting

The shale industry has taken a great step to meet global energy demand. Technological advancements have unlocked economically viable hydrocarbon resources from unconventional places such as shale formations. Just a few short years ago it was proposed that liquefied natural gas (LNG) would need to be imported into the U.S. from other countries. Due to this technology, the United States has a surplus of supply, which has driven natural gas prices down. Shale gas is expected to grow to represent 47 percent of total U.S. gas production by 2035.²⁴

Oil and gas employment projections are provided in the table below. However, it is probably not realistic to assume the employment levels estimated for these projects would occur concurrently in the foreseeable future.

²⁴ Deloitte

TABLES 28 & 29: EMPLOYMENT PROJECTIONS FOR CURRENTLY APPROVED PROJECTS²⁵

Projects Pending Approval	Start Date	Change				Total Employment	Sources
		Drilling/ Total Wells	Development Schedule	Wells/Year (Average)			
Continental Divide/Creston	??	8,950	15	597	431 - 1585	BCLLC/SBLL C Estimates	
Seminole Road Draft EA	??	1,240	9	138	54 - 198	Seminole Road Draft EA	
		10,190			485 - 1,783		
		Estimated Carbon County Jobs			226 - 832	(CDC jobs @ 40%)	

Currently Approved Projects	Start Date	NEPA Document Estimates								Actual		Remaining Approved Wells	Sources
		Drilling/			Drilling & Development		Production		Total Employment	Total Wells	Wells/ Year (Average to date)		
		Total Wells	Development Schedule	Wells/ Year (Average)	Employment (Direct)	Employment (Total)	Employment (Direct)	Employment (Total)					
South Baggs Desolation Flats	1999	50	10 Yrs	5	50 - 63	N/A	N/A	N/A	50 - 63	11	1.1	39	South Baggs EA
Atlantic Rim	2004	385	20 Yrs	19.25	103	246	N/A	156	402	50	7.14	335	Desolation Flats EIS
	2007	2000	20 Yrs	100	N/A	578	N/A	161	739	244	48	1756	Atlantic Rim EIS
Total Approved Projects		2435		124.25		824		317	1191 - 1,204	305	56.24	2130	

Source: Blankenship Consulting

These estimates do not show the employment increase and decline curve that is common for the drilling and development phase of all oil and gas projects. For the projects pending approval, the higher Total Employment estimates represents the drilling year – the lower estimate represents Production Employment. The continental Divide/Creston estimates are incremental jobs; there is ongoing employment on that project. Current drilling and production jobs are not counted in the estimate.

Natural gas prices are expected to remain relatively low due to the new techniques for releasing natural gas from shale formations through fracturing. A new natural gas liquid filling station has just opened west of Flying J.

²⁵ These estimates are drawn from the Environmental Assessments and Environmental Impact Statements for each project. The methods used to estimate and portray employment are in some cases different. Total Employment includes direct, indirect and induced employment, except for the South Baggs project which is only direct drilling employment. Total employment represents annual average employment in some cases and a range of employment over the drilling and field development and production cycles in other cases. So these estimates are “apples to oranges” estimates. The South Baggs EA did not provide estimates of operations or indirect and induced employment. Although these employment estimates are for projects that are in the general Rawlins area, portions of Continental Divide Creston and Desolation Flats are in Sweetwater County. In addition, many of the direct oil and gas jobs on all projects would actually be located in Rock Springs or Wamsutter, because that's where the big oil and gas service industry yards and field offices are located. An estimate of Carbon County jobs for Continental Divide – Creston is provided, because it is such a large project and most of it is in Carbon County, but clearly some of the jobs on the projects would be filled by Sweetwater County workers.

URANIUM

Ur Energy is proposing a project at the Lost Creek site, south of Bairoil in Sweetwater County (Great Divide Basin). This project is likely to move forward as there is only one approval remaining and which should be obtained Summer 2012. The project is anticipated to have an eight-year life. Construction is slated for 2014 and 2015. Ur Energy is expected to add 89 permanent jobs to the workforce.

OTHER MAJOR INDUSTRIES

The largest single industry in Carbon County is the lodging industry, largely supported by the energy industry and its temporary workers who book the hotels and motels in the City. Interviews with local hotels suggest that approximately 30 percent of their lodging nights are attributable to the energy sector. Demand for the lodging industry fluctuates widely with activity in mining (as well as with weather).²⁶

DATA CENTERS

Demand for data centers is growing. Research by Oracle has found that, polling 950 senior IT personnel across the globe, the number of new businesses looking to build new data centers within the next two years has risen from 27 percent to 38 percent.²⁷

Rawlins is an ideal site for a data center for the following reasons:

- Large sites of open space (assuming the City can work with the BLM)
- Population is less than 50,000
- Land costs are relatively inexpensive
- Large flat sites allow for berms and buffer zones
- Power is relatively inexpensive and abundant
- Climate is cool, cold and dry
- 10 long haul fiber routes along I-80
- Sufficient water resources
- Favorable tax structure (no corporate and personal income taxes)
- Low sales tax on building materials and equipment

Data centers in Rawlins would be advantageous for the following reasons:

- Environmentally friendly with little visual impact
- High paying jobs
- Interconnect with long haul broadband/fiber will improve local access and connectivity

²⁶ When I-80 is closed due to weather conditions, the hotels are reported to be at full occupancy and to raise their rates.

²⁷ Wyoming Data Centers Infrastructure Assessment, February 2012.

The Wyoming Data Centers Infrastructure Assessment, completed in February 2012, concludes that Wyoming is a favorable site for the following types of data centers:

- Unique purpose data centers (NCAR, NSA)
- Corporate data centers
- Large backup or recovery sites
- Mass data storage (Facebook, Google, Twitter, Amazon)
- Public and private cloud sites
- Federal government data centers

Rawlins should actively pursue the addition of small-sized data centers.

DISTRIBUTION AND WAREHOUSING

Due to Rawlins' location on I-80, as well as its access to rail, it is an attractive sight for distribution and warehousing. However, weather conditions and road closures on I-80 pose some limitations.

BUSINESS PARKS

Developing a business park is a critical factor for capitalizing on complementary development with the energy industry and for attracting other businesses to Rawlins. In addition to making good use of land and creating a strong business environment, a business park provides other benefits and advantages, including the potential for decreased costs for common maintenance services, and the formation of synergy between business park businesses, where materials, professional knowledge and expertise can be shared and leveraged for common benefit.

The Need for a Business Park in Rawlins

According to discussions with City leaders, staff and others, several potential businesses hoping to locate in a business park have been turned away in recent years due to the lack of adequate locations. No suitably large site has been located within the existing City boundaries. Periphery land is available, although the following conditions have hindered attempts to find a suitable site near the municipal boundaries:

- A checkerboard land ownership pattern that fragments vacant land into one-mile parcels of federal and private holdings beyond the City limits;
- The long, uncertain and arduous process required to secure federal land for private development purposes; and
- The difficulty of securing large private land holdings in areas beyond the City limits for business park purposes.

Characteristics of a Business Park

The following are some of the key conditions required for a business park:

- They must have utilities and services readily available to serve the needs of potential operators;

- Although some business parks encompass light industrial uses that contribute to the overall look and function of the park, the work that goes on in these locations is usually entirely commercial;
- They tend to include a high percentage of complementary operations, which create synergistic relationships between like operations;
- They tend to be located along the edges of a community where development is cheaper due to lower land and utility costs. A business park site also facilitates lower building costs, due to the ability to build wider rather than higher;
- They are usually located near motorways or primary roads. In Rawlins, a location near one of the freeway intersections and the rail lines could be viewed as advantageous.
- They should be located in an area that is appropriately zoned or where a re-zone can be easily obtained;
- They should generally be located on land that is in private ownership or which has the ability to be converted to private ownership, unless the site is part of a public/private joint effort;
- They should be located on land that is in single ownership or by very few owners;
- They should encompass adequate acreage of contiguous land. Although this varies by specific sites and needs, it has been suggested that Rawlins requires a minimum of 100 acres for a business park site, and up to double that amount in the longer term.
- They should be located on land with good topographic and drainage characteristics, and with little or no sensitive environmental conditions (natural drainage corridors, wetlands, steep slopes, difficult soils, etc.).

A Preferred Business Park for Rawlins

Since no large sites are available within the existing city limits, other options were investigated along the periphery of the City. Since access to good transportation and infrastructure is a requirement, efforts focused along I-80 and Highway 287 north of Rawlins, with particular scrutiny given to locations near existing exit ramps and crossroad locations.

Based on this investigation, it is clear that proximity to Interstate 80 and the existing city boundaries is essential when selecting a business park site for Rawlins. Initial scrutiny has located several 100+ acres sites that meet these criteria, although land ownership and infrastructure/utility issues have yet to be determined.

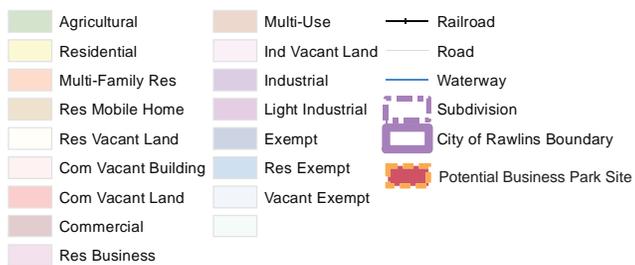
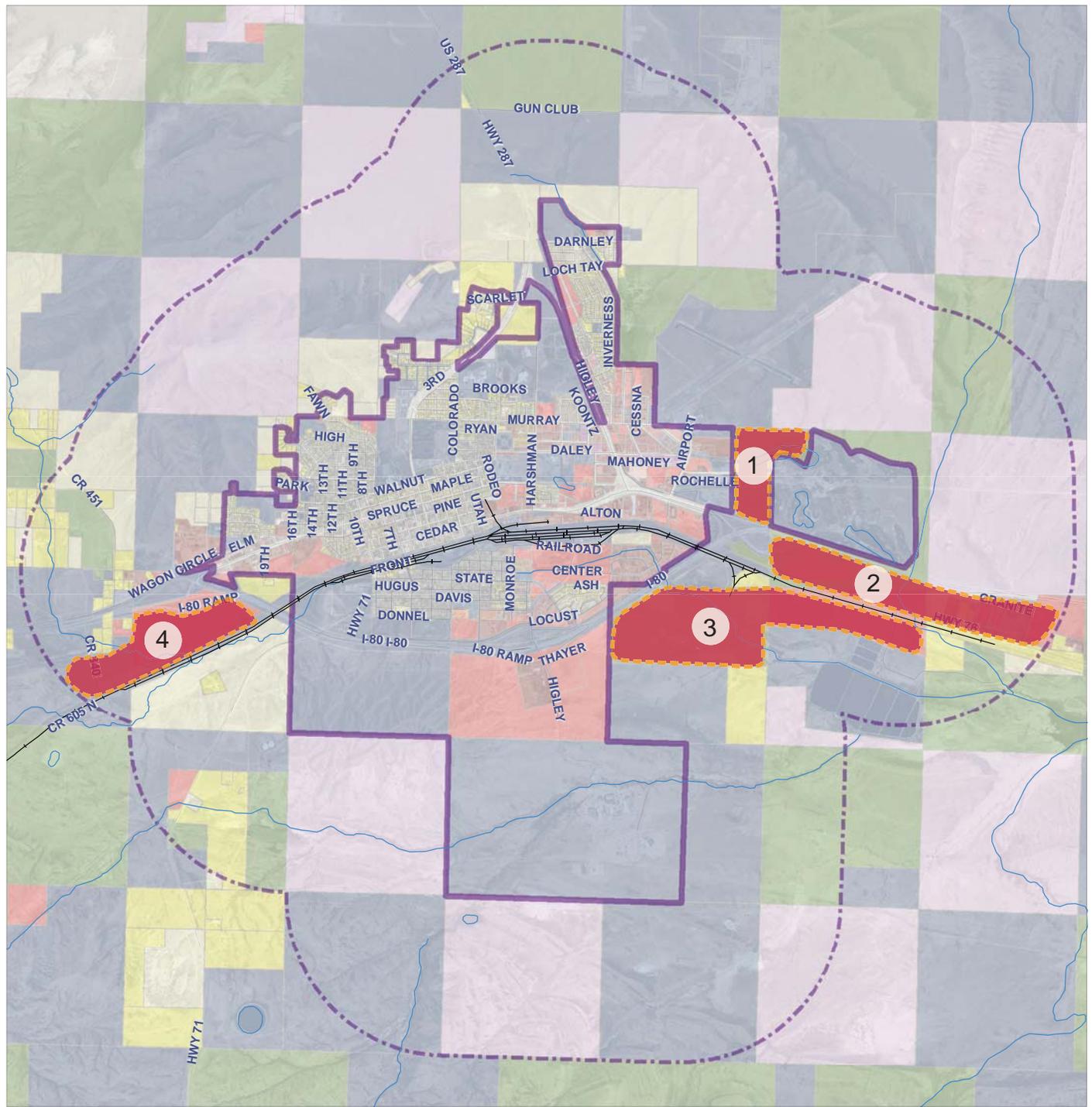
The following is a description of four alternative sites for future consideration as business park sites, which are illustrated on the accompanying maps:

- *Business Park Site 1: Golf Course*
Located just west of Rochelle Ranch Golf Course on the eastern edge of the city, this site would be suitable for a business park that specifically does not require access to the freeway or rail lines, or for uses that must avoid freeways, such as vibrations. It appears that a small pond is located on the northeastern edge of the site, which may have environmental implications, and could possibly be incorporated into the site as an amenity.

- *Business Park Site 2: East Gateway*
This 200+ acre site encompasses a range of vacant and underutilized industrial properties (Skyline Acres) and vacant land, making consolidation under single ownership a challenge. However, a fortuitous location between Rawlins and Sinclair could provide a distinct advantage for a business park at this location.
- *Business Park Site 3: Sugar Creek*
Another 200+ acre site, this area includes a large drainage corridor which may preclude use of the entire site for business park uses. However, creative site design could possibly turn challenging site conditions into positive amenities.
- *Business Park Site 4: Cherokee Creek*
Located on the southwestern periphery of Rawlins, this site is a good candidate for development into a business park. The inability to extend affordable infrastructure and utilities has hindered development of this site and others in the past, although a recent study provides hope that these necessities may be feasible in the future.

Business Park Examples





- 1** Golf Course Site
- 2** East Gateway Site
- 3** Sugar Creek Site
- 4** Cherokee Creek Site



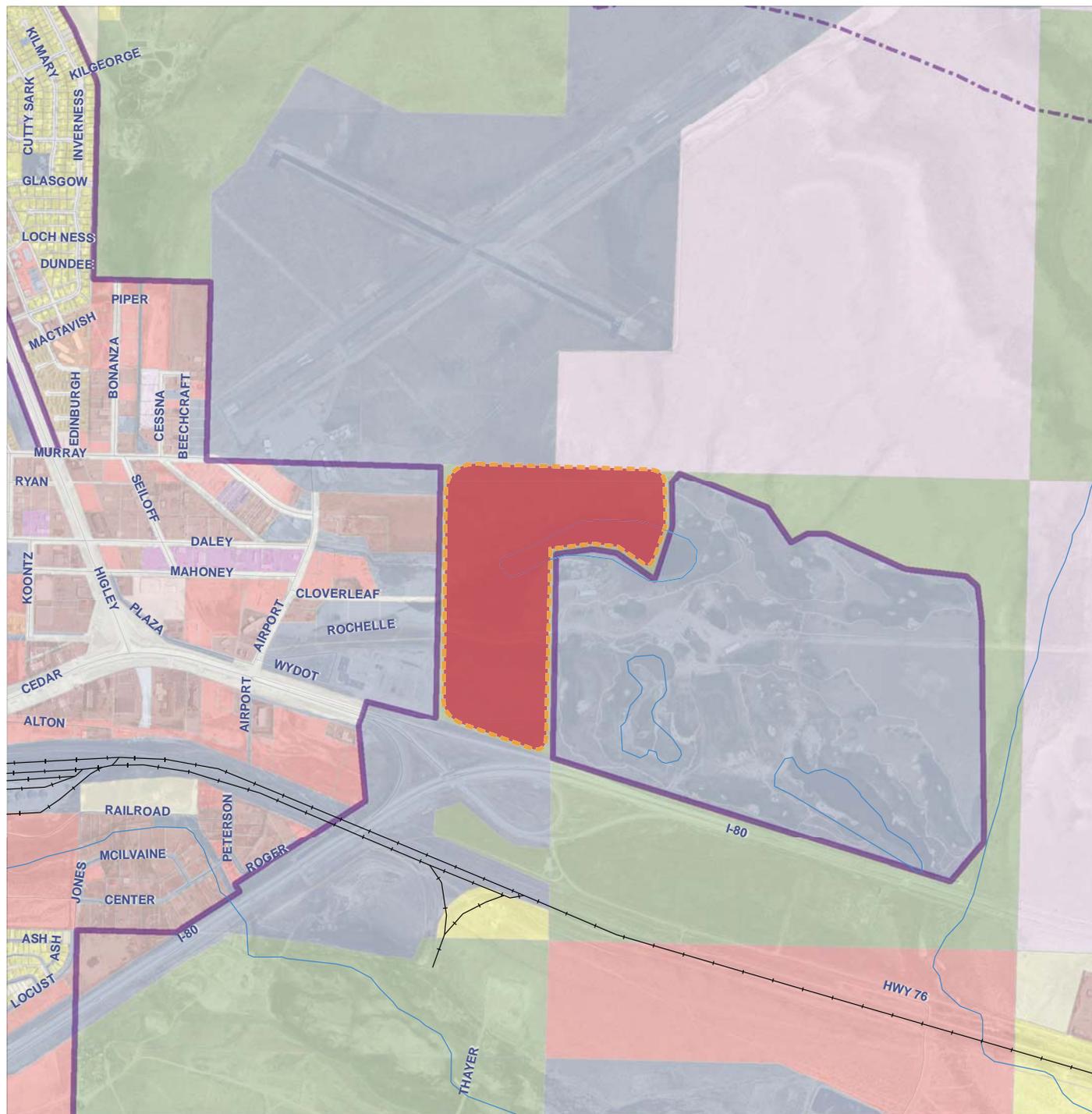
ZIONS BANK 2019 PUBLIC FINANCE



Potential Business Park Sites - Overview

City of Rawlins Economic Development Plan





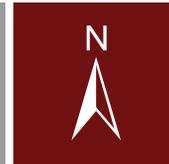
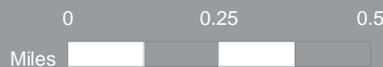
- | | | |
|---------------------|------------------|------------------------------|
| Agricultural | Multi-Use | Railroad |
| Residential | Ind Vacant Land | Road |
| Multi-Family Res | Industrial | Waterway |
| Res Mobile Home | Light Industrial | Subdivision |
| Res Vacant Land | Exempt | City of Rawlins Boundary |
| Com Vacant Building | Res Exempt | Potential Business Park Site |
| Com Vacant Land | Vacant Exempt | |
| Commercial | | |
| Res Business | | |



ZIONS BANK 2011 FIDELITY FINANCE



Potential Business Park Sites - Site 1 Golf Course Site City of Rawlins Economic Development Plan





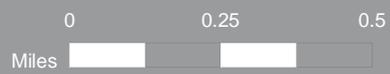
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| Agricultural | Multi-Use | Railroad |
| Residential | Ind Vacant Land | Road |
| Multi-Family Res | Industrial | Waterway |
| Res Mobile Home | Light Industrial | Subdivision |
| Res Vacant Land | Exempt | City of Rawlins Boundary |
| Com Vacant Building | Res Exempt | Potential Business Park Site |
| Com Vacant Land | Vacant Exempt | |
| Commercial | | |
| Res Business | | |

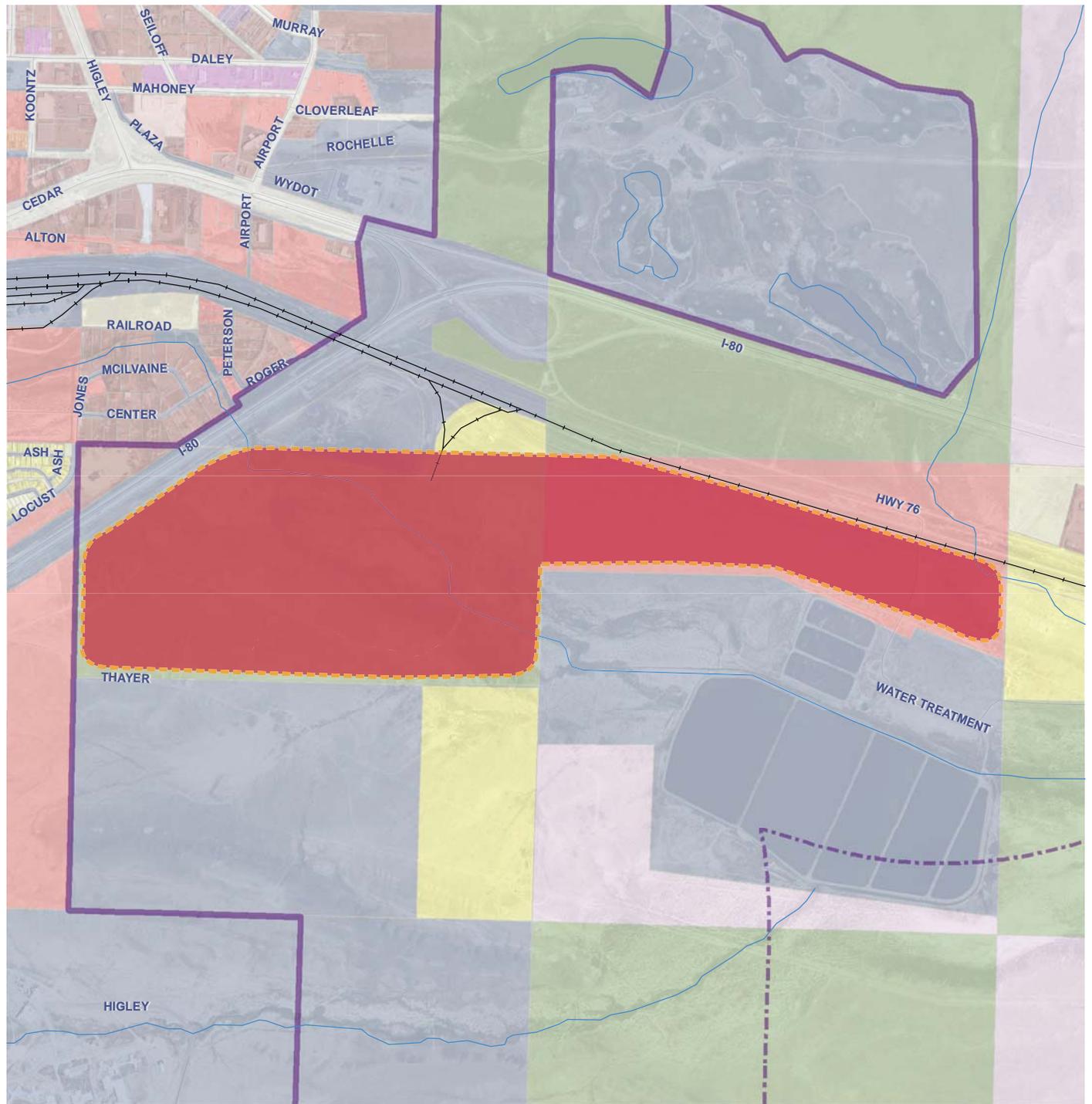


ZIONS BANK 20th ANNIVERSARY



Potential Business Park Sites - Site 2 East Gateway Site City of Rawlins Economic Development Plan





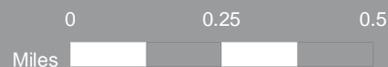
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|---------------------|------------------|------------------------------|
| Agricultural | Multi-Use | Railroad |
| Residential | Ind Vacant Land | Road |
| Multi-Family Res | Industrial | Waterway |
| Res Mobile Home | Light Industrial | Subdivision |
| Res Vacant Land | Exempt | City of Rawlins Boundary |
| Com Vacant Building | Res Exempt | Potential Business Park Site |
| Com Vacant Land | Vacant Exempt | |
| Commercial | | |
| Res Business | | |

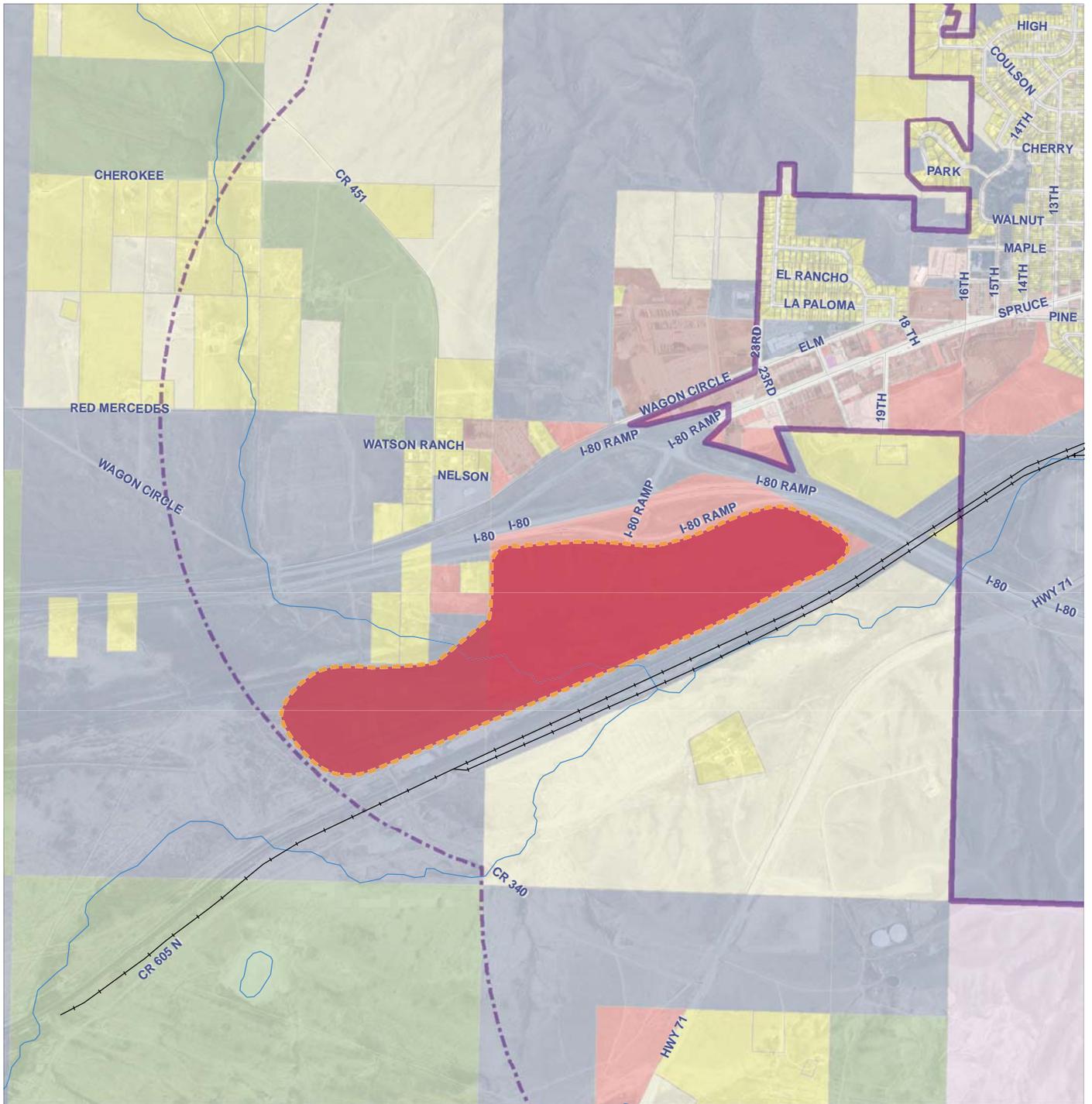


ZIONS BANK 2015 PUBLIC FINANCE



Potential Business Park Sites - Site 3 Sugar Creek Site City of Rawlins Economic Development Plan





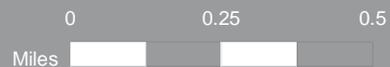
- | | | |
|---------------------|------------------|------------------------------|
| Agricultural | Multi-Use | Railroad |
| Residential | Ind Vacant Land | Road |
| Multi-Family Res | Industrial | Waterway |
| Res Mobile Home | Light Industrial | Subdivision |
| Res Vacant Land | Exempt | City of Rawlins Boundary |
| Com Vacant Building | Res Exempt | Potential Business Park Site |
| Com Vacant Land | Vacant Exempt | |
| Commercial | | |
| Res Business | | |



ZIONS BANK ZIONS PUBLIC FINANCE



Potential Business Park Sites - Site 4 Cherokee Creek Site City of Rawlins Economic Development Plan



LAND USE AND URBAN DESIGN IMPLICATIONS

A review of the existing land uses in Rawlins shows that there are approximately 815 vacant acres of privately-owned land within City limits (see Vacant Land Map). An analysis of land available for development outside of City limits is in the Rawlins General Plan. Over three-fourths—670 acres—of the vacant acres are currently slated for commercial development. Vacant commercial lands are located primarily along the main corridors of the City. Large parcels of vacant commercial land occur south of I-80 (surrounding the Travel Center) as well as in the area between the railroad tracks and I-80. Additional groupings of smaller vacant commercial parcels occur near the junction of Highway 30 and Higley Blvd./Highway 287 and at the west and north entrances to the City.

Residential vacant lands total approximately 141 acres. Vacant parcels are scattered throughout the City with the exception of a couple of larger areas (partially developed subdivisions) at the north and south end of the City. Currently, commercial land uses total nearly 360 acres with residential uses totaling approximately 625 acres.

TABLE 30: LAND USE FOR PRIVATELY-OWNED PROPERTIES WITHIN THE CITY LIMITS

Land Use	Total Acres
Residential, Vacant	140.82
Commercial, Vacant	670.72
Residential, Non-Vacant	671.10
Commercial, Non-Vacant	392.18

Source: Assessor's Data from the Wyoming Department of Revenue

The provision of well-organized land is a requirement for sustainable economic growth and development. Checkerboard ownership patterns, underutilized properties, incompatible land uses and poor land use transitions create particular challenges in Rawlins, limiting the ability of the City to grow logically and easily. Difficulties implementing zoning ordinances and subdivision codes, and the location of unsightly uses near main entrances to the community are other challenges that need to be overcome in order for the City to prosper.

Appropriate economic development and growth requires supportive land use and urban design actions and direction. The establishment of clear and logical land use and zoning direction provides a positive signal to developers and others that Rawlins is a place with minimal risk. The following are land use approaches for improving key areas of the City, and design strategies for enhancing its economic profile.

The community's first priority for development is on infill properties. However, if significant growth occurs, the City will need to consider annexing additional land outside City boundaries as identified on maps in the City's Master Plan that is currently being updated.

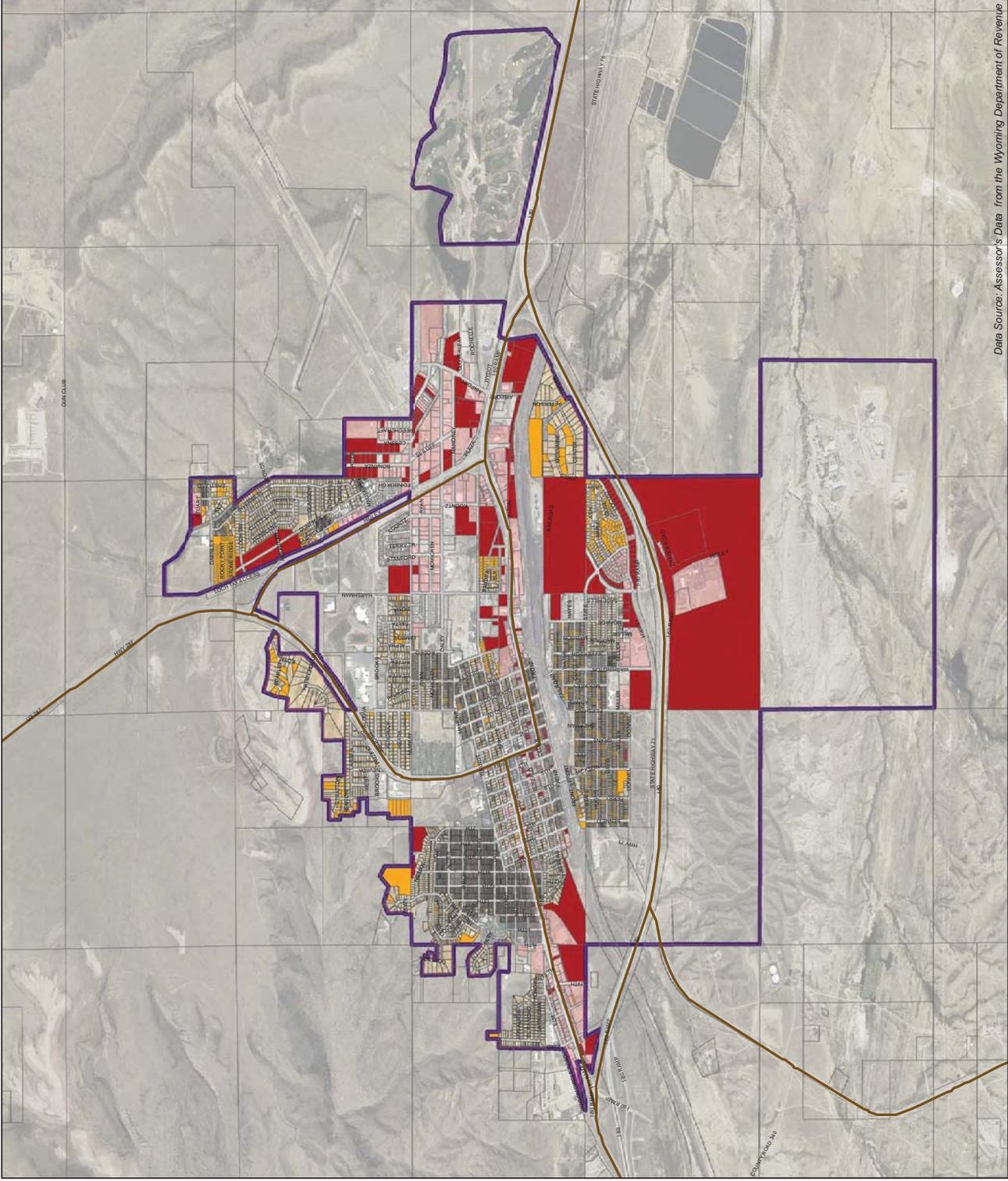
Vacant Land

(Privately-Owned)

-  City Boundary
- Land Use**
-  Publicly-Owned
-  Commercial
-  Residential
-  Vacant Commercial
-  Vacant Residential



City of Rawlins Economic Development Plan



Data Source: Assessor's Data from the Wyoming Department of Revenue

East Entrance District

The east entryway from I-80 has the largest sales tax base, with a grocery store, restaurants and some of the larger lodging establishments. Traffic and access in this area needs to be better coordinated and designed in order to improve the ease and flow of traffic into and out of the retail and lodging establishments. This area has some of the best commercial space in the City. National chain restaurants would be most likely to locate in this area, as would larger-scale development such as discount and general merchandise stores.

In this area, the City should focus on identifying key development sites (undeveloped sites with the most visibility and highest traffic counts) and encouraging and pursuing the type of development it would like to see occur in these areas. The City can enable and encourage development through streamlining the permitting process for key businesses, assisting with infrastructure to the site, reducing or waiving fees, and using tax increment funds if an urban renewal area is created.

A map of the airport exclusion zone is included as part of the City's General Plan and should be referred to for development restrictions limitations in this area.

The City should also apply for a Community Enhancement Grant to improve the landscaping and visual appearance of this east entryway. This grant can and should be applied for annually in order to improve "first perceptions" of visitors to the area, as well as community pride by Rawlins' residents.

West Entryway District

The west entrance to Rawlins is deteriorating, rundown and blighted. Many vacant buildings are found in this area, some of which should be demolished. But, demolition adds extra costs to the construction process, making new development more costly and less likely to occur. With the shortage of land in Rawlins for new development, as well as the unsightly appearance of some of these structures, an urban renewal district is the perfect vehicle to fund demolition and thereby encourage new development in the area by leveling the playing field with areas outside of City limits.

The City has a shortage of multifamily housing, which could be encouraged in the West Entryway area. Access to multi-family housing could be provided from the main highway (Spruce Street) into town, helping to create a "sense of place" for these new neighborhoods. New development along Spruce Street could be light industrial in nature, with design guidelines, code enforcement and other requirements enacted to promote a clean and attractive appearance.

Enhancing Community Image and Pride

Cities that thrive economically tend to present positive images of what they are and why people live there. They exude a strong and positive sense of self and "community pride," which is reflected in the way they look and how they are maintained.

In order to grow economically, Rawlins must improve the way it looks and the way it presents itself to the world. As part of these improvements, the City should build upon what it is, and the "unique sense of place" found here in order to create a more engaging place to live and conduct business.

LAND USE AND URBAN DESIGN STRATEGIES TO IMPROVE ECONOMIC DEVELOPMENT

As illustrated in the accompanying diagram and described below, a number of land use and urban design strategies are proposed to improve the appearance and look of Rawlins, and in the process improve the economic climate. Additional details are provided in the Rawlins Comprehensive Plan and Downtown Plan.

Community Gateway Enhancement

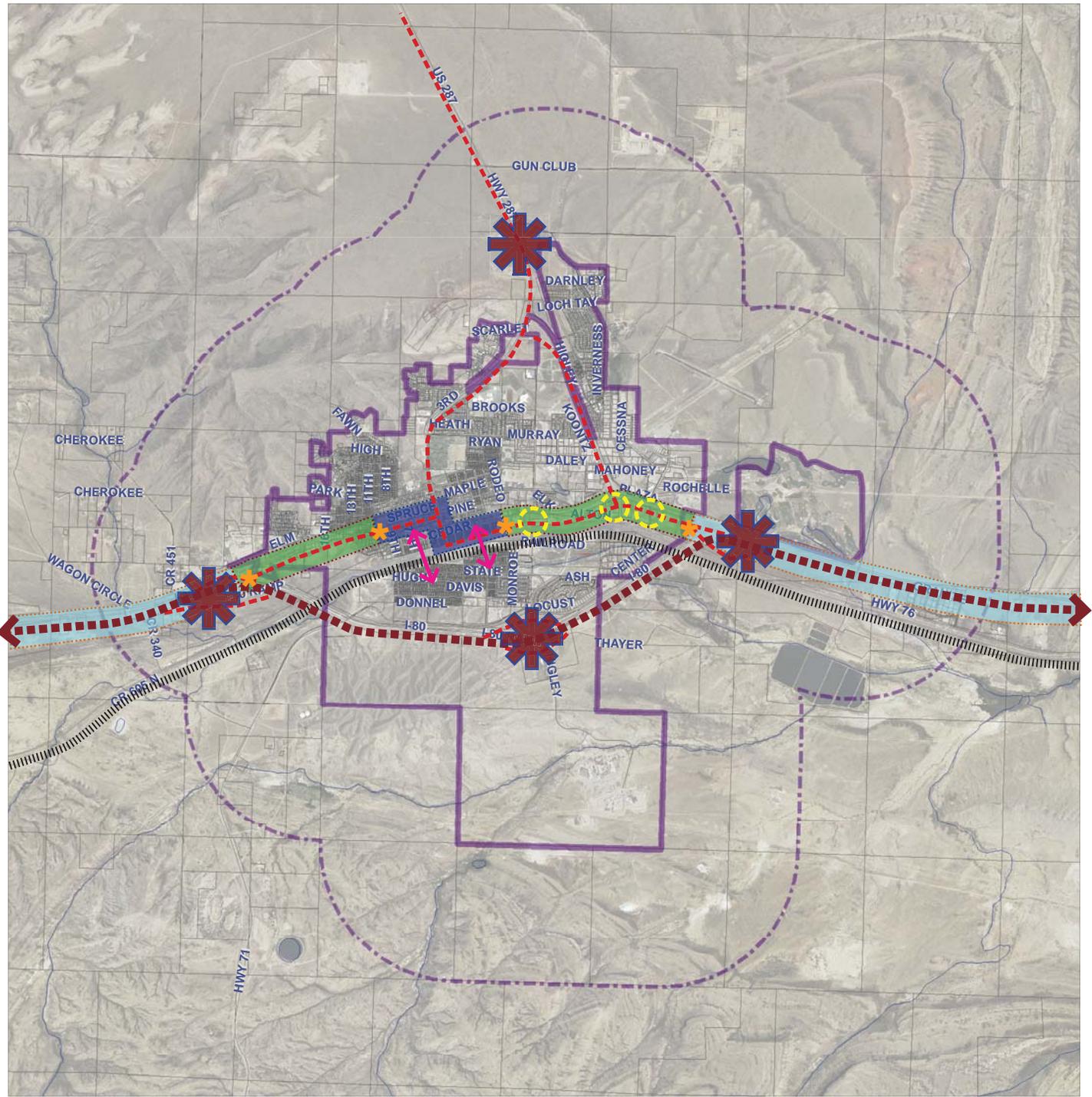
Clear messages that one has arrived in Rawlins need to be established at the four major entrances into the community. These enhancements should reflect the special qualities of Rawlins, including the “uplift” formations, resources, energy, wind and similar conditions. A variety of basic tools are available, including improved landscaping, engaging entry signage, unique berms and buffers to screen unattractive properties, landscape art and sculpture, entry lighting, and the removal or relocation of unattractive properties and uses.

I-80 Transportation Corridor

Interstate 80 is the primary route that connects Rawlins with the rest of the world. Whether passersby stop here or not, they should have a clear mental picture that they are passing a special place, and leave with a positive mental picture of the experience. Similar to the creation of an engaging gateway experience, controlling uses along the route will go a long way to improving the corridor experience. Other tools for improving the freeway corridor include good landscaping and signage, berms and buffers to screen unattractive sites, public art and consistent street lighting.

Examples of Gateway and Corridor Enhancements





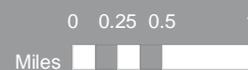
-  Community Gateway Enhancements
-  I-80 Transportation Corridor
-  Primary Boulevard Enhancements
-  Secondary Boulevard Enhancements
-  Downtown "Main Street" Enhancements
-  Key Intersection Enhancements

-  Street Enhancement Transition Points
-  Downtown/South Neighborhood Connections
-  Visual Enhancement of Rawlins from Freeway
-  Community Cleanup and Property Maintenance Efforts (throughout community, with focused efforts in economic districts)
-  City of Rawlins Boundary
-  One-Mile Town Expansion Area (according to existing Carbon County General Plan)



Land Use & Urban Design Strategies

City of Rawlins Economic Development Plan



Examples of Gateway and Corridor Enhancements



Primary and Secondary Boulevard Enhancements

Cedar and Spruce Streets are the key east-west roadways for bringing people into the community from the east and west. Together these roadways have the possibility to become the Primary Boulevard into and through the city, although at present they are generally wide and utilitarian in nature. Likewise, 3rd and Higley Streets serve as a secondary boulevard system, bringing traffic through the city from the north.

A long-term strategy should be implemented to convert these roads into a coordinated “boulevard” system incorporating improved streetscapes, center medians, wide sidewalks, roadside trails, safe crosswalks, plenty of green trees and other enhancements that convert them from utilitarian roads into memorable and pleasant boulevards.

Examples of Primary and Secondary Boulevard Enhancements



Examples of Primary and Secondary Boulevard Enhancements



Downtown “Main Street” Design Enhancements

Numerous improvements are underway or have recently been completed as part of enhancing the core of the city and re-establishing downtown as a thriving and desirable place. The detailed design and improvement concepts contained in the Rawlins Downtown Plan (2010) should be coordinated with improvements along 3rd, Cedar and Spruce Streets to create a clear and obvious “Main Street” experience.

Key Intersection Enhancements

Key intersections along the Cedar and Spruce Streets should receive special design attention in order to help lead visitors into and through the community. These efforts should go beyond wayfinding efforts, incorporating public art and special landscaping to help reinforce unique neighborhood characteristics and highlight the special flavors that are found in Rawlins.

Street Enhancement Transition Points

Streetscape enhancements along Cedar and Spruce Streets should be coordinated with improvements along I-80 and community gateways in order to ensure the results are unified and cohesive.

Downtown/South Neighborhood Connections

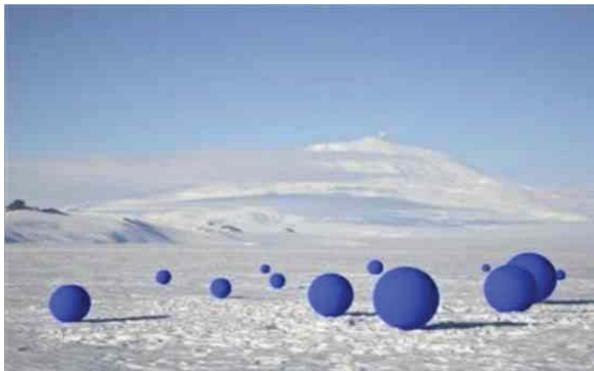
Special efforts should be taken to build upon the ideas outlined in the Downtown Rawlins Plan to bridge the divide between downtown Rawlins and the neighborhoods to the south. These efforts should go beyond painting

tunnel walls and building better bridges, incorporating creative ideas to transcend the wall created by the rail lines and rail yard.

Visual Enhancement of Rawlins from the Freeway / Community Cleanup and Property Maintenance Efforts

In addition to the enhancements and improvements discussed above, there is a general need to clean up the city and to maintain what is already here. Simple actions that directly involve the people of Rawlins (trash clean up, yard maintenance and façade painting are a few ideas) should take place before larger interventions.

Examples of Landscape Art



HOUSING MARKET

Rawlins is well populated within City limits, with little undeveloped land available for in-fill development. Available infill properties are shown in the land use section of this report. Much of the land outside of the City is federally owned and is not immediately available for residential housing growth. There is the potential, however, within City limits, for redevelopment of numerous blighted properties.

Population growth in Rawlins has not kept pace with employment growth over the same time period. This may be due to a lack of good quality, affordable housing in the City. If the City is unable to meet the housing market needs, the lack of other nearby population centers compounds the problem since there is no other support in filling housing gaps. As the evidence below supports, the current Rawlins housing trends show a market not equipped to handle the population challenges associated with rapid economic growth.

Real estate agents in the area²⁸ report difficulty placing clients in homes or apartments simply because there is too little inventory available. They especially note the lack of quality rental properties available for the influx of people associated with the energy industry. Rawlins has the additional challenges of trying to meet the special housing needs for the population boom-bust cycles that accompany the energy industry's work in the area. These individuals often own homes elsewhere and are not interested in buying a home, especially if they only plan on staying temporarily. Temporary workers often seek furnished housing, but there is also very little inventory of available furnished housing. As a result, these individuals often stay in either a hotel or a substandard rental where the mentality of a temporary stay is justified.

There are numerous stories of families who are currently unable to find suitable housing. One agent told about a wealthy client, an energy company executive, who came to Rawlins to manage a project. He planned to bring his family with him and possibly stay long term to manage projects that might follow. However, when they came to look for housing in preparation for the move, they were unable to find anything that met their previous living standard and the wife chose to stay behind. The executive left once the project was complete. Another agent said a family of five came to her office in a moving truck and the only good-condition property she found in their price range was a two-bedroom house. They ended up moving out of the City as soon as they could, even though they had originally planned on staying long-term.



²⁸ Interviews with agents at Sage Creek Realty and Century 21

Rawlins has a history of variability in population that is closely tied to the energy resources in the area. These “boom-bust” cycles understandably make developers, particularly of rental properties, hesitant to build. However, improving the housing market will also attract more people to live in the community, as there appear to be many “lost” residents (and therefore population growth) due to the lack of suitable housing.

BUILDING PERMITS AND SUPPLY

The problem becomes apparent when looking at the number of new building permits issued in Rawlins for the past 12 years. There have been no multi-family building permits issued and only 134 single-family permits issued.

TABLE 31: RESIDENTIAL BUILDING PERMITS SINCE 2000

Rawlins, WY				
Building Permits	Single-Family Units	Multi-Family Units	Demolition	Net Units
2000	0	0	0	0
2001	0	0	0	0
2002	2	0	0	2
2003	3	0	0	3
2004	10	0	0	10
2005	11	0	0	11
2006	30	0	0	30
2007	46	0	-5	41
2008	18	0	-5	13
2009	3	0	-5	-2
2010	5	0	-4	1
2011	6	0	0	6
Total	134	0	-19	115

Source: City of Rawlins

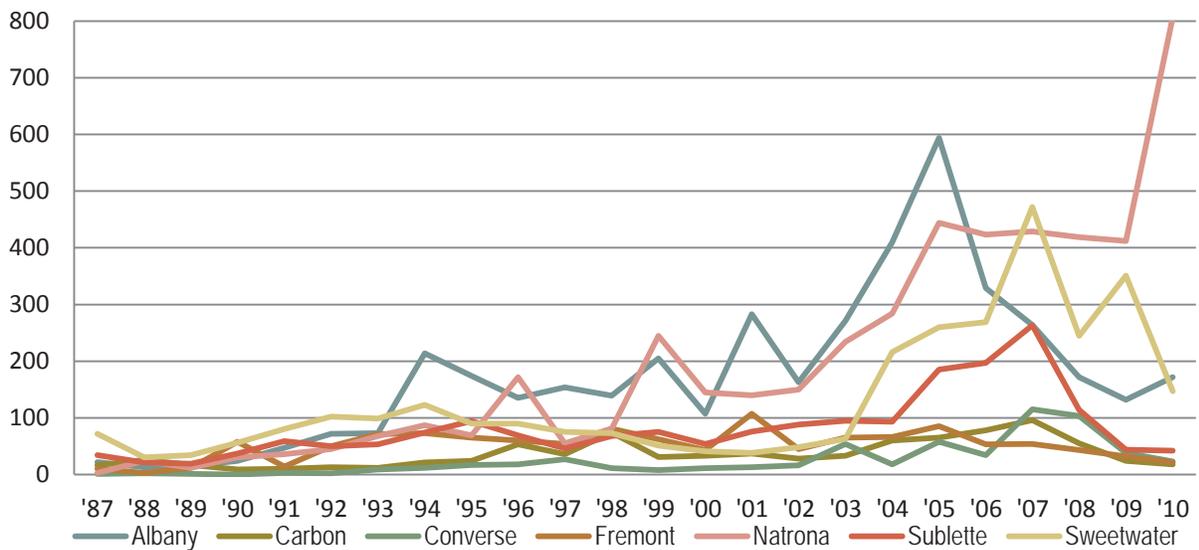
TABLE 32: RESIDENTIAL BUILDING PERMITS ISSUED – COMPARISONS BY AREA

Carbon County & Surrounding Counties											
	'00	'01	'02	'03	'04	'05	'06	'07	'08	'09	'10
Albany	107	283	163	271	410	594	329	264	172	132	172
Carbon	33	37	28	33	60	65	78	96	55	24	18
Converse	11	13	16	54	18	58	34	115	103	38	23
Fremont	43	107	45	65	66	85	53	54	43	32	21
Natrona	145	140	150	234	284	444	423	429	419	412	807
Sublette	54	76	88	95	93	185	197	263	114	44	42
Sweetwater	41	38	48	63	216	260	269	472	245	351	147
Wyoming	1,582	1,907	2,045	2,877	3,318	4,002	3,846	4,584	2,669	2,294	2,298

Source: U.S. Department of Commerce & 2010 Census

Building permits for Carbon County and surrounding counties from 1987 to 2010 have been tracked by the U.S. Department of Commerce and the Census Bureau. The following figure compares the number of total residential building permits issued by Carbon County and six other neighboring counties. When compared with neighboring counties, the growth of residential housing in Carbon County has remained relatively flat.

FIGURE 27: REGIONAL COMPARISON OF ANNUAL TOTAL RESIDENTIAL BUILDING PERMITS ISSUED



Source: U.S. Department of Commerce & 2010 Census²⁹

²⁹ <http://eadiv.state.wy.us/housing/annlbldg.htm>

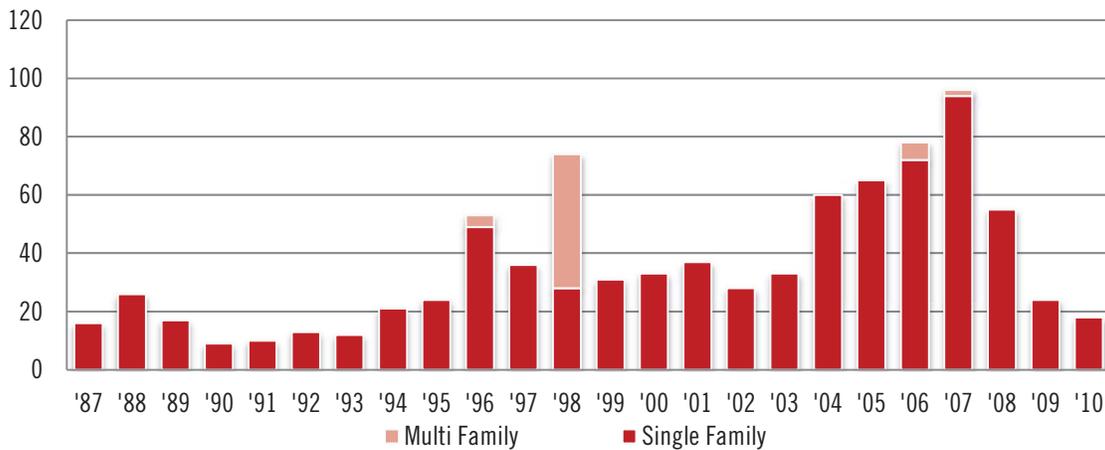
Real estate agents cite land availability as a better explanation for the low number of building permits. Current MLS listings show 162 lots and land listings for Carbon County with 36 of those properties within Rawlins. Only 15 of those lots are listed as residential. Over the last ten years, there has also been very little property demolition to free up more land within the City.



Outside of the City there is abundant empty land, but much of that land is federally owned and unavailable for development or difficult to purchase due to government regulations. Infill can substantially increase development costs, especially for demolition and decrease the ability to offer housing at affordable rates – furthering the trend of high cost relative to quality seen in Rawlins (see “Rental and Housing Prices” below). However, infill will also reduce the cost of public infrastructure and provision of municipal services.

A closer examination of the number of residential permits issued in Carbon County from 1987 to 2010 shows how single family housing has been the predominant form of construction. Not only have the number of new building permits been low in Carbon County, there have also been very few permits issued for multi-family units.

FIGURE 28: ANNUAL RESIDENTIAL PERMITS ISSUED IN CARBON COUNTY



Source: U.S. Department of Commerce & 2010 Census

Despite evidence that there is a housing shortage, vacancy rates of housing stock in Rawlins are still relatively high at 14 percent (538 vacant units out of a total of 3,872 housing units).³⁰ However, it is interesting to compare that number for housing units to that of rental properties which is less than half that rate at 6.7 percent.³¹ These numbers support the fact that there is a need for more rental properties in order to support energy workers. While the housing unit vacancy rate is high, housing conditions could play a significant role in driving that rate artificially high. As the conditions analysis will show, there is an oversupply of insufficient housing, and a lack of quality housing.

Activity in the energy industry will also have a significant impact on housing demand. An inventory of available temporary housing in the region was conducted during the summer of 2010 for the Chokeycherry/Sierra Madre EIS. At that time, natural gas drilling activity was at a fraction of 2004 to 2008 levels and associated natural gas development housing demand was correspondingly low, so much so that several temporary worker housing facilities near Wamsutter and Dad were closed. Increases in natural gas sales prices could result in a resurgence of natural gas development activity with associated elevated employment levels for these previously approved projects, increasing competition for temporary housing resources in Rawlins and nearby communities. The EIS concludes that, “Rawlins and Saratoga were the only communities within the study area with a substantial temporary housing base and summertime availability during the summer of 2010 and, under current circumstances, the only communities likely to host substantial numbers of CCSM construction workers.”³²

However, there will still be a significant shortage in housing. The EIS report that “estimated housing demand in affected communities would exceed summer 2010 supply by 581 units during the peak months of the first year of construction. . . . The housing shortfall would decrease to 526 units in the second year of construction, assuming similar availability. During the final two years of construction, the shortfall would decrease to an estimated 228 and 255 units, respectively.”³³ The EIS projects that at full operations, CCSM will create demand for between 109 and 182 units. Local hotels currently report high rates of their occupants being long-term stays for energy industry workers.

RENTAL AND HOUSING PRICES

Supply issues may partially explain the high rental rates in Rawlins that reportedly average from \$800 to \$1,200 per month and are somewhat higher than in Carbon County overall. Since rentals are in particular demand from temporary energy industry workers and the inventory is low, this is driving rental rates up especially in the types of small housing they seek, such as apartments. Building permits have not kept up with demand as rents continue to rise.

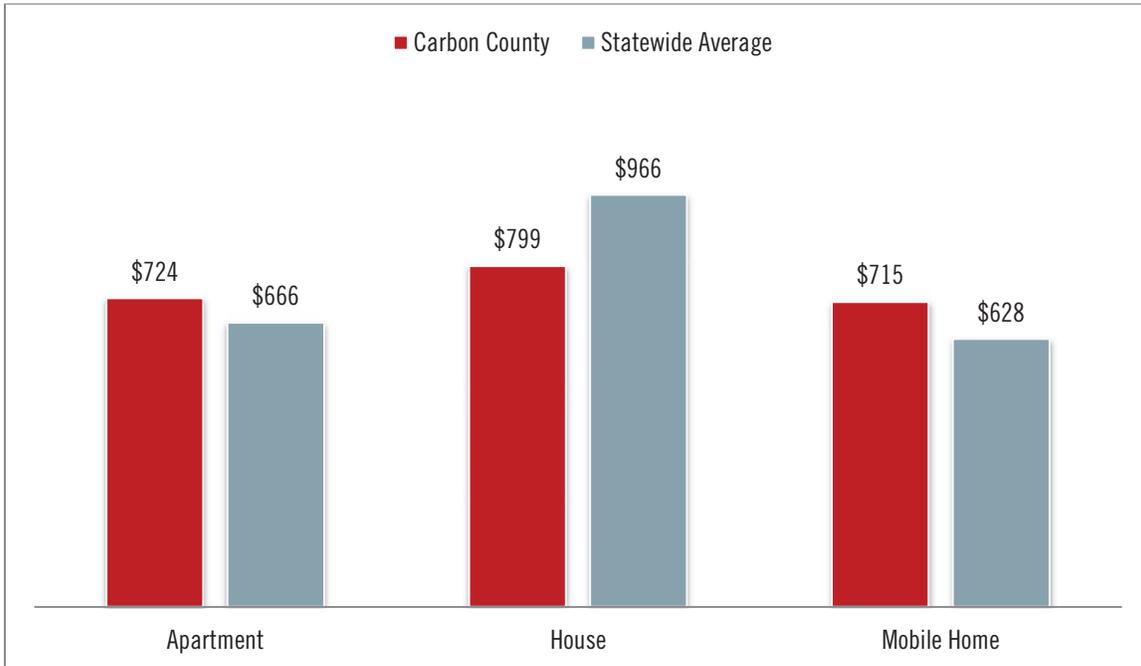
³⁰ Source: United States Census 2010

³¹ Wyoming Community Development Authority, “A Profile of Wyoming – Demographics, Economics and Housing Semiannual Report Ending December 31, 2011”, February 29, 2012

³² Chokeycherry/Sierra Madre Draft EIS, Volume II, 4.8-15.

³³ Chokeycherry/Sierra Madre Draft EIS, Volume II, 4.8-16.

FIGURE 29: AVERAGE RENTAL RATES, 4TH QUARTER 2011



Source: Wyoming Economic Analysis Division, “Food Prices Propel Inflation for the Fourth Quarter of 2011”, April 3, 2012

There has been a recent upswing in demand for apartment rentals. Prices have increased on those rental properties fairly quickly. In just the last year alone, rental rates have increased almost eight percent. From 2000 to 2006, average market rent went from about \$343 to \$791 – a dramatic increase of 110 percent over the period.³⁴ Housing prices have also increased but not at nearly the same rate.

TABLE 32: CHANGE IN AVERAGE RENTAL RATES, 4TH QUARTER 2010 TO 4TH QUARTER 2011

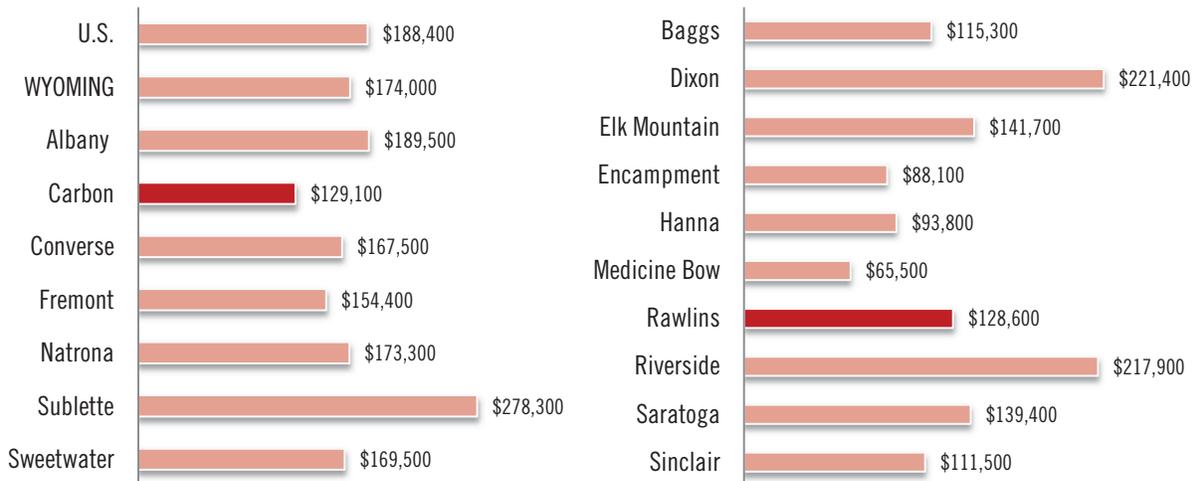
	Carbon County	Statewide
Apartment	7.9%	2.3%
House	0.8%	4.1%
Mobile Home	-2.5%	1.4%

Source: Wyoming Economic Analysis Division, “Food Prices Propel Inflation for the Fourth Quarter of 2011”, April 3, 2012

The median home value in Rawlins is \$128,600, similar to the median home value countywide. However, there is a considerable range in home values throughout the County, with the highest values found in Dixon and the lowest median values found in Medicine Bow. Home values in Rawlins are consistent with the Carbon County average, but those averages are considerably lower than the averages of neighboring counties.

³⁴ Rawlins Housing Assessment 2007

FIGURE 30: REGIONAL AND LOCAL COMPARISON OF MEDIAN HOME VALUES



Source: ACS 2006-2010

TABLE 33: MEDIAN VALUE BY YEAR STRUCTURE BUILT

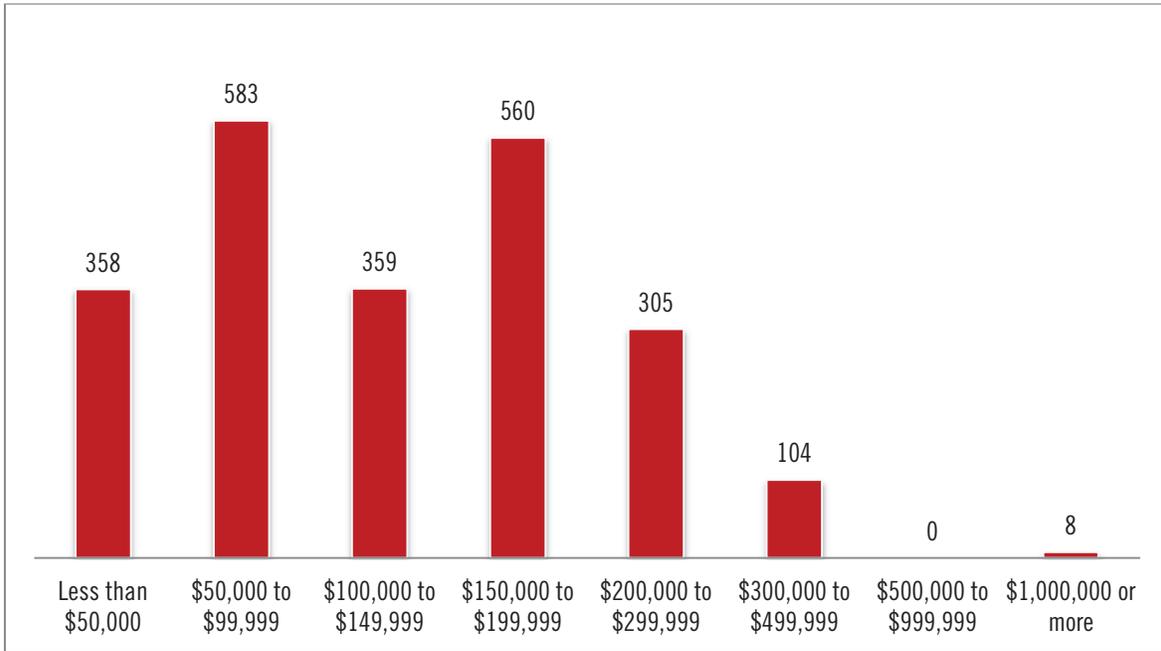
Median Value by Year Structure Built		
Year Built	Carbon County	State of Wyoming
1939 or Earlier	\$104,400	\$141,200
1940 to 1949	\$127,700	\$129,500
1950 to 1959	\$149,700	\$151,800
1960 to 1969	\$127,800	\$166,500
1980 to 1989	\$130,700	\$187,000
1990 to 1999	\$185,300	\$224,000
2000 to 2004	\$248,800	\$243,500
2005 or later*	\$65,800	\$244,600
Median Value	\$129,100	\$174,000

Source: Wyoming Community Development Authority, "A Profile of Wyoming – Demographics, Economics and Housing Semiannual Report Ending December 31, 2011," February 29, 2012, Census 2010

* Although this number appears to have inaccuracies, it has been double checked against Census and state economic state data

Median home values, when analyzed by year built, are lower in Carbon County than statewide. However, many report a perception that housing prices, as well as rental rates, are very high. This perception might be based on the quality, size, and condition of the home relative to price. Real estate agents confirm that price for condition is high. Potential new residents find they might be able to find housing in their price range, but that housing might be a downgrade from their previous residence at a comparable price.

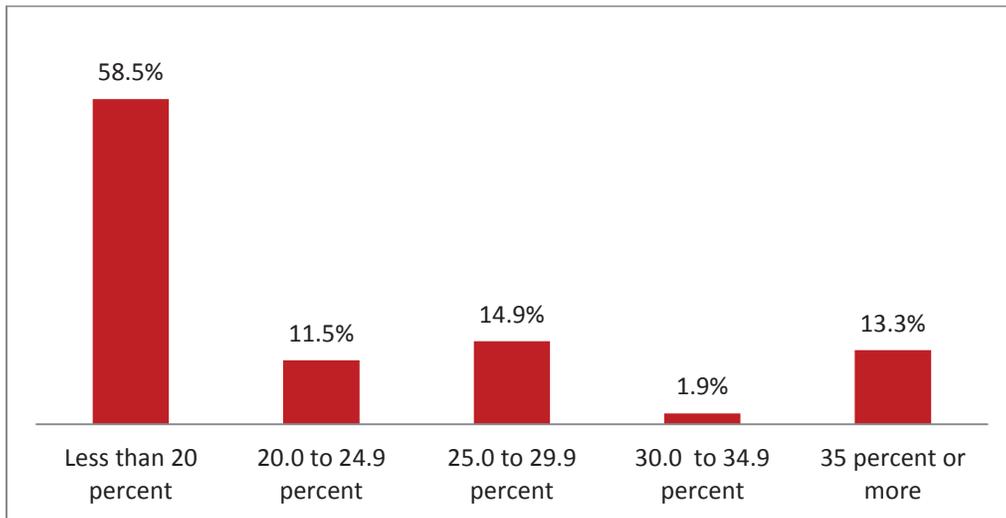
FIGURE 31: NUMBER OF HOUSING UNITS BY VALUE



Source: US Census Bureau, 2006-2010 American Community Survey 5-Year Estimates

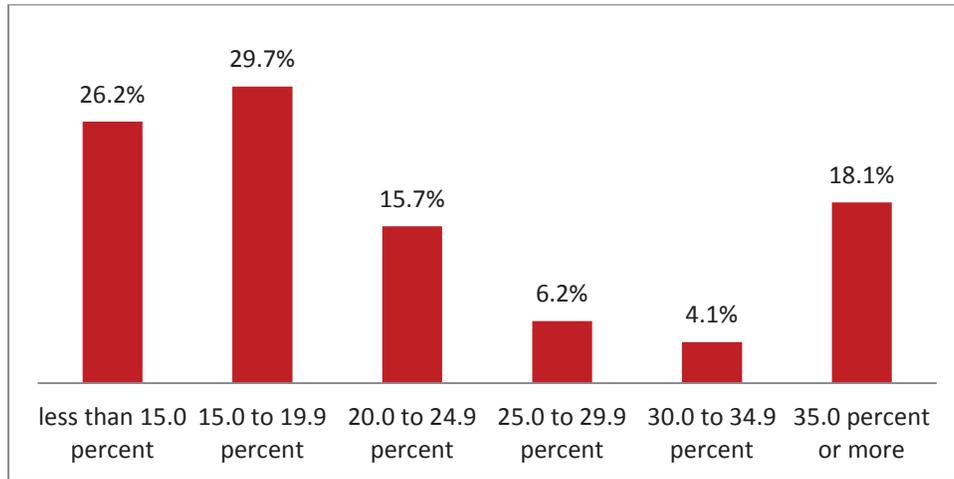
Forty-one percent of the housing units are valued below \$100,000, suggesting a lack of quality, although affordable. The question arises as to the livability of those housing units with low value.

FIGURE 32: SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE IF HOUSEHOLD INCOME



Source: US Census Bureau, 2006-2010 American Community Survey 5-Year Estimates

FIGURE 33: GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME



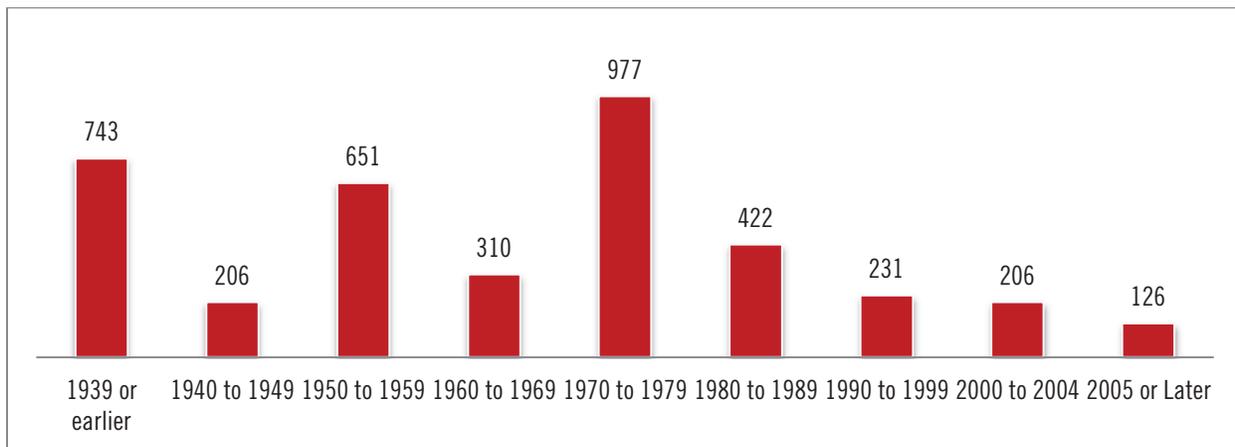
Source: US Census Bureau, 2006-2010 American Community Survey 5-Year Estimates

HOUSING CONDITIONS

According to real estate agents, rates and housing prices are both tied to issues of housing condition and quality in the City. They note that many of the vacant houses are very old or not up to a modern standard of living and are therefore not even considered a viable option by new residents, especially if they feel they have to pay too much for something that is clearly not an investment in real estate. Some of the available MLS listings are also in poor condition, limiting their marketability and further limiting the available inventory for new potential residents.

Approximately 75 percent of housing was built in the 1970's or earlier. Just as the low number of building permits indicate, there is very little modern housing available in Rawlins.

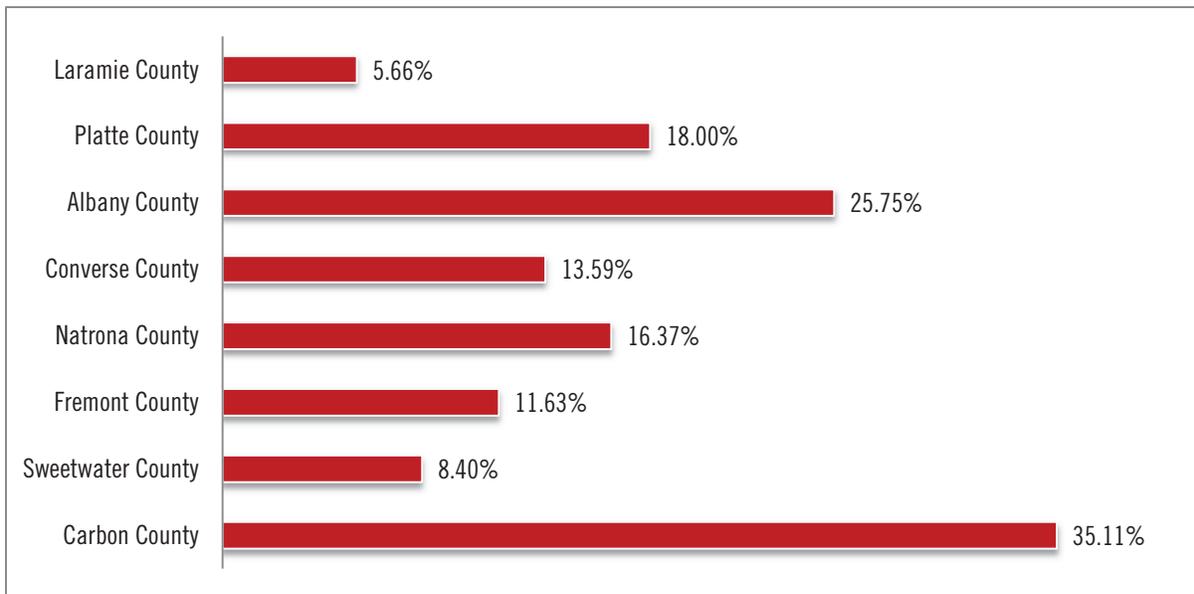
FIGURE 34: NUMBER OF HOUSING UNITS BUILT BY DECADE



Source: US Census Bureau, 2006-2010 American Community Survey 5-Year Estimates

One of the most striking statistics of the housing inventory is that Carbon County has one of the highest rates in the State of single-family homes in worn out or badly worn condition. The county has 35.11 percent of their housing in this poor condition. This is one of the highest rates in the State. Nearby counties have much lower percentages of poor housing conditions.

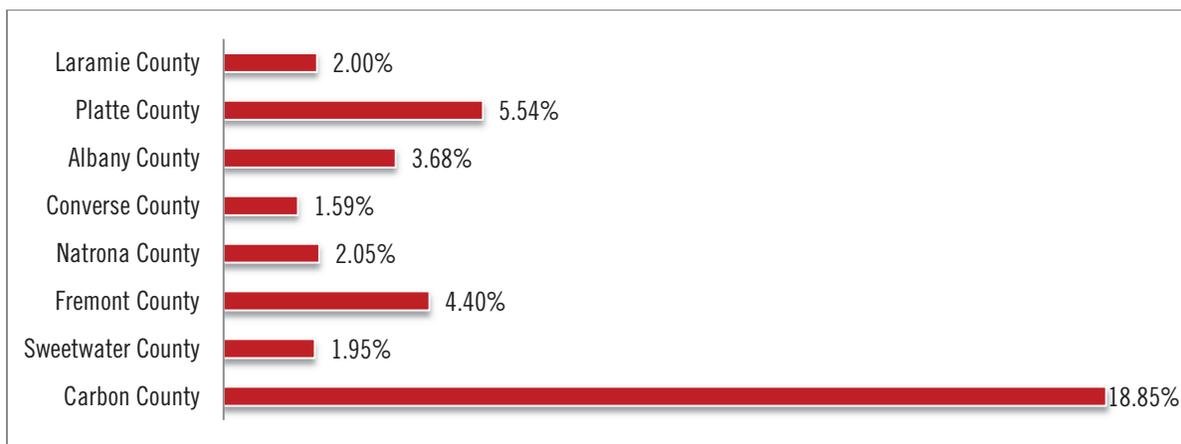
FIGURE 35: PERCENT OF SINGLE-FAMILY HOMES IN WORN OUT OR BADLY WORN CONDITION



Source: Wyoming Community Development Authority, "2011 Wyoming Housing Conditions"

Similarly, Carbon County has the worst rate in the State for the percentage of homes built with low quality materials at 18.85 percent of single-family homes.

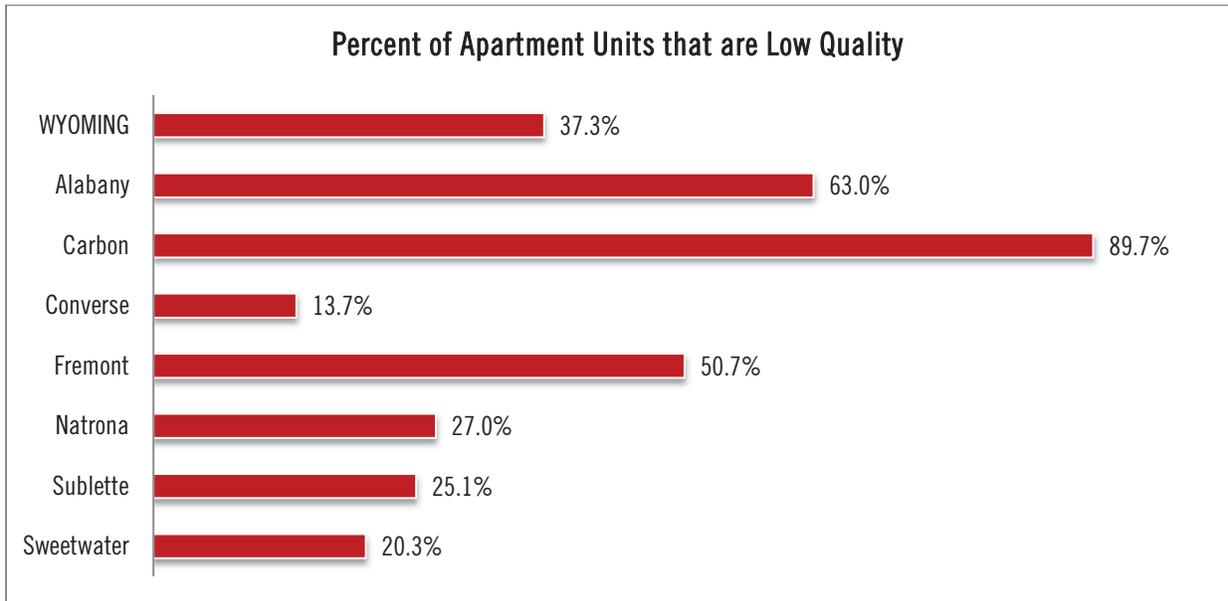
FIGURE 36: PERCENT OF SINGLE-FAMILY HOMES BUILT WITH LOW QUALITY MATERIALS AND IN UNSUITABLE CONDITION



Source: Wyoming Community Development Authority, "2011 Wyoming Housing Conditions," March 14, 2012

The state of apartment units is also dismal – nearly 90 percent of apartment units are considered low quality. This is one of the lowest rates in the State with only Sheridan, Niobrara and Hot Springs counties with lower rates. Carbon has the lowest rate in its region.

FIGURE 37: PERCENT OF APARTMENT UNITS THAT ARE LOW QUALITY



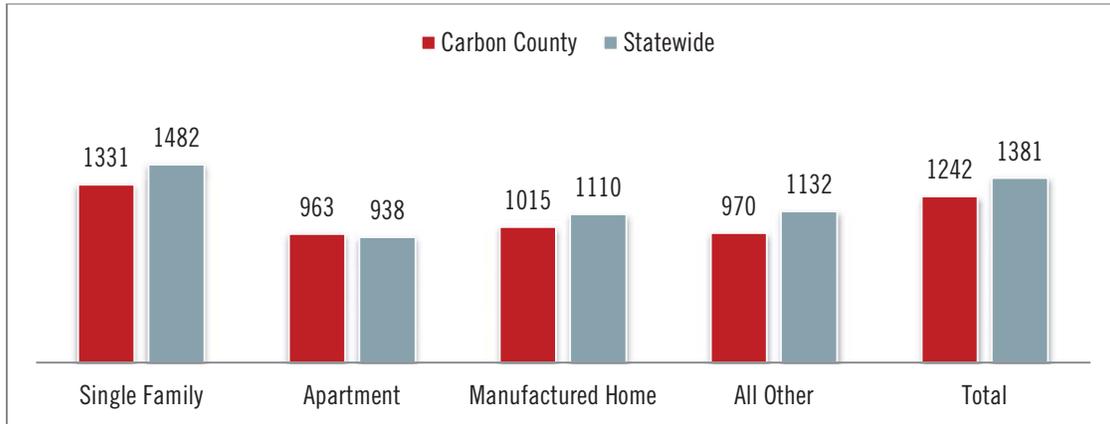
Source: Wyoming Community Development Authority, “2011 Wyoming Housing Conditions,” March 14, 2012

Housing in the County is also smaller on average in most types of housing than the rest of the State which contributes to a less desirable housing market for new residents. The County’s average square feet for single-family homes is the lowest in the State at 1,691 square feet when including basements, and second lowest in the state at 1,331 square feet if excluding basements.³⁵



³⁵ Wyoming Community Development Authority, “2011 Wyoming Housing Conditions,” March 14, 2012.

FIGURE 38: AVERAGE SQUARE FEET BY HOME TYPE, WITHOUT BASEMENT

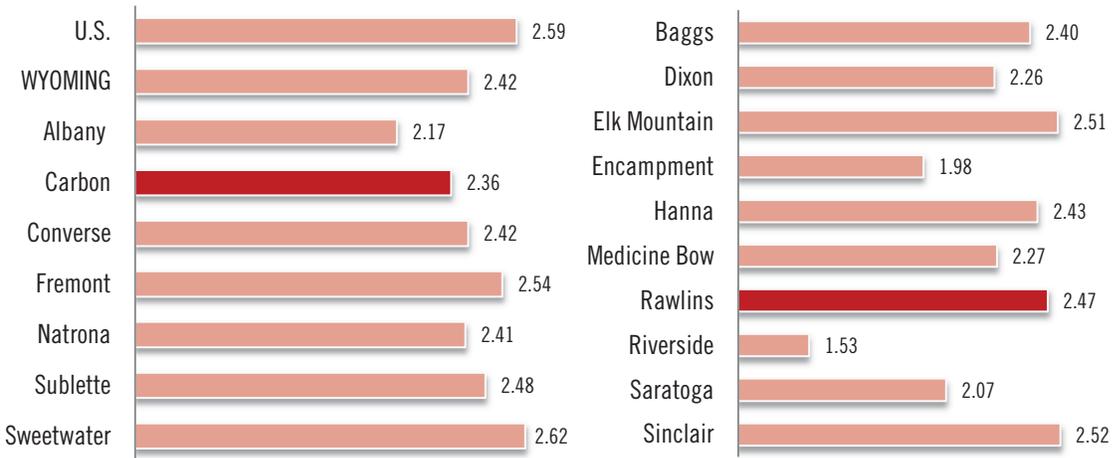


Source: Wyoming Community Development Authority, "2011 Housing Conditions Report," March 14, 2012

HOUSEHOLD SIZE AND DEMOGRAPHICS

The national average household size is 2.59 persons while Wyoming's average household size is 2.42. According to the latest Census data, Carbon County has a household size of 2.36, ranking it the second lowest among neighboring counties. Rawlins has a household size of 2.47, ranking it near the top of incorporated areas within Carbon County.

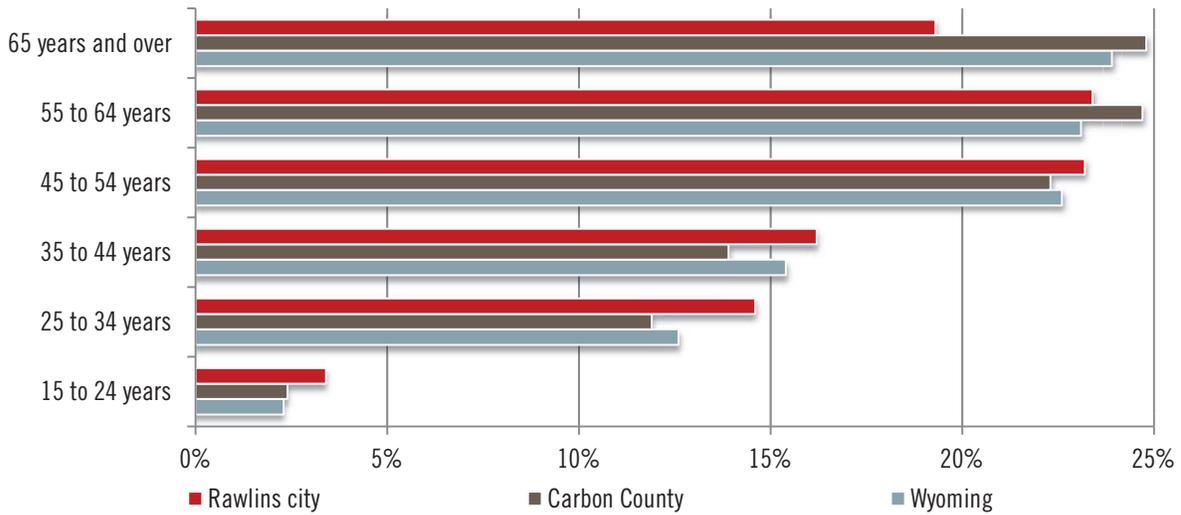
FIGURE 39: REGIONAL AND LOCAL COMPARISON OF AVERAGE HOUSEHOLD SIZE,



Source: 2010 Census

The following figure illustrates the age of the homeowner as a percent of all owner-occupied housing units. While Carbon County and Wyoming are fairly similar, Rawlins deviates slightly with a larger share of owner-occupied housing units owned by younger residents.

FIGURE 40: AGE OF HOME OWNER AS A PERCENT OF ALL OWNER OCCUPIED HOUSING UNITS



Source: 2010 Census

OVERFLOW TEMPORARY LODGING

The rental market in Rawlins has been volatile in the last several years as supply relative to demand has tightened causing rental prices to rise. If temporary workers are unable to find suitable rental housing due to the factors above, such as availability, condition, term of contract, or if they are looking for a fully furnished living space, they might turn to alternative housing options. These include facilities like hotels and campsites. Hotels in the region report high rates of this type of use.

Another unique factor in lodging availability in Rawlins is its position on the I-80 corridor. The Interstate is often closed in the winter due to extreme snow and blizzard conditions and the hotels in Rawlins fill up quickly with stranded travelers. It is reported that in these situations, some room rates can double and triple.

TABLE 34: ROOMS, CAMPGROUNDS AND RV SPACES AVAILABLE IN CARBON COUNTY, WYOMING, JULY 2010

Community	Rooms Available	Camp Ground / RV Spaces	Total	% of Carbon County
Baggs	72	23	95	4.7%
Elk Mountain	13	0	13	0.6%
Encampment	33	0	33	1.6%
Hanna	0	0	0	0%
Medicine Bow	64	0	64	3.2%
Rawlins	1,252	303	1,555	77.1%
Riverside	20	33	53	2.6%
Saratoga	174	30	204	10.1%
Total in Carbon County	1,628	389	2,017	

TABLE 35: ROOMS, CAMPGROUNDS AND RV SPACES AVAILABLE IN RAWLINS, WYOMING, JULY 2010

Rawlins Location	Rooms Available
America's Best Value Inn	76
Best Western Cottontree Inn	122
Budget Inn	74
Comfort Inn & Suites	65
Days Inn	119
Express Inn	48
First Choice Inn	48
Hampton Inn	78
Holiday Inn Express	72
Jade Lodge	24
Labella Motel	7
Microtel Inn	59
Motel 7	31
Oak Tree Inn	62
Quality Inn	131
Rimrock Lodge	4
Super 8 Motel	47
Travel Lodge	50
Econo Lodge	38
Key Motel	30
Best Motel	28
Sunset Motel	29
Golden West Motel	10
American President Campground	70
KOA Campground	62
Western Hills Campground	171
Total in Rawlins	1555

ASSISTED LIVING HOUSING

Rawlins currently has a 62-bed skilled nursing facility. Currently there are no independent living, assisted living, adult day care, hospice or at-home end of life care services available in Carbon County. This has economic implications as there will be an out-migration of a portion of older residents to areas where they can obtain more medical and assisted living services. The recently-completed Rawlins Aging In Place Feasibility Study (May 2012) identified demand for 36 assisted living beds, at the present time, with demand increasing to 48 beds by 2015.

SUMMARY OF HOUSING NEEDS

Based on the research above, as well as interviews with local real estate agents, the following types of housing have been identified to be in short supply at the present time:

- Furnished housing and efficiency units – temporary workers seeking low-hassle, inexpensive housing
- 3-bedroom homes with garages – ideal basic homes with better quality for small families
- Better quality single-family homes
- Better quality apartments and rentals – especially for middle or high-end markets
- Assisted living complexes
- More adequate affordable housing

TOURISM AND RECREATION

The City of Rawlins has great potential to capitalize on tourism opportunities, especially from outdoor entertainment. Because of the City's positioning on I-80 and US 287, in addition to great outdoor opportunities next to City amenities, Rawlins serves as a great jumping-off point for outdoor adventurers. Its position on US 287 also provides a great stop-over for outdoor-oriented tourists traveling to Yellowstone and Grand Teton national parks. Not only is the location ideal for serious sportsmen looking for quality recreation, but the accessibility provides opportunities to grow tourism for a wide variety of visitors. Rawlins has been making a concerted effort in recent years to increase tourism, and has become the State's first Aspiring Tourism Community.



LODGING

The accessibility to the outdoors, as well as the proximity to hunting and fishing makes the region a great place to camp. Although these activities can be a great asset to the economics of Rawlins, a common problem is the loss of revenue outside the City as people camp or stay in recreation areas during their trip. Rawlins would benefit from promoting the City as a recreation oasis to those already coming to the region for outdoor recreation. Promoting the proximity of hotels, restaurants, and other amenities has a lot of potential to a tourism base that already exists. A person or family can participate in the great outdoor activities of Rawlins while still being close enough to town to stay comfortably in a hotel.

In interviewing hotels³⁶ in the region, there is an interesting story with the lodging in town. Much like the recent tourism study³⁷ found, the majority of visitors from out of town that stop in Rawlins are stopping for a night on their way to somewhere else. The Hampton Inn said that about 60-70 percent of their rooms every night are these types of visitors. They also noted that in the summer months their rooms sell-out every night.

Clearly, there is high visitor traffic, but much of it is short-term. This is something the residents recognize too and is an area that Rawlins can continue to try to convert into additional tourism revenue. For example, a very large portion of the visitors travelling through are going to Yellowstone National Park. These visitors are already looking for an outdoor vacation, but still have a six-hour drive to their final destination. Rawlins could bring in a significant amount of tourism revenue just by enticing stopover traffic to spend a day in the area to break up long driving trips. People on their way to Yellowstone might be interested in the nearby fishing or hiking, visiting the Old Pen or other activities to take a break from driving.

³⁶ Hampton Inn interview

³⁷ "City of Rawlins – Tourism Assessment", Wyoming Office of Tourism, October 19, 2010

Within the hotels, there is potential for additional growth in attracting visiting hunters and other outdoorsmen - especially wealthy individuals looking for a luxury hunting adventure. The Hampton Inn suggested that approximately five percent of their rooms had hunting clients, but they saw potential for building partnerships with guide groups.

TABLE 36: AVERAGE LODGING CUSTOMER MIX – HOTELS/MOTELS/INNS/BED & BREAKFAST

2011 Full Year	
43.2%	RESPONSE RATE
54.43%	Business
39.80%	Blue collar workers (mineral industry, commercial, construction laborers, etc.)
14.63%	Individual business travelers (white collar)
33.29%	Leisure
20.38%	Tourists visiting Carbon County or passing through as part of a longer trip
5.72%	Hunting / fishing (other outdoor recreational activities)
3.88%	Visiting local friends & relatives
3.31%	Visiting Carbon County to attend a specific event (rodeo, concert, festival, etc.)
12.28%	Conference/Meeting/Group
3.56%	Weddings/reunions/family events/social events
3.34%	Sports events (games, tournaments, etc.)
2.72%	Conference/meetings
2.66%	Group Tour/motorcoach

Source: RTM 2012 Lodging Survey

- December and January are typically the slowest months of the year while June and August tend to have the highest occupancy each year, followed closely by July and September.
- Overall, for the three year time frame 2009 through 2012, Tuesday night is the highest average year-round occupancy at 64.4%, while Sunday night is the slowest at 44.9%. This is similar to other Wyoming destinations, especially given summer leisure travel patterns.

Top markets for future sales efforts by the CCVC were reported (in rank order of importance) by the hotel/motel/inns, leisure/vacation, family vacation, conference/meeting, nature tourism, family reunions, team sports events, group tour/motorcoach, fraternal/social groups and religious groups.



TABLE 37: MONTHLY LODGING OCCUPANCY PERCENTAGES

	2006	2007	2008	2009	2010	2011	2012 YTD
January	51.6%	61.7%	61.8%	39.3%	35.1%	34.0%	37.3%
February	53.0%	56.6%	59.3%	36.4%	35.6%	38.4%	43.9%
March	58.6%	61.2%	52.7%	41.9%	41.9%	39.1%	47.3%
April	63.3%	64.8%	55.5%	50.3%	67.0%	40.1%	61.5%
May	74.2%	75.5%	64.1%	47.4%	60.4%	49.0%	68.2%
June	84.7%	84.9%	82.8%	62.1%	71.6%	66.4%	73.6%
July	85.8%	84.8%	80.1%	70.7%	75.4%	69.8%	
August	86.8%	84.0%	77.0%	67.1%	78.2%	77.0%	
September	85.1%	80.2%	73.1%	62.0%	76.1%	80.9%	
October	73.6%	79.3%	62.6%	52.6%	62.4%	69.9%	
November	64.3%	65.7%	51.9%	37.8%	52.2%	56.8%	
December	56.1%	59.5%	40.8%	34.2%	37.7%	41.7%	

Source: RTM 2012 Lodging Survey

TABLE 38: LODGING TAX COLLECTIONS

	2000	2001	2002	2003	2004	2005
Carbon County	\$57,102	\$58,195	\$52,573	\$49,928	\$50,634	\$38,557
Baggs	\$8,575	\$7,664	\$6,725	\$7,167	\$7,522	\$7,638
Elk Mountain	\$0	\$0	\$0	\$952	\$1,401	\$1,303
Dixon	\$0	\$0	\$0	\$0	\$0	\$0
Encampment	\$868	\$867	\$826	\$1,031	\$863	\$791
Hanna	\$601	\$546	\$697	\$356	\$428	\$207
Medicine Bow	\$238	\$363	\$405	\$472	\$447	\$989
Rawlins	\$108,328	\$97,448	\$110,370	\$116,282	\$128,144	\$165,741
Riverside	\$1,052	\$4,836	\$863	\$965	\$880	\$1,279
Saratoga	\$28,286	\$29,767	\$32,515	\$30,007	\$34,665	\$33,050
Sinclair	\$0	\$0	\$7	\$0	\$0	\$0
TOTAL	\$205,050	\$199,686	\$204,980	\$207,158	\$224,985	\$249,555

	2006	2007	2008	2009	2010	2011
Carbon County	\$42,897	\$48,184	\$51,389	\$63,782	\$64,634	\$76,678
Baggs	\$8,959	\$8,998	\$11,758	\$9,259	\$4,493	\$272
Elk Mountain	\$1,828	\$1,888	\$2,543	\$2,169	\$2,195	\$1,563
Dixon	\$0	\$0	\$0	\$3,055	\$2,281	\$1,982
Encampment	\$967	\$954	\$1,235	\$863	\$723	\$669
Hanna	\$401	\$0	\$0	\$0	\$0	\$0
Medicine Bow	\$1,268	\$1,504	\$1,380	\$1,317	\$1,378	\$915
Rawlins	\$215,840	\$305,047	\$361,824	\$317,942	\$277,559	\$275,532
Riverside	\$1,244	\$1,515	\$1,712	\$1,688	\$1,765	\$2,068
Saratoga	\$34,440	\$36,993	\$40,333	\$31,986	\$22,206	\$20,456
Sinclair	\$0	\$2	\$0	\$0	\$0	\$0
TOTAL	\$307,844	\$405,084	\$472,174	\$432,059	\$377,234	\$380,133

Source: Wyoming DAI, Economic Analysis Division

HUNTING AND FISHING

Rawlins has been recognized since 2009 by *Outdoor Life* magazine as one of the top 15 towns for sportsmen³⁸ and it is easy to see why the City earns this distinction. The population of Rawlins is condensed within the City and surrounded by vast open and public land providing outdoor activities like hunting right in the City's backyard. In addition to the abundant public land, there is significant private land classified as "walk-in areas" allowing hunters and fishers to use private lands for free during certain parts of the year. The region has gun laws and hunting restrictions favorable to hunters in addition to a high quality and wide variety of species. All three major species of game hunting – elk, antelope, and mule deer – are in the region. *Outdoor Life* magazine also highly rated the region for trophy hunting potential. Moose, sheep, coyotes and mountain lions are also close. Moreover, there are excellent indoor and outdoor shooting ranges available to cater to tourists staying in the region.



While not as close to town as hunting, Rawlins is also a great base for world-class fishing. The North Platte River is nearby, and it includes the Miracle Mile famous for excellent fly fishing. There are also numerous nearby reservoirs, such as the Seminoe, with trout and trophy walleyes. Ice fishing is available in the winter.

OUTDOOR RECREATION

The proximity of the City to open land also gives plenty of space for other outdoor activities such as trail hiking, mountain biking, and winter sports like snowshoeing, snowmobiling, and cross-country skiing. Bikers and hikers have ample trails in the region. The Continental Divide Trail is near town, attracting hikers and bikers. Rawlins is also within day-trip distance of other wilderness areas in Carbon County such as Medicine Bow National Forest. An area that Rawlins could build on is to create more mountain biking trails in the region, perhaps for the more intense or adventurous biker. There are few areas for mountain biking that are not also hiking trails.

Many of these trails for hiking and biking double as snowshoe trails in the winter, adding to the extensive winter sport activities in the area. Carbon County also has over 500 miles of trails for snowmobiling. Most of these trails, including the snowmobile trails, accommodate cross-country skiing and dog sledding.

³⁸ <http://www.outdoorlife.com/photos/gallery/hunting/2009/05/top-200-towns?photo=7#node-1001312972>

The City's Tourism Committee appears to also be working on a horse-oriented project in its long term plans, which will also be a great fit for the type of tourists passing through Rawlins. The City already has a horse motel near I-80 which might be another area to promote for travelers passing through.

A survey conducted by Randall Travel Marketing in 2012 for the Carbon County Visitors Council indicates that of those visitors who participated in outdoor recreation while in Carbon County, 61 percent participated in hiking, followed by 55 percent camping, 29 percent fishing, 13 percent cycling and ten percent hunting. The results of that survey suggested that "Carbon County is well-positioned to market itself as a 'nature lover's paradise.'" This survey also found that for a majority of people who make inquiries regarding Carbon County, Yellowstone is a part of their trip. This suggests that Carbon County should make efforts to participate in media and public relations efforts aimed at Yellowstone National Park.

IN-TOWN RECREATION AND HISTORY

There are several tourist attractions and activities closer to town as well. Rawlins has a rich history that tourists might be interested in exploring. The most prominent historic building is the Historic Frontier Prison, or "Old Pen" which is a fascinating insight into the history of the region and of the country's prison systems. This is a popular attraction with about 15,000 tours annually. The Old Pen is also included in an interpretive trail that guides hikers through the City, passing by other historic and notable sites in town.

Another historic site that hotels report as popular is Martin's Cove, an important landmark on the Mormon Handcart Trail. This is about 60 miles north of town and many people stay in Rawlins to go visit this site. Since Rawlins is one of the closest places to stay by this attraction, Rawlins might find a niche in catering to potential visitors. Other locations along the Mormon Trail have catered to this unique tourism, and it's not clear that Rawlins is aware of this opportunity. It is not mentioned in the State's tourism assessment.

Also of note is the Rochelle Ranch Golf Course, which could be an attraction for visitors looking for a relaxing addition to their trip. The course has been ranked the 29th toughest course in the country by Golf Digest Magazine, as well as one of the best values in golf. The golf course is a great asset to the City to build attractive packages for high-income visitors, possibly in conjunction with high-quality hunting tours and packages.



An area that the City can continue to improve for stop-over visitors is to ensure that restaurants and stores, especially near I-80, keep longer hours. Visitors stopping only for the night are likely to get in later in the day. They likely need supplies and dinner, or just something to do for a few hours before sleeping. If nowhere is open, there is a lost opportunity for visitor revenues.

The City has a great asset in its indoor recreation center that serves the needs of not only City residents, but also has potential to attract tourists to stay longer in the area with some additions. The shooting range especially should be marketed as an available facility for visiting outdoorsmen. Adding some suggested activities like a mid-air adventure, zip lines, rock climbing, indoor batting cages, and trampolines can provide further family-oriented fun for citizens and visitors alike. These facilities could be marketed along with other suggested retail and tourism campaigns and promotions.

Further discussion of recreation development and strategy is explored in the Rawlins General Plan.

EDUCATION

Throughout the process of developing this Economic Development Plan, numerous comments were made about education, reflecting a community that has serious concerns about some aspects of the current educational status, as well as one that is committed to improvement. Comments made at the Industry Roundtable held in May 2012, regarding education, and distributed to attendees, are as follows:

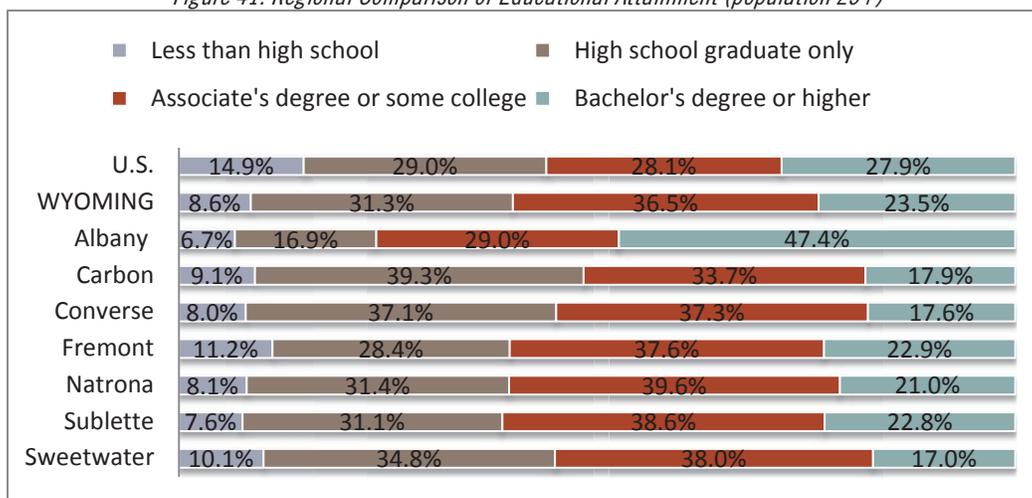
- Dropout rates in Carbon #1 and #2*
- More young men than women are going into the workforce*
- About 6 years later they need the GED for a promotion so they contact higher education*
- Lack of parental involvement*
- Transient population results in transient students*
- Need more vocational training*

This section of the study provides some background data that relates to the above-mentioned comments, includes programs and policies that the community is undertaking to improve existing educational attainment, as well as suggestions for future improvement. It should be noted that the community has recently shown a strong commitment to education, approving a \$26.5 million tax to support education -- \$6.5 million of which is to support state-of-the-art vocational education.

EDUCATIONAL ATTAINMENT

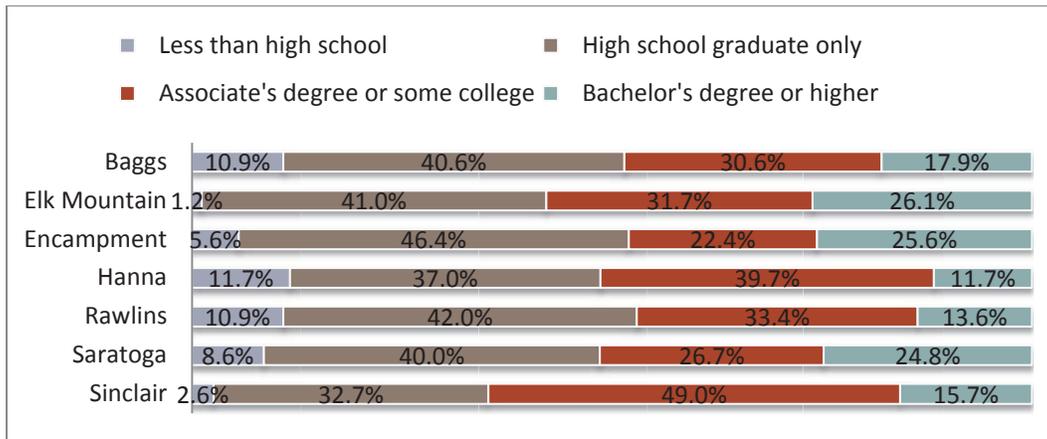
The most recent educational attainment data is provided by the American Community Survey. The following figures compare Carbon County to neighboring counties as well as the State and Nation, and Rawlins to other incorporated areas within Carbon County. Statistics show that the population within Rawlins generally has less education above a high school degree than surrounding areas. While these statistics could be an indication of the school system, they can also indicate that individuals with higher degrees are not remaining in the area. However, Rawlins is making significant positive steps through community awareness and dedication in order to shift trends in the other direction.

Figure 41: Regional Comparison of Educational Attainment (population 25+)



Source: ACS 2006-2010

FIGURE 42: LOCAL COMPARISON OF EDUCATIONAL ATTAINMENT (POPULATION 25+)

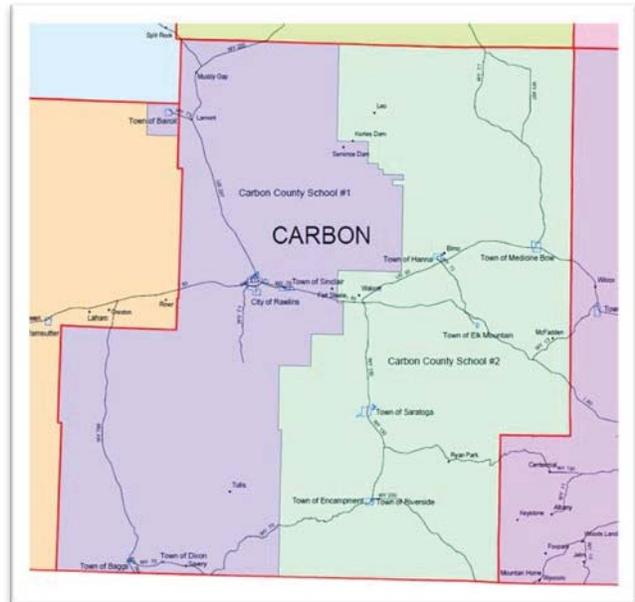


Source: ACS 2006-2010

Enrollment

In 2007, Rawlins High School was labeled a “dropout factory” by a national education study.³⁹ This distinction was made based on the high dropout rates in 2004, 2005 and 2006. The class of 2006 started with 140 freshman students, but there were only 74 remaining by senior year – a decrease of 47 percent. During those three years analyzed, only 53 percent of students remained by senior year. These numbers are low compared to the national number of about 70 percent.

For the 2011 class, these rates improved to 74 percent of the class graduating.⁴⁰ However, it is interesting to note that within that class, 85.7 percent of the females graduated while only 65.5 percent of the males graduated.

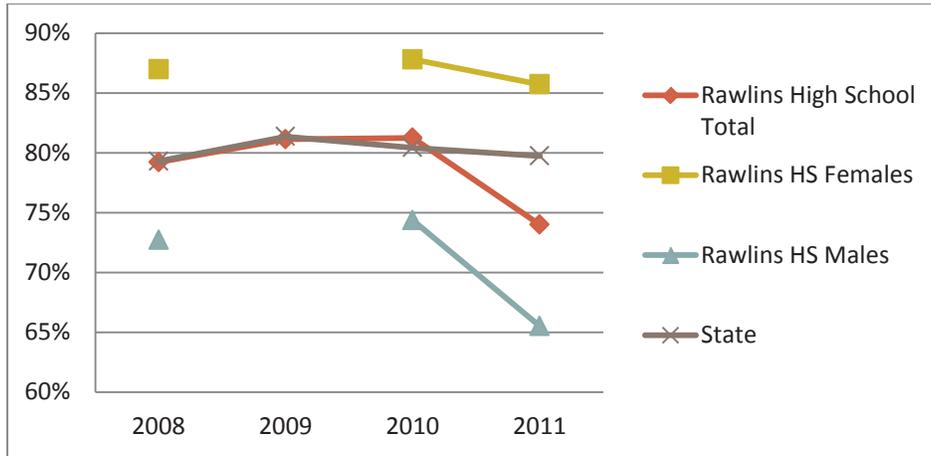


This data supports the common anecdotes from school and City officials that many students, especially males, are drawn to working in the oil fields for high starting wages. These jobs don’t require a degree, and their high starting wages give many students little incentive to stay in school.

³⁹ http://trib.com/news/state-and-regional/article_bb70883a-e87c-55f9-afe4-a51f20ac9e14.html

⁴⁰ http://edu.wyoming.gov/sf-docs/graduation-rates/WY_Graduation_Rates_Schools_4_year_2010-11.pdf?sfvrsn=0

FIGURE 43: GRADUATION RATES FOR RAWLINS HIGH SCHOOL AND STATEWIDE



Source: Wyoming Department of Education

EDUCATION AND EMPLOYMENT

The weaknesses in the high school graduation rates highlight an important area for improvement in order to be more competitive. The skill set of a workforce is just as much a resource as oil, natural gas or wind—and high educational attainment can in and of itself be a draw for companies seeking to locate in the area. Even if the oil industry is seeking young workers without necessarily needing degrees, there is still a strong need for an educated workforce to fill the management roles that can help grow the industry within the region and provide a more stable economy.



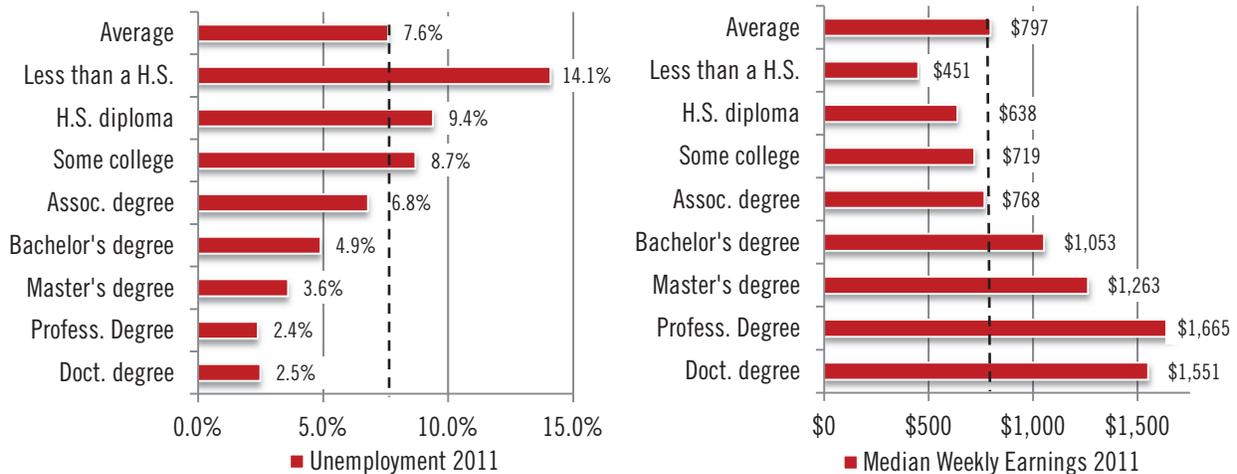
Many employers have indicated that they are concerned about the selection of applicants for jobs. There is high competition for educated and skilled employees and companies are worrying that they have to compete within their industry for workers. They often see applicants that do not have a GED. Banks have a difficult time filling

skilled positions, and the energy industry states that it has trouble finding engineers and managers. Sinclair cites major needs for employees with computer skills. Employers want a better trained workforce in order to grow the company with their human capital. Interviews also suggest that there is a need for leadership training within the community in order to promote entrepreneurship and local business growth.

According to the Economist Intelligence Unit’s research, skills shortages are becoming more acute in the oil and gas industry. In fact, this issue comes out of a recent survey they conducted as one of the major obstacles to growth over the next 12 months. In 2011, skills issues came fifth on the list of barriers and were only identified as a top three issue by 25 percent of respondents. In 2012, the issue has risen to second on the list, and has been identified as a key barrier by 34 percent of respondents.⁴¹

Additionally, there exists a strong correlation between higher educational attainment and both lower unemployment and higher earnings.

FIGURE 44: “EDUCATION PAYS”



Source: Bureau of Labor Statistics⁴²

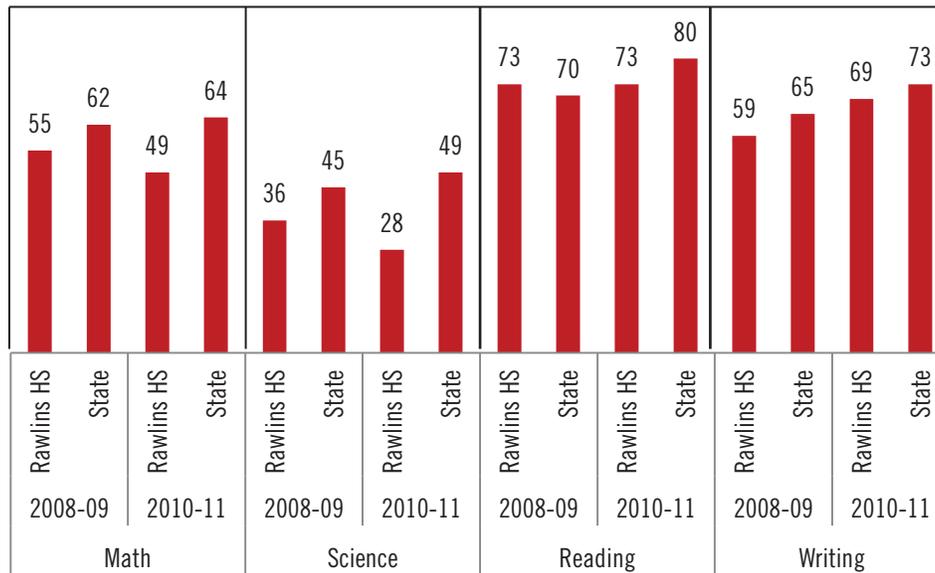
TEST SCORES

The statewide assessment test, or PAWS, provides information regarding the educational performance of students in Rawlins. Not every grade level is tested every year, and the last grade which takes the test is the 11th grade. In the following figures, the 11th grade test scores are compared for Rawlins High School against statewide results.

⁴¹ Commodities Now, Oil & Gas Industry Trends, January 2012.

⁴² http://www.bls.gov/emp/ep_chart_001.htm

FIGURE 45: PAWS TEST SCORES FOR RAWLINS HIGH SCHOOL AND STATE OF WYOMING⁴³



Source: Wyoming Department of Education, School Assessment Reports

When compared to the State, test scores in Rawlins are generally lower. Of concern is the declining trend in math and science scores since 2008 – especially when scores in these areas are improving statewide. Both math and science skills are an integral part of the energy industry and the school district should focus on hiring teachers who can make a significant difference in these areas. Sinclair is investing in a science teacher for the middle school, showing positive strides in education investment by community leaders.



Reading scores have held steady in Rawlins, but have improved dramatically statewide. Writing scores have seen great improvement in Rawlins, although are still not at State levels.

TEACHERS

The table below shows how the teachers in Rawlins High School compare to statewide averages. Overall, teachers in Rawlins tend to have slightly less experience. They are also more likely to be working on provisional

⁴³ http://edu.wyoming.gov/Programs/statewide_assessment_system/paws.aspx

certification or to not be “highly qualified.” However, despite these differences, they are slightly more likely to have post-graduate degrees than teachers in the rest of the State.

TABLE 39: TEACHER QUALIFICATIONS - SCHOOL PROFILE REPORTS 2010-11⁴⁴

	Rawlins High School	State Level Report
Avg. Years of Prior Teaching Experience	13.0	14.1
% of Teachers with Masters Degrees or Higher	40.8%	39%
% of Teachers with Provisional Certification	3.1%	0.8%
% of classes not taught by highly qualified teachers	3.9%	1.5%

As the community’s economic strength grows, the ability to draw great teachers will improve as amenities, housing, and social aspects become more appealing for educated professional teachers. Rawlins is also making great strides in creating attractive teaching environments for both students and teachers including a new state of the art elementary school, plans for a new high school, and physical fitness facilities.

HIGHER EDUCATION

While Carbon County does not have its own college or university currently, the community is fortunate to have the Carbon County Higher Education Center (CCHEC). The CCHEC is an affiliate of Western Wyoming Community College and it fills a number of roles for the community’s higher educational needs:

- Offers college-level courses
- Provides vocational training for Rawlins High School
- Provides community education classes on a wide range of subjects
- Offers GED and ESL programs

Currently, the CCHEC offers programs in three separate locations in Rawlins: 1) Rawlins High School; 2) Vocational Campus (leased building in a residential neighborhood); and 3) Main Campus (renovated grade school leased from the school district). The expansion of the Carbon County Higher Education Center in the north part of Rawlins is an important strategy for increasing interest in education in the community, expanding course offerings and for continuing to meet the needs of all employers, including the energy industry. In addition, the Wyoming School Facilities Division intends to build a new high school in Rawlins. The voters of Carbon County District #1 approved an additional \$26.5 million educational bond⁴⁵ for expansion of the new high school which includes \$6.1 million dedicated to the Career and Technical Education Center. This will allow for significant expansion of career and vocational training in Carbon County.

⁴⁴ <http://fusion.edu.wyoming.gov/Login/web/Pages/StateReportCards/SchoolProfileReports.aspx>

⁴⁵ In addition to the \$26.5 million bond, the School Facilities Department will contribute approximately \$35 million, for a total \$60 million investment in education.

Some students currently travel to Rock Springs for energy industry related classes due to the hands-on equipment and training that is available at the Rock Springs campus. To the extent that the CCHEC can add the laboratory-type experience now available in Rock Springs to the Rawlins area, it will benefit the local employers, and the entire community as local workers can keep their skills in the region.

VOCATIONAL TRAINING

Given the prominence of specialized sectors in the region, such as wind and other energy production, an enhanced vocational program provides great value to local youth to bridge the gap between education and employment. Since there is a concern that many are not graduating from high school since they are drawn to the high pay as laborers in the energy industry, providing an education that is more specialized to the work they seek incentivizes young people to stay and complete school. This will help these young adults in the long term as they have a more marketable set of skills and education, as well as helping the energy companies to have higher skilled workers and employees that are better prepared to be promoted.

Well aware of the importance of vocational training, the Carbon County Higher Education Center (CCHEC) offers high school classes in pre-engineering (including electrical, digital and instrumentation programming) and adult courses in AC/DC electrical, an electrical apprenticeship program and advanced classes in instrumentation. These classes will provide valuable skills in serving the needs of the expanding wind energy industry in the area.

In short, the CCHEC currently offers several distinct vocational programs that will be located in the new Career and Technical Education Center. These classes include welding, auto mechanics, hospitality and restaurant management, construction trades, electricity and instrumentation, nursing, CNA, and pre-engineering. The electricity and instrumentation program, in particular, will benefit from the new facility which is somewhat limited in its current location. Based on input from energy industry officials, this course offers key skillsets that are seeing growing demand.

The CCHEC offers good training in vocations in the healthcare industry, including a Certified Nursing Assistant (CNA) program for high school students and adults, and an Associate Degree Registered Nurse (ADRN) program. Many of these graduates remain in the community, thereby providing valuable medical skills. CCHEC is also one of two sites in the state to offer CNA II and Medication Aide programs.

INFRASTRUCTURE

Rawlins is strategically situated along I-80, providing the City with excellent ground access and visibility. Major broadband and fiber infrastructure follows along I-80 and provides opportunities for Rawlins to tap into this resource and attract companies reliant on high technology. A more detailed discussion of existing infrastructure and future infrastructure needs is included in the City's Master Plan.

TABLE 40: RAWLINS DAILY TRAFFIC AND MILE COUNTS 2010

Section Description	MILEPOST		ROUTE SIGNS		DAILY COUNTS		VEHICLE MILES '10	
	BEGIN	END	SYS	RTE	ALL VEH.	TRUCKS	AVMT	TVMT
Rawlins South Corp Limits	1.249	2.270	WY	71	426	40	435	41
Rawlins South Urban Limits	2.270	10.470	WY	71	252	20	2,067	164
Rawlins South Urban Limits	0.773	1.230	WY	78	928	90	428	41
Rawlins West Urban Limit	1.130	1.150	F	0156	256	50	5	1
Rawlins North Corp Limits	1.187	1.919	US/WY	287/789	3,559	329	2,605	241
Rawlins North Urban Limits	3.090	15.250	US/WY	287/789	3,839	562	46,682	6,834
Rawlins North Corp Limits	1.217	1.400	US	287bypass	5,237	86	958	16
Rawlins East Urban Limits	215.820	219.594	US	30/287	7,390	2,849	27,890	10,752
Rawlins East Urban Limits	215.810	219.594	US	30/287	7,530	3,176	28,494	12,018
Rawlins West Urban Limits	211.200	211.780	US	30/789	6,450	3,419	-154,774	-82,042
Rawlins West Urban Limits	211.200	211.780	US	30/789	6,603	3,426	3,830	1,987
Jct I 80 (West Rawlins Int)	211.870	212.016	I/US	80bus/30	5,085	620	742	91
Rawlins West Corp Limits	212.016	212.910	I/US	80bus/30	8,459	555	7,562	496
Rawlins East Corp Limits	215.423	215.640	I/US	80bus/30	8,660	780	1,974	178

Source: Wyoming Department of Transportation, 2010 Vehicle Miles Book

Airports are an integral part of a community's overall transportation system. Given Rawlins' distance from major airports, the development and expansion of its airport becomes especially critical. Currently, Rawlins has an airport that is used solely for private, not commercial air service. At the present time, the airport is mainly used by executives in the energy industry. The runway length is 7,008 feet. The recent retirement of the long-time fixed base operator (FBO) resulted in this position no longer being filled at the airport. There is not a current FBO at Rawlins for local charter air service and no locally manned charter air service is currently available. Rawlins is interested in filling this position and is currently searching for a new FBO. The fueling service is leased out and receives significant demand from planes stopping and refueling on cross-country flights. Twelve planes are permanently stationed at the Rawlins Municipal Airport.

Rawlins has recently completed an airport master plan and needs to pursue all avenues to increase the usage of the airport and to obtain commercial air service. One recommendation of the master plan is for a terminal building which would greatly enhance the safety, comfort and convenience of travelers, making Rawlins a more desirable destination or stopover.

According to interviews with local airport officials, the runway is long enough and can support enough weight such that it would not require extensive renovations, expansions or additions in order to expand into commercial service. The major factor in adding commercial service is sufficient demand. According to

interviews with local officials, demand has been increasing and averages 5-6 takeoffs and landings per day in the summer. Due to the weather, summer demand and airport usage is greater than in the winter.

It is anticipated that demand would come mainly from the following groups:

- Sinclair executives (especially with flights to Salt Lake City, the headquarters for Sinclair)
- Other energy industry executives
- Local residents using air travel out of Salt Lake City and Denver

The airport has been making efforts to increase demand through its marketing efforts, with promotional (discounts) for military groups, travelers who give advance notice of stopping in Rawlins, and large volume users. Increasing demand will be a critical factor in attracting a carrier willing to serve Rawlins. Demand could also be increased by appealing to recreation enthusiasts or by providing support services for activities such as grass and range fires, search and rescue, crop dusting, delivering parts for emergency repairs for large industry, recreation enthusiasts flying into more backcountry areas, etc.

The Joint Powers Board may want to consider hiring an airport consultant to assist them with assessing demand and maximizing the use of the airport. Currently, there are efforts by many small communities to encourage Congress to change the 90-10 percent FAA/local funding split to 95-5 percent for small communities. Rawlins should encourage its local Congressman to support this effort. An airport consultant could also work with WYDOT to ensure that the Rawlins Municipal Airport receives its fair share of state and federal funding sources.



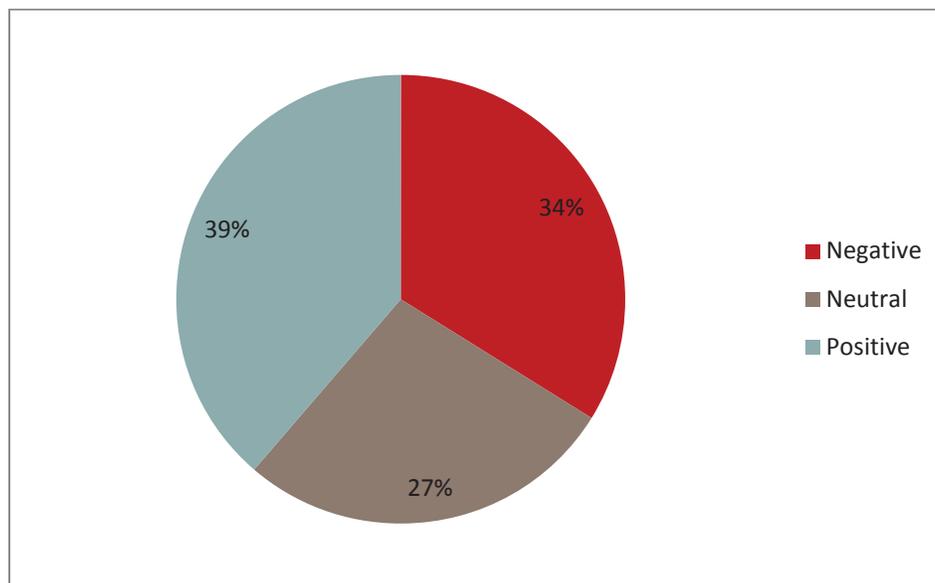
COMMUNITY IMAGE AND PRIDE

RAWLINS PRIDE

Any city can be enriched socially, economically, and aesthetically by a strong sense of community pride in its residents. This can be challenging in Rawlins where a large percentage of the population is composed of transient workers. However, pride is important because it can be a motivating factor in residents to improve and uphold the area in many areas, such as keeping yards neat, supporting local businesses, or getting to know others in the community. In turn, these factors can help lift the local economy, promote new growth and even foster lower crime rates and better quality of life. Conversely, low community pride can lead to a lack of caring by locals to keep the area clean or in good repair and other lack of interest in building up the City and those that live there.

Given these factors, it is important that Rawlins continue to find ways to enhance community pride, especially since there is significant negative feedback from citizens when asked about their feelings regarding Rawlins. A community survey found more positive feelings about the community than negative, but also found that over one-third of the community has negative impressions.

FIGURE 46: PRIDE IN COMMUNITY – SURVEY RESULTS



The resident survey also gave great feedback to the City for what citizens like, and don't like, about the City. This can be a great resource for helping the City find what areas to focus on when choosing development projects. The factors that received at least two mentions by residents are listed in the table below.

TABLE 41: PRIDE IN COMMUNITY – WHAT RESIDENTS ARE MOST PROUD OF AND LEAST PROUD OF

What Residents Like Most and/or are Most Proud Of	What Residents Like Least and/or are Least Proud Of
<ul style="list-style-type: none"> • Good People (<i>High Responses</i>) • Simple, Small Way of Life • Close-Knit Community • Outdoor Access • Innovative, Good Programs and Things To Do • Wind and Weather • Nonprofits Getting Results • Western Attitude • Horse Community • Good Future and Opportunity to Grow • Safe/No Bums • Downtown • Good Customer Service 	<ul style="list-style-type: none"> • Lack of Shopping (especially Big Box Stores) • Lack of Restaurants • Cleanliness of City Property (Streets, Entrances, etc.) • Cleanliness and Upkeep of Private Property, Including Downtown • Need More Things to Do, Generally and for Children • Wind and Weather • City Government and Politics • Economic Opportunities • Lack of Ambition in Youth • Cultural Events (Lacking or Not Well-Attended) • Get Rid of Prison • Lack of Internal Pride • Recreation Center • No Help for Homeowners • Vacant Buildings • Bad Customer Service • Only Promote Downtown, not Whole Community • Downtown

In order to promote a better community image and foster pride, Rawlins is already promoting cleanliness, local business success, yard cleanup, and community events.

For example, last year CCHC presented The Power of Place, a lecture series designed to re-acquaint residents of Carbon County with their heritage. This program received the Wyoming State Historical Society annual award for Outstanding Educational Program. This successful program will be continued next year.

Rawlins has also completed a “branding” study. The logo developed as part of that study should be widely used in order to increase community awareness and pride.

Numerous comments were made through the interview and meeting process of this plan that the City needs to step up its code enforcement.

ENHANCING COMMUNITY IMAGE AND PRIDE

Cities that thrive economically tend to present positive images of what they are and why people live there. They exude a strong and positive sense of self and “community pride,” which is reflected in the way they look and how they are maintained.

In order to grow economically, Rawlins must improve the way it looks and the way it presents itself to the world. As part of these improvements, the City should build upon what it is and its “unique sense of place” in order to create a more engaging place to live and conduct business.

Some of the key enhancements that need to take place to help support economic development are described below.

- **Community Gateway Enhancement**

Clear messages that one has arrived in Rawlins need to be established at the four entrances into the community. A variety of improvements may be used to achieve this idea. Key ideas to be considered include better landscaping, engaging entry signage, berms and buffers to screen unattractive properties, landscape art, entry lighting, and the removal or relocation of unattractive properties and uses.

- **Multi-Purpose Boulevard Enhancements**

Cedar and Spruce Streets are the key east-west roadways for bringing people into the community from the edges. These roadways are generally wide and utilitarian in nature. A long-term strategy should be to convert these roads into a coordinated “boulevard,” incorporating improved streetscapes, center medians, wide sidewalks, safe crosswalks, plenty of green trees, and modifications to the roadway that encourage use by pedestrians and cyclists in addition to vehicle drivers.

- **Downtown “Main Street” Design Enhancements**

The detailed design and improvement concepts contained in the Rawlins Downtown Plan (2011) should be coordinated with improvements along 3rd, Cedar and Spruce Streets to create a clear and obvious “Main Street” experience in Rawlins.



- **Key Intersection Enhancements**

Special intersections along the Cedar and Spruce Streets Boulevard should receive special design attention in order to help lead visitors into the community. These efforts should go beyond wayfinding, incorporating public art and special landscaping to help reinforce the unique neighborhood characteristics and special flavors found throughout Rawlins.

- **Downtown/South Neighborhood Connections**

Special effort should be made to build upon the ideas outlined in the downtown plan to bridge the divide between downtown Rawlins and the neighborhoods to the south. These efforts should go beyond painting tunnel walls, utilizing creative ideas to transcend the wall created by the rail lines and rail yard.

- **Visual Enhancements of Rawlins from the Freeway**

In addition to the enhancements and improvements discussed above, there is a general need to clean up the City and to better maintain what is already here. Simple actions that directly involve the people of Rawlins (trash clean up, yard maintenance and façade painting, etc.) should take place before larger interventions.



FINANCIAL TOOLS

Rawlins needs to take advantage of each and every financial tool available to the community in order to move forward with developing a business park, improving the visual appearance of the City, improving educational opportunities, developing a wider range of affordable, quality housing and attracting new business to the area.

WYOMING BUSINESS COUNCIL

The Wyoming Business Council is the single largest funding source to Rawlins. These funds can be applied for annually.

TABLE 42: WYOMING BUSINESS READY COMMUNITY GRANT & LOAN PROGRAM – WYOMING BUSINESS COUNCIL

Type of Grant	Maximum Amount	Description
Business Committed Grant	\$1,500,000	Infrastructure to facilitate the startup, retention, expansion or location of a specific business
Data Centers	\$1,000,000	Infrastructure to improve the development or expansion of data generation and information technology storage
Community Readiness	\$1,000,000	Infrastructure to prepare a community for future business development

These programs can be used to develop a business park, a smaller data center in the City and assist with improving the visual appearance of Rawlins. The City should immediately apply for the following to develop a business park:

- \$1,000,000 Community Readiness grant - for infrastructure for the development of a business park.
- Funds for a business park could also be supplemented through the Special Purpose (6th penny) Tax.
- Federal EDA funds are also available through grant applications. While the City of Rawlins cannot qualify as an economically-distressed area (incomes and employment levels are too high), certain areas of the City (at the Census tract or block group level) can qualify. Job creation in low-income areas is viewed very favorably.

In addition, Rawlins should actively pursue a smaller data center in the City. The data center could be part of the business park. Rawlins has many attributes that are attractive to data centers and is easily accessible off of I-80. Financial tools available for a smaller data center include:

- \$1,000,000 grant for infrastructure to improve the development or expansion of data generation and information technology storage.
- \$1,500,000 for Business Committed Grants for infrastructure

In order to assist with improving the visual appearance of Rawlins, the City should apply for the following grant:

- Community Readiness Grant (requires a 50 percent match). The City should apply for this annually in order to improve its entryways. Funds could also be used for downtown improvements, such as façade renovations.

- The matching amount could be met through donations of volunteer time, thus not requiring any monetary outlays on the part of the City.

COMMUNITY DEVELOPMENT BLOCK GRANT

Other funding programs include the Community Development Block Grant (CDBG) program including Economic Development and Community Development grants. Economic development grants can be used for planning, technical assistance, downtown development, infrastructure and a variety of loan programs. Community development grants are not planning grants but rather are available for community facilities and public infrastructure.

TABLE 43: CDBG GRANTS – WYOMING BUSINESS COUNCIL

Grant Types Administered through State CDBG Program	
Community Development	
- Public Infrastructure	
- Access for the Disabled	
- Community Facilities	
- Economic Development (Infrastructure and Downtown Development)	
Planning and Technical Assistance	
Homeownership Assistance	

In reviewing census tract data, there is a varied picture of the economic situations within Rawlins. On the southern edge of the city, per capita income rates are at 77% of the national average, qualifying the tract for priority federal funding as an economically distressed area. (See Appendix: “Rawlins Census Tract Map” as prepared by the CBI)

TABLE 44: 2010 RAWLINS PER CAPITA INCOME BY CENSUS TRACT

	967600	967700	967800	National
Per Capita Income	\$20,208	\$26,056	\$31,066	\$26,059

Source: ACS

Rawlins has a difficult time accessing these grants because its median per capita income is fairly high. What the per capita income does not reflect is the fact that there is great disparity in incomes in the City and that there are large areas of the City where residents live below the poverty level. In fact, the percentage of the population living below the poverty level in Rawlins is 14.4 percent, compared to 13.9 percent statewide. Rawlins also has 4.2 percent of its residents living below 50 percent of the poverty level, compared to 3.3 percent statewide in this category. CDBG funds are sorely needed in Rawlins for a variety of projects, most notably infrastructure repair including curb, gutter and sidewalk.

TABLE 45: 2010 RAWLINS PERCENTAGE OF PEOPLE WITH INCOME BELOW POVERTY LEVEL BY CENSUS TRACT

	967600	967700	967800	National
Poverty Rate	7.90%	11.10%	4.90%	15.3%

Source: ACS

URBAN RENEWAL

Another financing tool is for Rawlins to become an urban renewal area, as defined in the Wyoming Urban Renewal Code. This would be easier for the City to receive CDBG funds because of its designation of “blight.” In order to become an urban renewal area, the City must do the following:

1. Adopt a resolution finding that slum or blight exists in the City and that redevelopment is in the best interest of the public health, safety, morals or welfare of the residents of the municipality.
2. The City will need to carefully define policies regarding how these funds should be used. These policies should be clear and concise and should consider the following factors:
 - Potential benefit to the City in terms of property and sales tax revenues;
 - Job creation with higher-than-average wages;
 - Cleanup of a blighted site; and
 - Ability for the project to encourage additional economic development in the surrounding area.

The City must then develop a workable program that includes plans for redevelopment of the area. Creation of an urban renewal area also allows the City to receive tax increment funds to assist with projects as defined in the workable plan. Tax increment is the additional taxes that are generated in the urban renewal area, over and above the “baseline” or taxes currently paid to the taxing agencies. These taxes are due to increased investment in the area (and hence increased taxable value) and are not due to increased tax rates. For example, if investment in the City were to increase by \$20 million through development at a business park, the incremental taxes to all taxing agencies would be approximately \$127,000 annually (based on 9.5 percent taxable value and a total tax rate of .067241). These funds could be used for a period of time to encourage development in the business park. All taxing entities win from this arrangement because this increases the total valuation and does not rely on any funds currently being used by the taxing entities. No tax rate increases are incurred in urban renewal areas.

TRANSPORTATION FUNDING

Another funding source includes WYDOT funds for improving entryways and other transportation improvements. The United States Department of Transportation is also a source of funding but funds are competitive and evaluated based on a benefit-cost ratio that includes such factors as increased safety, reduced pollution, livability and economic competitiveness.

USDA FUNDING

Rawlins can also use USDA programs for infrastructure, public facilities grants, health care, housing, or telecommunications.

IMPACT FEES

Lastly, impact fees can be used as a financial tool. While Rawlins does not currently charge impact fees, the City may want to consider this revenue source as development activities increase. Impact fees are a one-time charge to offset the capital costs of infrastructure associated with new development. Impact fees are

regulated not only by Wyoming law, but also by national case law that requires that there be a rational nexus between the impact fee charged and the benefit provided.

GREAT DIVIDE ECONOMIC DEVELOPMENT DISTRICT

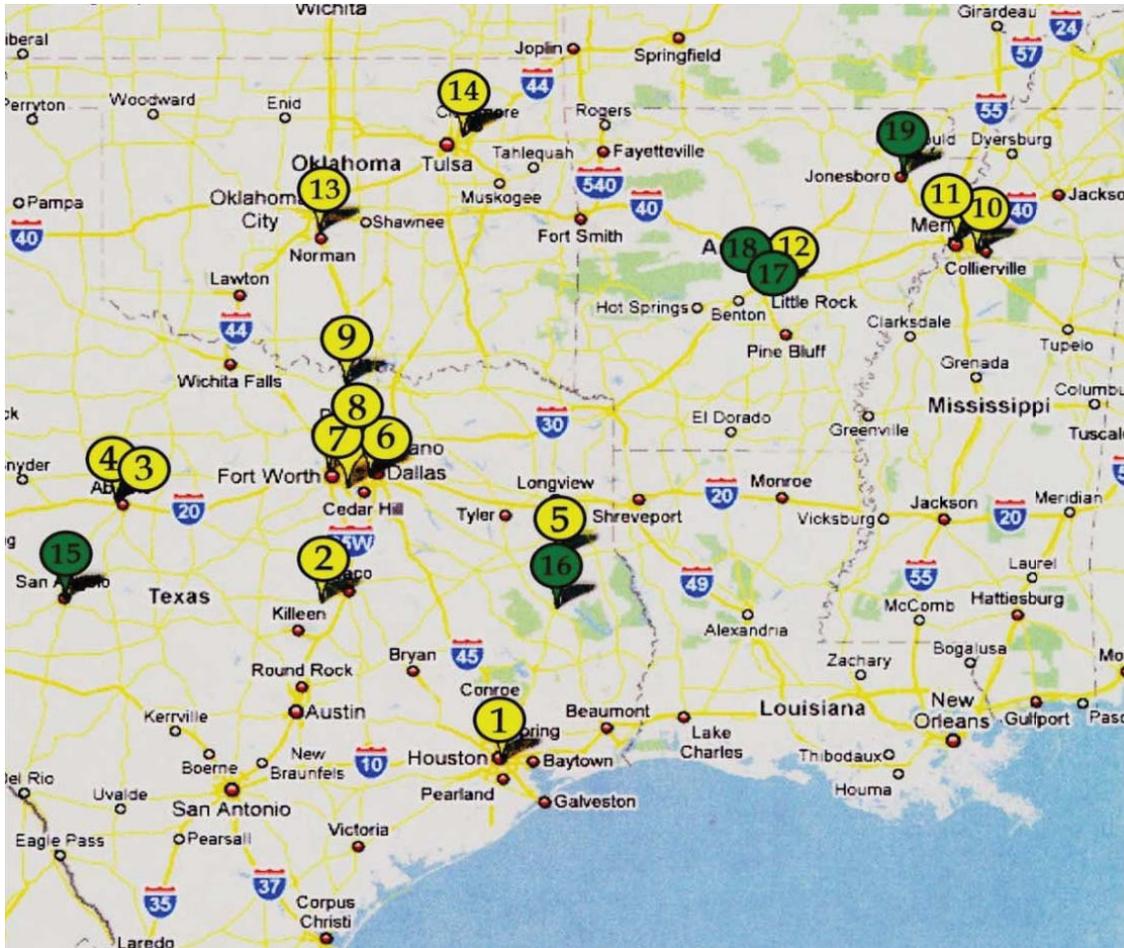
This plan will need to work with the Great Divide Economic Development District 2012 CEDS (Comprehensive Economic Development Strategy) update. Incorporating the goals and priorities of the Rawlins Economic Development Plan into the CEDS will enable access to more federal funding through the regional Great Divide Economic Development District through Economic Development Administration funding and assistance.

APPENDIX 1 – WIND POWER CASE STUDIES

Case Study – Little Rock Arkansas

In recent years, Arkansas has successfully attracted wind turbine component manufacturers. With four companies having announced/opened major facilities, approximately 2,500 jobs will be supporting the wind industry in the near future.⁴⁶

FIGURE 47: OPENED AND ANNOUNCED WIND TURBINE COMPONENT MANUFACTURERS LOCATED IN ARKANSAS AND SURROUNDING STATES



- | | | |
|------------------------------|---|-----------------------|
| 1) RBC Bearings | 8) All-Pro Fasteners | 15) Martifier |
| 2) RTLK Wind Towers | 9) Molded Fiber Glass | 16) Lufkin Industries |
| 3) Zoltek | 10) Thomas & Betts | 17) Polymarlin |
| 4) Tower Tech | 11) GE Parts Operation Center | 18) Wind Water |
| 5) CAB Inc | 12) LM Wind Power (formerly LM Glasfiber) | 19) Nordex |
| 6) Diab Inc | 13) Bergey Wind | |
| 7) Trinity Structural Towers | 14) DMI | |

⁴⁶ National Renewable Energy Laboratory (NREL)

At the end of 2008, LM Wind Power in Little Rock, Arkansas employed 600 people and were ahead of pace in their hiring of 1,000 workers by 2014. In January, 2009 LM Wind Power announced that they were laying off 150 workers at Little Rock due to the national credit crisis. In June, 2009 the company announced that they were again laying off an additional 80 workers, again as a result of the economic credit crisis. The company still employs 300 workers. Wages at the plant range from \$12.15/hr - \$15.50/hr.

Case Study – Muncie, Indiana

Brevini Wind in Muncie, Indiana makes gear boxes for wind turbines. The plant is expected to employ 455 workers, with average pay of \$46,000 per year. Annual payroll when fully operating will be \$20.9 million. It is important to note that this manufacturer was attracted to Muncie, Indiana because of an aggressive incentive package that includes:

- \$1.4 million in local EDIT (Economic Development Income Tax) funds
- \$1.6 million in local TIF (Tax Increment Financing) funds
- \$1.9 million in infrastructure improvements for a rail extension
- \$3.9 million in state funds in Hoosier Business investment tax credits
- \$300,000 in job training assistance funds

The following map displays wind turbine component manufacturers opened and announced as of 2009.

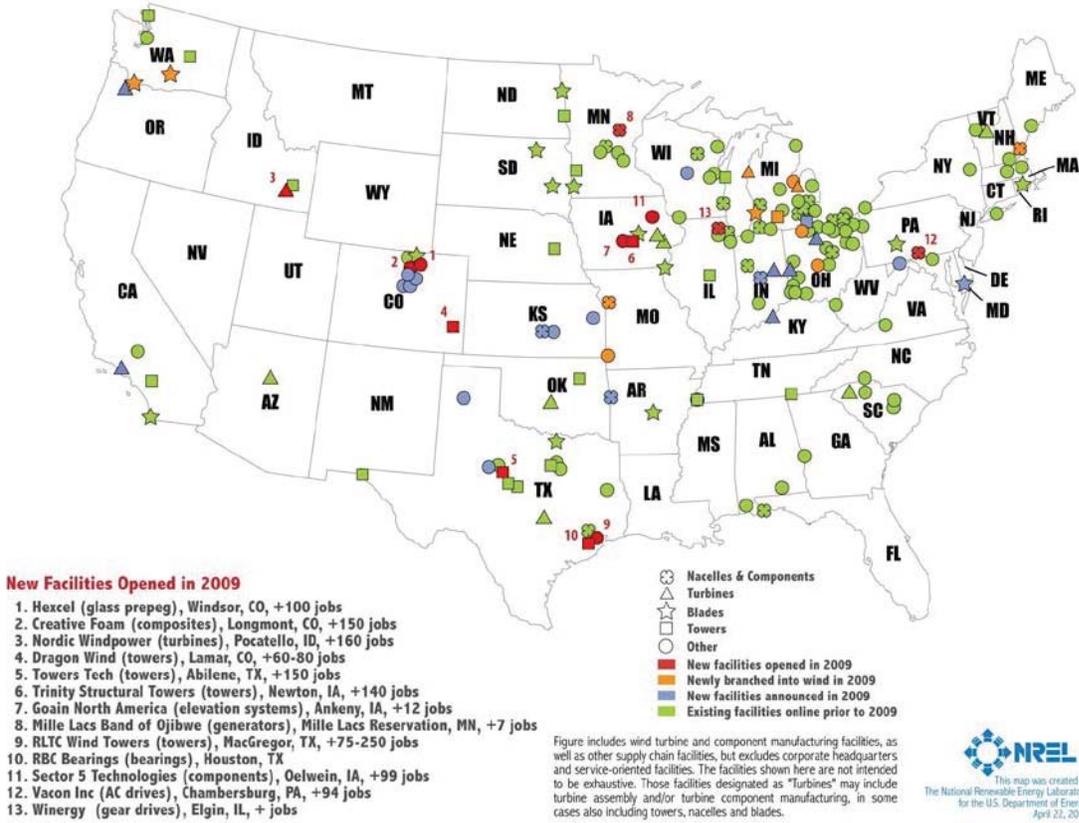
FIGURE 48: OPENED AND ANNOUNCED WIND TURBINE COMPONENT MANUFACTURERS LOCATED NEAR OR IN THE GREAT LAKES REGION



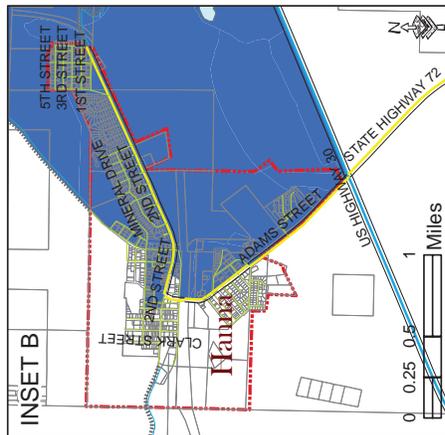
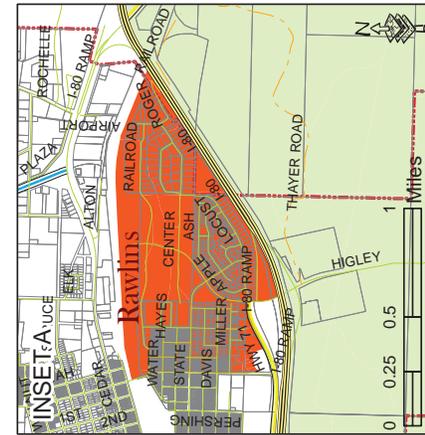
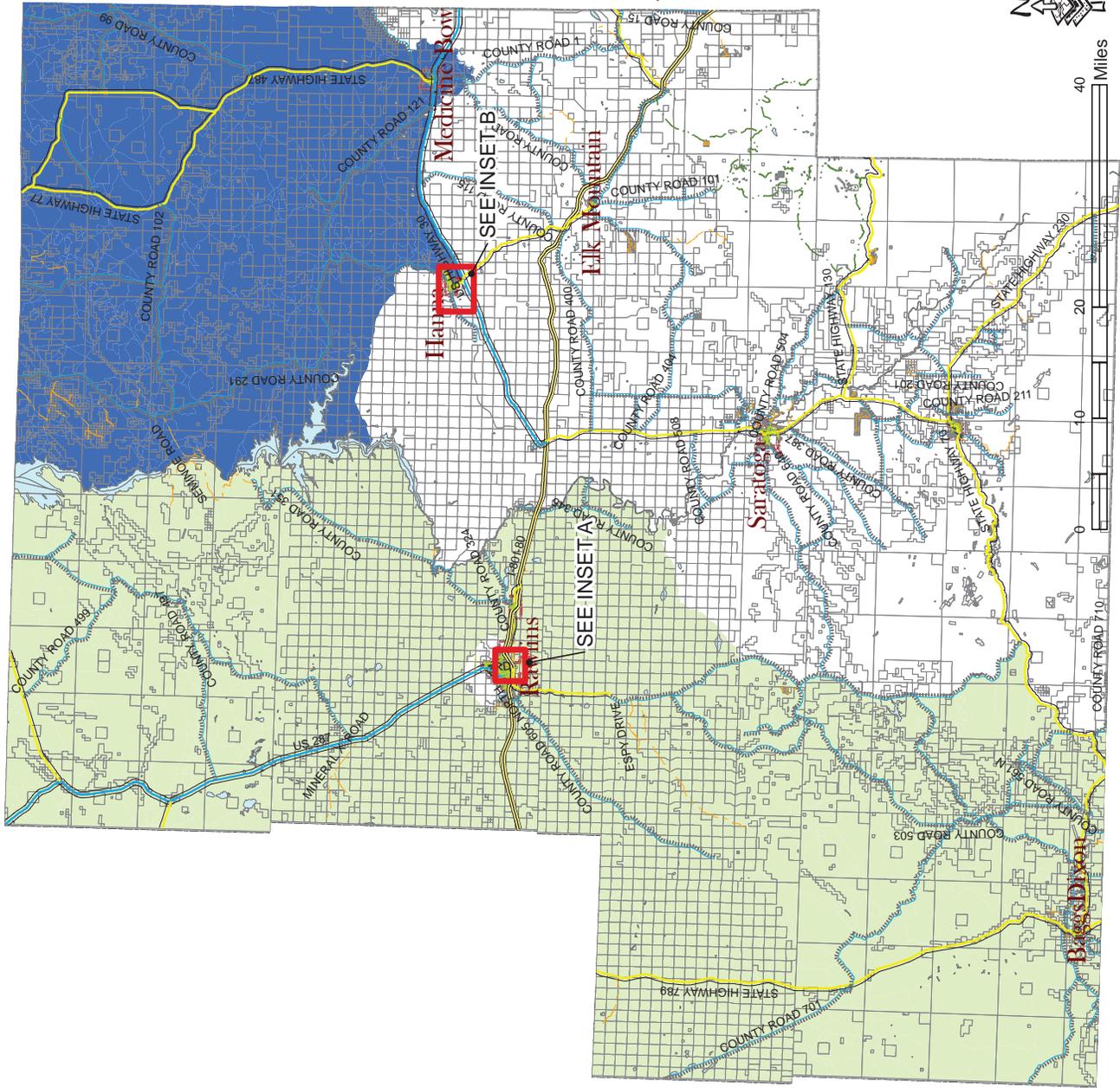
1. K & M Machine-Fabricating Inc
2. Great Lakes Gear Tech Inc
3. Merrill Fabrication
4. Dowding Industries
5. Danotek Motion Technologies
6. Creative Foam Corp
7. Genzink Steel
8. Citation Corp
9. Three M Tool & Machine Inc
10. E-T-M Enterprises
11. ATI Casting Service
12. Global Wind Systems
13. Great Lakes Towers
14. Prestolite Wire LLC
15. Akebono Corporation
16. Johnson Systems Inc
17. Rotek Inc
18. Avon Bearings Corp
19. Kalt Manufacturing
20. Magna Machine Co
21. Cast-Fab Technologies Inc
22. Cardinal Fastener & Specialty Co
23. Federal Gear Corp
24. Canton Drop Forge
25. Michael Byrne Manufacturing Co Inc
26. Advanced Manufacturing Corp
27. Dyson Corp
28. Webcore Technology Inc
29. Horsburgh & Scott Co
30. Hamby Young
31. Owens Corning Composites
32. Minster Machine Co
33. Hyundai Ideal Electric Co
34. Eaton Corp
35. Swiger Coil Systems LLC
36. Connector Manufacturing Co
37. EGC Enterprises Inc
38. HPM America
39. Tuf-Tug Products
40. Benjamin Co
41. LAH Development
42. Parker Hannifin
43. ATI Casting Service
44. Fairfield Manufacturing Co Inc
45. Brevini
46. Bedford Machine and Tool Inc
47. Finkl & Sons
48. Trinity Structural Towers
49. Centa Corp
50. Winergy
51. Winergy/Siemens
52. Brad Foote Gear Works Inc
53. GE Energy
54. Hodge Foundry Inc
55. Gamesa
56. Wausaukee Composites Inc
57. Plexus Corp
58. Merit Gear Corp
59. Tower Tech Systems Inc
60. Bassett Mechanical
61. Milwaukee Gear Co
62. Energy Composites Corp
63. Wausaukee Composites Inc
64. VEC Technology LLC
65. Milacron Inc
66. American Tank & Fabricating
67. MasTech
68. Vela Gear
69. McSwain Manufacturing
70. Edco Inc
71. Graco
72. Michigan Tool
73. Ashland Performance

Source: National Renewable Energy Laboratory (NREL)

FIGURE 49: TURBINE AND COMPONENT MANUFACTURING FACILITIES



Rawlins Census Tract Map



Legend

- Census Tract 9676
- Census Tract 9681 Block Group 1
- Census Tract 9677 Block Group 4
- CITY STREET
- COUNTY ROAD
- FOREST SERVICE
- INTERSTATE HIGHWAY
- PRIVATE
- STATE HWY
- US HIGHWAY
- Parcels
- Municipalities
- County Border

Retail MarketPlace Profile

Carbon County, WY_16
 Carbon County, WY (56007)
 Geography: County

Summary Demographics

2010 Population	15,884
2010 Households	6,521
2010 Median Disposable Income	\$36,815
2010 Per Capita Income	\$22,285

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$136,069,209	\$208,493,785	\$-72,424,576	-21.0	186
Total Retail Trade	44-45	\$121,750,894	\$203,012,504	\$-81,261,610	-25.0	122
Total Food & Drink	722	\$14,318,315	\$5,481,281	\$8,837,034	44.6	64

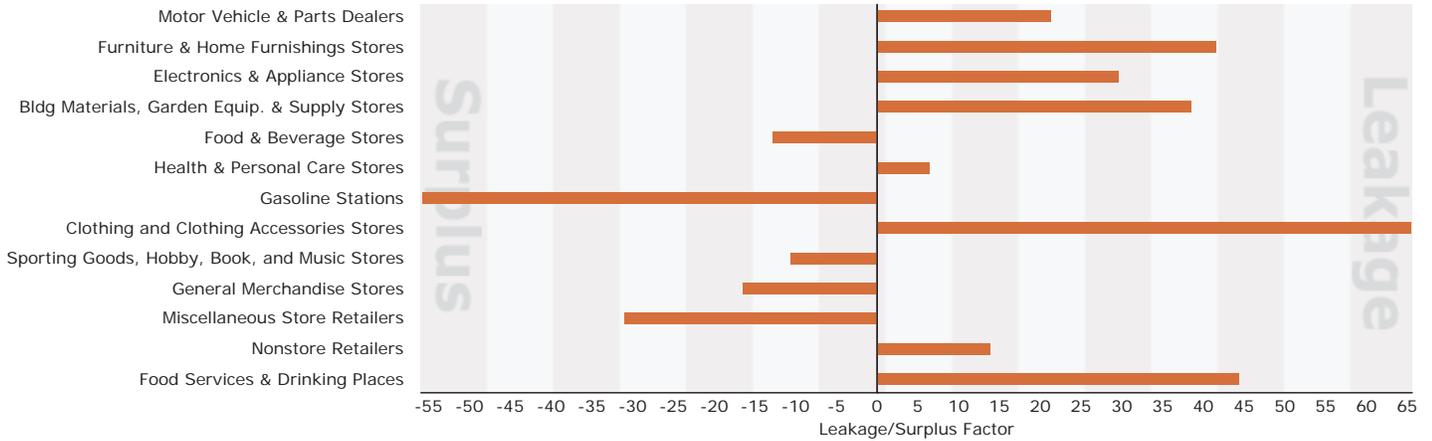
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$27,364,945	\$17,693,365	\$9,671,580	21.5	18
Automobile Dealers	4411	\$23,958,440	\$13,950,255	\$10,008,185	26.4	8
Other Motor Vehicle Dealers	4412	\$2,110,648	\$528,390	\$1,582,258	60.0	1
Auto Parts, Accessories & Tire Stores	4413	\$1,295,857	\$3,214,720	\$-1,918,863	-42.5	9
Furniture & Home Furnishings Stores	442	\$2,116,264	\$869,239	\$1,247,025	41.8	4
Furniture Stores	4421	\$963,498	\$433,475	\$530,023	37.9	1
Home Furnishings Stores	4422	\$1,152,766	\$435,764	\$717,002	45.1	3
Electronics & Appliance Stores	4431	\$2,692,534	\$1,457,642	\$1,234,892	29.8	7
Bldg Materials, Garden Equip. & Supply Stores	444	\$3,593,294	\$1,589,936	\$2,003,358	38.7	9
Bldg Material & Supplies Dealers	4441	\$3,425,850	\$1,387,120	\$2,038,730	42.4	8
Lawn & Garden Equip & Supply Stores	4442	\$167,444	\$202,816	\$-35,372	-9.6	1
Food & Beverage Stores	445	\$17,491,813	\$22,671,499	\$-5,179,686	-12.9	15
Grocery Stores	4451	\$15,757,354	\$18,946,767	\$-3,189,413	-9.2	8
Specialty Food Stores	4452	\$113,540	\$178,701	\$-65,161	-22.3	1
Beer, Wine & Liquor Stores	4453	\$1,620,919	\$3,546,031	\$-1,925,112	-37.3	6
Health & Personal Care Stores	446,4461	\$1,198,622	\$1,052,477	\$146,145	6.5	4
Gasoline Stations	447,4471	\$35,543,411	\$126,085,546	\$-90,542,135	-56.0	21
Clothing & Clothing Accessories Stores	448	\$3,072,467	\$636,717	\$2,435,750	65.7	4
Clothing Stores	4481	\$2,985,346	\$567,613	\$2,417,733	68.0	3
Shoe Stores	4482	\$17,305	\$0	\$17,305	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$69,816	\$69,104	\$712	0.5	1
Sporting Goods, Hobby, Book & Music Stores	451	\$785,729	\$973,406	\$-187,677	-10.7	14
Sporting Goods/Hobby/Musical Instr Stores	4511	\$777,531	\$973,406	\$-195,875	-11.2	14
Book, Periodical & Music Stores	4512	\$8,198	\$0	\$8,198	100.0	0
General Merchandise Stores	452	\$11,628,749	\$16,228,780	\$-4,600,031	-16.5	5
Department Stores Excluding Leased Depts.	4521	\$3,566,391	\$533,166	\$3,033,225	74.0	1
Other General Merchandise Stores	4529	\$8,062,358	\$15,695,614	\$-7,633,256	-32.1	4
Miscellaneous Store Retailers	453	\$1,323,273	\$2,508,577	\$-1,185,304	-30.9	20
Florists	4531	\$723,263	\$1,256,718	\$-533,455	-26.9	5
Office Supplies, Stationery & Gift Stores	4532	\$341,317	\$645,012	\$-303,695	-30.8	9
Used Merchandise Stores	4533	\$41,597	\$46,920	\$-5,323	-6.0	1
Other Miscellaneous Store Retailers	4539	\$217,096	\$559,927	\$-342,831	-44.1	5
Nonstore Retailers	454	\$14,939,793	\$11,245,320	\$3,694,473	14.1	1
Electronic Shopping & Mail-Order Houses	4541	\$14,293,479	\$11,245,320	\$3,048,159	11.9	1
Vending Machine Operators	4542	\$349,961	\$0	\$349,961	100.0	0
Direct Selling Establishments	4543	\$296,353	\$0	\$296,353	100.0	0
Food Services & Drinking Places	722	\$14,318,315	\$5,481,281	\$8,837,034	44.6	64
Full-Service Restaurants	7221	\$6,365,502	\$3,007,210	\$3,358,292	35.8	34
Limited-Service Eating Places	7222	\$3,967,728	\$1,514,070	\$2,453,658	44.8	9
Special Food Services	7223	\$2,999,234	\$0	\$2,999,234	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$985,851	\$960,001	\$25,850	1.3	21

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

Source: Esri and Infogroup

Carbon County, WY_16
 Carbon County, WY (56007)
 Geography: County

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile

Rawlins City, WY
 Rawlins city, WY (5663900)
 Geography: Place

Summary Demographics

2010 Population	8,971
2010 Households	3,425
2010 Median Disposable Income	\$38,455
2010 Per Capita Income	\$22,504

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$72,782,475	\$148,782,158	\$-75,999,683	-34.3	109
Total Retail Trade	44-45	\$64,682,628	\$144,754,330	\$-80,071,702	-38.2	72
Total Food & Drink	722	\$8,099,847	\$4,027,828	\$4,072,019	33.6	37

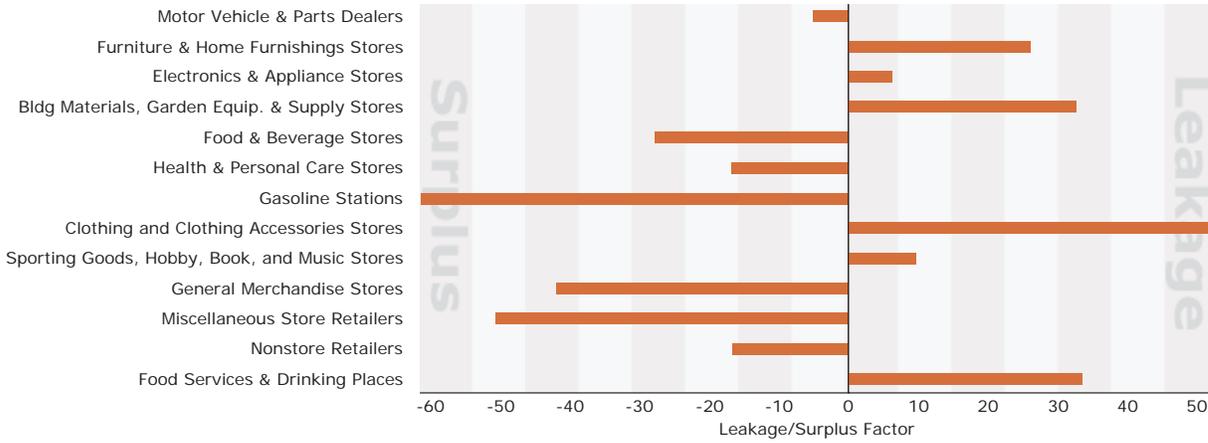
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$14,276,589	\$15,838,690	\$-1,562,101	-5.2	12
Automobile Dealers	4411	\$12,628,789	\$12,953,808	\$-325,019	-1.3	5
Other Motor Vehicle Dealers	4412	\$932,902	\$528,390	\$404,512	27.7	1
Auto Parts, Accessories & Tire Stores	4413	\$714,898	\$2,356,492	\$-1,641,594	-53.4	6
Furniture & Home Furnishings Stores	442	\$1,166,127	\$682,483	\$483,644	26.2	3
Furniture Stores	4421	\$535,163	\$433,475	\$101,688	10.5	1
Home Furnishings Stores	4422	\$630,964	\$249,008	\$381,956	43.4	2
Electronics & Appliance Stores	4431	\$1,423,559	\$1,251,449	\$172,110	6.4	6
Bldg Materials, Garden Equip. & Supply Stores	444	\$1,811,792	\$913,875	\$897,917	32.9	3
Bldg Material & Supplies Dealers	4441	\$1,731,510	\$913,875	\$817,635	30.9	3
Lawn & Garden Equip & Supply Stores	4442	\$80,282	\$0	\$80,282	100.0	0
Food & Beverage Stores	445	\$9,468,366	\$16,807,928	\$-7,339,562	-27.9	8
Grocery Stores	4451	\$8,477,968	\$15,897,452	\$-7,419,484	-30.4	4
Specialty Food Stores	4452	\$61,489	\$178,701	\$-117,212	-48.8	1
Beer, Wine & Liquor Stores	4453	\$928,909	\$731,775	\$197,134	11.9	3
Health & Personal Care Stores	446,4461	\$612,494	\$861,117	\$-248,623	-16.9	2
Gasoline Stations	447,4471	\$18,772,904	\$78,779,520	\$-60,006,616	-61.5	11
Clothing & Clothing Accessories Stores	448	\$1,754,800	\$549,392	\$1,205,408	52.3	3
Clothing Stores	4481	\$1,706,084	\$480,288	\$1,225,796	56.1	2
Shoe Stores	4482	\$9,795	\$0	\$9,795	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$38,921	\$69,104	\$-30,183	-27.9	1
Sporting Goods, Hobby, Book & Music Stores	451	\$410,912	\$338,229	\$72,683	9.7	6
Sporting Goods/Hobby/Musical Instr Stores	4511	\$410,087	\$338,229	\$71,858	9.6	6
Book, Periodical & Music Stores	4512	\$825	\$0	\$825	100.0	0
General Merchandise Stores	452	\$6,295,254	\$15,455,228	\$-9,159,974	-42.1	4
Department Stores Excluding Leased Depts.	4521	\$1,974,389	\$533,166	\$1,441,223	57.5	1
Other General Merchandise Stores	4529	\$4,320,865	\$14,922,062	\$-10,601,197	-55.1	3
Miscellaneous Store Retailers	453	\$664,927	\$2,031,099	\$-1,366,172	-50.7	13
Florists	4531	\$344,005	\$1,195,121	\$-851,116	-55.3	3
Office Supplies, Stationery & Gift Stores	4532	\$187,326	\$469,100	\$-281,774	-42.9	6
Used Merchandise Stores	4533	\$23,370	\$46,920	\$-23,550	-33.5	1
Other Miscellaneous Store Retailers	4539	\$110,226	\$319,958	\$-209,732	-48.8	3
Nonstore Retailers	454	\$8,024,904	\$11,245,320	\$-3,220,416	-16.7	1
Electronic Shopping & Mail-Order Houses	4541	\$7,702,825	\$11,245,320	\$-3,542,495	-18.7	1
Vending Machine Operators	4542	\$191,527	\$0	\$191,527	100.0	0
Direct Selling Establishments	4543	\$130,552	\$0	\$130,552	100.0	0
Food Services & Drinking Places	722	\$8,099,847	\$4,027,828	\$4,072,019	33.6	37
Full-Service Restaurants	7221	\$3,600,716	\$2,128,000	\$1,472,716	25.7	20
Limited-Service Eating Places	7222	\$2,226,900	\$1,340,069	\$886,831	24.9	7
Special Food Services	7223	\$1,683,343	\$0	\$1,683,343	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$588,888	\$559,759	\$29,129	2.5	10

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

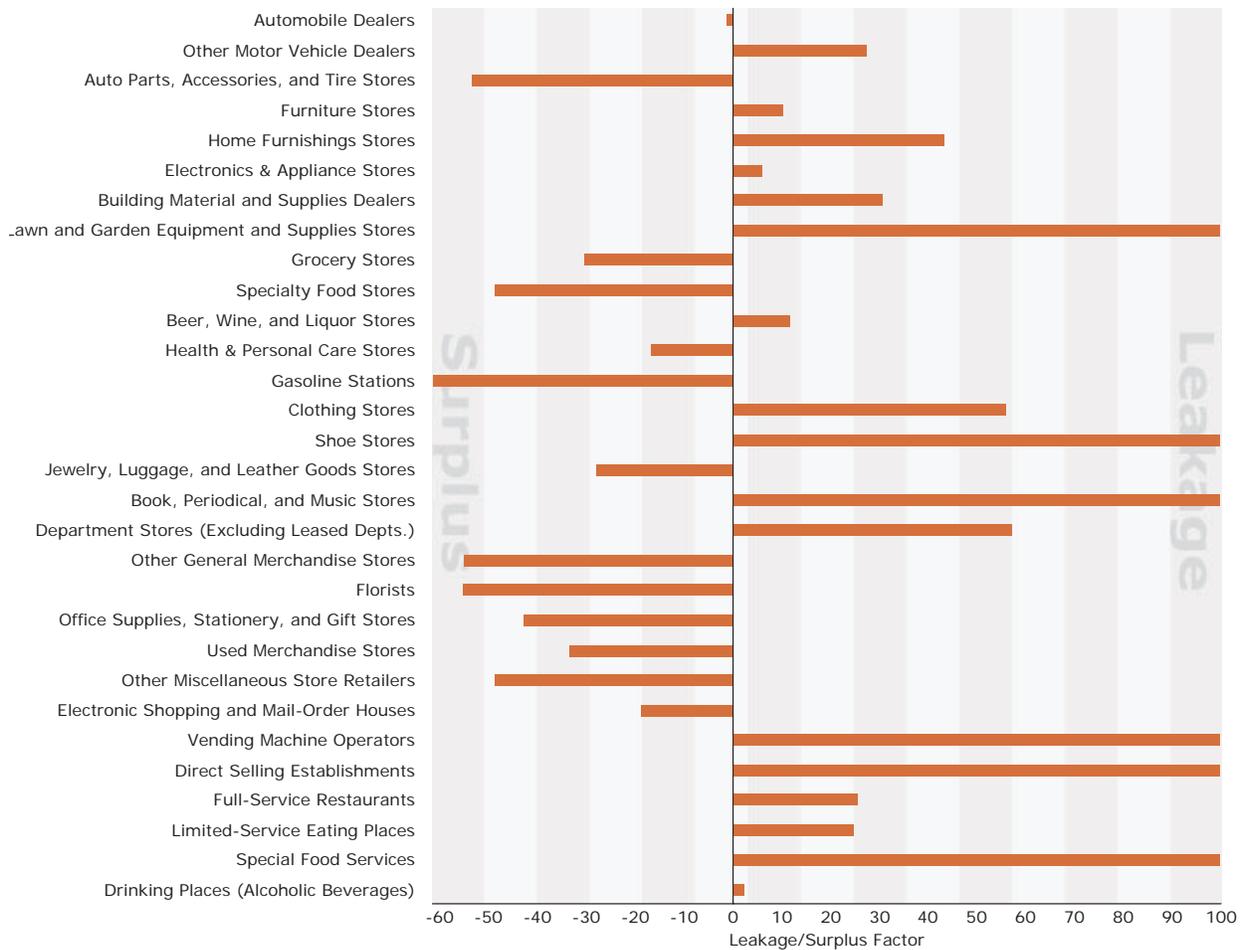
Source: Esri and Infogroup

Rawlins City, WY
 Rawlins city, WY (5663900)
 Geography: Place

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



APPENDIX 4 – CURRENT PROJECT STATUS DISCUSSIONS

The following are attached documents and appendices from community leaders and groups. These appendices represent a discussion of current statuses of community projects and endeavors. The topic updates are attached in the following order:

- A. DDA/Main Street
- B. Tourism and Community Pride
- C. Healthcare
- D. Rawlins Recreation Services
- E. Nuisance Abatement Code Enforcement/Dangerous Building Abatement
- F. Higher Education
- G. K-12 – Carbon County School District #1

Rawlins DDA/Main Street Update:

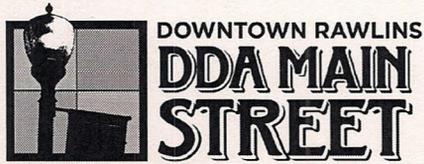
Mission: To revitalize the Rawlins' Downtown Development Authority/Main Street District to preserve our history and build our future through the Design, Organization, Marketing and Retail Strategies and Economic Restructuring committees.

2012-2013 Goals, Projects and Highlights:

See attached work plans

2010-2012 Accomplishments:

- Hired a consult to execute a “Downtown Image Campaign” — the campaign will reintroduce the community to the downtown and attract new consumers.
- Involved with the city in “Wayfinding” Program — a pedestrian-oriented informational and directional signage program to increase support and promote the identity of Rawlins and raise community and visitor awareness.
- Complete Phase I & II of the Rainbow Te-ton Entrepreneur Center - the Rainbow Te-ton Entrepreneur Center—RTEC is a multi-dimensional entrepreneur center in Rawlins & Carbon County. Created for the opportunity for new or early stage businesses to collaborate and share expenses. RTEC will house private and public, educational and professional agencies that will stimulate economic development, share information and strengthen community partnerships.
- Expanded the Building Better Business Program – business retention and expansion program for the downtown, city and county businesses.
- Launched a new “Merchant Program” for the downtown in the 2011.
- Continued our involvement with the Tourism Committee.
- Continued our involvement in the Rawlins Pride Committee.
- Employed Arnett Muldrow to perform a branding study — in January 2011, Rawlins DDA/Main Street, the City of Rawlins, Department of Recreation Services, Carbon County Museum, and the Wyoming Frontier Prison combined efforts to unify the marketing of Rawlins. Arnett Muldrow is from Greenville, South Carolina, a firm very familiar with rural Main Street communities to work with all the agencies.
- Applied for grants for the Rawlins Multimodal Downtown Plan— the plan will provide an attractive but cost-effective Cedar Street streetscape, designed to provide maximum amenity and convenience at moderate cost. Improve pedestrian safety and comfort to encourage walking and shopping in the downtown. Design of on-street parking that improves parking in adequacy and accessibility, which will in turn, provides parking for mixed-use, upper-story residential development that creates additional activity and revenue within the district.



Long-Term Planning Worksheet

Design Committee

Get downtown into top physical shape while preserving its historic integrity

Initiative #1: Improve and maintain public spaces.		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> Restructure Cedar Street as Phase #1 of Rawlins Downtown Plan 	This Summer	Grant and Funds Raised by P&P
<ul style="list-style-type: none"> Hold Volunteer Days to clean and decorate 	2x/yr.	Designated Funds
<ul style="list-style-type: none"> Create mural with Boys and Girls Club 	This Spring	Designated Funds
<ul style="list-style-type: none"> Create mural on side of RTEC 	This Summer	Rec Board Grant
<ul style="list-style-type: none"> Add flags to downtown to improve color 	Dependent on Funding	<u>Designated Funds/County</u>
<ul style="list-style-type: none"> Partner with Elks to improve lot between Soroptimist Park and Elks Lodge 	Plans finished by 6/30/12	Technical Funds, Other Funding Needed
<ul style="list-style-type: none"> Continue enhancing flower pots. 	Dependent on Funding	Grant?
<ul style="list-style-type: none"> Partner with City to add wayfinding signage 	Unknown	Grant and Technical Funds

Initiative #2: Educate on and improve historic buildings.		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> Implement Façade Easement Grant Program, with a focus on good signage 	Grant Due 9/1/12	WBC Grants
<ul style="list-style-type: none"> Create and implement Design Guidelines 	This Summer	
<ul style="list-style-type: none"> Paint Program, including new colors in conjunction with rebranding (Program not just for the downtown) 	Dependent on Funding	<u>Designated Funds/County</u>
<ul style="list-style-type: none"> Partner with museum to create walking tour publication 	Dependent on Funding	

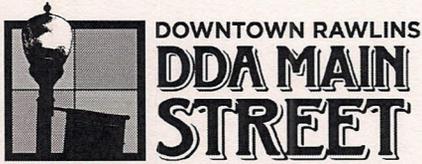
In three to five years our committee will be:

* Have free and accessible from the street way of accessing historical information about community, esp. buildings, such as through plaques

* Continue to add color

* Put together a proposed request to City Council about how to do partnerships for Christmas Decorations, including implementing clear extension cords

* Look into bringing statues, large and small, downtown



Long-Term Planning Worksheet

Organization Committee

Gather the resources, both of finances and volunteers, to make us effective, while promoting our organization

Initiative #1: Raise funds to sustain the organization		
Projects and Actions:	Timeline	Funding Source
• Oversee the Passion & Pride Ball	Every Year	Designated Funds
• Look into alternate methods of funding for operating needs	By 8/12 Meeting	No Cost
•		
•		
•		
•		
•		
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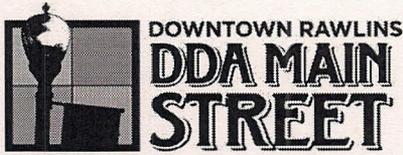
Initiative #2: Develop and strengthen our volunteers and perception in the community		
Projects and Actions:	Timeline	Funding Source
• Put out a 5-Year Report	By March	Designated Funds
• Host a meal to appreciate all volunteers	Summer	Designated Funds
• Brainstorm another way to say thanks to volunteers	This Year	No Cost
•		
•		
•		
•		
•		

In three to five years our committee will be:

*Give public recognition for all volunteers, including figures on hours and dollars, as another way to appreciate them and to educate the public

*In general, expand exposure of volunteers, through such avenues as the newsletter, newspaper, pictures in the building, and pictures at events

*Begin implementing alternate methods of funding



Long-Term Planning Worksheet

MARS (Marketing and Retail Strategies) Committee

Market downtown through advertising, retail promotions, special events, and marketing campaigns

Initiative #1: Develop and implement a marketing plan to reach targeted audiences		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> • Create downtown image campaign, including a downtown brochure 	This Year	Technical Funds
<ul style="list-style-type: none"> • Partner to place tourist informational kiosks in hotels and tourism spots 	With Tourism Committee, This Year	CCVC Grant?
<ul style="list-style-type: none"> • Advertise in publications aimed at tourists and locals 	This Year	Designated Funding
<ul style="list-style-type: none"> • Create an easy to use electronic business list on our website 	This Year, with Daily Times	Technical Funds
<ul style="list-style-type: none"> • Redo website to match rebranding 	This Year	Technical Funds and Designated Funding

Initiative #2: Host events, giveaways, campaigns and promotions to draw people into downtown and businesses		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> • Host Where's Rawley? Downtown Scavenger Hunt 	April	Designated Funding
<ul style="list-style-type: none"> • Continue SummerFest 	July	CCVC Grant, other grants?
<ul style="list-style-type: none"> • Hold Trick or Treat on Downtown Streets 	October	Designated Funding
<ul style="list-style-type: none"> • Continue the three holiday events: Shop Downtown Win Big, Thursdays After Dark and WinterFest 	November and December	Designated Funding, Grants?
<ul style="list-style-type: none"> • 		

In three to five years our committee will be:

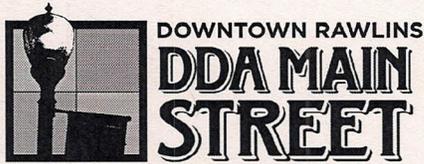
* Publish hours more publically, through such items as a weekend hours brochure, newspaper, and online
Share stats of effectiveness of including hours in ads with businesses

* Better info out at hotels and other front-line services, including:

Partner for training on things for people to do in Rawlins and Carbon County

Put informational kiosk out at these locations

Create point of contact at each hotel, etc. to put out info about current activities



Long-Term Planning Worksheet

Economic Restructuring Committee

Strengthen the downtown's existing economic assets while diversifying its economic base

Initiative #1: Retain and strengthen existing businesses		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> Host monthly classes aimed both at new and existing businesses 		Technical funds & In-kind
<ul style="list-style-type: none"> Continue Building Better Businesses to meet the training needs of downtown businesses 		Technical Funds
<ul style="list-style-type: none"> 		
<ul style="list-style-type: none"> 		
<ul style="list-style-type: none"> 		
<ul style="list-style-type: none"> 		
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<ul style="list-style-type: none"> 		

Initiative #2: Recruit new businesses and improve the mix of businesses		
Projects and Actions:	Timeline	Funding Source
<ul style="list-style-type: none"> Recruit new businesses to RTEC, both retail, office and virtual - Market the building and the services it has to offer 	Very Important	Building revenue
<ul style="list-style-type: none"> Finish Phase II of the RTEC WBC Grant 	Very Important	WBC – BRC Grant
<ul style="list-style-type: none"> Actively recruit a new restaurant/eatery for downtown 		Partner with other organizations
<ul style="list-style-type: none"> Actively recruit a new tenants for downtown 		Partner with other organizations
<ul style="list-style-type: none"> Initiate changes to downtown zoning and DDA/MS District 		No funds needed
<ul style="list-style-type: none"> 		

In three to five years our committee will be:

* Create a business recruitment package

* Create & facilitate a "Venture Capital Grant" for recruitment of needed professional in the community

RESPONSE TO



CITY OF RAWLINS TOURISM ASSESSMENT



Created by Rawlins Tourism Committee
August 2012



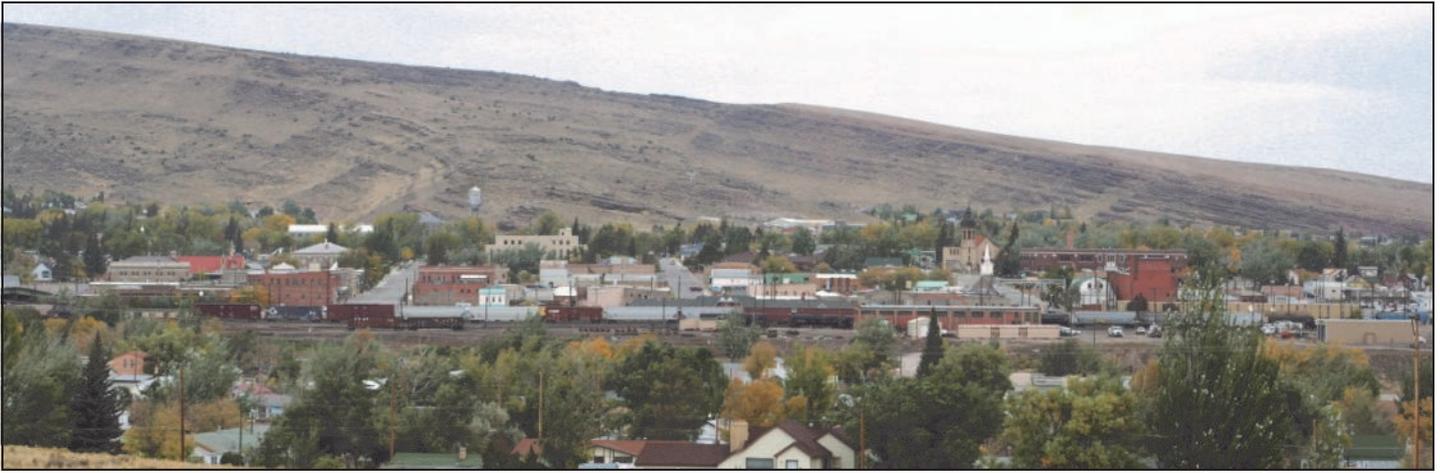


Photo by Jenita Calton

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INTRODUCTION & PURPOSE

Rawlins Certified Tourism Community – Tier 1 Update

On February 2, 2010, the Rawlins City Council decided to pursue the certification as a Wyoming Certified Tourism Community. On May 19, 2011, the Wyoming Office of Tourism (WOT) accepted the City of Rawlins to the Tourism certification program and offered assistance to work directly with our community through the certification process. There are three tiers of certification offering differing levels of support and assistance from the WOT program according to the varied resources and needs of each individual community. These tiers include the following levels and are described in more detail by the attached materials:

- Aspiring Tourism Community - 1 yr.
- Affiliate Tourism Community – 2 yrs.
- Certified Tourism Community – 5 yrs.

To become an Aspiring Tourism Community, the following requirements must be met. The completed requirements have been marked with an X.

- X Complete a Lodging Survey
- X Complete Visitor Profile and Conversion Study
- Complete Visitor Intercept Study (optional)
- X Complete Destination Marketing Specialist / Wyoming Forever Friendly Training Programs – 20% Participation
- X Create Tourism Goals to address Tourism Assessment Recommendations

This report accomplishes the following:

- Updates progress on completion of Tier 1 “Aspiring Tourism Certification,
- Responds to issues identified in the October 19, 2012 Rawlins Tourism Assessment Report,
- Updates the Committee’s Response to issues identified in the Tourism Community Assessment report
- Updates Rawlins Tourism Goals, plans and progress toward them.



To get to this point, the following tasks have been completed:

Selection as Wyoming Tourism Assessment Community—On February 25, 2010 the City of Rawlins was selected to be the pilot community to conduct the first ever Wyoming Tourism Assessment that will serve as a pre-cursor to a Certified Tourism Community Program that was in the process of being developed by the State of Wyoming. This was as the result of a November 25, 2009 request for proposal released by the Wyoming Office of Tourism (WOT) for applicant communities to submit proposals to become the pilot community. The City of Rawlins responded to the request for proposals (RFP) on January 28, 2010 with a letter from the Mayor, a resolution passed by City Council and a full packet of information responding to the RFP. The application packet included a narrative of the City of Rawlins’ interest and support for conducting a community assessment including:

- Community support for the assessment,
- How the assessment will meet the need as outlined in previous community assessments of Rawlins performed by the Wyoming Rural Development Center,
- What resources would be committed to complete the tourism assessment,
- The local committee assembled to assist the state assessment team, and
- Letters of support from various organizations and businesses.

Resident Tourism Attitude Survey Completed – Prior to the Tourism Assessment, the local planning team was assigned the task of conducting a Resident Attitude Survey to gauge how residents and local businesses feel about the travel and tourism industry. Overall, the residents of Rawlins are supportive of

tourism in their community. Specific concerns about tourism include higher prices for goods and services, environmental impacts, crowded recreation areas and facilities closely followed by higher taxes. Specific goals for tourism development include employment opportunities, more viable and active local economy, and improvements in overall appearance of the community.

The Tourism Assessment Process – The Rawlins Tourism Assessment process was conducted on August 2-4, 2010. This involved a team of assessors qualified in the travel and tourism profession who visited the City of Rawlins and surrounding areas, toured the sites and attractions, conducted discovery sessions and compiled a report to the community with recommendations for the community.

The Tourism Assessment Report – The report was completed on October 19, 2010 and distributed for review, comments, questions and suggestions from the local team. A copy of the Rawlins Tourism Assessment Report is available at www.rawlinswy.org.

Tourism Assessment Local Unveiling— A public meeting unveiling the Community Tourism Assessment findings and recommendations was held in March 2012. Leslie Kedelty, the Industry Services Manager of the Wyoming Office of Tourism, who oversaw the Rawlins Tourism Assessment, was present to explain the findings of the report and answer questions. The community was also made aware of the report. The priorities identified in the Assessment and information about training and support available to the community helped set top priorities for the community to begin working on achieving tourism success. Projects and initiatives are already being pursued.



WORKFORCE DEVELOPMENT

The Carbon County Higher Education Center has trained a small cadre of customer service trainers and unleashed them on an unsuspecting world. To date we have done customer service trainings for Memorial Hospital of Carbon County, downtown Rawlins business owners, downtown Saratoga business owners, Carbon County School District #1, and others.

We have a component in the training that emphasizes sites that visitors might enjoy seeing in and around Carbon County.

Who doesn't want to see an historic old penitentiary? Native American ceremonial regalia? A frisky old building façade? The Rawlins uplift? Our trainers are prepared to gin up enthusiasm about these and other tourist attractions as a part of their training.



We have discovered that it is more difficult to gather together the "front line" labor force (service station attendants, hotel clerks, convenience store clerks, etc.) for customer training than we had anticipated. For one thing, there is a large turn-over in those jobs. For another, employers are not anxious to pay employees to take the training and employees are not anxious to take it when they are not on the clock.

We'll keep working at it and perhaps find the right formula. One approach we have discussed but not tried is to get several of the clerks and attendants together for a tour of the community with a special emphasis on the tourist attractions.

We have heard from a few of the convenience store attendants that they have not been in the museum since they were children, for example. Getting them into the museum now seems to be a good way to rekindle their interest in the history of the region so that they are comfortable passing that information along to tourists who stop for gas and a soft drink.

BRANDING

In January 2011, Rawlins DDA/Main Street, the City of Rawlins, Department of Recreation Services, Carbon County Museum, and the Wyoming Frontier Prison combined efforts to unify the marketing of Rawlins. They hired Arnett Muldrow from Greenville, South Carolina, a firm very familiar with rural Main Street communities, to work with all the agencies.

Arnett Muldrow worked with the steering committee on our goals for the project. Every agency was present for the initial meetings and then he met with them independently. Most agencies had their boards and/or staff present. Over the next few months, ideas went back and forth between all agencies. The outcome was well received. The committee agreed on city “colors” and “fonts” for the agencies. Arnett Muldrow created a new look and feel for the community of Rawlins by using the four colors

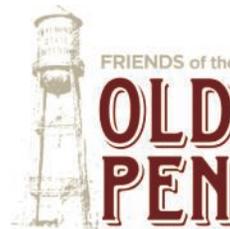
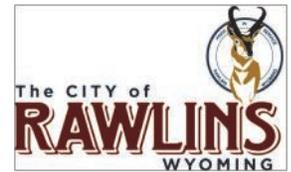
- Rawlins Red – Rawlins’ history of the colors is known throughout the United States,
- Historic Blue – a color already being used by the City of Rawlins,
- Sage Green – for all of our sagebrush
- Goldenrod Yellow – just a nice pop color

The fonts chosen were Horndon and Gotham. The City of Rawlins logo (antelope drawing given to the City by Paul Wawrzinicak) shall remain the same and now be accompanied by “City of Rawlins, Wyoming” written in the newly selected fonts.

Tag lines and ads were created for varying organizations; examples of this are to the right . In addition, Arnett Muldrow created a basic wayfinding program for the city.

The program was presented to City Council in June 2011 and they approved all modified logos. Almost all agencies have incorporated the changes into their marketing for 2011-2012 and give the community of Rawlins a unified look.

EXAMPLES:



WAYFINDING TEMPLATE:



CIVIC PRIDE

Since civic pride has been an area that Rawlins residents and organizations have known that we could improve on, a group of interested citizens has formed Rawlins Pride, a new committee to our community. Rawlins Pride is a group of interested organization and individuals whose goal is to create more pride within Rawlins residents for our community. Our mission statement is "People enhancing the image of our community — within our community — in order to promote pride that leads to economic and social opportunities."

We have been meeting for about a year and are an un-official collaboration. Our fiscal agent is the Rawlins Community Association for purposes of receiving donations and grants to further our purposes. We have no employees and no official board or membership. Currently, we have representatives from (in alphabetical order) the City of Rawlins, Carbon County Higher Education Center, Jackalope Printing, Oasis Church, Rawlins-Carbon County Chamber of Commerce, Rawlins Daily Times, Rawlins DDA/Main Street, Rawlins KOA, Wyoming Frontier Prison, and occasional other community members.

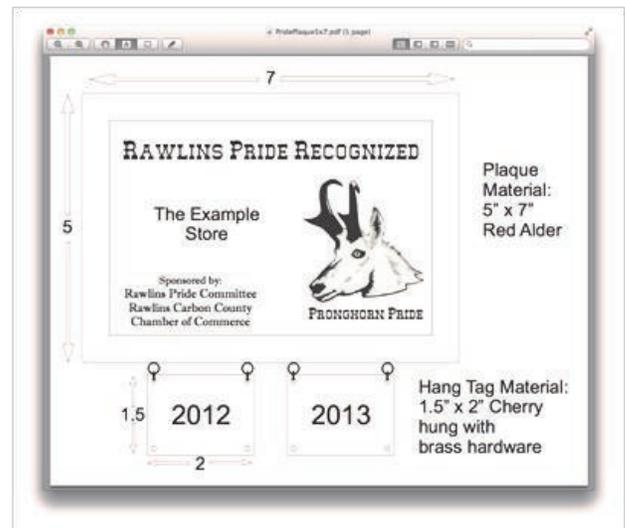
In our first year of existence, we have already achieved some projects of which we are proud.

- We have surveyed over 50 Rawlins residents about potential projects and ways Rawlins could improve, in order to choose projects which will best address the communities wants and needs.
- We have distributed Rawlins Pride rubber bracelets throughout the community, including Rawlins High School.

We, with significant assistance from the Rawlins Daily Times, started the Yard of the Week program last year, which recognizes those people who take care of their yard. It has also taken place this year.

We also have two new additional projects that we are actively working on.

- **Adopt-A-Street.** This is very similar to the Wyoming Highway Adoption program, but scaled down to city size. We have researched the best way to implement this in our community, and are in the process of finding the necessary partners to make it happen.
- **Rawlins Pride Recognized.** This is a program to recognize businesses on a quarterly basis in 3 categories: aesthetic appeal, customer service, and community involvement. There will be 12 prizes given out each year; businesses can be nominated by the public and the Rawlins Pride Committee will choose the winners. The awards will be given at major events throughout the year. Below is an example of the plaque they will be given with the hangtags for each time they win.



In regards to the specific suggestions from the Rawlins Tourism Assessment, improving our civic pride is being addressed in several ways:

- Adopt-A-Street: in development by Rawlins Pride Committee and City of Rawlins
- Clean-Up Day: Done annually for 4 years by the City of Rawlins
- Yard of the Week: Done for 2 Years by Rawlins Pride Committee, Rawlins Daily Times and True Value
- Gardening Classes: 5 week series in 2012 by the Carbon County Higher Education Center

- Design Guidelines: Educational guidelines for use throughout the community to encourage historically appropriate design
- Paint Program: Funding for all Rawlins businesses to pay for 40% of the paint for repainting commercial exteriors

There are also several ideas from the Tourism Assessment which we will be considering for the future:

- Entryway Beatification: Planned for 3-5 Years by the Tourism Committee
- Promotion of Rawlins as a Prison Town: Already being done in an informal manner, may be done more thoroughly in the future.

COLLABORATIONS/ PARTNERSHIPS IN RAWLINS AND CARBON COUNTY

Rawlins Community Garden: Wyoming Frontier Prison, Carbon County Higher Education Center, and University of Wyoming Cooperative Extension Service.

Tom O’Day presentation: Carbon County Higher Education Center, Carbon County Museum, and Wyoming Frontier Prison.

Great Divide Music Festival: Carbon County Higher Education Center, Rawlins Department of Recreation Services, Wyoming Frontier Prison, Carbon County School District #1 Recreation Board, and Carbon County Visitors’ Council.

Rawlins Pride: Rawlins Daily Times, City of Rawlins, Rawlins-Carbon County Chamber of Commerce, ERA Shepard, Bank of Commerce, Carbon County Library, Carbon County Higher Education Center, Rawlins DDA/Main Street, Rawlins KOA, Best Western Cotton tree Inn, and Wyoming Frontier Prison.



Interpretive Walking Path: Wyoming Office of Tourism, Carbon County Higher Education Center, Wyoming Frontier Prison, Carbon County Museum, City of Rawlins, BLM, Rawlins DDA/Main Street, and Carbon County Visitors’ Council.

Carbon County Council of Governments: Representatives from all Carbon County local governments, including Carbon County and all 10 municipalities meet six times a year

Wellness Challenge: Carbon County Higher Education Center, Carbon County Library, Rawlins Department of Recreation Services, Wyoming Frontier Prison, Rawlins Daily Times, and a community volunteer.

Rawlins Tourism Assessment: City of Rawlins, Daily Times, Rawlins DDA/Main Street, Carbon County Higher Education Center, Carbon County Visitors’ Council, Wyoming Frontier Prison, Carbon County Museum, Rawlins Department of Recreation Services, Rawlins-Carbon County Chamber of Commerce, Wyoming Office of Tourism, Carbon County Economic Development Corporation, Wyoming Business Council, and Rawlins Community Development.

Carbon County Museum Consortium: Wyoming Frontier Prison, Carbon County Museum, Saratoga Museum, Grand Encampment Museum, Little Snake River Museum, Mormon Handcart Visitors’ Center, Ft. Steele.

Smithsonian Traveling Exhibit “Key Ingredients”: Carbon County Higher Education Center, Carbon County Museum, Wyoming Frontier Prison, Rawlins DDA/Main Street and others.

COLLABORATIONS CONT.

County United: Carbon County Economic Development Corporation, Carbon County Higher Education Center, Rawlins Daily Times, Carbon County Library Systems, the town of Baggs, Carbon County Visitors' Council, Rawlins DDA/Main Street, Wyoming Business Council, Rawlins Department of Recreation Services, Wyoming Frontier Prison, Grand Encampment Museum, Saratoga Chamber of Commerce, Platte Valley Community Center, City of Rawlins, Carbon County Museum, and the town of Hanna.

SummerFest/Rawlins Jam: Rawlins DDA/Main Street, Rawlins-Carbon County Chamber of Commerce, Wyoming Frontier Prison, Rawlins Jam Committee, Rawlins Department of Recreation Services, Carbon County Museum, and Carbon County Higher Education Center.

Pen to Pen Fun Run: Rawlins Daily Times, Friends of the Old Pen, Wyoming Frontier Prison, Carbon County Museum, Rawlins Department of Recreation Services, Carbon County Visitors' Council, Old Pen Joint Powers Board, Rawlins DDA/Main Street, Bank of Commerce, Rawlins National Bank, Fremont Motors, Pepsi of Rawlins, Rawlins City Market, Michael's Big City Grill, and The Peppermill Bar and Grill

Write Now Carbon County: Carbon County School District # 1, Carbon County School District #2, Carbon County Higher Education Center, Carbon County Library Systems, and Rawlins Daily Times.

Quiz Bowl: Carbon County Higher Education Center, Rawlins Daily Times, Carbon County School District #1, and Carbon County School District #2.

Shop Carbon County.com: Rawlins Daily Times, the Rawlins-Carbon County Chamber of Commerce, the Platte Valley Chamber of Commerce, and Rawlins DDA/Main Street.

The Native American Symposium: The Carbon County Museum and Carbon County Higher Education Center.

Sage Brush Fun Run: Dr. Couch and family and the Rawlins Department of Recreation Services.

Community of Rawlins Garden Tour:

University of Wyoming Extension, Wyoming Frontier Prison, Rawlins Department of Recreation Services, the Carbon County Higher Education Center, and the Rawlins Community Garden.

Bicycle tour of Colorado: Bicycle Tour of Colorado, Carbon County Museum, Carbon County Higher Education Center, Carbon County Visitors' Council, City of Rawlins, Rawlins DDA/Main Street, Rawlins-Carbon County Chamber of Commerce, Rawlins Department of Recreation Services and Wyoming Frontier Prison.

Other City /County Collaborations include: City and County joint branding sessions, the Explore Carbon County portal website, Union Pacific Sesquicentennial, Tracks Across Wyoming, Wyoming Association of Municipalities, and County Commissioners' Association.



VISITOR SERVICES & RETAIL OPERATIONS

Most of the information contained in the retail operations and lack of visitor services is accurate. There is a lack of visitor service information and building a visitor center is being studied. Some feel it should be a stand-alone structure and others feel that it could become part of the new museum. Because of lack of funding for two or three different structures, it could make sense to combine it all in one building and would give people another reason to stop in Rawlins.

As far as hours of operations for the retailers, the Rawlins-Carbon County Chamber of Commerce and Rawlins DDA/ Main Street has been working with businesses concerning their hours of operations but have no control over retail business owner hours. During an event, they do ask merchants to extend their hours and get good cooperation.

The suggestion of a retail leakage study was cited in the report and the Rawlins DDA/ Main Street plan for the downtown has an extensive area that covered retail leakage in Rawlins. The Great Divide CEDS plan update that is currently being done for Sweetwater and Carbon County also has a section listing as a goal for Carbon County to do a retail leakage study. Also, the recently completed 7/30/12 draft of the Rawlins Economic Development plan updates the retail sales leakage study. A marketing report to research what businesses are needed and what could possibly locate in Rawlins is a good idea and the Carbon County Economic Development Corporation, Rawlins- Carbon County Chamber of Commerce and Rawlins DDA/Main Street could partner in this effort.

The Carbon County Higher Education Center as well as the Rawlins-Carbon County Chamber and Rawlins DDA/Main Street has offered many customer service training sessions and will continue to monitor what other types of training are needed for our area businesses. In case a business could not get attendees to the session, a possible idea is to make a CD or DVD of the session and offer it to the employer to show to their employees. This would also be a good idea for those businesses that have a high turnover and could be shown to new employees at any time.

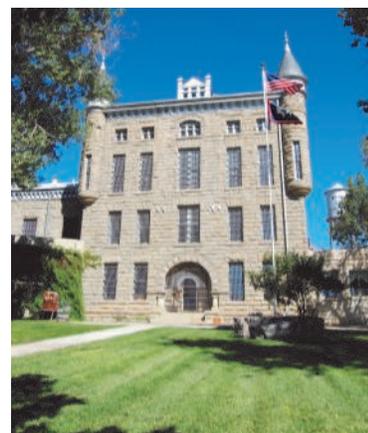
To address current business needs and wants, Rawlins DDA/Main Street has created the "Building Better Business" Program. The program brought *Disney Institute* in spring 2011 to Rawlins and continues with a new line-up of guest speakers for 2012. Building Better Businesses is a program that gives current business owners and employees tools to increase the retention and success of their businesses. In addition, Rawlins DDA/Main Street, the

Small Business Development Center and the Small Business Administration have teamed together to host monthly classes for start-up, expanding and existing businesses to address topics pertinent to business requests. The goals of both the programs are to provide information for businesses in Rawlins to succeed at their entrepreneur endeavors.

A Carbon County Familiarization Trip is worth developing. The Rawlins- Carbon County Chamber of Commerce has looked into this idea to offer a trip around the county to residents to personally see what there is to see and do in our own back yard. Other local agencies could partner with the Chamber to develop this further.

As far as some potential businesses ideas dealing with the section of bicyclists, there is some action being done in trying to work with the owners of the bike shop to see if they could extend hours certain times of the year or see if other merchants could service this market.

There are many ways to promote events in Rawlins and throughout the county. The Rawlins-Carbon County Chamber of Commerce, Rawlins DDA/ Main Street, the Rawlins Daily Times, County United , Carbon County Visitors' Council and Explore Carbon County website works with different event planners to help promote the various events. Table top tents or place mats that have a calendar of events listed on them to display at restaurants could also be used for promotion ideas. As far as way-finding signs in Rawlins, there is already a committee working on this.



OTHER GENERAL RECOMMENDATIONS

Place Rawlins billboards in Lander, Casper, Muddy Gap, Laramie, Fort Collins, Cheyenne, Rock Springs & Wilson, CO:

Response: While we do agree that billboards can be an effective method of advertising, purchasing billboards is expensive and dependent upon availability. It will need to be determined who should and is able to finance billboards on behalf of Rawlins for purposes of enhancing tourism; as well as finding available billboards in the areas recommended in the assessment. We can't just go out and place billboards where and when we want.

Develop cultural heritage tourism:

Response: The local museums and the "Old Pen" all do a great job of marketing their cultural heritage. The CCVC has recently begun to help local hotels and other entities come together to develop packages. One of these proposed packages will be one including the Old Pen, Carbon County Museum and an overnight stay in Rawlins. The Rawlins DDA/Main Street historic mural tour is another example of cultural heritage being marketed for tourism.

Transcontinental Railroad Sesquicentennial:

Response: July 1, 2012, marks the 150 year anniversary of the **Pacific Railroad Act**. (The trans-continental railroad wasn't completed until 1869.) The Assessment report mentioned that the National Park Service would play a major role and that grant monies would be made available. We didn't receive any information about the National Park Service playing any role and there haven't been

announcements of any activities or celebrations that we have been made aware of, in the state. We don't see a local reception in Rawlins recognizing the Act as a "tourist" event.

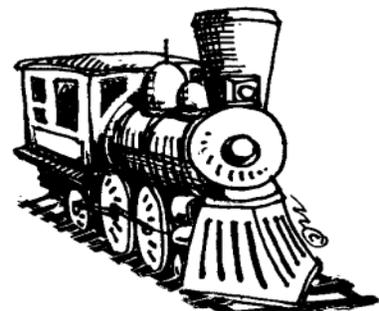
On the other hand, 2018 will mark the Sesquicentennial of the founding of Rawlins, and we feel that a multi-day celebration might draw people into the area to celebrate with us.

Snowed-In packages:

Response: The "snowed-in" packages have been discussed amongst the committee. There are many entities willing to participate; there are just some bugs that need to be worked out for the project to proceed. We are still discussing this project and will launch it as soon as it is viable, and it might just come down to some coupons and a game or something.

The major problem is that when the roads are closed, it means it's really bad out and we're asking our committee members to open their place of business or attraction in the night, in the cold, blinding wind and snow and the roads in town are bad as well.

In the meantime, a couple of the hotels have, on their own, gone above and beyond when people are snowed in. For example, the Hampton showed a movie in one of the meeting rooms and provided popcorn and cocoa to the families that were there during one road closure.



TOURISM COMMITTEE PROJECTS

Current/1 Year

Tourism Certification

- Destination Marketing Specialist – Completed 9/2011
- Lodging Survey – CCCV
- Visitors Profile and Conversion Study – CCVC

Marketing in the City

- 115 Things to Do List and Brochure – Tourism Committee
- Downtown Image Campaign – DDA/Main Street
- SummerFest and other events - DDA/Main Street
- Golf, Shooting and Other Tournaments - Rawlins Department of Recreation Services
- Pen to Pen Fun Run, Spooky Events including Friday the 13th and Haunted Halloween Night Tours– Wyoming Frontier Prison

- Rotating Exhibits, Trek - Museum
- Celebration of Wind & Customer Service Training - CCHEC
- Promote Local Pride - Rawlins Pride
- Shopcarboncounty.com – Daily Times, RCCC and DDA/Main Street

- Interpretive Walking Path from Rawlins Spring to the Uplift – Collaboration
- Musser Grant Funding
- Trails/Picnic Area
- Mineral Tours etc...

- Community Branding – Collaboration
- Way finding/Signage – DDA/Main Street, CCVC & City of Rawlins
- Hotel Kiosk – Chamber, Daily Times, DDA/Main Street & CCVC

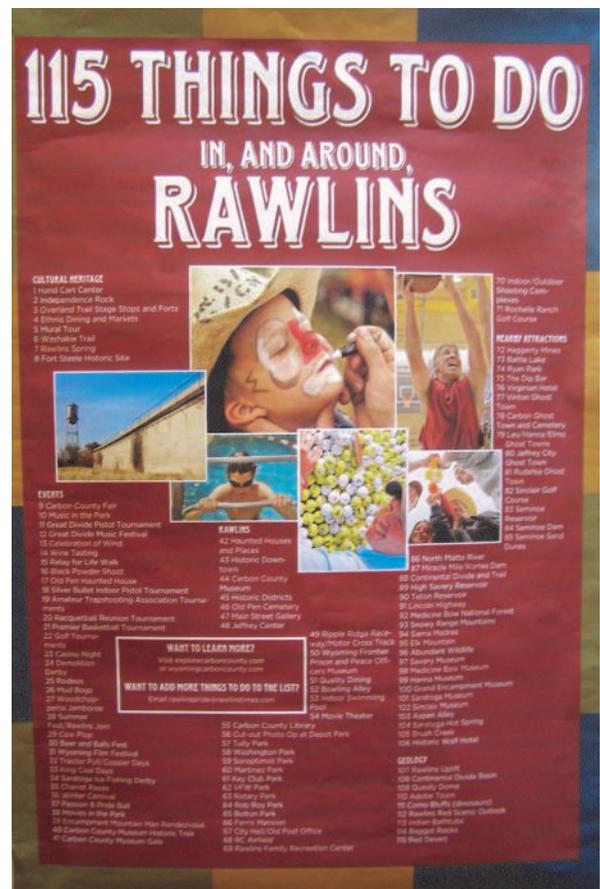
- Tourism Assessment Review - Aug. 2012
- Rawlins Pride Recognized Awards

3/5 Years

- Adopt a Street – Rawlins Pride
- Exercise Circuit on Walking Path – Recreation Services
- Downtown Walking Tour Brochure – DDA/Main Street, CC Museum & Wyoming Frontier Prison
- Dog & Horse Park - Collaboration
- Splash Park – DDA/Main Street & Recreation Services
- Fishing Derby
- Target Specific Advertising for Cross-Country Bikers & Continental Trail Hikers
- Sesquicentennial of UPRR

5+ Years

- Pronghorn Pride Interpretive Visitor Center
- New Museum
- Convention and Event Facility





RAWLINS TOURISM COMMITTEE MEMBERS

August 2012

Steve	Golnar	City Manager, City of Rawlins
Dave	Throgmorton	Director of Carbon County Higher Education Center
Pat	Robbins	Regional Director of Wyoming Business Council
Pam	Thayer	Executive Director of Rawlins DDA/Main Street
Lisa	Howell	Executive Director of Carbon County Visitor's Council
Cindy	Wallace	Executive Director of Carbon County Economic Development Corporation
Tina	Hill	Historic Site Director of Frontier Prison
Mira	Miller	Rawlins DDA/Main Street
Amy	Bach	Community Development Director, City of Rawlins
Chris	Waller	Recreation Services Director, City of Rawlins
Jerry	Raehal	Publisher of Rawlins Daily Times
Kelly	Bohanan	Interim Director of Carbon County Museum
Yvonne	Johnson	Executive Director of Rawlins-Carbon County Chamber of Commerce
Heather	Mortensen	Seminole Boat Club
Kristin	Phipps	Wyoming Office of Tourism
Alan	Dubberly	Wyoming Office of Tourism
Richard	Chenoweth	Pronghorn Pride

Local update of the Healthcare in Rawlins: -Ned Hill, Chief Executive Officer

The Memorial Hospital of Carbon County has faced two main challenges over the last several years:

1. Financial stability and operations
2. Physician access and out-migration

The financial instability of the hospital has been addressed and corrected over the past 5 months. We have taken many actions to clean up the billing processes as well as the operational aspects of controlling costs. These measures have created an organization that is financially sound and is actually running far ahead of the budgeted profit margin year to date.

The remaining financial challenges we face are finishing the “clean up” of all the old account that have not yet been billed and those that are hung up in the system with some kind of error. The “back log” of accounts should be cleaned up by the end of this calendar year.

The Second challenge we have faced and continue to face is the ability to provide enough physicians and specialties to enable the community to receive their healthcare services locally. There are usually two main reasons people choose to leave the area to seek healthcare elsewhere. Either we don't provide the service (like brain surgery) or we do provide the service, but not well. The hospital currently has a little of both. There are services like Ear, Nose and Throat (ENT) that we currently don't provide and there are other services like Family Practice that we do provide, but need additional physicians in the area to meet the access needs.

We are recruiting several new physicians to town and to date have an ENT coming in November and have two contracts out with Family practice physicians. We are also actively recruiting an OB/GYN, a Pediatrician, an Internist and a second Ortho and General surgeon. We hope to be able to recruit 2-4 new physicians into town each year.

Those are two of the historical challenges that are being resolved, on the other hand there are several things that the hospital does exceptionally well! For example:

- The hospital has a renowned Emergency Department staffed 24/7 with emergency room physicians. We also have our own Ambulance service staffed with Paramedics and EMT's, which is available in house 24/7/365.
- We are in the final stages of completing a major renovation project which includes three brand new operating rooms, a new Post Anesthesia Care Unit and a new, state of the art, Intensive Care Unit (6 beds).
- Another unique service offered here at MHCC is our new Sleep Lab. It is unusual for a hospital our size to have an in house sleep lab, but we are very fortunate to be able to offer this service.

In addition to the services highlighted above, the hospital offers many other important service lines. The hospital is a full service 25 bed acute care facility. As such we are able to provide services which include ER, ICU, Lab, Radiology, Respiratory, Physical Therapy, Surgery, Outpatient Clinics and all of the Ancillary departments that ensure the clinical departments run smoothly.

We believe the most important message we can send to the community or those looking to relocate to Rawlins is that when it comes to the healthcare provided in this town, there is only one statement that sums up what we are about;

“The mission of the Memorial Hospital of Carbon County is to become the most exceptional healthcare facility in the country.”



Local Update on City of Rawlins Recreation—10/1/12

The Rawlins City Council has made recreation a priority, enhancing the quality of life for its citizens. For a city of its size (9,259), Rawlins boasts many recreational amenities that usually can only be found in larger communities.

The city has a family recreation center that includes 3 gyms, 3 racquetball courts, a weight room, and elevated walking track, a fitness room, cardio equipment, as well as an indoor shooting range. The indoor range has 9 eighty foot lanes that are in the process of being updated (5 lanes complete). The city outdoor range has 2 trap and 2 trap/skeet combination fields for shotgun sports, 10 pistol bays, 12 300 yard rifle bays, 10 archery lanes and a 1000 yard rifle/black powder range. These facilities are used to host both local and regional tournaments.

In addition to the interpretive trail being realized, Rawlins has over 7 miles of walking/biking paths that runs along indoor and outdoor recreation areas as well as scenic areas such as the Rawlins Uplift. A trail plan is being developed.

The city golf course, Rochelle Ranch, has been named the 29th toughest course in the country according to Golf Digest in 2007, 2008 and 2009 as well as 32nd of Golf Magazine's Thrifty-Fifty (top 50 courses you can play for under \$50) in 2010. It has also been ranked regularly in Wyoming's top golf courses. Rochelle Ranch has hosted state tournaments such as Wyoming's Senior Men's, Wyoming Senior Women's and the Wyoming State Best Ball. With our national rankings for outdoor sports and golf, it makes sense to market Rawlins as a destination for these activities.

Every summer, the city offers its residents and visitors an 8 week summer concert series every Thursday evening called "Music in the Park." Various types of music, food, and fun are presented to audiences averaging over 1,000 each night.

The challenge that the city leaders deal with is what recreational activities/facilities to offer while budgets and population remain relatively stagnant. If and when the energy (wind, oil, gas, etc) booms again, additional types of recreation activities and facilities would be able to be added or built. The challenge would be to try to plan for the maintenance and staffing of these facilities after the boom is gone.

Chris Waller
Director, Department of Recreation Services
City of Rawlins

City of Rawlins

P.O. Box 953
Rawlins, Wyoming 82301



October 5, 2012

COMMUNITY DEVELOPMENT APPENDIX TO THE RAWLINS ECONOMIC DEVELOPMENT MASTERPLAN

The mission of the Community Development is to strive to promote and accommodate growth while preserving the area's unique natural resources and community values. The Community Development Department is comprised of a Building Division and Code Enforcement Division.

The Building Division ensures the safe and lawful use of buildings and properties by enforcing the building codes and zoning regulations. We pride ourselves in providing the highest level of customer service, while enforcing the code requirements to ensure a safe community. The functions performed by the division consist of plan review, permitting and inspections. Our staff often serves as an educator to contractors and our citizens, and is a branch of public safety. We are committed to improving our performance and developing procedures that are streamlined, understandable and transparent.

Building Permit Activity

Year	New Commercial	New Residential	Mobile Homes
2007	5	47	85
2008	1	21	36
2009	5	3	11
2010	11	4	12

The mission of the Code Enforcement Division is to promote, protect, and improve the health, safety, and welfare of the citizens of Rawlins through an effective code enforcement division. Through the efforts of Code Enforcement the following has been accomplished:

Code Enforcement Cases

Year	Nuisance Cases	Vehicle Impoundment
2009	236	122
2010	226	155

With the adoption of the 1997 Uniform Code for the Abatement of Dangerous Buildings, the City of Rawlins has adopted reasonable procedures for the classification and abatement of dangerous buildings. Where a building or other structure is in such an unsafe condition that that it may place people in danger, through the provisions of this code the Building Official has the authority to investigate and with proper legal authority the ability to make the structures safe in abating dilapidated, defective buildings which endanger life, health, property and public safety within the concepts of fair play and justice. In order to be considered a dangerous, a building or structure must endanger the life, limb, health, morals, property, safety or welfare of the general public or their occupants. Buildings which are simply dilapidated or run down would not necessarily be considered dangerous. The Community Development Department is charged with investigating and inspecting potential dangerous buildings. Once a building or structure has been deemed dangerous the City Attorney's Office begins the legal process including notice requirements and filings with the court. The city through the dangerous building process has abated the following:

Dangerous Building Abatement

Year	Buildings Abated	Buildings Demolished
2007	4	20
2008	12	16
2009	22	20
2010	23	7

*This information will be updated to provide the most current information on Dangerous Building Abatement

Through the dangerous building process a number of properties have been demolished creating a greater opportunity for infill development and overall general appearance to the community. The following is a historical review of the total properties abated through the dangerous building process to date:

Dangerous Building Abatement through October, 2012

Total Abated through Legal Involvement	76
Total Abated without Legal Involvement	92
Total Pending in Legal System	20

Through the concerted efforts of the City Attorney's Office and the Community Development Department a total of 168 buildings and/or structures have been abated from the community. Both departments will continue to improve the character and appearance of this community through their efforts of abating dangerous buildings and structures.

Carbon County Higher Education Center Program update, October 1, 2012

There is no question that Carbon County School District #1 is working to improve student test scores that are consistently below the state average. Rawlins Middle School in particular has not met AYP (Average Yearly Performance) goals for six consecutive years. The School Board has initiated a series of data-driven programs that will identify problem areas early in a student's career so that steps can be taken to reduce them. **The District recently built a state-of-the art elementary school to replace three outdated and inadequate schools. And the District is working with the Wyoming School Facilities Department to build a new high school to accommodate a high school population of around 500 students.**

The proposed new school was deemed by District voters to be insufficient to meet the educational needs of the community, so in November, 2011 they passed a \$26.5 million mil levy to expand on what the School Facilities Department was proposing. Included in that amount was \$6.1 million to construct a new Career and Technical Center to focus on vocational education and industry training.

Here is a brief update on vocational programs in Rawlins that are germane to economic development in Rawlins:

The Carbon County Higher Education Center, a Board of Cooperative Educational Services project of Western Wyoming Community College and Carbon County School District # 1, was established in 1985 to provide adult basic education programs and industry training for adults. It quickly became apparent that many high school students were eager to move directly from high school into the local labor force and the mission of CCHEC expanded to include vocational training for young people in its programming.

Working closely with Western Wyoming Community College and the University of Wyoming, CCHEC has consistently been providing recognized credit and certificate programs, some leading to associates degrees and beyond and some providing skills that are necessary in the local job market. In addition, CCHEC has consistently worked with local industry to deliver industry-specific programs that provide the local labor force with higher level skills demanded by industries in the community.

The Carbon County Higher Education Center in Rawlins (there is also a campus in Baggs) is located in three separate facilities: some programs are offered at Rawlins High School, some are provided in the Vocational Campus (a leased building in a residential neighborhood) and some at the Main Campus (a series of offices and classroom in a renovated grade school leased from the school district). This configuration of facilities is often confusing to students and prospective students and makes it difficult to coordinate all of the programs that are offered in the community.

The Carbon County Higher Education Center houses several distinct vocational programs that will be located in the new Career and Technical Education Center. They are:

Welding: The welding program is currently housed at Rawlins High School and is staffed by a welding instructor certified to teach at both the high school and college levels. Welding courses are offered during the day for high school students and in the evening for adults. The high school program

enjoys full enrollments every semester; the adult programs vary with full enrollment some semesters and less during some other semesters. High school students (the Hot Strikers) compete successfully in state welding competitions and are easily employed upon graduation.

Auto Mechanics: The auto mechanics program is currently housed at Rawlins High School and is staffed by an instructor certified to teach at both the high school and college levels. To date, the program has been limited to high school students but the intention is to offer auto mechanics courses to adults in the new facility. The current facility is definitely “old school” but the classroom for the new Career and Technical Education Center is based on the most up-to-date facilities in the state. As currently designed the program is focused on students who want to maintain or repair their own vehicles. With the move to the new facility, the focus will be on training people for the local auto repair industry (including three local truck stops that have frequent openings for auto and diesel mechanics).

Hospitality and Restaurant Management: The hospitality program is currently housed at Rawlins High School and is staffed by an instructor certified to teach at both the high school and college levels. This is an increasingly important program, especially in light of the aggressive push by the City of Rawlins to become a Tourism Certified Community. The program focuses on restaurant management, entrepreneurship, and customer service. It is a hands-on, experiential learning program. In 2009 the students opened a restaurant called Kickin’ Chicken. The restaurant is in operation during the school year and serves students, staff and a growing catering clientele. Students learn every aspect of restaurant management by actually managing a restaurant and recently placed well in a state high school Pro Start Management competition.

The adult program includes teaching the Pro Start food safety and preparation courses. The courses are offered frequently and are well attended, but the current facility limits the size of classes and the range of topics that could be covered in these courses. The new facility is designed to meet the restaurant management needs of the high school program and the Pro Start needs of the adult program.

Construction Trades: The construction trades program is located at the high school and taught by an instructor certified to teach at both the high school and college levels. In fact, this program has the highest percentage of concurrently enrolled students (high school students taking classes at the high school for which they are receiving both high school and college credit) of any program at the high school. Like welding, courses for adults are held in the evenings and attendance varies. In the past the evening courses have focused on home repair and maintenance but in the new facility the program will take on a decidedly career-preparation focus.

During the 2012-13 school year students in both the high school and adult classes will be building a 3-bedroom, 2-bath home on a lot that CCSD #1 has owned for decades. This experiential, hands-on approach to vocational education is to become the model for all future vocational programs at CCHEC.

Electricity and Instrumentation: This program is taught at the Vocational Campus and the instructor is certified to teach at both the high school and college levels. This program is singularly focused on adult students who are engaged in a career and want additional training or who are seeking additional training for advancement in their field. The electrical courses culminate in proficiency on the programmable logic controllers, the most common instrumentation panel used by operators in the oil and gas industries and in the burgeoning wind energy industry.

This program has proven to be one of the most versatile in terms of meeting industry needs. The curriculum, developed by instructors at CCHEC and Western Wyoming Community College, is designed to allow students to take portions of the courses as their work demands. Some need the elementary electrical portion; others need the more advanced PLC training. Either way, the program is designed to fit the specific needs of local industries and their labor force.

This program is also versatile in that it allows students to gain skills in machining, computer programming and 3-dimensional design. The Solid Modeling program has been particularly well received by both high school students and adults working in local industry. It is a 3-dimensional computer-assisted-design program that allows users to design complex machine parts or even entire systems (electrical systems, plumbing systems, etc.) in order to see how the component parts fit together. Industry is quickly recognizing the utility of this skill-set and demand is growing. The current facility is woefully inadequate for teaching this along with the instrumentation courses and the new facility has been specifically designed to incorporate all of these programs in a professional educational space.

Nursing: The Nursing program is housed at the Vocational Campus and focuses exclusively on adult learners. CCHEC has the capacity to educate eight nurses annually through a Distance Learning arrangement with Western Wyoming Community College. Current space for this program is an embarrassment, but our professional teaching staff has certainly made the best of a bad situation. The new facility includes the necessary classrooms and laboratories and simulation rooms along with integrated technology to best utilize the distance learning model currently in use by WWCC.

In addition, CCHEC is one of two sites in the state to offer CNA II and Medication Aide programs. These programs add value to the CNA certificate and are increasingly utilized in hospitals and nursing homes nationwide they will be valuable in Rawlins and CCHEC is ahead of the curve.

Certified Nursing Assistant: The CNA program is housed at the Vocational Campus and is taught by an instructor certified to teach at both the high school and college levels. It is currently taught in a large hallway that has been converted to a classroom adjacent to another hallway that holds the hospital beds and other equipment necessary for the program. The CNA class is taught during the day for high school students and in the evening and summer for adult learners. It is currently one of our most popular programs, in part because it is a feeder program for the nursing program. The new facility has space shared by the nursing and CNA programs with simulated hospital or nursing home rooms so that students are learning in an environment that reflects the environment in which they will work.

Pre-Engineering: This course is currently taught at the Vocational Campus and is taught by an instructor certified to teach at the high school level. This rapidly growing program uses the Project Lead the Way Curriculum to introduce students to principles of engineering, digital design and a variety of other programs that prepare them to pursue engineering degrees at the community college and university levels. The program features an experiential, hands-on approach that is clearly successful: graduates who wish to continue in engineering at the University of Wyoming are able to do so and to do so successfully. Students in this program have won state competitions in the Skills, U.S.A. program and placed in the top tier in national competitions.



G. K-12 – Carbon County School District #1

The 2012 Carbon County School District #1 Fall Report Card will provide updates to K-12 Education in Rawlins.