Better City

Green River Strategic Plan Phase II: Community Analysis

Green River, Utah

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Prepared by: Better City

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EXECUTIVE SUMMARY

Background and Introduction

Recognizing the need for additional economic activity and community development investment, the City of Green River (the "City" or "Community") commissioned a Strategic Plan (the "Plan") in the Spring of 2017. The goal of the Plan is to orient City leadership and the community at large, to key catalytic projects that have the potential of generating new vibrancy, responsible population growth, and economic prosperity. Unlike many rural communities, Green River benefits from key strategic advantages, including transportation infrastructure, natural assets including world-renowned scenery and the Green River. The challenge the City faces is how to prioritize potential investment and growth opportunities, given the limited resources and tax base that the Community has.

The appearance of many potential investment opportunities, combined with the limited resources of the City and a risk-averse population, have created a dynamic sometimes referred to as "paralysis by analysis." In other words, the uncertainty of which option will prove most successful has prevented proactive investments from occurring. As a result, few strategic investments have occurred in recent decades and the built environment reflects the lack of investment—many properties along the main corridors of the community are vacant and blighted. However, with a galvanizing vision, an actionable, detailed strategic plan of action and implementation follow-through, Green River has a tremendous future.

Demographic Assessment

The demographic assessment looks at demographic trends to assess the growth potential of the community. Contrary to ACS estimates, the population of the community is likely shrinking. The City's age-group composition shows that there is a smaller percentage of working age individuals from 25-44 than the region and State. Growth of the working class is a key goal for the implementation of the Strategic Plan. Green River's Hispanic share of the population is much higher than the State or County average. This is a potential strength to the community, because the Hispanic population within the State is growing in size and purchasing power, and minority individuals tend to be more entrepreneurial which helps feed the local economic engine.

Economic Assessment

The Economic Assessment analyzes the current state of the economy, especially for employment distribution, income, and educational attainment. Employment is dominated by a few industries that tend to pay low wages. Higher-paying industries are in the lower shares of the distribution, resulting in a median income for the City that is $20,000 less than the State average.

The Tourism Industry

To better understand the nature of the tourism market in the City, visitation at key regional attractions was compared to the City's economic performance as measured by tax collections. Green River's peak transient room tax ("TRT") collections closely resembles the visitation averages at Arches National Park. Surprisingly, the correlation between visitation at Arches and TRT collections in Green River is stronger than the correlation between Arches visitation and Moab's TRT collections, or Moab's TRT vs Green River's TRT. This suggests that of the visitors to the region, there

may be a stronger connection between Arches visitation and hotel stays in Green River than was previously assumed, and is a more important factor than general traffic to Moab.

Utah's "Mighty Five" campaign has driven incredible growth in year-over-year visitation at many of Utah's national parks, especially in the off season. However, the growth has not been represented in Green River's or Moab's TRT revenues. Neither community is fully capitalizing on the new off-season growth. The city should implement a more thorough market analysis initiative to better understand the customers that are visiting in the off season, and establish itself as a basecamp for this new category of regional visitor.

SWOT Analysis

A Strengths, Weaknesses, Opportunities, and Threats Analysis was performed for five components of the economy:

1) Economic Development,
2) Community Development,
3) Workforce & Human Capital Development,
4) Branding, Marketing, & Event Promotion, and
5) City Governance

The results of the SWOT analysis are summarized in the tables found on pages 21-28 of this report.

The City's Role in Implementation

This section of the document provides a framework with which the City's elected leaders and staff can use to implement the recommendations provided in the Strategic Plan. The framework highlights the need for government to provide for safety and well-

being for local residents, but after those needs are accounted for, a cost-benefit analysis should be performed for each initiative. Priority should be placed on projects and initiatives that have the potential of driving significant private investment and ongoing economic activity.

Next Steps

This report is the second phase of a three-phase Strategic Planning process. Phase III will identify potential funding sources, potential project champions, and will provide a framework for how to approach each of the catalytic projects.

DEMOGRAPHIC ASSESSMENT

The demographic make-up of a community plays a role in determining opportunities for economic and community development. For example, businesses rely on the availability of local labor to support operations, and the current and forecasted size of the tax base determines what investments can be made to improve public infrastructure and quality of life amenities. Factors such as age, population size, workforce size, and education attainment levels each play a role in the success and growth potential of the local economy and may provide insights into the types of industries or market opportunities that would be best suited for the Community.

One of the challenges that rural communities face, and Green River is no exception, is acquiring good demographic data for analysis. The data gathering methods utilized by federal sources such as the American Community Survey[1] (ACS) are best suited for large communities, where it is easier to obtain a statistically relevant sample size that can yield good data, even in non-census years. To determine the current population and demographic analysis for the Community, this report will rely heavily upon decennial census data, and will utilize ACS data and other sources to the degree that the information appears relevant based on observations made within the Community.

POPULATION SIZE AND AGE

The population of the City of Green River was reported at 973 in the 2000 Census, and 952 in 2010. The ACS reports that from 2010 to 2015, the population of the City increased by 16%, or by 154 residents to a population of 1,106 (see Figure 1).
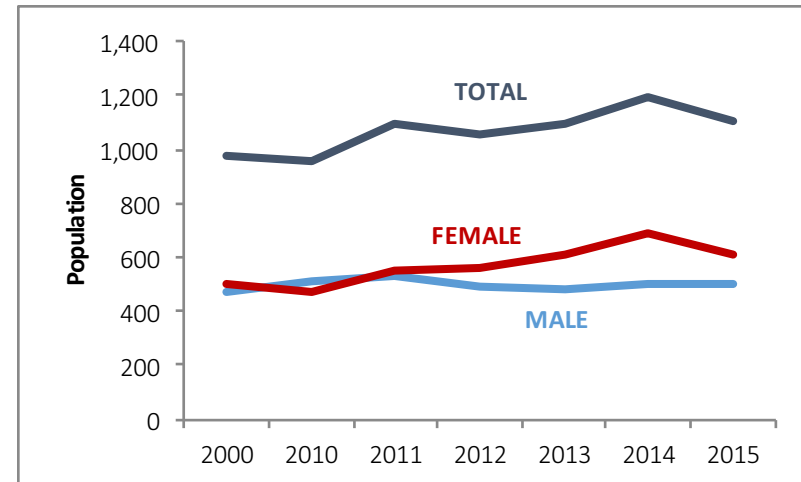
Source: US Census (2000, and 2010), ACS 2011-2015

Figure 1: Population, 2010-2015

However, residents reported during interviews that the population has been decreasing over the last several years. Because official comprehensive data will not be collected until the 2020 Census, school enrollment data provided by the State of Utah was analyzed with the assumption that school enrollment will serve as a proxy for the overall population trends. If local school enrollment increases, it is reasonable to assume that the overall population of the Community has also increased, and vice versa. There are some

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[1] The American Community Survey is a national survey administered by the U.S. Census Bureau. It samples a portion of the population every year as a way of estimating population and economic trends in non-decennial census years.

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potential issues with this approach, including that if the non-children raising population, such as retirees, increases or decreases at a faster rate than the overall population, those changes will not be reflected in the school enrollment data. Anecdotal reports from residents suggests that there has not been an influx or exodus of retirees, therefore it is assumed that the school enrollment data is a relevant proxy for the overall population trend.

October school enrollment at the Book Cliff Elementary School and Green River High School from 2012-2016 is shown in Figure 2. This figure shows that during the five-year period analyzed, school population at Book Cliff Elementary decreased from 125 students in 2012 and 2013 to 91 students in October of 2016. Similarly, Green River High School enrollment decreased from 116 in the Fall of 2012 to 94 students in 2016.
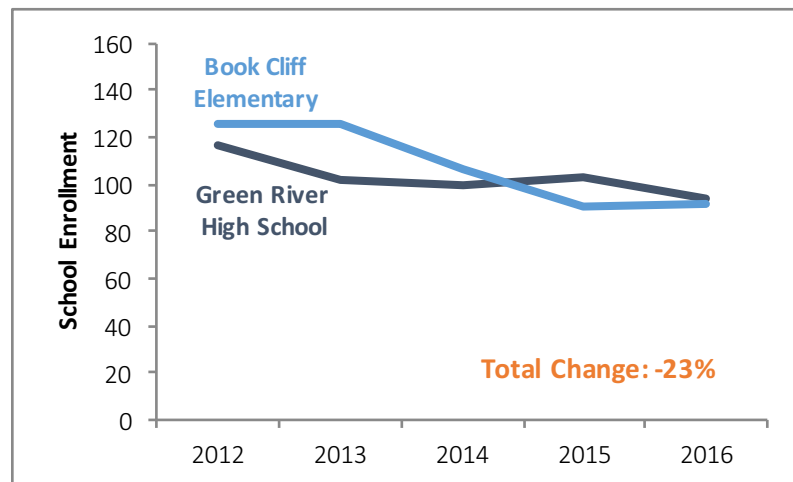

Source: Utah State Board of Education

Figure 2: School Enrollment, 2012-2016

The change represents a 23% decrease in total enrollment over the five-year period. If this same trend is extrapolated to the population of Green River as a whole, it would suggest that the actual population of the City was closer to 731 in 2015, rather than the ACS reported 1,106. The actual population probably lies somewhere between the 2010 reported number of 952 and the extrapolated result of 731.

This observation is an item of concern. Natural attrition through the aging of the population and movement of families out of any given city needs to be overcome by the growth of new people, and especially young people, in the community. A declining school population is likely a symptom of a weak economic engine, and working families move to find more prosperous circumstances in other locations. When it is the young and working class that is moving away, the Community is faced with declining prospects of new entrepreneurial and economic activity that serves as the lifeblood of the City.

The overall age composition of the City also highlights a few potential areas of concern. The key age group of 25 to 44 year-olds is underrepresented in the City in comparison to the County, State, or the nearby city of Moab (see Figure 3). Specifically, approximately 17% of the City's population is between 25 and 44, compared to the State average of 28% or Moab's 31%. In other words, there are fewer workers relative to the City's entire population than is typical in Utah, making it difficult for employers to find adequate talent. In the case of recruiting in new industries, the smaller than expected workforce is an area of concern that may lead potential recruits to consider other locations.
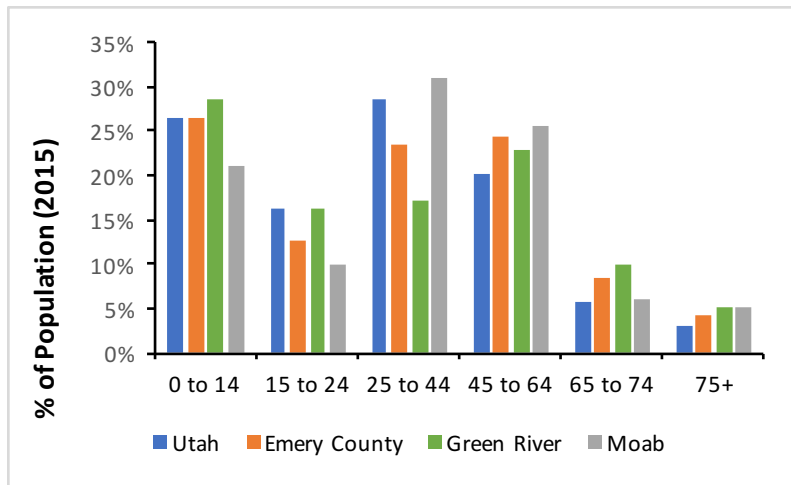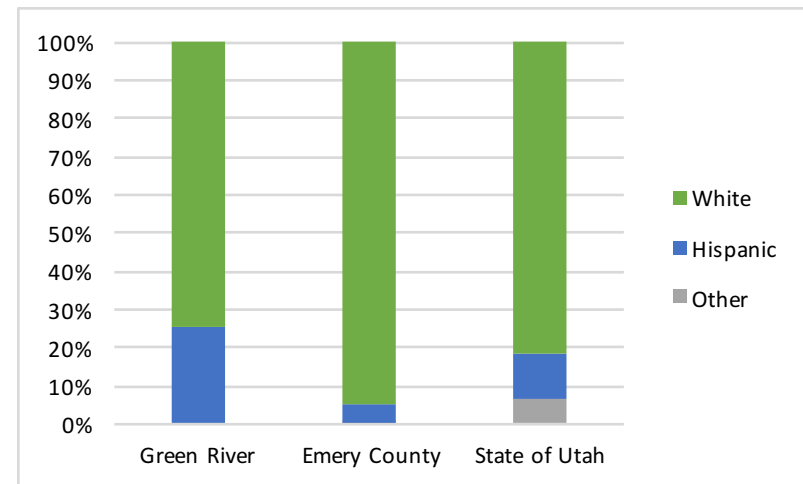
Source: ACS

Figure 3: Green River Population Breakdown, 2015

There are several forces at play to consider when it comes to workforce size. The prevailing saying used to be that "people follow jobs" when explaining why certain communities grew in population while others fell behind. This is almost certainly one of the factors into why the City's key working population is smaller than average because families have moved away to find more economic opportunities. However, the more recent trend in economic development is that now "jobs are following people." Because the unemployment rate in many states, including Utah, is now approaching what is defined as "full-employment," people are primarily choosing a place to live first based on quality of life factors, and then finding employment opportunities within that area. Employers in turn, are choosing locations and building operations in communities where their ideal employee already lives, or wants to live. It is not enough anymore to simply recruit in a large employer and think that the population will move to Green River. The City will have to proactively build a community and environment that

is attractive to the workforce, while simultaneously recruiting employers, or supporting entrepreneurs that are a good fit.

ETHNICITY

The City of Green River is much less ethnically homogenous than the rest of the State of Utah. Specifically, the City is reported to have a Hispanic population of approximately 25%, vs the State average of 12% or the Emery County average of 5% (see Figure 4).

Source: ACS

Figure 4: Ethnic Composition, 2015

The significant Hispanic population is even more pronounced when looking at the school enrollment data. As reported by the State Department of Education, the student population at Book Cliff Elementary was 42% Hispanic in 2012, and increased to 49% in 2016 with a peak of 58% in 2015 (see Figure 5). Similarly, the Hispanic population at Green River High School increased from 30% in 2012 to 56% in 2016 (see Figure 6).
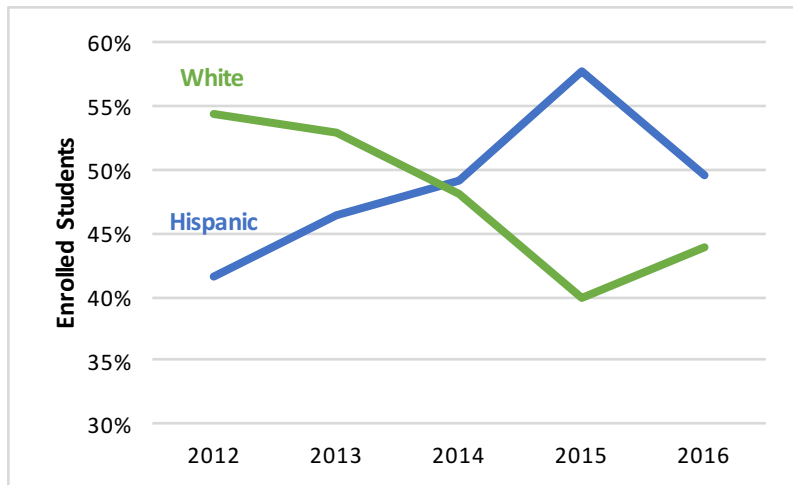
Source: Utah State Department of Education

Figure 5: Student Population Composition, Book Cliff Elementary 2012-2016
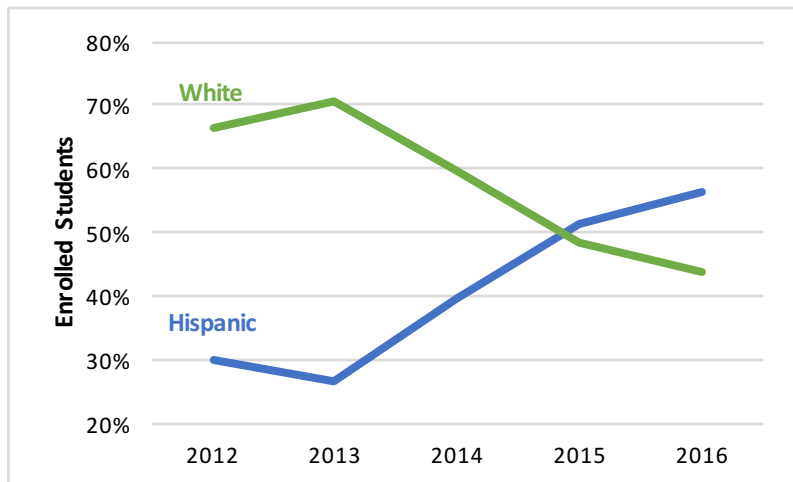
Source: Utah State Department of Education

Figure 6: Student Population Composition, GR High School 2012-2016

But the increase in percentage of the Hispanic population is only part of the story. As described previously, total school enrollment decreased during the same time period. Further analysis shows that the change in ethnic distribution at Book Cliff Elementary is due to a decrease in the number of White students that exceeded the decrease in the number of Hispanic students (see Figure 7).
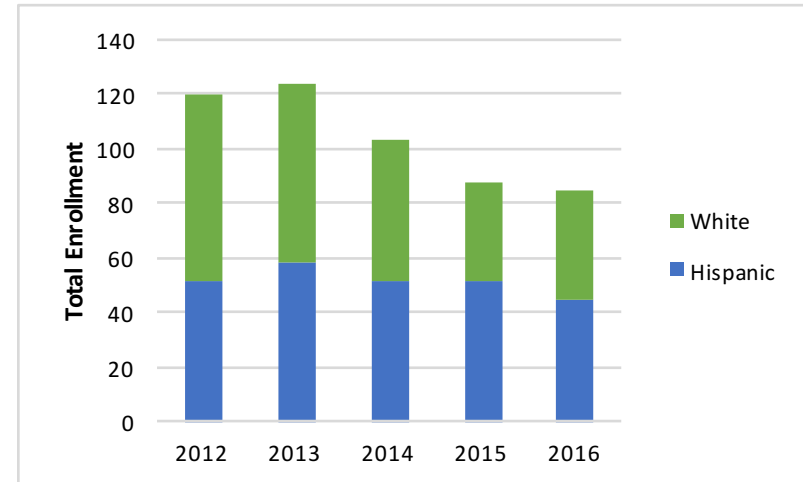
Source: Utah State Department of Education

Figure 7: Enrollment Comparison, Book Cliff Elementary 2012-2016

Green River High School saw an increase of 18 Hispanic students, or a 51% increase from 2012 to 2016, but a decrease in the White student population of 36 students or 47% (see Figure 8). Student population changes are summarized in Table 1.
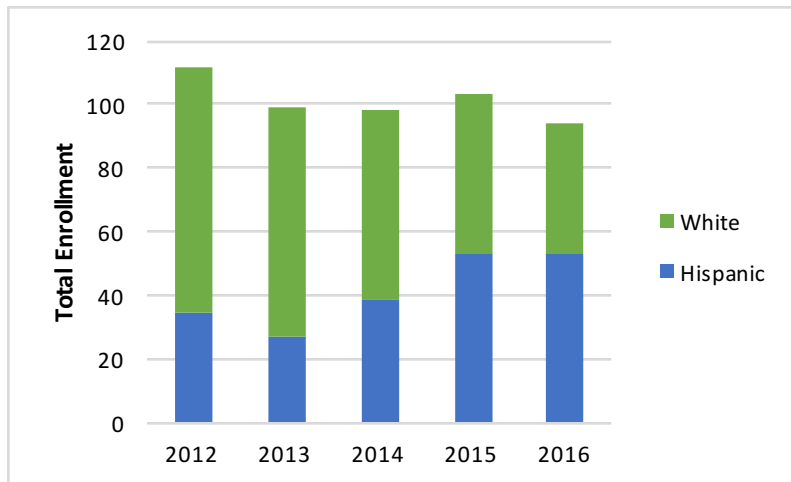
Source: Utah State Department of Education

Figure 8: Enrollment Comparison, GR High School 2012-2016

		2012	2016	% Change
Book Cliff Elementary	Total	125	91	-27%
	White	68	40	-41%
	Hispanic	52	45	-13%
Green River High School	Total	116	94	-19%
	White	77	41	-47%
	Hispanic	35	53	51%

Source: Utah State Department of Education

Table 1: Student Enrollment Summary

The shifting ethnic profile of the Community may be evidence, or a symptom of a change in economic drivers for the Community. Long-term residents appear to be moving away from the Community, while first or second generation minority immigrants are moving in, attracted by the agriculture and hospitality industries.

This ethnic shift can be a great strength, however. The Hispanic population within the State, and the Nation as a whole is growing, and they have tremendous buying power and entrepreneurial spirit. For example, from 2007 to 2012, the number of businesses in Utah owned by Hispanic individuals grew by 49%. During the same time period, the total number of businesses in Utah increased by 2%. Sales receipts and payroll of Hispanic-owned businesses also out-paced the State average growing by 38% and 34% respectively (see Figure 9).
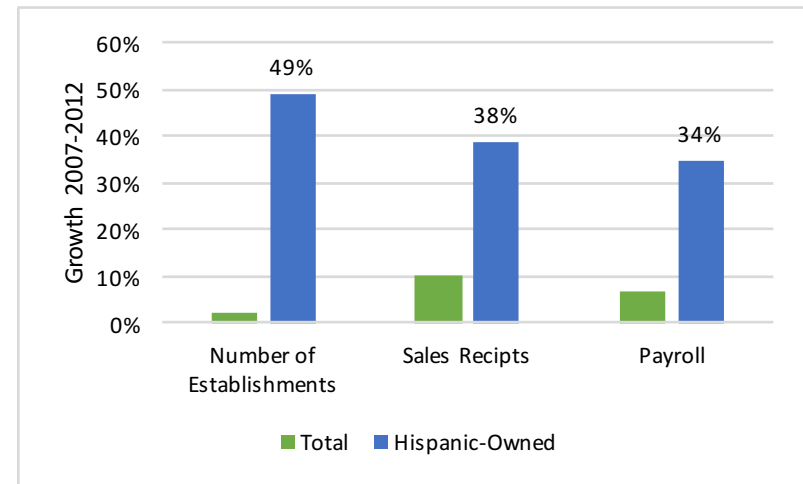
Source: US Census Bureau

Figure 9: Hispanic-Owned Business Growth

This finding also helps provide additional support and economic justification for the proposed downtown Green River project of the Business Owner and Entrepreneurial Support Center discussed in the Phase I report. The proposed support center will have its greatest impact if it is able to help inspire residents, including the local Hispanic population to become entrepreneurs and business owners.

ECONOMIC ASSESSMENT

INDUSTRIES

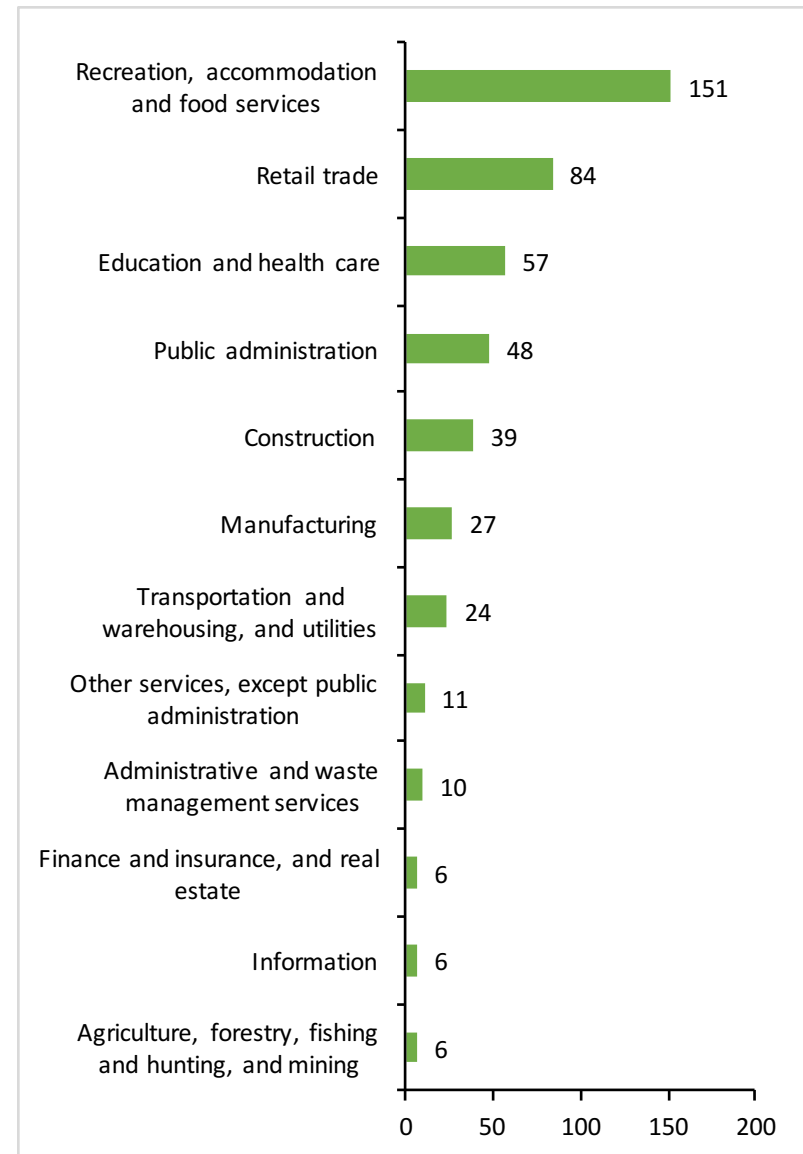Employment in the Green River area is dominated by a few industries. Specifically, the Recreation/accommodation/food service industry as defined by the US Census is the largest industry in terms of the number of employees and represents approximately 32% of the local workforce, or approximately 152 workers (see Figure 10). The next largest contributor is retail trade, followed by education and healthcare services.

Construction, manufacturing, and transportation/warehousing often pay above-average wages and represent the 5th, 6th, and 7th most common industries. Agriculture is reported to have a small number of employees, which is likely an error in the data. Farm labor is sometimes hard to capture, and anecdotal information suggests that there are many more agriculture workers in the area. Also, because the data presented was collected through the Census and is self-reported, there may be some respondents who work in the agriculture industry, but reported another industry such as hospitality due to seasonality or other factors.

Industry	Employment
Recreation, accommodation and food services	151
Retail trade	84
Education and health care	57
Public administration	48
Construction	39
Manufacturing	27
Transportation and warehousing, and utilities	24
Other services, except public administration	11
Administrative and waste management services	10
Finance and insurance, and real estate	6
Information	6
Agriculture, forestry, fishing and hunting, and mining	6

Source: ACS

Figure 10: Industry by Employment, 2015

INCOME

Unfortunately, many of the most common jobs available within the City are among the lowest wage jobs, which contributes to low overall median incomes within the community. Nearly 35% of the City's households earn less than $25k/year (see Figure 11).
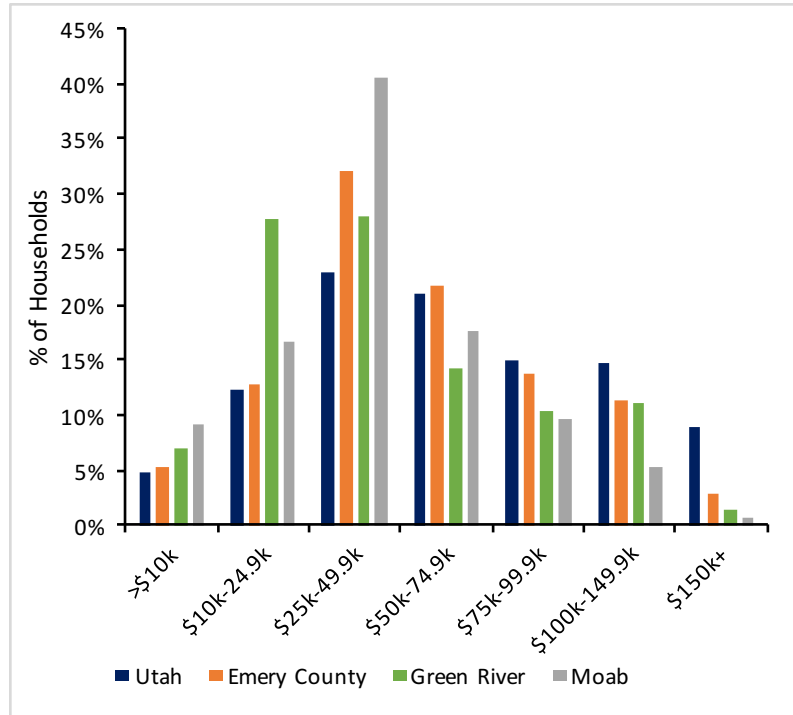
Source: ACS

Figure 11: Household Income Distribution, 2015

Median household income for Green River was $41,786 in 2015 which is nearly $20,000 less than the State average of $60,727 (see Figure 12). One of the major goals and a benchmark for the success of the implementation of the strategic plan will be to increase the median household income for the community.
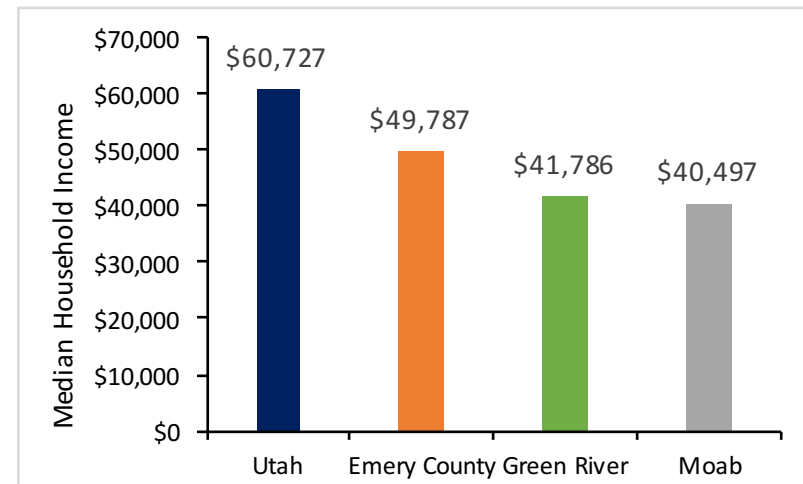
Source: ACS

Figure 12: Median Household Income, 2015

It is important to note that while the success of Moab is often envied by other communities in Utah, it's perceived success is not apparent when comparing median incomes. Like Green River, Moab is heavily reliant upon the tourism industry, which historically pays local wages. This highlights the need for Green River to develop diversified industry and business growth, rather than relying solely upon the tourism industry.

EDUCATION

The collective education attainment of a community has a large impact on economic output, including median incomes and economic mobility. For illustration purposes, Edward Glaeser and Joshua Gottlieb report in their article *The Economics of Place-Making Policies* that "As the share of the adult population with college degrees increases by 10 percent, wages increase by 7.8 percent."[2] Green River has approximately 25% more residents without any college education than the State average, and approximately 15% fewer residents with a Bachelor's degree or higher (see Figure 13).
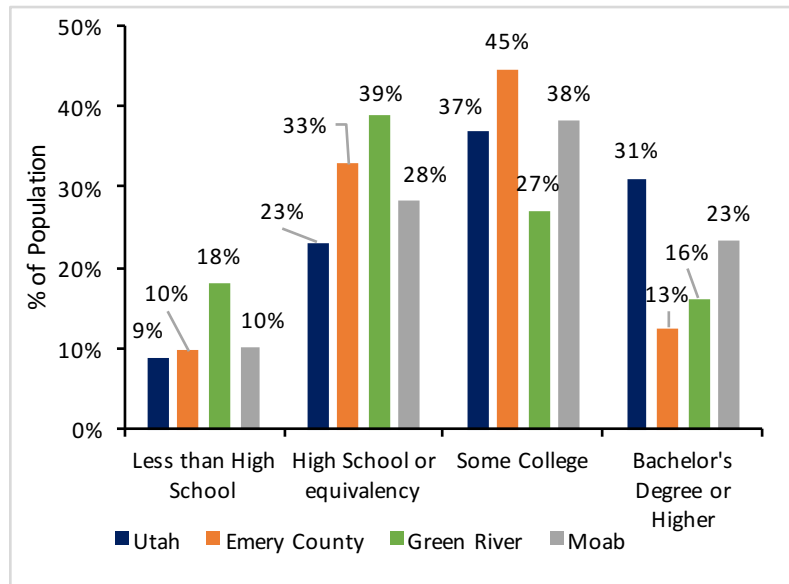
Source: ACS

Figure 13: Education Attainment, 2015

There are multiple factors that contribute to the lower than average educational attainment. First, many of the jobs that are available within the City do not require a college degree, therefore there is not as much motivation to obtain a degree if an individual wants to stay and live in Green River. Second, those that do seek college degrees have a difficult time returning to the Community to find gainful employment in a career that matches their degree.

If nothing changes, the scenario described above is a major contributor to the "brain-drain" as the Community begins to export more and more of its best and brightest. The best way to combat the brain drain is to create opportunities for smart and motivated individuals, both residents and visitors, to create strong attachments to the Community. In this regard, individuals who have the ability and desire to start businesses that require advanced degrees and that pay higher wages will be more likely to locate to the City. To quote the book *Triumph of the City*, "…the best economic development strategy may be to attract smart people and get out of their way."[3] The vision outlined in Phase I is designed to help create the connections to attract new interest to the City, and help reverse the "brain drain" that has been occurring over the past several decades.

THE TOURISM INDUSTRY

As highlighted previously, the tourism industry is the largest industry in the City, and employs approximately 32% of the local workforce. During the interview process of the Strategic Plan, local residents and stakeholders made comments suggesting that the prevailing belief is that much of Green River's tourism demand is overflow from the Moab region. The assumption expressed was

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[2] Edward L. Glaeser & Joshua D. Gottlieb, 2008. "The Economics of Place-Making Policies," Brookings Papers on Economic Activity, Economic Studies Program, The Brookings Institution, vol. 39 (1 (Spring), pages 155-253

[3] Triumph of the City. Edward Glaeser. The Penguin Press, 2011. Page 259.

that as Moab's hotels become full, visitors began looking for the next closest option and Green River is the natural choice. An alternative explanation is that Green River attracts the more budget-conscious traveler that is heading to Moab. To better understand the connection and correlation between Green River's economic performance, and visitation of the Moab region, tax revenues (sales, resort, and transient room tax or "TRT") for Moab and Green River were compared, and correlated with park visitor data.

There is typically a two-month lag between when tax revenue is collected and when it appears in the City's financial reports, so for all tax collections, the collection date was adjusted to reflect when the tax was actually collected, not when it was distributed back to the City. This model assumes that businesses on average are timely with their tax filings.

It is important to note that not all businesses are required to submit tax filings on a monthly basis, and some only file quarterly or annually based on total revenue. As a result, small businesses that file on a quarterly basis can contribute to a "bump" in the collections during the months of March, June, September and December. There is a bump in the Green River and Moab data for the months of June and September, but it is difficult to accurately quantify the amount of the quarterly bump with publicly available data, especially because the months of June and September are among the busiest months due to summer travelling and Melon Days. Acknowledging that some noise in the data is introduced from the quarterly filings, the discrepancy has been determined to not be a significant factor for the purposes of this report.

Tax collections were analyzed and extrapolated to determine the total spending that is represented in the amount of collected tax. For example, Green River imposes a 1% municipal TRT tax, so the reported tax collections were divided by 0.01 to yield the approximate hotel revenue that generated the reported tax. Hotel spending in Green River fluctuates tremendously throughout the year, from a low of approximately $200k/month in the winter, to a peak of greater than $1,000,000 during the summer[4]. Year-to-year variability is also considerable (see Figure 14).
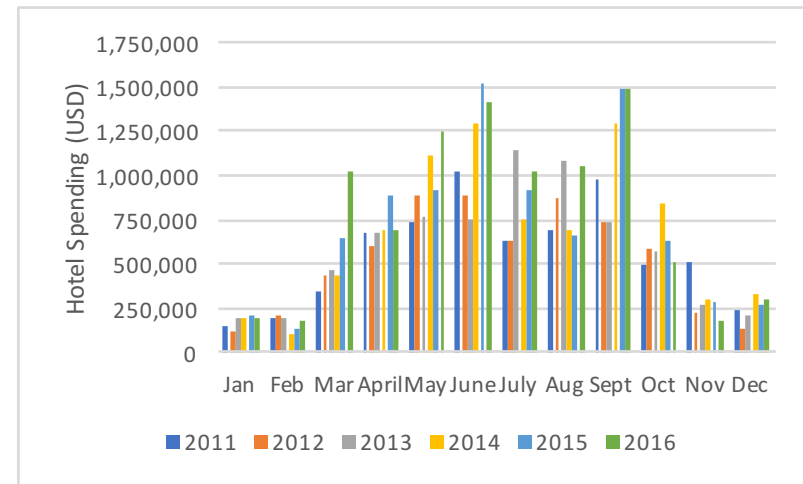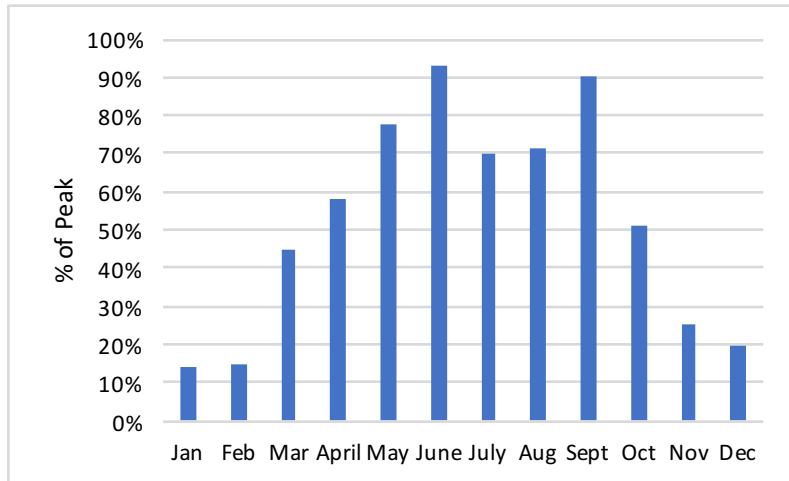

Source: www.utah.gov/transparency

Figure 14: Hotel Revenue, 2011-2016

To reduce the noise in the data and better understand the impact of seasonality, the average collections of each month from 2011-2016 were normalized based on the peak collection for any given

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[4] The reported amount is for all the hotel properties collectively. Individual property performance was not analyzed.

year. The resulting analysis shows how busy each month of the year is, on average (see Figure 15).

Source: www.utah.gov/transparency

Figure 15: Average Green River Hotel Revenue Based on Peak Collections, 2011-2016

Another way to view the data is in terms of how much revenue each month generates based on the annual totals. If the tourism season were perfectly balanced year-round, one would expect each month to contribute approximately 8.3% toward the annual total. As seen in Figure 16, the months of November through February are incredibly slow, generating on average only 3% of the annual revenue. This extreme seasonality makes it very difficult for business owners to sustain operations.
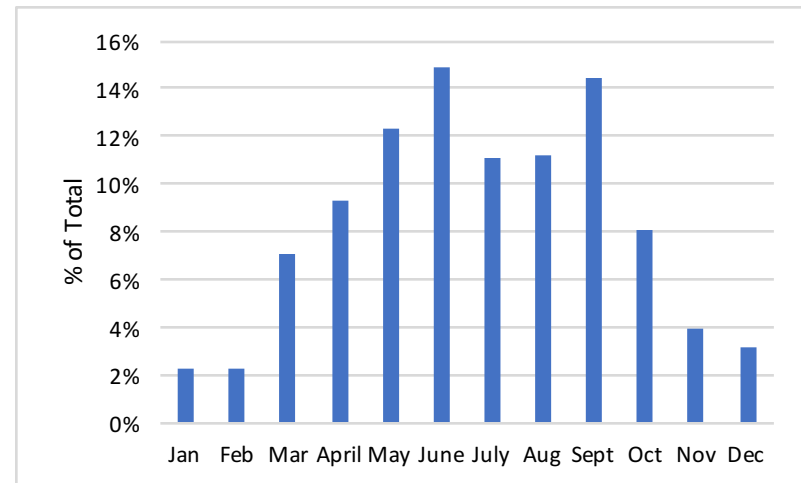
Source: www.utah.gov/transparency

Figure 16: Average Green River Hotel Revenue Contribution, 2011-2016

For comparison purposes, the same analysis was conducted with reported TRT collections for the City of Moab. Moab collects nearly an order of magnitude (10x) more hotel revenue than Green River, peaking at approximately $9-10M/month during the summer; but the seasonality pattern is very similar (see Figure 17 and Figure 18).

Source: www.utah.gov/transparency

Figure 17: Average Moab Hotel Revenue Based on Peak Collections, 2011-2016

Source: www.utah.gov/transparency

Figure 18: Average Moab Hotel Revenue Contribution, 2011-2016

If Green River was strictly capturing overflow in the traditional sense, one would expect to see Moab reach its peak visitation first, before Green River started to approach its pe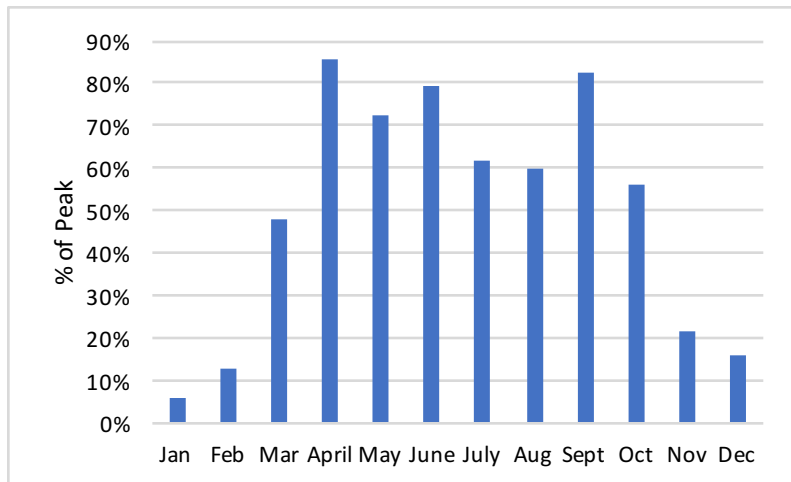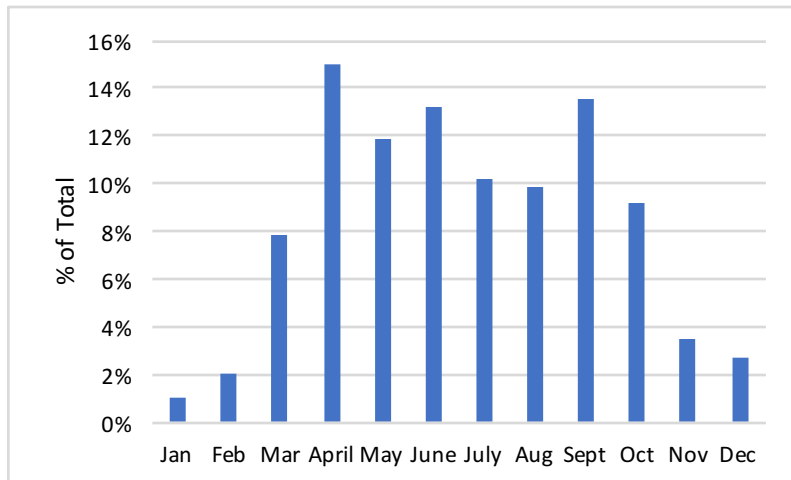ak. As shown in the preceding figures, other than the month of April (Jeep Safari in Moab) both communities appear to be approaching as well as reaching their relative peak visitation simultaneously. This observation suggests that there are factors, other than strictly vacancy in Moab, that are influencing the purchasing decisions of travelers to Southeastern Utah.

One way of providing additional insight into the visitors that spend money in Green River vs. those that spend money in Moab, is to analyze visitation at popular nearby State and National Parks and compare it to TRT collections. Arches National Park is the most popular park destination in the region, attracting more than 1.5M visitors each year[5]. Canyonlands is the next most popular destination, attracting over 750k visitors in 2016.

Peak visitation at Arches follows a smooth growth curve, peaking during the months of June and July (see Figure 19). Canyonlands follows a similar pattern, although it is more variable (see Figure 20).

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[5] National Parks Service
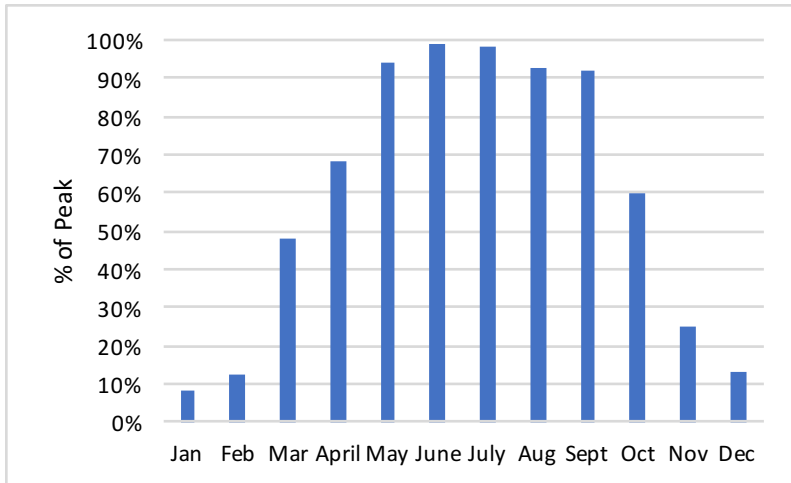
Source: National Parks Service

Figure 19: Peak Visitation at Arches National Park, 2011-2016
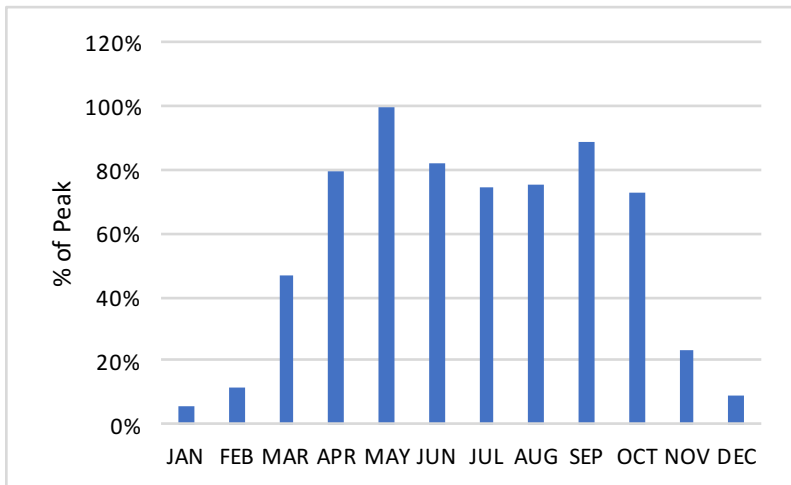
Source: National Parks Service

Figure 20: Peak Visitation at Canyonlands National Park, 2011-2016

The assumption going into the analysis was that visitation at Arches would be most closely correlated with Moab TRT due to the proximity of the park to the city. Surprisingly, peak Arches visitation is more closely correlated with Green River TRT collections than Moab TRT collections (see Table 2). Moab and Arches visitation are also very strongly correlated, with a correlation coefficient of 0.91, but the fact that peak visitation at Arches more closely tracks peak hotel utilization in Green River warrants further investigation. The available data is insufficient to determine how many Arches visitors purchase hotel rooms in Green River, but the observation suggests that there may be a stronger connection between Green River hotel utilization and Arches visitors than was previously thought. Unsurprisingly, Canyonlands visitation is more closely correlated to Moab TRT than it is to Green River TRT.

	Arches	Canyonlands	Moab TRT
Green River TRT	**0.97**	0.94	0.93
Moab TRT	0.91	0.96	1

Source: National Parks Service, www.utah.gov/transparency, Better City LLC

Table 2: Correlation Coefficient Comparison

Sales Tax

The seasonality trends with Green River sales tax are also apparent, although not quite as dramatic as TRT. Sales tax collections can serve as a proxy for overall economic activity within the City (see Figure 21 and Figure 22).
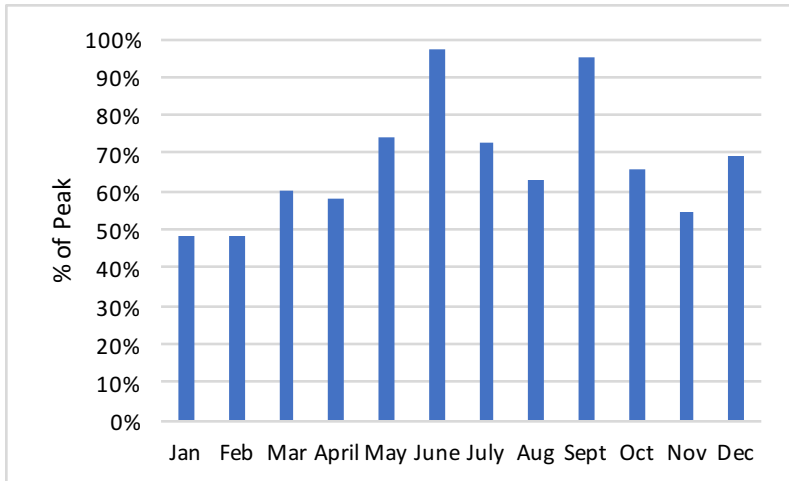
Figure 21: Green River Sales Tax Based on Peak Collections
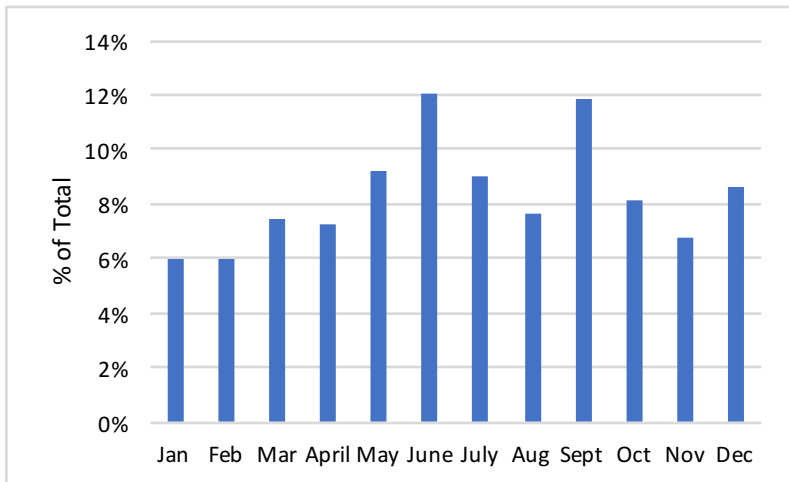
Figure 22: Green River Sales Tax Contribution by Month

Areas of Opportunity

As highlighted in the Phase I draft and throughout Phase II, the tourism industry brings with it challenges and issues that need to be mitigated, but it also represents a great opportunity if it is properly leveraged to attract additional diversified economic growth. To that end, there are several potential opportunities and areas of investment that could yield beneficial results for the Green River economy.

The State of Utah's "Mighty Five" campaign has brought tremendous impact and growth in the visitation of the national parks in Utah. Visitation at Arches has grown by approximately 500k annual visitors since the campaign started, and Canyonlands visitation nearly doubled from approximately 450k to just under 800k. But there has also been a significant increase at State Parks as a result of better awareness. Visitation at Goblin Valley has doubled since 2014, growing from just over 100k visitors per year to over 220k in 2016. Goblin Valley currently has fewer visitors than Arches or Canyonlands, but its visitation is growing at a much faster pace with a compound annual growth rate (CAGR) of 29% from 2011-2016. If this growth trend continues, Goblin Valley will exceed 1M annual visitors by the year 2023. Growth in visitation at Arches and Canyonlands is also significant, growing at an average CAGR of 8% and 10% respectively.

It is important to note that while the greatest growth in terms of numbers has occurred during the summer months, the greatest percentage of growth is actually occurring during the off-season of the analyzed parks (see Figure 23). In all three instances, monthly CAGR is the inverse of peak visitation.
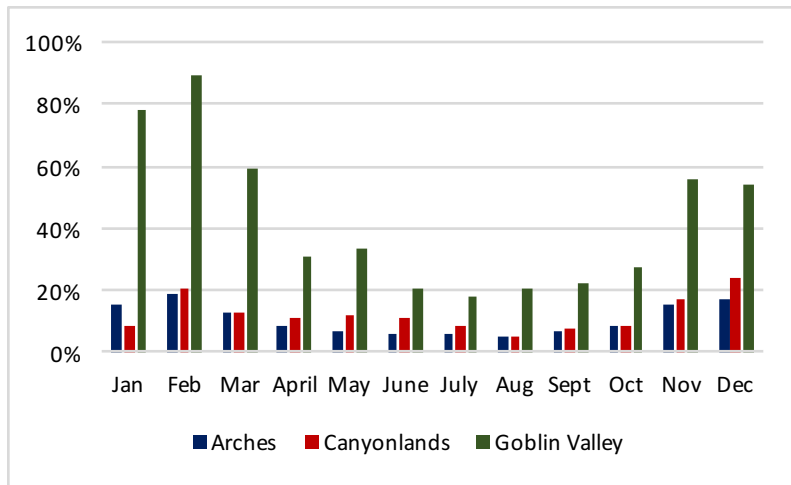
Source: National and State Parks Service

Figure 23: CAGR Comparison 2011-2016

Source: www.utah.gov/transparency, Better City LLC

Figure 24: CAGR Growth Comparison, 2011-2016

The monthly CAGR of Green River and Moab TRT collections is not nearly as consistent (see Figure 24). There is no statistically significant correlation (data not shown) between the CAGR growth of the parks analyzed in Figure 23 and the CAGR of TRT collected in Green River and Moab. The finding suggests that the new park visitors, and particularly those that visit during the off-season, are not having a significant impact on hotel revenue. The lack of correlation may be an area of opportunity for Green River if it is able to position itself to provide services that are better aligned with the demands of the new visitors to the nearby State and National Parks.

To better capture the potential low-hanging fruit within the tourism industry, the City should consider investing in and implementing a more thorough market analysis initiative to better understand the City's target customer. Through targeted market research, and targeted advertising, Green River should be able to take a more proactive role in helping to support local businesses and stabilizing demand, particularly during the slow months where there appears to be great growth potential and increasing demand.

SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal Origin (attributes of the organization)	Strengths	Weaknesses
External Origin (attributes of the environment)	Opportunities	Threats

A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis reviews and characterizes a community's characteristics. This exercise facilitates understanding of a community's native assets, those factors which could impede progress and provides ideas about future direction. The SWOT analysis reflects a synthesis of information gleaned from the stakeholder interviews, demographic, financial and business research, community forums and meeting with City staff and leaderships. To facilitate more focused analysis, separate SWOT matrices were completed for each of the three facets of economic development, namely community development, economic development and workforce development. This is not intended to be a comprehensive list of everything about the City that could be characterized as a strength, weakness, opportunity or threat, but rather is a prioritized, filtered compilation of those things that are most significant. Some of those items cited by the Community were not included in the final lists not because they lacked merit, but simply because an inclusion of every suggestion would dilute the focus on those items of the greatest significance and practicability.

- "Economic Development" refers to everything that deals with industry, jobs, and includes tourism, public incentives, and entrepreneurial infrastructure.

- "Community Development" contemplates all aspects of community life that contribute to quality of life and define it character. Some of the components of Community Development include housing, amenities, and social services.

- "Workforce & Human Capital Development" considers all the factors that affect the size, quality and skills of the workforce, including education.

- "Branding, Marketing, & Event Promotion" considers the efforts being made to brand and promote the community effectively.

- "City Governance" considers those factors that affect the ability of the City to effectively govern and undertake strategic initiatives.

Green River's attributes relative to these categories are listed below.

Economic Development - SWOT

Strengths – Economic Development		Weaknesses – Economic Development
• Green River's location on I-70 provides opportunities for tourism, energy production, and manufacturing. • The City's proximity to National and State Parks has been a driving factor for the tourism industry and there is a strong correlation between Park visitation and lodging tax revenues. • Transportation assets including the highway, rail, and airport provide infrastructure for potential manufacturers and energy producers. • The agricultural heritage of Green River and melon farming has been a defining industry that has established the Green River identity. • The City and many agricultural users have sufficient water rights and water availability thanks to proximity to the Green River. • There is plentiful available industrial land for economic development prospects in the zoned industrial parks within close proximity to transportation infrastructure. • Emery Telecom provides broadband and is an important utility service provider in the City. • Local non-profits and coalitions have helped strategize, plan, and increase the capacity of the community to undertake economic development initiatives. • Utah Department of Transportation Maintenance Station provides access to good paying jobs with benefits to the community. • A grant has been secured and an RFP issued to conduct a feasibility study for a natural gas line. The development of a natural gas line would improve the City's competitiveness for businesses looking to expand in or relocate to the region. • Emery County Economic Development provides capacity for economic development initiatives and has been a great resource for the County and City.		• The tourism industry creates significant seasonality issues for local businesses, which creates difficulty in managing and sustaining a year-round business. • Many of the jobs in the tourism industry are low wage and without benefits, which requires some employees to hold multiple jobs. • The prevalence of mancos shale in certain areas of the City creates construction issues for new development. • Some farmers struggle to sell all of their harvested agricultural crops. • There is a lack of infrastructure in the west end industrial park. • Many local businesses do not have an ownership succession plan, which may result in a loss of locally-owned businesses. • There is a general lack of access to capital and entrepreneurial infrastructure which limits the ability of entrepreneurs to start- new businesses. • There is no natural gas line in the City and the nearest connection is many miles away and will require significant investment to develop.

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Opportunities – Economic Development	Threats – Economic Development
• Opportunities in value-added food manufacturing exist even if it is just limited to capturing value from agricultural products that can not be sold to market and otherwise rot in the field. • The City's location to outdoor recreational assets that are subjects and sites for film & photography production present an opportunity to provide services and inexpensive labor in support of this industry. • The Amtrak passenger train stop is an underutilized asset and the placement of a Zipcar or availability of local Uber drivers may create opportunities for train passengers to recreate and use Green River as a basecamp. • There is tremendous opportunity for growth in the outdoor adventure outfitters cluster along with curated recreational packages for tourists, equipment rentals, uranium mine tours, and a river shuttle service. • A Community Reinvestment Area (CRA) should be created that would provide tax increment for new development, blight elimination, and redevelopment along Main Street and in the industrial parks. • Initiatives to strengthen the entrepreneurial culture should be enhanced and partnerships with the high school formed to create linkages between students, local entrepreneurs, and business leaders. In addition, a business owner and startup support center should be developed that will be a resource for entrepreneurs and local business owners and a revolving loan fund should be established through the USDA REDLG program. • Vacation Rental By Owners (VRBO's) represents an opportunity to create a unique and compelling neighborhood-centric hospitality product, further differentiating Green River offerings from Moab.	• Temporary closures of the National Parks have happened in the past and could be an external shock to the Green River tourism industry if it occurs again. • Due to the prevalence of low income demographics, Green River qualifies for various Federal economic development programs, which could be impacted by a reduction in funding under the current Administration. • Previous legislation has been proposed to close the Green River State Park golf course, which if reintroduced and passed, would impact the availability of amenities to visitors and decrease the amount of visitation to downtown Green River. • The concentrated tourism industry is highly susceptible to external shocks from an economic downtown and a contraction in consumer disposable income. • Changes to or stricter enforcement of immigration policies may impact the availability of workforce for local businesses. • A drought may severely impact the availability of water resources for the local agricultural producers. • Continued excess supply of cheap oil in the global market may hamper the level of improvements on planned refinery developments. • Continued and increasing competition with Moab for businesses and highly-skilled workforce may limit the amount of economic expansion opportunities in Green River.

Community Development – SWOT

Strengths – Community Development	Weaknesses – Community Development
• The community's location along the Green River has defined the City while supporting the agricultural industry and providing recreational opportunities. • Proximity to outdoor amenities provides an unparalleled quality of life for residents as well as attractions for visitors. • Existing infrastructure in the Elgin neighborhood provides opportunity for new development in close proximity to the City's namesake. • The City has been successful in receiving approval and funding for a trail development project to make the Crystal Geyser more accessible. • There is a concentration of land and property ownership within the City making it relatively easy to undertake potential redevelopment projects. • The Green River Medical Center is a critical asset for a community the size of Green River and a necessary amenity to attract and retain residents. • The City's museum, high school theater program, and art gallery are important stakeholders in the support and promotion of the arts within the community. • The establishment of the Green River Improvement Team (GRIT) has been helpful in creating stewardship regarding community-lead clean-up initiatives. • Significant personal sacrifices, donations, and volunteerism has created a shooting range that is highly-valued by many within the community.	• The abandoned and dilapidated missile base has been a magnet for vagrancy, creating public health and safety issues that the community has struggled to address for many years. The base is a blight that is visible from the freeway and negatively impacts passerby's perception of the community. • Blighted properties along Main Street leave an unfavorable impression with visitors and residents alike and hold the community back from realizing its potential as a basecamp for recreation. • Multi-jurisdictional boundaries along the Green River present an additional challenge for potential development along the river corridor. • A lack of both affordable and quality housing stock creates an impediment in retaining and attracting residents. • A lack of participation/inclusion among the Latino population could continue to alienate many of those that contribute to and support the local economy, as well as limit the ability of the rising generation to contribute as future entrepreneurs, business, and community leaders. • A general lack of entertainment and retail offerings represents an impediment to community development but is not unusual considering the City's population size. • A lack of sufficient local contractors makes construction, repair, and maintenance of the existing built environment more costly. • The general lack of pedestrian friendliness along Main Street creates a significant barrier between businesses on either side of and along the street. Although traffic flows efficiently, UDOT's road design requirements are not suitable for community development.

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Opportunities – Community Development		Threats – Community Development
• The State of Utah Parks Division owns land to the north of Main Street that is currently underutilized and represents an opportunity for new development and connectivity enhancements along the corridor. • A Community Reinvestment Area (CRA) should be created that would provide tax increment for new development, blight elimination, and redevelopment along Main Street. • Opportunities should be explored at the west interchange to expand the service offerings to travelers along the I-70 corridor. • Continued focus on creating trail linkages to neighborhoods, river, and downtown will create a compelling recreational asset for residents and visitors alike. • Riverbank and channel improvements should be undertaken to improve and strengthen the health of the City's namesake. These should be done in conjunction with expanding the riverfront commercial corridor along with neighborhood development and river access improvements to enhance recreational offerings along the river. • Investing in new housing developments will provide quality stock to residents and new construction should place downward pressure on pricing, making housing more affordable. • Redevelopment Broadway and Main and creating a "Gateway Project" will improve the appearance of the community and create a defined core that will lead to periphery development in adjacent parcels. • New development should adopt walkable new urbanism guidelines to create desirable neighborhoods that will generate demand for housing product and accommodate desirable workforce participants. • Support art & cultural initiatives with the museum, school, and art gallery to host musical & theater performances, art exhibits, etc. as well as encourage the creation of additional public art throughout the community. • Petition UDOT to improve Main Street walkability and pedestrian crossings to accommodate foot traffic and slowdown passerby's so they have time to observe and stop at downtown restaurants and businesses. • The development of community amenities should be explored such as a conference center, bike & skate park, restoration of the Crystal Geyser, and recreation center.		• A reduction in federal and state funding for community development may limit the availability of resources to undertake community development initiatives. • Floodplain issues may create impediments to neighborhood development in certain areas along the river corridor. • The development of autonomous vehicles may negatively impact the number of highway visitors that stop in Green River.

Workforce & Human Capital Development

Strengths – Workforce & Human Capital Development		Weaknesses – Workforce & Human Capital Development
• Low wages, which are prevalent in the community, are often attractive to businesses looking to expand or relocate, assuming all else is equal in comparative communities. • Local hunting destinations creates a unique attraction for hunting enthusiasts, some of which are successful business, community, and political leaders. There is a surprising amount of human capital that visits the community. • The high school has established entrepreneurial and robotic programs that expose students to broader aspirations and higher paying careers. • Having highly skilled medical staff employed by the Green River Medical Center provides incredible human capital assets within the community.		• Local businesses face workforce shortages and quality of workforce issues. • In general, the community is losing its high school graduates as they seek to further their education and/or seek job opportunities elsewhere. • The continued loss of the workforce demographic has resulted in an aging population and declining school enrollment. • A language barrier among first generation Latinos has created an impediment to workforce and human capital development. • A recent survey revealed a general lack of aspiration among high school students. • A lack of affordable housing creates impediments to businesses and local institutions needing to attract and retain skilled workforce. • There are few job opportunities requiring degrees within the community.

Opportunities – Workforce & Human Capital Development		Threats – Workforce & Human Capital Development
• Attracting and retaining human capital that creates and strengthens businesses and communities is key to building a thriving community in the knowledge economy. Strategies to target location neutral professionals that appreciate Green River's recreational offerings should be pursued. • Adult education classes should be offered to teach English as a second language as well as other courses for lifelong learning opportunities. • Leverage existing and visiting human capital as well as high school alumni by forming a "Green River Society" that would mentor high school students and provide connections to access investor networks for local entrepreneurs. • A film post-production studio may present an opportunity to partnership with an institution of higher education to hold film classes and/or a visiting student program to take advantage of filming opportunities in the National and State Parks. • Create strategies to build inclusion among the Latino community by expanding bilingual outreach, communication resources, and leadership participation.		• Moab's new USU campus may limit the ability of Green River to attract interest from institutions of higher education for a satellite campus

Branding, Marketing, & Events Promotion

Strengths – Branding, Marketing, & Events Promotion		Weaknesses – Branding, Marketing, & Events Promotion
• Emery County Travel Bureau is an advocate of Green River tourism and is actively pursuing outdoor adventure outfitters to expand operations to the City. • A new part-time events coordinator has been hired, which will help establish personnel continuity, stewardship, and accountability for organizing annual events. • Melon Days has been a staple of the community for many years and a great opportunity in promoting the agricultural products of the local farmers. • A recent branding effort was undertaken and a new brand and creative collateral is available for promoting the community.		• There is a general lack of public awareness of the surrounding recreational assets of Green River. • Some events, like the Friendship Cruise, had not been institutionalized and have been discontinued. • Businesses have a general understanding of their customers but no demographic profiling or geographic point of origin analysis has been performed to understand the target market and where community marketing dollars should be strategically deployed.

Opportunities – Branding, Marketing, & Events Promotion		Threats – Branding, Marketing, & Events Promotion
• Defining visiting demographics & targeted audience will allow for efficient and effective marketing campaigns to attract additional visitors to the community. • Explore the ability to expand train access from the Wasatch Front and position Green River as a convenient train stop / basecamp for National & State Parks weekend visits. • Bring back the Friendship Cruise and initiate other events such as a BBQ chuck wagon tour. • Increase marketing / awareness of Green River by developing additional signage assets along the highway. • Utilize existing stock footage of the area for marketing collateral, including a Green River video.		• The loss of the events coordinator could result in a lack of institutional capacity to undertake future events. • Shifts in consumer preferences could limit the effectiveness of branding and marketing efforts.

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City Governance - SWOT

Strengths – City Governance		Weaknesses – City Governance
• Code enforcement improvements have been made and the City has prioritized enforcement to address the immediate concerns of public safety issues. • The City has initiated a strategic planning process to identify impediments to and opportunities for growth, identifying priorities, and provide consistent direction as Councilmembers turnover. • The City has had dialogue with external parties regarding the closed missile base and is seeking a resolution to clean-up the site.		• There is a lack of institutional capacity and adequate, dedicated resources for economic and community development and to some degree, code enforcement. • A weak code enforcement ordinance limits the effectiveness of enforcing community standards. • Building and enforcement codes are perceived as onerous. • Historically, there has been a lack of strategic planning and an adequate decision-making framework for allocating City resources among different initiatives / priorities.

Opportunities – City Governance		Threats – City Governance
• Create cross-functional teams and involve various departments (like Public Works) in addressing strategic initiatives. • Dedicate additional resources to and strengthen ordinances to create a robust code enforcement division in order to improve public safety and community appearance. • Increasing coordination and communication among entities, organizations and businesses to help establish dialogue and improve the ability of the community to address critical issues and build consensus with key stakeholders. This could be accomplished through a weekly "Community Coffee", which is a concept borrowed from Lake County, Colorado, whereby stakeholders come together to share what their organizations are doing and make requests for input and support. This weekly forum has been extremely effective in keeping everyone informed of what is happening in the community, reducing duplication of efforts, and garnering community support for key initiatives. • Formally adopt a guiding framework for decision-making on how to best allocate City resources among different initiatives and strategic priorities.		• Unfavorable economic conditions could reduce the City's tax revenues, which would impact their ability to provide municipal services and regulatory oversight.

THE CITY'S ROLE IN IMPLEMENTATION

There are many competing philosophies regarding the role that Government should take with the implementation of a Strategic Plan, and specifically with the initiatives that have a direct impact on the private sector. There are typically as many opinions as there are residents, which can create a very overwhelming task for the elected leaders and the City staff. The opinions also tend to shift with each administration, leaving City staff in a position of trying to scramble to tie together loose ends. Rather than presenting specific recommendations regarding the exact role that the City government should take, this document will present some guiding principles that can be used as a framework for implementation.

One of the most important jobs of the City government is to provide for the safety and well-being of local residents. When considering or prioritizing investments, those projects that are absolutely required to provide for the safety of the population should be addressed first and foremost. It is important to distinguish between wants and needs, however, and there may be times when a public safety want, such as a new fire-truck, may not actually be a need until building heights or population size dictate the investment.

Public services such as providing water and sewer should also be a top priority to the degree that the infrastructure is negatively impacting the quality of life of residents.

Beyond these mission-critical investments, the City government should evaluate potential investments and initiatives by looking at a cost-benefit analysis. For example, building new sidewalks and beautifying streets is a worthy investment that often has widespread community support, but in the long-run it may not contribute as much to the Community as investing in a strategic project, such as the downtown redevelopment or riverfront development initiatives outlined in Phase I. It is important to remember that municipal revenues are a direct result of private-sector investment, not municipal investment. Therefore, if municipal spending is not also inducing significant private-sector investment, then those municipal investments must be reconsidered. Spending municipal funds that do not result in an increased tax-base is akin to killing the golden goose, whereas investment in a project that induces private-sector investment is providing growth hormone to the goose.

Major projects require funding assistance from many different sources such as grants, but in most cases matching money is required. There are many examples of communities that have allocated relatively modest sums of money, and leveraged those funds to achieve marvelous redevelopment results. But it is far more common to see municipalities waste money on non-strategic projects, only to find themselves on the sinking ship of shrinking tax revenues and growing expenses.

In addition to financial contributions, the City plays an important role during implementation by showing leadership and fostering community support. Advocacy, public engagement, event promotion, and expending political capital are all critical activities that are exceedingly difficult to accomplish if the City doesn't take an active role in coordinating efforts. It doesn't necessarily mean that elected officials and City staff have to do everything, but a united leadership team and delegation to local project champions will ensure that the projects continue to progress through the long and trying trenches of pre-development.

It is impossible to anticipate all the potential decision points that future City leaders will have to address when it comes to implementation, but in all cases the leadership should approach each question by evaluating the cost, and the future benefit. The benefit can take the form of improving the quality of life (and thereby playing a role in attracting new residents and businesses), or contributing to the tax base. Projects that can accomplish both of these tasks simultaneously should almost always take priority.

NEXT STEPS

The third phase of the Strategic Plan will outline the implementation strategy for the projects and initiatives highlighted in Phase I and Phase II. It will identify potential funding sources, potential project champions, and will provide a framework for how to approach each of the catalytic projects. When applicable, it will also identify potential impediments, and suggestions for how to address those impediments should they arise.