

Salem and Dent County, Missouri Economic Development Strategy

September 2019



Prepared for:

City of Salem, Missouri

Dent County, Missouri

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Section 1: Summary

The Salem and Dent County, Missouri, Economic Development Strategy is a culmination of seven public workshops held over eight months including the direct input of over 40 community members plus information and thoughts gathered during numerous side conversations with additional members of the community.

NOTE – The “Cliff Notes” version of this entire plan can be understood by reading this Summary section, Section 18: Summary Observations, and Section: 20 the Action and Implementation plan. The main body of this document are the data, information and public input that support and provide the reasons for the assumptions and action items. Below is the document summary.

Section 3: Economic and Demographic Profile gives a snapshot of information about income levels, poverty statistics, educational attainment and the employment situation. Two points stood out in this section; first the difference between the percentage of citizens living at or below poverty level in the County at 20.2% versus 29.9% within the City limits of Salem. The second unexpected point in this section relates to the common belief in the community that the cost of living is low and therefore the poverty level numbers are not truly reflective of living conditions. To research this further, the United Way’s Basic Living Measure report was consulted and indicated that instead of Dent County residents enjoying less severe conditions due to the low cost of living, residents were actually worse off than poverty levels indicate with 63% of all households living below the Basic Living Measure.

Section 4: Industry Profile and Cluster Analysis took a deep dive look at the industries that are active in Salem and Dent County, which industries are projected to grow in the forecasted future, a look at Location Quotients indicating industries that the community has a specialization in, and wraps up with a industry cluster analysis which identifies multiple related industries that can be pursued and built upon with the existing support system for each industry that is already in existence here in Dent County.

Section 6: Retail Analysis looks at the Retail Marketplace Profile Report for Salem and Dent County which show surpluses and gaps in existing retail facilities in the community based upon actual spending by Dent County residents. These gap numbers are then used to calculate approximate square footages for various retailers that could be supported in the community assuming proper management and marketing of such facilities.

Section 7: Recent Economic Development Activities looks at the public and private sector capital investments over the past decade and looks forward to the planned investments over the next 3-5 years.

Section 8: Downtown Salem outlines a snapshot of downtown and establishes a baseline for improvement of 17% vacancy rate as of February 2019. There is discussion of the Old City Hall/Civic Theater renovations under way and the potential impact on the community’s economy. There is also a compiled list of Internal and External community assets which may be of use in moving the economy forward.

Sections 9 and 10 discuss available land and buildings for business use and detail the education and trainings opportunities currently available in the community.

Sections 11, 12 and 13 detail the top industries, Agriculture, Timber and Tourism for Dent County and look at the related industries by North American Industry Classification System (NAICS) Codes.

Section 14: Gateways & Community Signage Assessment looks at existing entry signage for the community and explores ideas for enhancements or future options as well highlighting the need for some type of signage plan that includes cohesive branding and wayfinding not just within Salem but county wide to direct locals and visitors to amenities and attractions.

Section 16: Property Taxes takes a comparative look at property tax rates and specifically commercial rates within the community. Current Salem and Dent County rates are compared with surrounding cities and counties and includes a discussion of the Commercial Sur Tax.

Section 17: details the results of the SWOT (strengths, weaknesses, opportunities and threats) exercise done during one of the public workshops.

Section 18: gives a listing of Summary Observations based upon the details of the report.

Section 19: Current Economic Development Activities list the various activities currently underway and in process.

Section 20: is the finale for the strategy and lists out the action items developed by staff based upon the findings of the report and public input and were ranked by priority by the public during the August 22 workshop. The last part of this section is a spreadsheet with the action items prioritized by color codes and given timelines for completion.

Section 2: Introduction and Methodology

The following Report summarizes the findings and recommendations pursuant to an economic profile and strategic action plan conducted by Sally Burbridge, Economic Development Director for the City of Salem and Dent County in the first half of 2019. The economic development profile and strategic action plan is intended to guide the development and implementation of policies for the City and County, as well as actions of the Industrial Development Authority Board and the City Board of Aldermen and County Commission. Over the course of the eight-month study, public workshops were conducted and interviews with key stakeholders in Salem and the surrounding region, including public sector officials, citizens and business/property owners, including:

- Marty Anderson – Salem R-80 High School
- Joyce Bradley - Citizen
- Shawn Bolerjack – Country Mart, Salem Area Community Betterment Association (SACBA)
- Harley Conaway – Citizen
- Jerry Craig - SACBA
- Mary Beth Cook – Dent County Community Foundation (DCCF)
- Skip Dahms – Allen’s Treasure Chest, Salem Area Chamber of Commerce (CoC)
- Donald Dodd – The Salem News, Industrial Development Authority (IDA)
- Jay Gibbs - Citizen
- Josh Gordon – Town & Country Bank
- George Gruendel – Citizen
- Liz Gruendel – Citizen, SACBA
- Chad Heithold – Citizen, former City Alderman
- Chris Holliday – Riverways Federal Credit Union
- Kevin James – Doe Run Mine, City Alderman
- Dean Jones - Independent Stave Company, IDA
- Joe Kammerer – Community Foundation of the Ozarks
- Tod Kinerk – Citizen, CoC
- Gary Larson – Larson Collision Center, Dent County Commissioner
- Sherry Lee – Healthy Dent County
- Kasey Lucas – Salem Memorial Hospital District
- Sarah Massengale – Dent County Extension
- Angie Mihalka - Citizen
- Jon Mihalka - Citizen
- Sherman Odom – Citizen, IDA
- Ed Pratt – Pratt & Mitchell CPAs
- Dennis Purcell – Dent County Commissioner
- Joan Sample - United Country Realty, IDA
- Alex Sellers - Civic Theater Association
- Jeff Sellers - Chilton Oil Company, IDA
- Darryl Skiles – Dent County Commissioner
- Bernie Soirs – Cornerstone Chiropractic, DCCF, Salem R-80 Schools
- Becky Steiner - DCCF

- Chris Strickland – Salem Memorial Hospital District
- Marilyn Sweitzer - Citizen
- Tabitha Utley – CoC
- Ray Walden – City of Salem Administrator
- Babette Wells – United Country Realty
- Wayne Werline – Sawdust & Splinters
- Ralph Williams – Williams Real Properties, LLC
- Johanna Zhercher – CoC

Relevant reports were reviewed, and data and information regarding the local economy were collected and analyzed from a quantitative and qualitative perspective.

Moving forward, it is intended that this strategy will be revisited annually during a public workshop to assess what progress has been made, what actions need amended and to re-prioritize the remaining action items. The reason for this is two-fold, first it gives the public an opportunity to discuss what progress or hang-ups have occurred and to adjust as the plan moves forward. Secondly, annual review and re-prioritizing ensures the plan does not become stale and begin collecting dust on a shelf, it becomes a living document that changes with the community and its needs.

Section 3: Economic and Demographic Profile

Demographic Summary

A summary of selected demographic and economic data is shown in the two tables below. Between 2010 and 2018, Salem population's contracted by 3.3 percent, St. James by .8 percent, Licking's by 2.1 percent and Dent County's by .35 percent.

Other area jurisdictions experienced growth between 2010 and 2018: Rolla at 3.3 percent and all the listed counties except Dent at rates between .8 percent (Shannon) and 9.2 percent (Iron). The State of Missouri grew by roughly 3.5 percent in the same time period.

Table 1:

Salem and Surrounding Cities for Comparison				
	Salem	St James	Rolla	Licking
Population 2010 1	4,950	4,216	19,559	3,121
Population 2018 2	4,788	4,180	20,201	3,057
Population Projection 2023 2	4,700	4,177	20,514	3,029
Labor Force (16+) 2018 2	1,769	1,809	8,456	547
Median HH Income estimates 2018 1	\$27,740	\$38,271	\$33,046	\$28,181
Median Age – Data USA	41.6	38.1	34.5 Metro Area	40.6
Persons in Poverty 1	29.9%	15.8%	28.9%	29.3%
Mean Travel Time to Work in Minutes 2018 2	19	19	15	0

1 US Census Bureau

2 Location One Information Systems (LOIS), ESRI ® 2018 – Updated July 5, 2019

Salem's decline in population is trending with surrounding small communities and national trends for rural areas and offset by Rolla's population growth as the larger urban community in the immediate area. Salem's Median Household Income is lower by comparison than the surrounding communities as reflected in Table 1 above but the Household Income levels for Dent County appear to be more middle of the pack as compared to the six counties that share borders and immediately surround Dent as shown below. Table 2 below, compares data between Dent County and the six surrounding counties that share boundaries.

Table 2:

Dent and Surrounding Counties for Comparison								
	Dent County	Phelps County	Crawford County	Iron County	Reynolds County	Shannon County	Texas County	Missouri
Population 2010 1	15,657	45,156	24,696	10,630	6,696	8,441	26,008	5,988,927
Population 2018 2	15,602	46,439	25,079	11,606	7,119	8,507	26,448	6.3 M
Population Projection 2023 2	15,453	47,111	24,023	11,958	7,189	8,455	26,622	6.4M
Labor Force (16+) 2018 2	6,419	20,259	11,027	3,898	3,268	3,489	9,437	3.1M
Median HH Income estimates 2018 1	\$38,829	\$41,681	\$37,171	\$36,457	\$42,265	\$31,202	\$35,571	\$51,542
Median Age – Data USA	43.1	34.5	41.6	44.1	46.8	44.8	41.5	38.4
Persons in Poverty 1	20.2%	18.4%	19.4%	22.6%	20.4%	35.9%	21.2%	15.5%
Mean Travel Time to Work Minutes 2018 2	26	20	27	28	23	26	25	24
HHs with a broadband internet subscription 1	65.6%	76%	64.4%	59.5%	63.2%	49.4%	57.9%	75%

1 US Census Bureau

2 Location One Information Systems (LOIS), ESRI ® 2018, Updated July 5, 2019

Poverty and Dent County Average Wages

The US Census numbers for 2018 indicate the poverty level is at or below \$25,465 annually for a household of 4 people, two of those being children under 18 years of age. One fifth or 20.2% of Dent County's population is living at or below the poverty line by this definition. During our first public workshop discussing data for this plan, it was mentioned that in addition to low average annual wages as compared to the state, Dent County also enjoyed a lower cost of living as compared to other locations in the state.

In order to explore this question of whether Dent County enjoyed a lower cost-of-living making the high percentage of poverty level households less of a concern from an overview perspective, The Basic Living Measure (BLM) Report Missouri, created by the United Way of Greater St. Louis was referenced. The Basic Living Measure was created to reflect, but localize, a basic needs budget research methodology. The process of calculating a basic need, or standard budget is fairly uniform – for six to seven categories of household expenditures which specify a monthly expenditure level for several different household configurations.

Based on the BLM report, 63% of households in Dent County are below the Basic Living Measure and therefore cannot meet Basic living expenses as defined in this report including housing, food, transportation, health care, childcare for households with young children, taxes and miscellaneous expenses. This seems to indicate the picture is worse for households in Dent County than the simple measure of poverty levels. Specific details for Dent County's BLM are included in *Image 1* below.

Image 1:



Educational Attainment

Represented in Table 3 below, Salem and Dent County have higher percentages of GED and High School Diploma attainment than Phelps County or the State of Missouri for 2018 and are within striking distance for the Some College category and on par for Associates Degrees. It is noted that the community has an active GED program led by Instructor Pat Todd and has been providing this service for the past several years. This program should continue to be supported in the community in addition to developing efforts to support both continued post-secondary education and vocational training programs.

The areas for concern are the lower and upper end of the education attainment spectrum. Dent County has roughly half the percentage of Bachelor and higher degrees as compared to Phelps County and the State. Residents within the City of Salem are 31% below the state numbers for Bachelor and above educational attainment.

Finally, the 26% of Salem residents who have not attained an educational level of High School Diploma or equivalent, plus the 19% for Dent County, can be directly correlated to the lower income levels referenced later in this document.

Table 3:

2018 Population, 25+ by Educational Attainment				
	City of Salem	Dent County	Phelps County	State of Missouri
Graduate Degree	5%	5%	13%	11%
Bachelor's Degree	6%	9%	17%	18%
Associates Degree	6%	7%	8%	8%
Some College	16%	19%	18%	22%
High School Diploma	34%	35%	26%	26%
GED	8%	7%	4%	5%
Some High School	16%	11%	8%	7%
No High School	10%	8%	4%	3%

Location One Information Systems (LOIS), ESRI © 2018- Updated July 2019

Business and Employment Characteristics

The business categories represented in Table 4 on the next page, give both the actual number of individuals employed for each category and the % of the total workforce for the jurisdiction listed. Interestingly, the first three Business Categories listed also employ the largest number of individuals in the workforce across all jurisdictions including the State. For Salem and Dent County respectively, Health Care/Social Assistance employs 540 and 1592; Retail Trade 330 and 937; and Manufacturing 235 and 631.

Three additional Business Categories stand out when looking at the data. Accommodation & Food, Wholesale Trade and Mining/Quarrying/Oil & Gas Services stand out because the percentage of the workforce in Salem and Dent County are at higher rates for these categories than for the surrounding regions.

Table 4:

Employed Population 16+ by Industry 2018												
Business Category	City of Salem Workforce 1981		Dent County Workforce 6530		1 Meramec Region Workforce 82090		2 Ozark Foothills Region Workforce 33262		3 Ozark Heritage Region Workforce 48937		Missouri Workforce 3,100,000	
	#	%	#	%	#	%	#	%	#	%	#	%
<i>Health Care / Social Assistance</i>	540	27.3	1592	24.4	12920	15.8	6781	20.4	7792	15.9	461456	14.9
<i>Retail Trade</i>	330	16.7	937	14.3	9759	11.9	3945	11.9	5546	11.3	332677	10.7
<i>Manufacturing</i>	235	11.9	631	9.7	11284	13.7	4972	14.9	6544	13.4	338476	10.9
<i>Construction</i>	119	6.0	530	8.1	6383	7.8	2014	6.0	3517	7.2	206017	6.6
<i>Accommodation & Food</i>	156	7.9	382	5.4	5998	7.3	1704	5.1	2810	5.7	196965	6.4
<i>Educational Services</i>	91	4.6	463	7.1	8258	10.1	2629	7.9	4232	8.6	274142	8.8
<i>Public Administration</i>	135	6.8	338	5.2	7888	9.6	1900	5.7	2667	5.4	138464	4.5
<i>Wholesale Trade</i>	63	6.4	162	2.5	1240	1.5	560	1.7	1101	2.2	78529	2.5
<i>Agriculture / Forestry / Fishing / Hunting</i>	53	2.7	227	3.5	1401	1.7	1265	3.8	2751	5.6	45132	1.5
<i>Administration / Support / Waste Management Services</i>	53	2.7	155	2.4	1703	2.1	691	2.1	1091	2.2	971300	3.1
<i>Other Services</i>	56	2.8	382	5.8	4304	5.2	1446	4.3	3336	6.8	155270	5.0
<i>Transportation / Warehousing</i>	44	2.2	155	2.4	3286	4.0	1934	5.8	3098	6.3	145190	4.7
<i>Arts / Entertainment / Recreation</i>	3	.15	37	.57	805	1.0	370	1.1	489	1.0	49251	1.6
<i>Professional / Scientific / Tech Services</i>	2	.10	109	1.7	2241	2.7	795	2.4	1205	2.5	174369	5.6
<i>Mining / Quarrying / Oil & Gas Services</i>	3	1.5	154	2.4	567	0.7	384	1.2	215	0.4	5037	.2
<i>Finance / Insurance</i>	19	.96	85	1.3	2101	2.5	1192	3.6	1267	2.8	172751	5.6
<i>Information</i>	39	2.0	74	1.1	779	0.9	196	0.6	423	.9	50161	1.6
<i>Utilities</i>	0	0	8	.12	343	0.4	224	0.7	305	0.6	20168	.7
<i>Rental / Real Estate / Leasing</i>	21	1.1	139	2.1	787	1.0	310	0.9	651	1.3	54384	1.8
<i>Management of Companies / Enterprises</i>	0	0	0	0	29	.04	0	0	0	0	4596	.15

Location One Information Systems (LOIS), ESRI © 2018 – Updated July 2019

1 Meramec Region Counties: Washington, Dent, Crawford, Gasconade, Maries, Osage, Phelps and Pulaski.

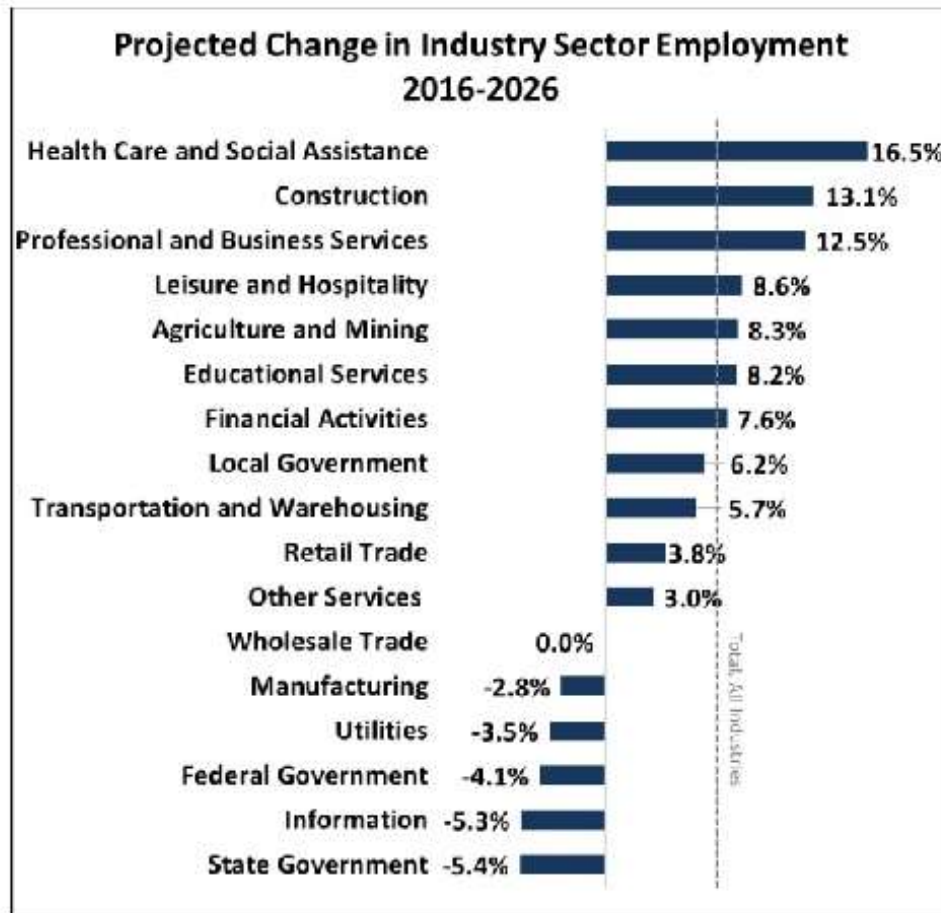
2 Ozark Foothills Region Counties: Carter, Butler, Ripley, Wayne and Reynolds.

3 Ozark Heritage Region Counties: Oregon, Howell, Douglas, Shannon, Texas, Wright and Ozark.

Employment Projections

The following graph shows projected changes in Industry Sector Employment at the State level.

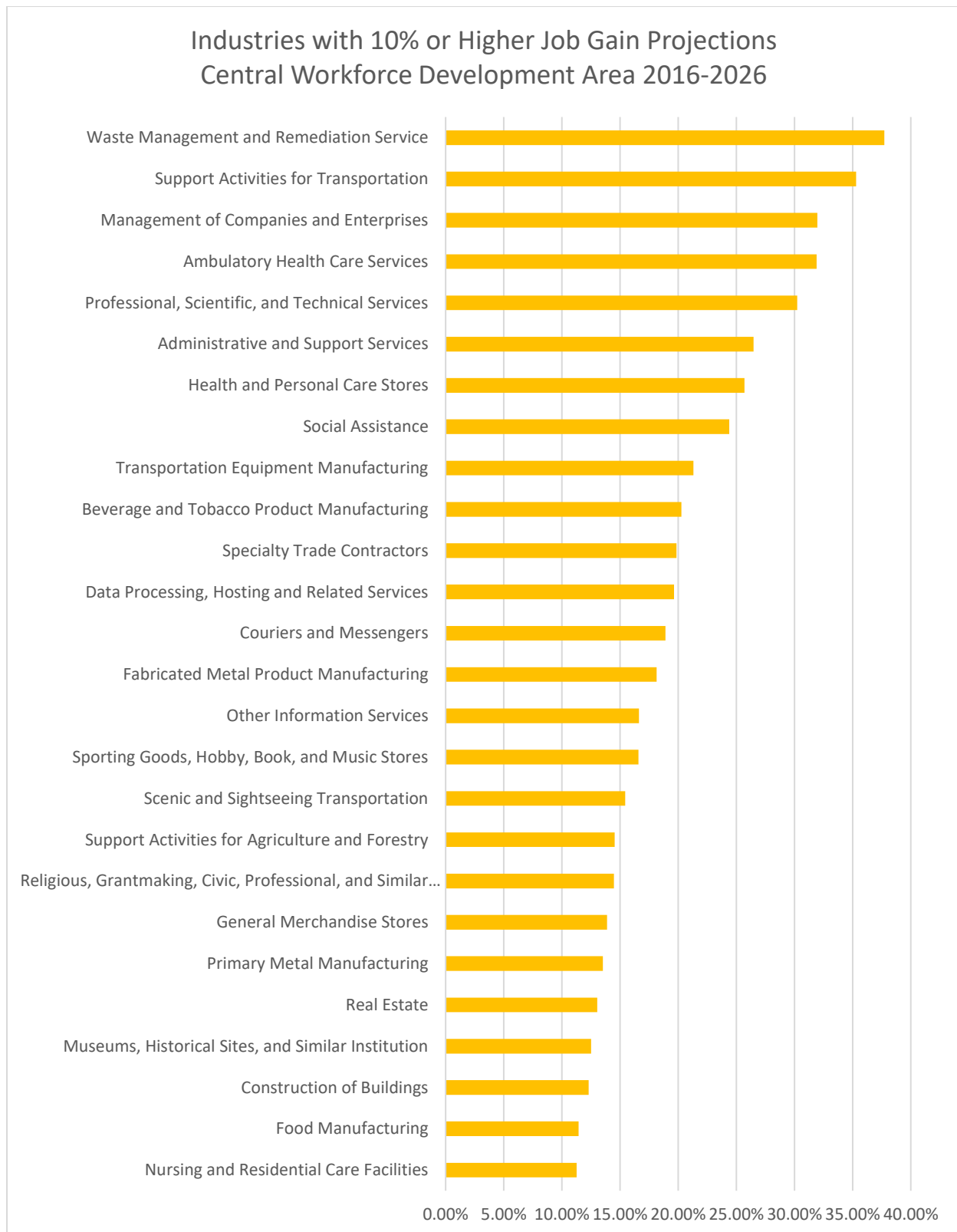
Chart 1:



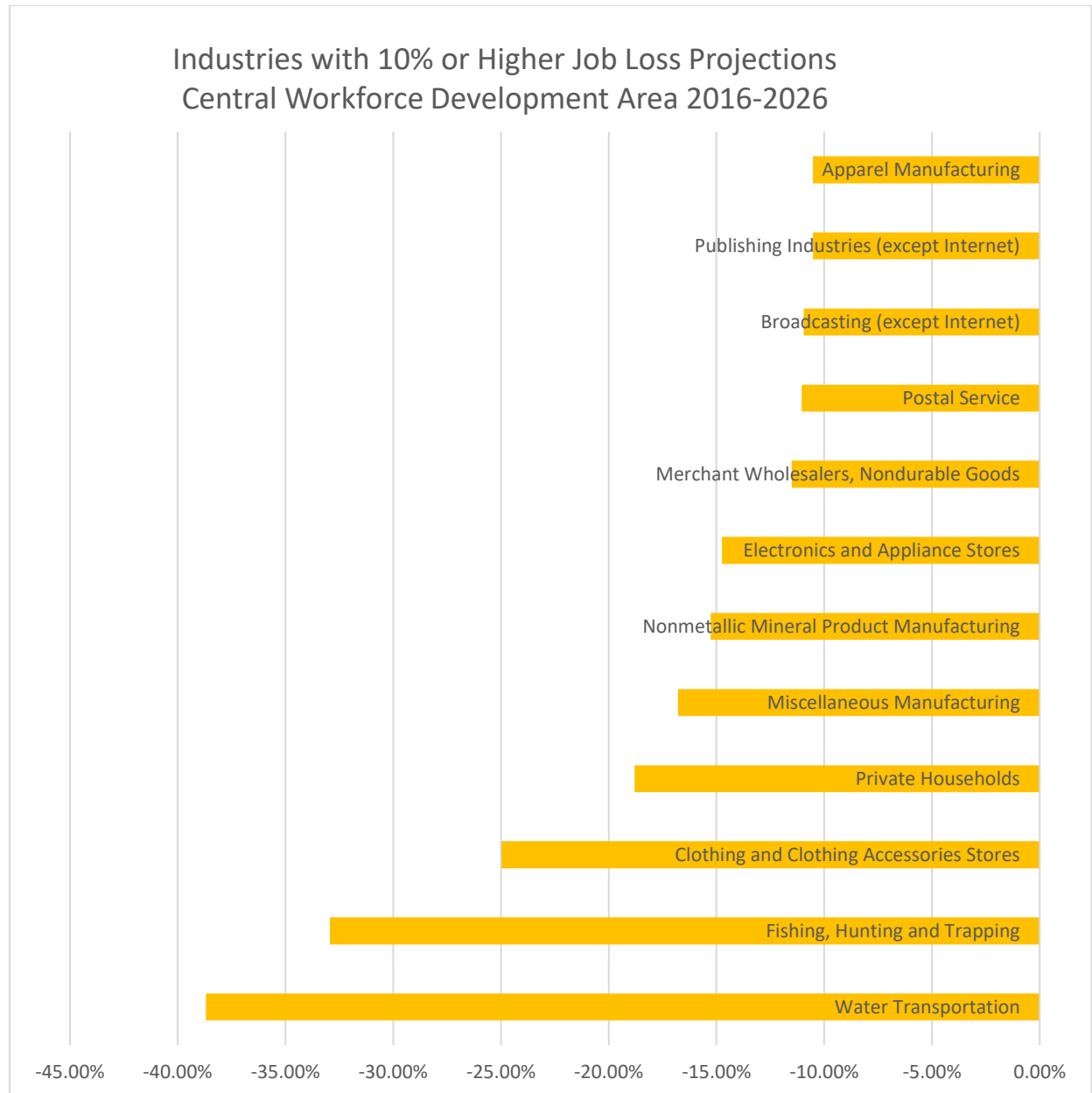
Missouri Economic Research and Information Center, Missouri Department of Economic Development, Missouri Industry Projections Highlights 2016-2026

Chart 2 below shows the Industry sectors whose projected growth rate from 2016 to 2026 are estimated to be 10% or higher growth in the Central Workforce Development Area which includes Salem and Dent County. Overlapping growth industry sectors with the top sectors in Dent County for 2018, from Table 4 are: Healthcare and Social Assistance which show four categories poised for growth; Retail which will continue to shift focus as shown by projected growth in niche stores such as Sporting Goods, Hobby, Book and Music Stores or with general merchandise stores; Manufacturing makes a bit of a split and includes in the growth segments some items that might otherwise be classified as a food sector as well as some traditional manufacturing activities.

Another sector of note is Accommodations and Food which translates in notated growth sectors as Scenic and Sightseeing Transportation and Museums, Historical Sites and other Institutions. All of which could be considered as Tourism assets.

Chart 2:

Missouri Economic Research and Information Center, Missouri Department of Economic Development,
wia_industry_projections_2016-2026

Chart 3:

Missouri Economic Research and Information Center, Missouri Department of Economic Development, wia_industry_projections_2016-2026

A couple of definitions for Chart 3 above: Postal Service includes the USPS, and carriers such as DHL, but not generally UPS, Fed-Ex, etc., these are considered Express Delivery services. Private Household includes positions such as butler, cook, nanny, etc.

Image: 2 below shows the Workforce Development Regions in the state of Missouri. The Central Workforce Development Area whose job gains and losses are projected in the previous two charts is shown in the middle of the state in purple with Dent County being the southernmost county.

Image 2:

Missouri Workforce Development Regions – Dent County is part of the Central Region shown in purple above.

Recent Unemployment Rates

The most recent numbers available for the Bureau of Labor Statistics unemployment rates for July 2019 are:

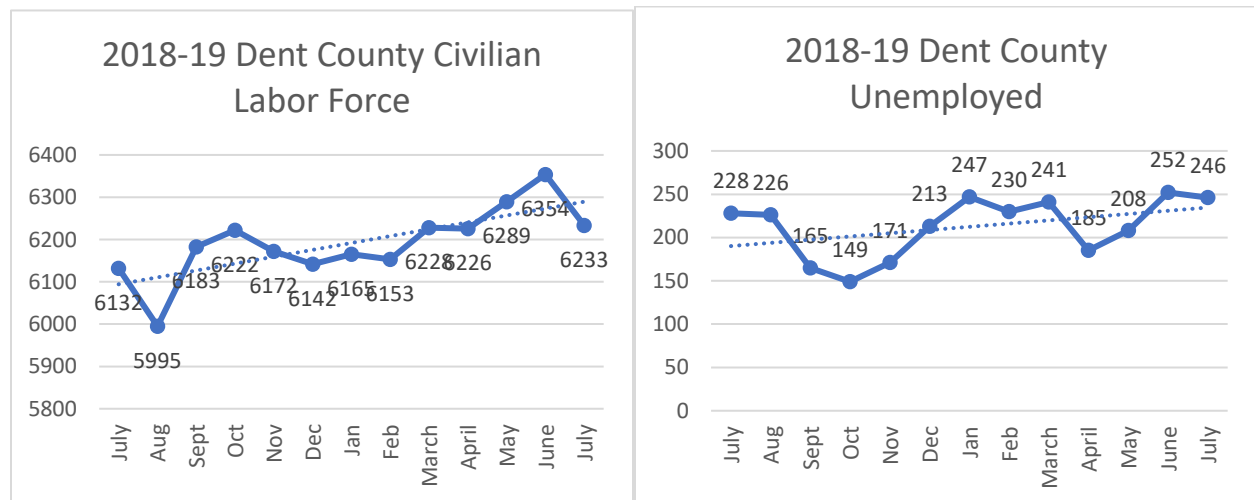
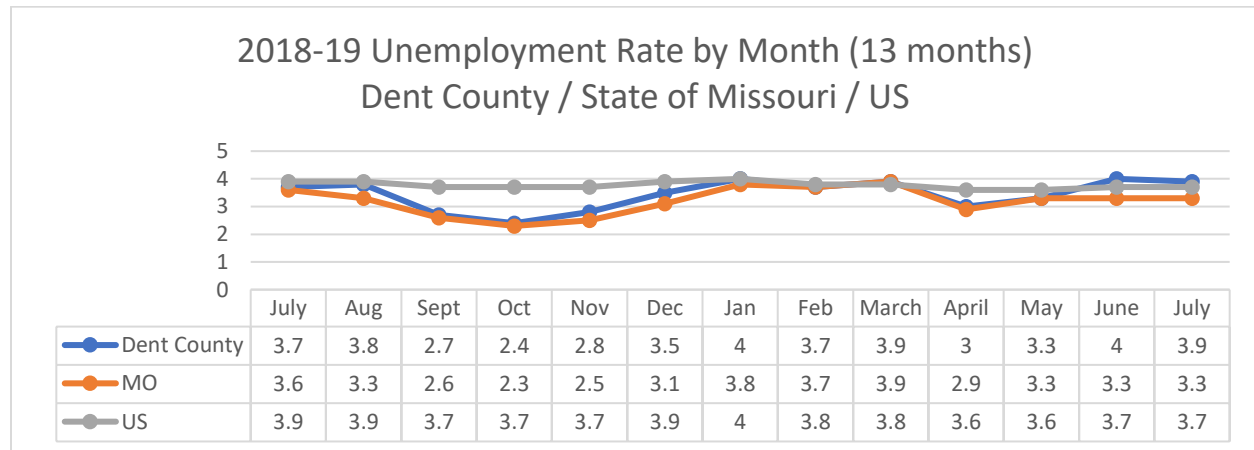
United States: 3.7

Missouri: 3.3

Dent County: 3.9

A look back at the past 13 months of Unemployment Rates shows the historic lows experienced by Dent County as well as Missouri and across the US.

Chart 4:



Section 4: Industry Profile and Cluster Analysis

Taxable Sales

Due to the nature of Sales Tax reporting in Missouri, a look at total taxable sales by industry sector does not give a complete picture of business activity either at the state level or at the county or city levels. In addition, in order to maintain confidentiality and protect private information the Missouri Department of Revenue does not report sales tax numbers for industry sectors that have less than 6 (six) reporting businesses for that sector which leaves even more gaps in the data.

However, this data can be used as one component to support conclusions about business activity since it can correlate information about industry clusters and indicate support industries to other themes in the community. As an example, the top 3 taxable sales by North American Industry Classification System (NAICS) for both the City of Salem and the 3rd through 6th items for Dent County as listed in Tables 5 and 6 below are business sectors that could all be industry clusters in support of Tourism.

Table 5:

City of Salem Taxable Sales Top 10 NAICS				
NAICS	Description	*FY 17	FY 18	*FY 19
447110	GASOLINE STATIONS WITH CONVENIENCE STORES	\$7,153,641.28	\$4,983,988.82	\$6,457,168.66
722511	FULL-SERVICE RESTAURANTS	\$5,207,530.80	\$4,819,534.70	\$5,178,959.16
722513	LIMITED-SERVICE RESTAURANTS	\$4,529,103.30	\$4,230,256.72	\$4,383,752.44
424720	PETROLEUM AND PETROLEUM PRODUCTS MERCHANT WHOLESALERS (EXCEPT BULK STATIONS AND TERMINALS)	Not reported	**\$1,367,858.84	**\$2,506,701.04
452319	ALL OTHER GENERAL MERCHANDISE STORES	\$1,842,201.88	\$1,383,660.31	\$1,977,603.34
517911	TELECOMMUNICATIONS RESELLERS	\$853,961.02	\$836,577.69	\$959,211.22
453998	ALL OTHER MISCELLANEOUS STORE RETAILERS (EXCEPT TOBACCO STORES)	\$95,837.82	\$346,533.74	\$346,399.06
517110	WIRED TELECOMMUNICATIONS CARRIERS	\$411,354.12	\$91,350.92	\$302,793.84
515210	CABLE AND OTHER SUBSCRIPTION PROGRAMMING	\$295,356.68	\$284,247.14	\$289,677.92
425120	WHOLESALE TRADE AGENTS AND BROKERS	\$253,046.80	\$204,647.11	\$275,262.46

- FY 17 and 19 are based upon half year of NAICS revenue numbers and calculated for a full year. Calendar Year end 2016, the Dept of Revenue switched from using SIC Industry Codes to NAICS Codes and there is not adequate detail in the information reported to make good comparison numbers. At the time of this analysis, only half of FY 19 has passed so numbers are doubled to make full year comparisons.
- **Only reported last 3 quarters of calendar 2018. Doubled the last 2 quarters to give full year comparison for FY 19 and multiplied by 4 the 2nd quarter to give a full year comparison for FY 18.

Table 6:

Dent County Taxable Sales Revenues Top 10 NAICS				
NAICS	Description	*FY 17	FY 18	*FY 19
212231	LEAD ORE AND ZINC ORE MINING	Not reported	**\$33,047,082.40	**\$29,337,694.62
221122	ELECTRIC POWER DISTRIBUTION	Not reported	**\$10,637,009.70	**\$9,596,868.28
447110	GASOLINE STATIONS WITH CONVENIENCE STORES	\$8,666,908.74	\$7,995,450.24	\$7,779,506.56
722511	FULL-SERVICE RESTAURANTS	\$5,211,621.00	\$4,819,921.47	\$5,222,061.10
722513	LIMITED-SERVICE RESTAURANTS	\$4,529,103.30	\$4,230,256.72	\$4,383,752.44
721110	HOTELS (EXCEPT CASINO HOTELS) AND MOTELS	\$2,244,899.52	\$2,441,611.05	\$3,790,725.62
445110	SUPERMARKETS AND OTHER GROCERY (EXCEPT CONVENIENCE) STORES	Not reported	Not reported	***\$3,057,401.00
517911	TELECOMMUNICATIONS RESELLERS	\$2,335,694.50	\$2,244,751.39	\$2,618,055.76
424720	PETROLEUM AND PETROLEUM PRODUCTS MERCHANT WHOLESALERS (EXCEPT BULK STATIONS AND TERMINALS)	Not reported	Not reported	\$2,506,701.04
452319	ALL OTHER GENERAL MERCHANDISE STORES	\$1,842,459.96	\$1,385,707.90	\$1,977,743.46

- *FY 17 & 19 are based upon half year of NAICS revenue numbers and calculated for a full year. Calendar Year end 2016, the Dept of Revenue switched from using SIC Industry Codes to NAICS Codes and there is not adequate detail in the information reported to make good comparison numbers. We are currently halfway through FY 19 and are therefore doubling the first half of the year's numbers for comparison.
- **Lead Ore and Zinc Ore Mining and Electric Power Distribution were only reported for the last half of FY 18 and only the first half of FY 19 is reported as of the date of this analysis. In order to show the full impact of this item on the overall County wide economy, the numbers have been doubled to roughly reflect a full year as the other numbers in the table show.
- ***Only reported the 4th quarter of 2018.

Employment Growth in Selected Industry Sectors

The information included in this next section is taken directly from the Missouri Career Grades 2014-2024 document prepared by the Missouri Economic Research Information Center, Missouri Department of Economic Development.

Missouri Career Grades are a tool to help compare the future outlook of occupations. To make the comparisons easier, the Missouri Career Grades Report assigns letter grades to various occupations within the state based on each occupation's outlook over the next decade. For example, occupations in the Grade A category have the best outlook while Grade F occupations have the worst outlook. Grades are based on a combination of total job openings, percent growth, and the average wages of an occupation.

For each of these three variables, an occupation's projected performance is compared with the average for the state or region being analyzed. The degree to which an occupation is above or below the average for the three factors is used to determine its grade. Occupations with a career grade of B+ or B have above average results in at least one of the three variables, and

occupations receiving a grade of A+ or A, have above average results in at least two of the three variables being used.

The NOW, NEXT and LATER categories in Image 3 below represent the education and experience levels for specific occupations and are used in conjunction with the Career Grades of A, B, C, etc.

Image 3:

Education, Training and Experience

The education and experience categories describe the most significant level of education or training for a particular occupation based on national trends. While many occupations could be pursued with various levels of education or training, these groupings identify typical requirements and provide an additional source of information for a career-seeker.

NOW

Short/Moderate-Term On-the-Job Training

Occupations generally requiring short-term training are those where employee competency can be achieved during 1 month or less of on-the-job experience, and informal training. Jobs that generally require moderate-term training are those where employee competency can be achieved during 1 to 12 months of combined on-the-job experience and informal training.

NEXT

Long-Term On-the-Job Training/Work Experience in a Related Occupation

Occupations requiring long-term training are those for which more than 12 months of on-the-job training, or combined work experience and formal classroom instruction are needed for the workers to develop the skill to attain competency. This on-the-job training includes employer sponsored programs, as well as formal courses offered to prepare an employee for a specific required licensing exam.

Associate's Degree/Postsecondary Non-Degree Education

Associate Degrees usually require between 2 and 4 years of full-time academic study beyond high school. Postsecondary non-degree programs lead to a certificate or other award, but not a degree. Certificates are obtained through an educational institution, and require the completion of formal postsecondary schooling.

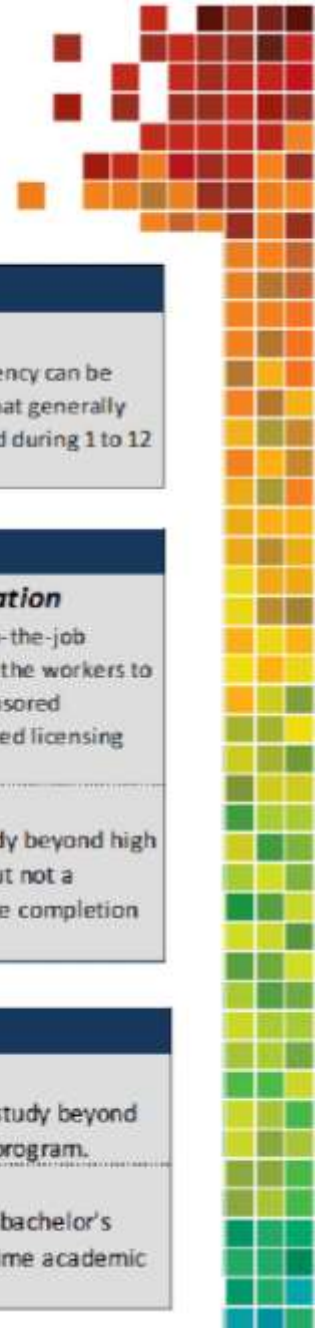
LATER

Bachelor's Degree/Work Experience

A bachelor's degree program generally requires 4 to 5 years of full-time academic study beyond high school. Jobs may require work experience in addition to an academic degree program.

Master's Degree/Doctoral/Professional Degree

Master's Degrees usually require 1 or 2 years of full-time academic work beyond a bachelor's degree. Doctoral and professional degrees usually require at least 3 years of full-time academic study beyond a bachelor's degree.



Regional Outlook Central WDA (Workforce Development Area)

Employment in the Central Workforce Development Area (WDA) which includes Dent County (see map on page 12 for reference) totaled over 295,000 in 2014 and is projected to increase by 6.8 percent by 2024. The Central WDA is projected to have over 92,000 job openings between 2014 and 2024, with 24.4 percent of those openings coming from new growth. Grade B occupations account for 64.9 percent of this new growth. Job openings are identified as either “Growth,” “Replacement” or “Total” openings. Growth openings are new jobs that are added to the existing workforce, while replacement openings are vacancies created by worker mobility or retirements, but are not new jobs. Total openings are the combination of both growth and replacement openings. Grade A occupations have the best outlook with an above average growth rate and annual wage when compared to all occupations in the region. Grade A occupations in the Central region are projected to grow by 12.9 percent, and these new growth openings are expected to account for 38.6 percent of Grade A total openings. Grade B occupations make up the largest portion of the Central WDA workforce, and they are expected to have the largest number of job openings between 2014 and 2024. In 2014, Grade B occupations accounted for 60.1 percent of the Central WDA’s total workforce, and they are projected to produce 64.6 percent of the region’s total openings. A large portion of Grade C total openings are from replacement openings. Grade C occupations account for 17.3 percent of the region’s total projected openings, 84.6 percent of which are replacement openings.

Image 4:

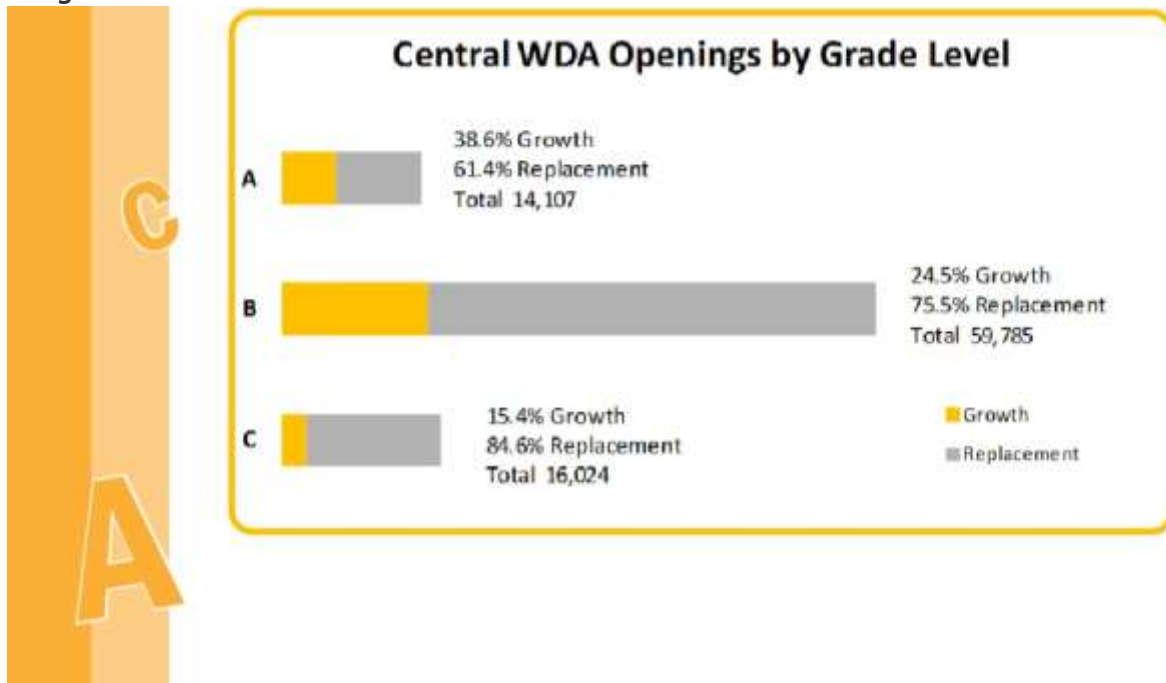


Image 5:

Good Outlook Careers – Central WDA**NOW Occupations**

Title	Grade	Openings	Avg Wage
Cashiers	B	4,073	\$19,658
Retail Salespersons	B	4,013	\$23,175
Combined Food Preparation and Serving Workers	B+	3,150	\$18,833
Waiters and Waitresses	B	3,059	\$18,816
Office Clerks	B	1,777	\$29,163
Customer Service Representatives	B+	1,590	\$31,734
Laborers and Freight, Stock, and Material Movers	B	1,508	\$27,702

NEXT Occupations

Title	Grade	Openings	Avg Wage
Nursing Assistants	B+	1,599	\$23,672
First-Line Supervisors of Retail Sales Workers	B+	1,141	\$36,135
Maintenance and Repair Workers	B	1,087	\$32,303
Cooks	B+	926	\$20,969
Supervisors of Food Preparation and Serving Workers	B+	900	\$27,409
Licensed Practical and Licensed Vocational Nurses	B+	716	\$36,210
Heavy and Tractor-Trailer Truck Drivers	B	704	\$35,002

LATER Occupations

Title	Grade	Openings	Avg Wage
Registered Nurses	A	2,099	\$56,183
General and Operations Managers	A+	1,620	\$76,519
Secondary School Teachers	A	1,058	\$43,411
Elementary School Teachers	A	769	\$46,488
Accountants and Auditors	A	685	\$56,606
Managers, All Other	A+	617	\$82,859
Substitute Teachers	B	447	\$24,228

With a comparison of the Good Outlook Careers in Image 5 above and the Average Wages for Dent County in Table 7 below, of the 21 Career/Occupations listed as Good Outlook, only 12 show averages wages above the 2017 average wage for Dent County. Leaving 9 below the 2017 average wage. While this may lift the countywide average wage over time, it indicates that a focus on developing higher wage industries should be of high importance for Salem and Dent County to close the gap between county and state average wages, which are currently just 58% of the statewide average wages.

Average Wages as displayed in Table 7 below are included as a future measuring tool. With the adoption of this Plan and successful implementation of such, there should be an increase in Average Wages over time that is above the inflationary increases that will occur with the state and national economy.

Table 7:

2017 Dent County vs State Average Wages for All Industries				
	Private Ownership		Public and Private	
	Avg Annual Wages	Avg Hourly Wages	Avg Annual Wages	Avg Hourly Wages
Dent County	\$27,879	\$13.40	\$29,401	\$14.14
State of Missouri	\$47,806	\$22.98	\$47,351	\$22.76

Missouri Economic Research and Information Center (MERIC), Missouri Department of Economic Development, County Average Wages

Business Trends

Analysis of business trends by type and their respective employment is a key element for assessing future business development needs. The following Tables 8 and 9 show employment trends from 2016 to 2026. Industry sectors are sorted by employment numbers, from highest to lowest proposed change. Top five industry sectors by proposed gains in employment are Ambulatory Health Care Services, Educational Services, Professional, Scientific, and Technical Services, Administrative and Support Services and Social Assistance. Top five industry sectors by projected losses in employment are State Government (excluding Education and Hospitals), Clothing and Clothing Accessory Stores, Merchant Wholesalers (Nondurable Goods), Non-store Retailers and Electrical Equipment, Appliance and Component Manufacturing.

Table 8:

Central Workforce Development Area Employment Growth Industries by NAICS (2016-2026)			
NAICS	Industry	Change	% Change
621000	Ambulatory Health Care Services	3189	31.91%
611000	Educational Services	2786	8.58%
541000	Professional, Scientific, and Technical Services	2,452	30.24%
561000	Administrative and Support Services	2,371	26.49%
624000	Social Assistance	1,687	24.40%
551000	Management of Companies and Enterprises	1,469	31.96%
238000	Specialty Trade Contractors	1,362	19.85%
622000	Hospitals	1,140	7.42%
813000	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1,093	14.46%
452000	General Merchandise Stores	1,092	13.89%
623000	Nursing and Residential Care Facilities	941	11.27%
999300	Local Government, Excluding Education and Hospitals	840	7.26%
336000	Transportation Equipment Manufacturing	728	21.31%
446000	Health and Personal Care Stores	425	25.70%
332000	Fabricated Metal Product Manufacturing	409	18.14%

236000	Construction of Buildings	320	12.31%
423000	Merchant Wholesalers, Durable Goods	301	7.47%
311000	Food Manufacturing	280	11.44%
531000	Real Estate	256	13.04%
451000	Sporting Goods, Hobby, Book, and Music Stores	243	16.59%
441000	Motor Vehicle and Parts Dealers	243	4.69%
562000	Waste Management and Remediation Service	213	37.74%
492000	Couriers and Messengers	170	18.90%
488000	Support Activities for Transportation	167	35.30%
713000	Amusement, Gambling, and Recreation Industries	157	5.62%
221000	Utilities	92	4.94%
493000	Warehousing and Storage	90	4.66%
518000	Data Processing, Hosting and Related Services	85	19.63%
312000	Beverage and Tobacco Product Manufacturing	84	20.27%
112000	Animal Production	80	8.97%
453000	Miscellaneous Store Retailers	71	5.12%
331000	Primary Metal Manufacturing	63	13.53%
326000	Plastics and Rubber Products Manufacturing	62	3.31%
111000	Crop Production	60	7.05%
115000	Support Activities for Agriculture and Forestry	43	14.54%
519000	Other Information Services	38	16.61%
485000	Transit and Ground Passenger Transportation	35	4.07%
337000	Furniture and Related Product Manufacturing	26	4.23%
524000	Insurance Carriers and Related Activities	21	0.53%
321000	Wood Product Manufacturing	17	0.95%
325000	Chemical Manufacturing	16	1.78%
512000	Motion Picture and Sound Recording Industries	8	1.94%
711000	Performing Arts, Spectator Sports, and Related Industries	8	6.39%
486000	Pipeline Transportation	6	8.87%
712000	Museums, Historical Sites, and Similar Institution	5	12.52%
487000	Scenic and Sightseeing Transportation	1	15.44%

Missouri Economic Research and Information Center, Missouri Department of Economic Development,
wia_industry_projections_2016-2026

Table 9:

Central Workforce Development Area Employment Loss Industries by NAICS (2016-2026)			
NAICS	Industry	Change	% Change
999200	State Government, Excluding Education and Hospitals	-665	-3.12%
448000	Clothing and Clothing Accessories Stores	-557	-24.97%
424000	Merchant Wholesalers, Nondurable Goods	-341	-11.51%
454000	Non-store Retailers	-228	-9.23%
335000	Electrical Equipment, Appliance, and Component Manufacturing	-175	-7.14%
333000	Machinery Manufacturing	-168	-6.36%
327000	Nonmetallic Mineral Product Manufacturing	-160	-15.26%
491100	Postal Service	-130	-11.04%
511000	Publishing Industries (except Internet)	-113	-10.53%
443000	Electronics and Appliance Stores	-108	-14.74%
339000	Miscellaneous Manufacturing	-89	-16.78%
814000	Private Households	-70	-18.80%
515000	Broadcasting (except Internet)	-69	-10.95%
334000	Computer and Electronic Product Manufacturing	-68	-5.77%
323000	Printing and Related Support Activities	-63	-3.16%
425000	Wholesale Electronic Markets and Agents and Brokers	-44	-7.23%
517000	Telecommunications	-40	-3.57%
442000	Furniture and Home Furnishings Stores	-30	-4.65%
482000	Rail Transportation	-22	-5.49%
315000	Apparel Manufacturing	-14	-10.53%
314000	Textile Product Mills	-14	-5.48%
483000	Water Transportation	-9	-38.69%
999100	Federal Government, Excluding Post Office	-6	-0.09%
114000	Fishing, Hunting and Trapping	-2	-32.94%
316000	Leather and Allied Product Manufacturing	-2	-0.52%
113000	Forestry and Logging	0	0.48%
445000	Food and Beverage Stores	0	0.01%

Missouri Economic Research and Information Center, Missouri Department of Economic Development,
wia_industry_projections_2016-2026

Location Quotient – Salem and Dent County

The Location Quotient (LQ) for a given industry sector is a measure of its concentration relative to the concentration of that sector in the state of Missouri. The LQ compares the local economy

to the state economy to identify specializations in the local economy. Any employment over and above the expected percentage is therefore considered to consist of basic sector jobs because these workers are assumed to be exporting their goods and services to non-local areas. The LQ's shown in the following table are derived from the numbers of employees for each industry sector. If the percentages are identical or if the local percentage is less than the reference percentage, then the local area has no basic sector employment for that industry as the area can only, at best, meet their local demand and not export these goods and services.

Based on the LQ methodology, it can be concluded that Salem and Dent County's basic sector industries are comprised of Mining, Agriculture/Forestry/Fishing/Hunting, Health Care/Social Assistance, Construction, Retail Trade, Wholesale Trade and Accommodation and Food.

Table 10:

Location Quotients				
Business Category	LQ Compared to MO		LQ Compared to US	
	City of Salem	Dent County	City of Salem	Dent County
Health Care / Social Assistance	1.84	1.44	2.13	1.67
Retail Trade	1.49	1.34	1.64	1.48
Manufacturing	1.11	.91	1.49	.98
Construction	1.81	1.61	2.38	2.11
Accommodation & Food	1.24	.96	1.01	.78
Education Services	.47	.89	1.78	3.35
Public Administration	.73	1.1	*	*
Wholesale Trade	1.04	1.04	.70	.70
Agriculture / Forestry / Fishing / Hunting	1.53	1.87	13.53	16.47
Other Services	.33	1.11	.42	1.39
Transportation / Warehousing	.35	.5	.42	.61
Arts / Entertainment / Recreation	.68	.74	.87	.93
Professional / Scientific / Tech Services	.18	.25	.18	.25
Mining / Quarrying / Oil & Gas Service	6.43	15	1.96	4.57
Finance / Insurance	.17	.23	.21	.28
Information	.29	.47	.29	.47
Utilities	.06	.21	.18	.59
Rental / Real Estate / Leasing	.04	.44	.04	.04
Management of Companies / Enterprises	0	.83	0	.03

LQ < 1.0: local employment is less than expected for a given industry

LQ = 1.0: local employment is exactly enough to meet the local demand for a given good or service

LQ > 1.0: local employment is greater than expected, these extra jobs must export their goods and services to non-local areas

BLS – Other Services: Repair and Maintenance: NAICS 811, Personal and Laundry Services: NAICS 812, Religious, Grantmaking, Civic, Professional, and Similar Organizations: NAICS 813, Private Households: NAICS 814

*BLS groups Public Administration in with other categories, not able to break out for US LQ calculations.

Industry Cluster Analysis

Introduction

An important component of Salem and Dent County's vision for economic development is a focused effort to attract, retain, and expand firms in target industry clusters within the region.

Following is an industry cluster assessment that targets industries that demonstrate a competitive advantage to the region, in terms of economic development importance.

Method of Analysis

The process to assess industries includes both quantitative and qualitative evaluations. Location quotient and shift-share analyses are key quantitative methods used to initially understand industries, while stakeholder interviews and public meetings are used to obtain qualitative insight into local strengths and preferences.

As part of the industry target assessment, all industry clusters were evaluated, and the following screening process implemented to identify key target industries within Salem and Dent County:



➤ Is the industry a local specialization?

Methodology: Examined the location quotient of each industry to quantify the level of concentration in the County when compared to the state (Missouri). To identify if an industry cluster represents a local specialization, location quotient (LQ) analysis was conducted. Location quotients compare the proportion of local employment in an industry to the proportion of state employment in an industry. Those industries with proportionately more local employment relative to the state are local specializations ($LQ > 1.0$).

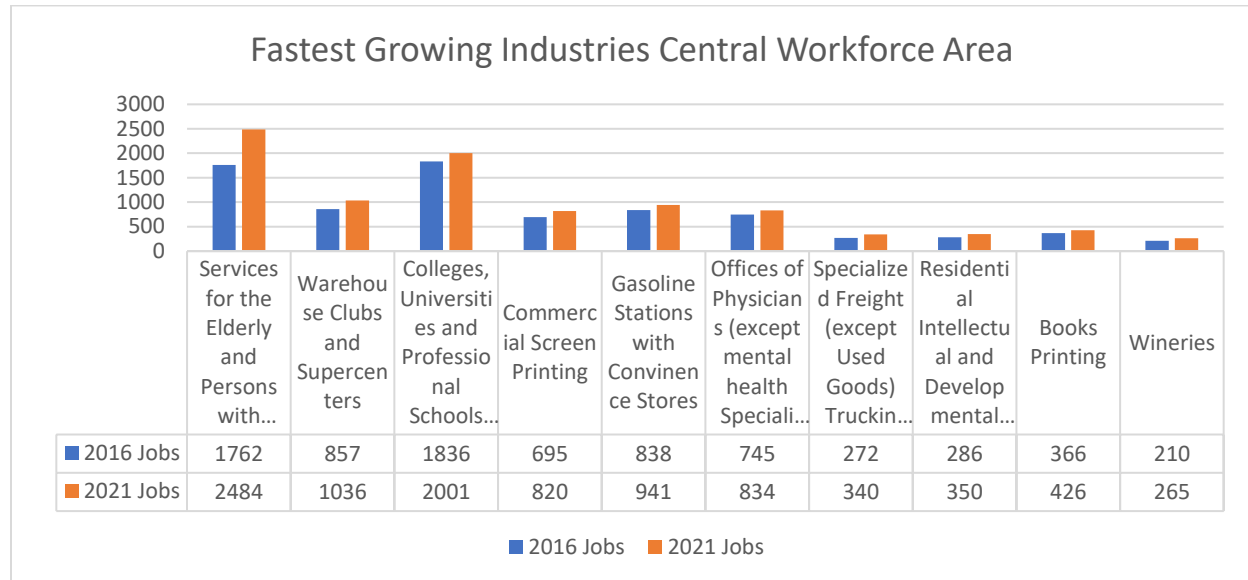
➤ Is the industry experiencing employment growth locally?

Methodology: Referenced the projected employment growth rate of each industry between the years of 2016 and 2026 to determine whether local employment in Salem and Dent County is expected to experience an increase or decrease. Local job growth or job loss is another important dimension of industry cluster evaluation. Trends in employment help to identify which local specializations are twice as strong as growing fields, and these trends also help identify industries that may not be local specializations yet but are nevertheless adding local jobs and could therefore serve as emerging economic engines.

➤ **Is the industry gaining a competitive share over the state?**

Methodology: Determined whether Salem and Dent County or the State of Missouri anticipate a higher employment growth rate between the years of 2016 and 2026. An industry that is locally gaining competitive share is defined as one that is either adding jobs faster locally than in other parts of the state, or that is losing jobs less rapidly locally than in other parts of the state.

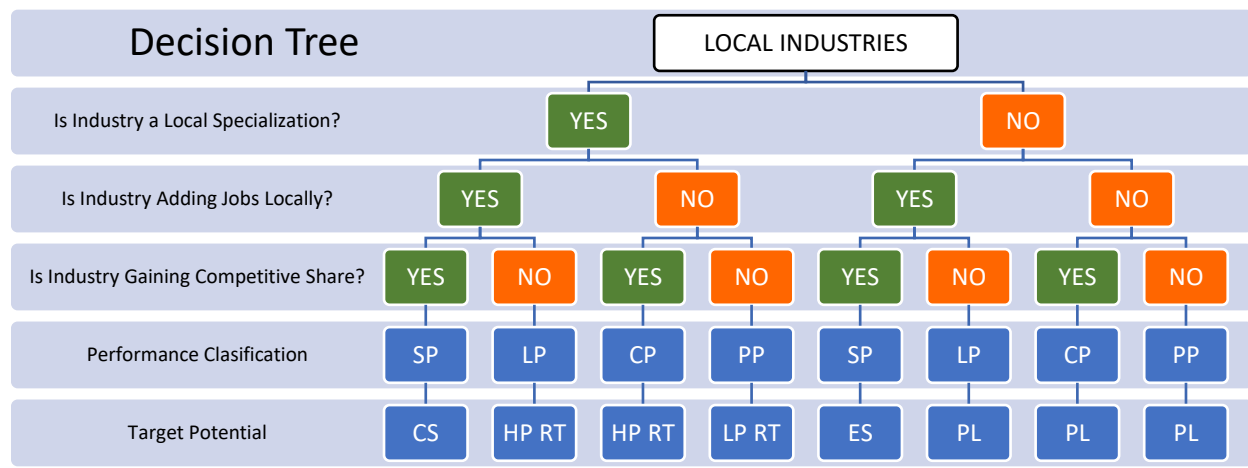
Chart 5:



Central Workforce Development Board, Meramec Sub-Region, Regional Workforce Overview, Emsi Q1 2017 Data Set, March 2017

A more detailed illustration of the quantitative processes (which address the first three steps in the above illustrated process) is provided in the following 'Decision Tree' diagram.

Chart 6:



From the results of these evaluations, the performance of industries may be classified into four categories:

- Strong performers (SP)
- Lagging performers (LP)
- Constrained performers (CP)
- Poor performers (PP)

Then, industries can be further classified based on their potential as local targets, with five potential categories:

- Current strengths (CS)
- High priority retention targets (HP RT)
- Lower priority retention targets (LP RT)
- Emerging strengths (ES)
- Prospects limited (PL)

Findings

After examining all seventy-three (73) industries identified by the Central Workforce Area Board through the quantitative screening process / Decision Tree diagram on the previous page, industries were identified as current strengths, high priority retention targets, low priority retention targets, and emerging strengths for Salem and Dent County in the local economy and are outlined in the tables below.

Table 11:

Strong Performer – Current Strength			
NAICS	Industry	Performance Classification	Target Potential
62	Health Care / Social Assistance	Strong Performer	Current Strength
44-45	Retail Trade	Strong Performer	Current Strength
811	Other Services: Repair and Maintenance	Strong Performer	Current Strength
	NAICS 8111: Automotive Repair and Maintenance	12-13 businesses in County	
	NAICS 8112: Electronic and Precision Equipment Repair and Maintenance	1 or 2 businesses in County	
	NAICS 8113: Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	1 or 2 businesses in County	
	NAICS 8114: Personal and Household Goods Repair and Maintenance	1 or 2 businesses in county	

Strong Performer – Emerging Strength			
NAICS	Industry	Performance Classification	Target Potential
48-49	Transportation / Warehousing (Warehousing and Storage: NAICS 493)	Strong Performer	Emerging Strength

Lagging Performer – High Priority Retention Target			
NAICS	Industry	Performance Classification	Target Potential
31-33	Manufacturing	Lagging Performer	High Priority Retention Target
	NAICS 321: Wood Product Manufacturing - Industries in the Wood Product Manufacturing subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile homes), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planning, shaping, laminating, and assembling of wood products starting from logs that are cut into bolts, or lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and bolts that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills and wood preservation establishments, the establishments are grouped into industries mainly based on the specific products manufactured. - North American Industry Classification System		
23	Construction	Lagging Performer	High Priority Retention Target
42	Wholesale Trade	Lagging Performer	High Priority Retention Target
11	Agriculture / Forestry / Fishing / Hunting	Lagging Performer	High Priority Retention Target
	Industries in the Forestry and Logging subsector grow and harvest timber on a long production cycle (i.e., of 10 years or more). Long production cycles use different production processes than short production cycles, which require more horticultural interventions prior to harvest, resulting in processes more similar to those found in the Crop Production subsector. Consequently, Christmas tree production and other production involving production cycles of less than 10 years, are classified in the Crop Production subsector. - North American Industry Classification System		

Poor Performer – Low Priority Retention Target			
NAICS	Industry	Performance Classification	Target Potential
72	Accommodations and Food	Poor Performer	Lower Priority Retention Target
*	Public Administration	Poor Performer	Lower Priority Retention Target
61	Education Services	Poor Performer	Lower Priority Retention Target
21	Mining, Quarrying, Oil & Gas	Poor Performer	Lower Priority Retention Target

In order to shift from a quantitative evaluation (above) to a qualitative evaluation of Salem's strengths in relation to these industry clusters, each industry should be assessed in terms of its ability to perform in the context of other factors including demographic, economic, and trade area characteristics, and most importantly, real job creation. For example, the Repair and Maintenance industry while having a strong showing in Dent County is proposed to have no growth in the Central Workforce Development Area. While Transportation and Warehousing reflects being an emerging strength, only having one facility in the community, and a small projected growth of employment in the Central WDA of 307, this may not be an area of focus for mass recruitment. The highest projected growth sectors in the Central WDA are Health Care and Social Services at a growth of 6,957 jobs, Education Services at 2,786 jobs growth, Construction at 1,681 jobs and Retail Trade at a growth of 1150 jobs in the region. Therefore, based on the analysis above and additional analysis conducted in the course of this program of work, recommended target industries are as follows:

Current Strengths (Local Specialization, Adding Jobs, Gaining Competitive Share)

- Health Care/ Social Assistance
- Retail Trade

Emerging Strengths (Not a Local Specialization, Adding Jobs, Gaining Competitive Share)

These two sectors are the single largest projected job gains in the CWDA after Health Care and Social Services.

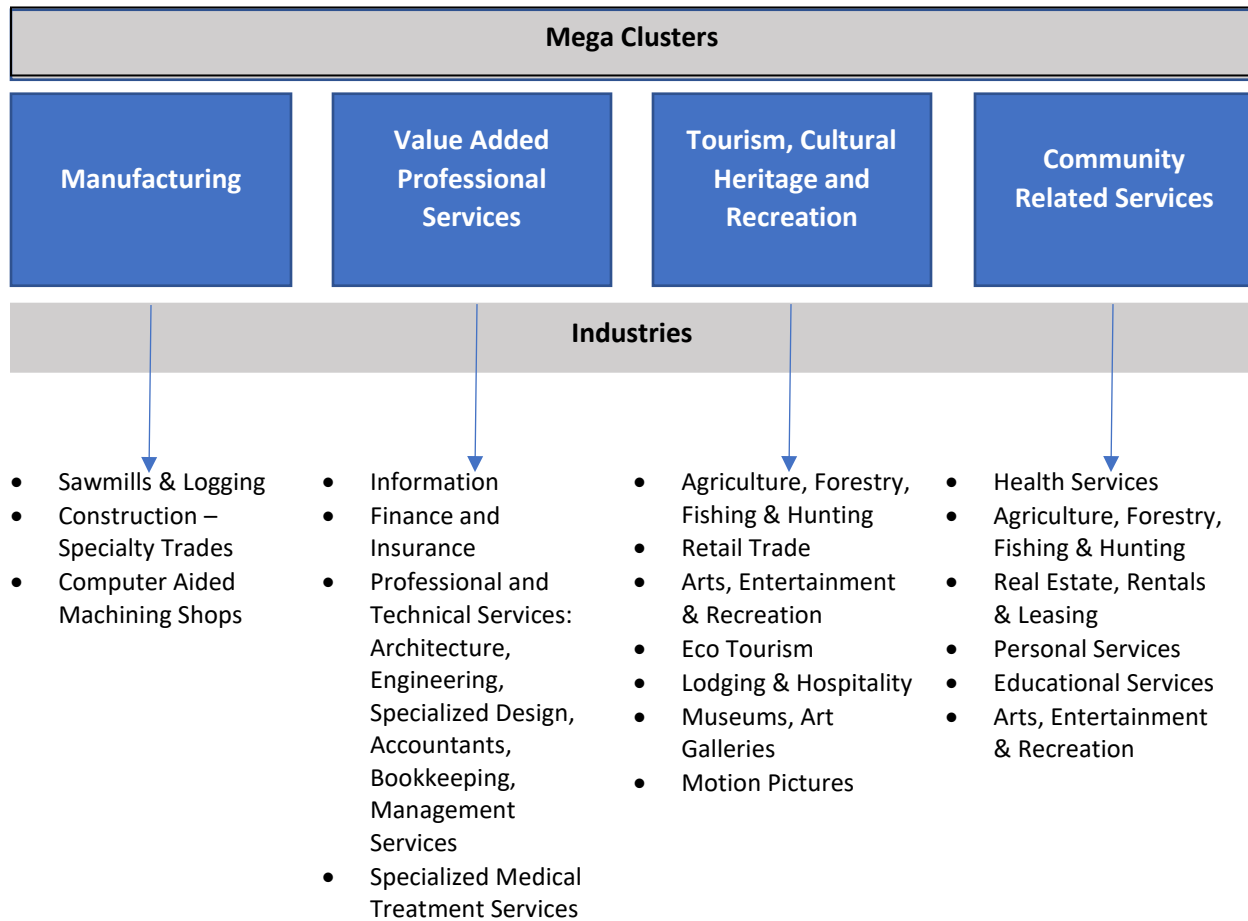
- Educational Services
- Professional, Scientific and Technical Services

High Priority Retention Targets (Not a Local Specialization, Gaining or Losing Jobs, Gaining or Losing Competitive Share)

- Transportation and Warehousing
- Manufacturing
- Construction (specifically Specialty Trade Contractors)
- Agriculture/Forestry/Fishing and Hunting

The remaining industries analyzed through the quantitative evaluations are considered to have limited prospects and fall into three categories: 1) industries that are not a local specialization, adding jobs locally but losing competitive share; 2) industries that are not a local specialization, losing jobs locally and not competitive share, and; 3) industries that are not a local specialization, losing jobs locally and losing competitive share.

It is helpful to group industry clusters based on common themes – in essence, turning the clusters into mega-clusters. The identification of mega-clusters allows the opportunity to add industries that may not have been identified as potential targets through the quantitative analysis for lack of data, yet nevertheless have thematic ties to the other industries that have been identified as potential targets. These mega-clusters include most of the potential targets listed above as well as other industries not covered for lack of data yet have potential to become viable targets.



Finally, we need to also look at what industries are being targeted in adjoining regions/communities and at the state level to see if there are opportunities to piggyback on marketing efforts and other strategic initiatives. The Rolla Regional Economic Commission is currently undergoing both a complete website rebuild and a search for a new Executive Director. The Missouri Department of Economic Development has not updated their target industries since about 2009. It is anticipated that through their current “Best in the Midwest” efforts to revamp and update the focuses and structural operations of the department, the target industries will be addressed. That leaves the current, most up-to-date list of industry targets from the Missouri Partnership. The Partnership’s targets, defined as Industry Strengths, are as follows:

Aerospace & Defense
 Advanced Manufacturing Network
 Global Agtech Leader
 North America’s Logistics Center

Empowered Energy Solutions
 Financial & Professional Services Leadership
 Food Solutions
 Health Innovation

Section 5: Business Resource Inventory

Existing Business Development Organizations

Local

- City of Salem Economic Development - serves the City of Salem and Dent County. The purpose of the Economic Development office is to assist in the retention, expansion, recruitment and creation of economic base companies in Dent County for the purpose of high wage job creation.

The goal is to develop long-term sustainable economic development programs to move Dent County's economy forward. Activities include:

- Industrial park growth
- Access to employer support programs such as workforce development
- Business/Industry Advocate
- Connecting companies to resources and incentives such as tax credits and technical assistance programs when applicable

Salem Economic Development is also one of the first points of contact for site selectors and other company representatives interested in establishing operations in Dent County. Salem Economic Development partners with the Missouri Department of Economic Development; the Missouri Partnership; Meramec Regional Planning Corporation, the Small Business Technology and Development Center (SBTDC) and other technical assistance programs available to help expanding companies and otherwise create and support higher wage jobs in the county.

The Salem Economic Development office is in the City of Salem Administration building at 400 N. Iron St. in Salem. 573-729-2428, economic@salem-mo.com

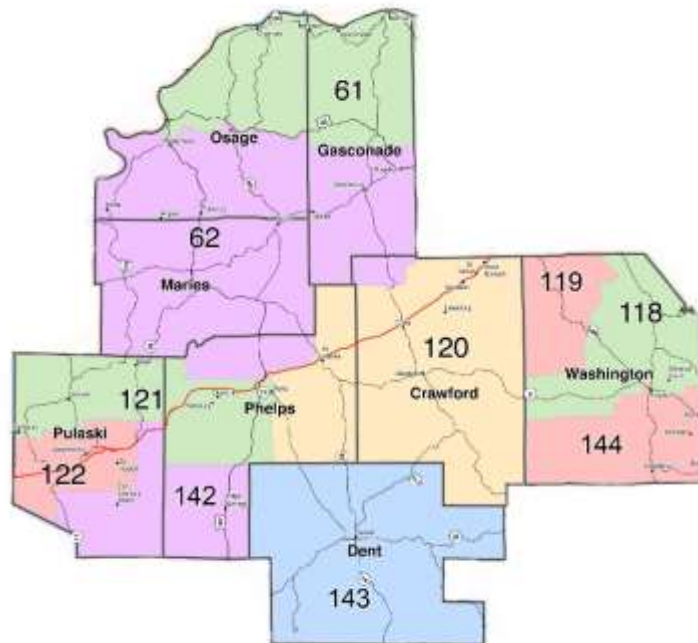
Regional

- Meramec Regional Planning

Commission (MRPC) - is a voluntary association of local units of government serving as the regional planning organization for the Meramec region, also known as a State Planning and Development District. The MRPC is headquartered in St. James, Missouri but includes the Counties of Crawford, Dent, Gasconade, Maries, Osage, Phelps, Pulaski and Washington.

<https://www.meramecregion.org/>

The MRPC also oversees the Meramec Regional Development Corporation (MRDC) which administers a small business loan portfolio including SBA and local funds. This is a local fund designed to provide loan money to



small businesses in Crawford, Dent, Gasconade, Maries, Osage, Phelps, Pulaski and Washington counties in order to induce private lenders' participation in projects that will retain or create employment. The Revolving Loan Fund can provide up to 40 percent of the funding or a maximum of \$100,000, funding 50 percent with a private lender and the applicant supplying 10 percent. One job must be created or retained for each \$20,000 of RLF requested. Loan applications are prepared and serviced by the MRPC staff.

<https://www.meramecregion.org/mrpc-programs-and-services/business-loans/>

State

- Missouri Economic Development Department (MO DED) - is the state's economic development agency. The MO DED has identified the following as Target Industries:

Automotive Suppliers

Biosciences

Energy Solutions

Advanced Manufacturing

Financial & Professional Services

Health Sciences & Services

Information Technology

Transportation & Logistics

The Missouri Department of Economic Development works to create an environment that encourages economic growth by supporting Missouri's businesses and diverse industries, strengthening our communities, developing a talented and skilled workforce, and maintaining a high quality of life. <https://ded.mo.gov/>

MO STEP=UP – Missouri State Trade and Expansion Promotion Grant Program enables the state to carry out export programs that assist eligible small businesses concerns. The aim of the program is to increase the number of small businesses exporting and increase the value of exports for those small businesses that are currently exporting.

The program has two tracks: The Market Expansion track that focuses on companies that are currently exporting to at least one market and demonstrates export sales potential as well as confirmation of export experience; and the New-to-Export Program which targets companies that do not currently export to a foreign market or whose exports are sporadic and very small in volume.

- International Trade and Investment Office – Staff can assist your business with accessing financial assistance, you can participate in trade shows and missions and market your products to a worldwide audience.

- Missouri Enterprise - Missouri Enterprise was founded in 1983 and our mission is really quite simple. It's to help Missouri businesses, like yours, succeed. To do that, we provide a broad range of hands-on business, technical and manufacturing optimization services, delivered by an experienced, "been there, done that," staff and a comprehensive network of public and private partners. We help Missouri manufacturers build cultures to support and sustain continuous improvement. <http://www.missourienterprise.org/>

- Missouri Partnership - Missouri Partnership is a public-private economic development partnership designed to increase the visibility of Missouri as a globally competitive business location and attract new jobs and investment to the state. We're always looking for new candidates to come and join us in the Show-Me state.

The Missouri Partnership also works with Location One to provide a statewide database of commercial and industrial properties available for investment by startup or relocating companies. <https://www.missouripartnership.com/>

- Missouri Small Business & Technology Development Centers (MO SBTDC) – Experts to help businesses in every stage. From concept to startup, growth to renewal, mature to succession. We are here to help you succeed at every point. MO SBTDC experts are located statewide providing help on a variety of business topics through: professional business analysis and business consultations and access to technology resources.

The MO SBTDC also offers educational training seminars on a variety of business topics: financial analysis, strategic planning, technology commercialization, management, HR, social media, marketing, taxes, customer service, business plan, startup and more.

<https://missouribusiness.net/sbtdc/>

- Missouri Technology Corporation - The Missouri Technology Corporation is a public-private partnership created by the Missouri General Assembly to promote entrepreneurship and foster the growth of new and emerging high-tech companies. MTC focuses on 21st Century bioscience industries that build on Missouri's rich history in agriculture.

MTC focuses on 21st Century bioscience industries that build on Missouri's rich history in agriculture. <https://www.missouritechnology.com/>

Existing Business Development Programs and Incentives

Data Center Incentives

Data centers may be eligible to receive exemptions from state and local sales taxes associated with a variety of activities necessary to build a new facility or expand an existing facility in Missouri. These sales tax exemptions could include utilities, machinery, equipment, computers and construction equipment and could last for up to 15 years for new facilities and up to 10 years for expanding facilities.

<https://www.missouripartnership.com/regions-sites-incentives/incentive-programs/>

HUB Zone

The government limits competition for certain contracts to businesses in historically underutilized business zones. It also gives preferential consideration to those businesses in full and open competition.

Joining the HUBZone program makes your business eligible to compete for the program's [set-aside contracts](#). HUBZone-certified businesses also get a 10 percent price evaluation preference in full and open contract competitions.

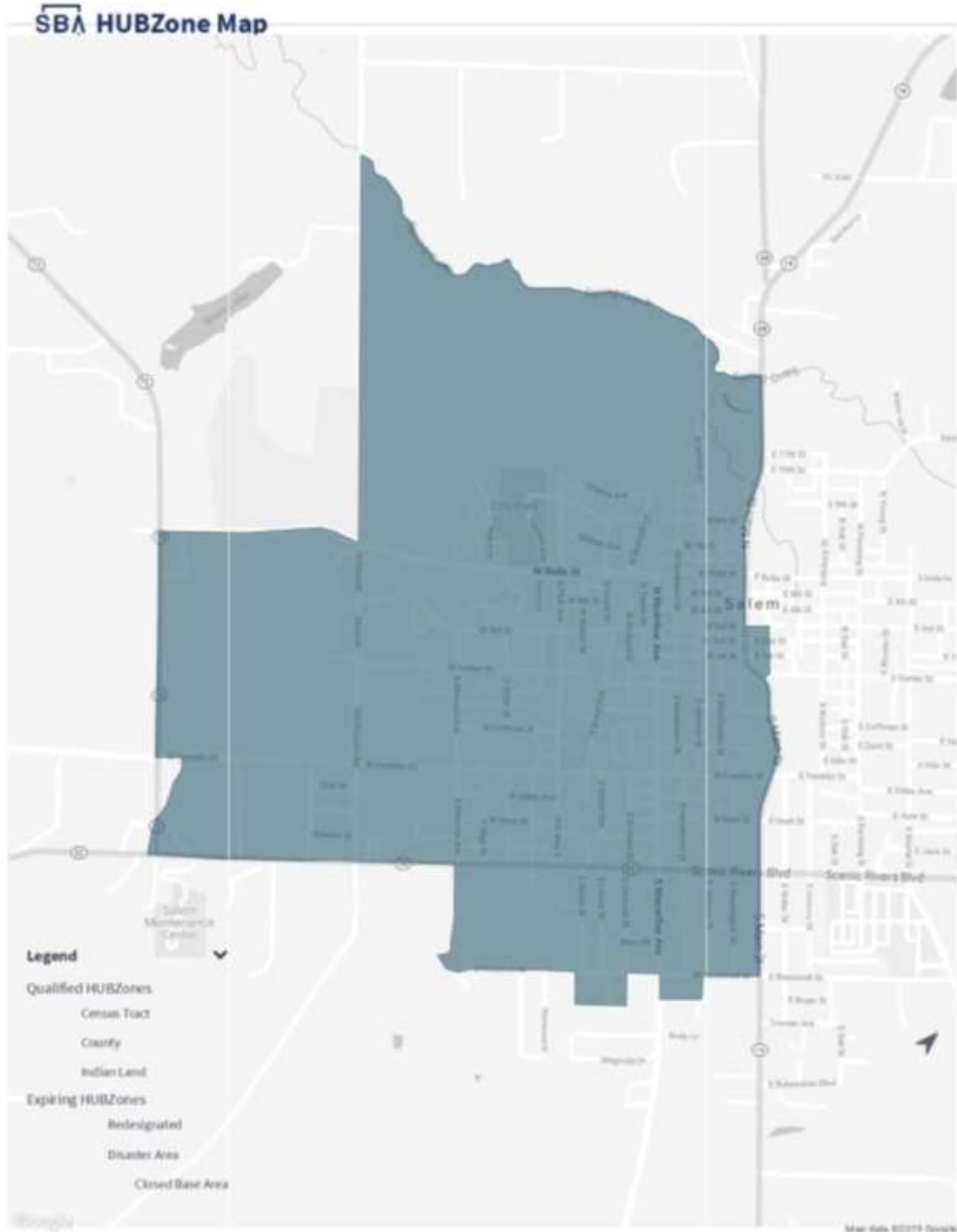
HUBZone-certified businesses can still compete for contract awards under other socio-economic programs they qualify for.

To qualify for the HUBZone program, your business must:

- Be a small business
- Be at least 51 percent owned and controlled by U.S. citizens, a Community Development Corporation, an agricultural cooperative, a Native Hawaiian organization, or an Indian tribe
- Have its principal office located in a HUBZone
- Have at least 35 percent of its employees live in a HUBZone

You can find the full qualification criteria in Title 13 Part 126 Subpart B of the Code of Federal Regulations (CFR). You can also get a preliminary assessment of whether you qualify at the SBA's Certify website: <https://certify.sba.gov/am-i-eligible>
See the map below for HUB Zone designation areas within Salem:

Image 6:



Intercounty Electric Cooperative Rebate Program

Intercounty Electric Cooperative offers rebates for specific appliances and equipment. Intercounty must be contacted within 60 calendar days of purchase. An original receipt and copy of warranty must be provided. Intercounty must verify the new electric appliance or equipment by visually observing the appliance or equipment. Rebates are limited to services that use more than 6,000 kilowatt-hours on an annual basis.

<http://www.ieca.coop/rebates>

Intercounty Electric Cooperative REDLG Loan & Grant Program

The Rural Economic Development Loan (REDL) and Grant (REDG) programs provide funding to rural projects through local utility organizations. Under the REDLoan program, USDA provides zero interest loans to local utilities which they, in turn, pass through to local businesses (ultimate recipients) for projects that will create and retain employment in rural areas. The ultimate recipients repay the lending utility directly. The utility is responsible for repayment to the Agency. Under the REDGrant program, USDA provides grant funds to local utility organizations which use the funding to establish revolving loan funds (RLF). Loans are made from the revolving loan funds to projects that will create or retain rural jobs. When the revolving loan fund is terminated, the grant is repaid to the Agency.

<http://www.ieca.coop/revolving-loan-fund>

Missouri BUILD

The BUILD program provides financial incentives for the location or expansion of large business projects in Missouri. The incentives are designed to reduce necessary infrastructure and equipment expenses.

<https://www.missouripartnership.com/wp-content/uploads/2016/09/BUILD-new.pdf>

Missouri Department of Agriculture – Financial Assistance

The Missouri Department of Agriculture programs provide a variety of loan, loan guarantees and grant programs for agribusiness pursuits. Email: abd@mda.mo.gov

Missouri First Linked Deposit

This program facilitates a lower interest rate on loans to approved businesses. Eligible businesses include new, existing or expanding firms. Email: info@treasurer.mo.gov

Missouri Works

One of Missouri's signature programs to help create jobs and investment in Missouri, the Missouri Works program, offers achievable, flexible, and competitive benefits to companies investing in Missouri. The retention of the state withholding tax on the new jobs and/or state tax credits, which are refundable, transferable and/or saleable make this a powerful business attraction program for businesses that qualify. The program offers multiple categories with different minimum thresholds to fit the needs of almost any business considering Missouri.

<https://www.missouripartnership.com/regions-sites-incentives/incentive-programs/>

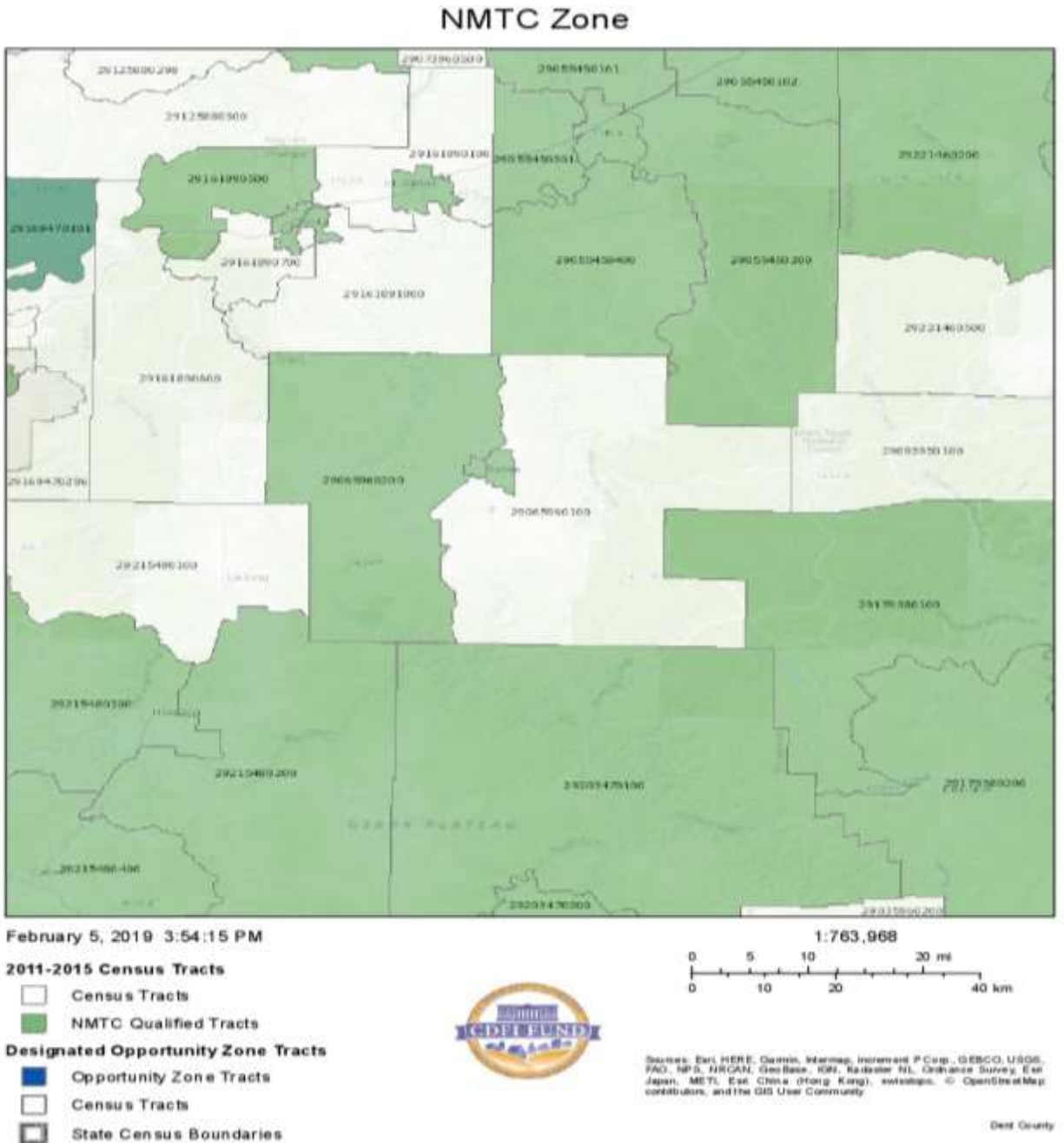
New Market Tax Credit

Provides supplemental funding for investment entities that have been approved for the Federal New Markets Tax Credit (NMTC) program in order to direct more funding to Missouri projects. The NMTC program provides state and federal tax credits to investors that make investments

into approved funds, which will make investments in eligible projects located in low income census tracts in Missouri. This program does not provide tax credits directly to businesses. See the map below delineating the NMTC census tracts in Dent County in green.

<https://ded.mo.gov/programs/business/new-markets-tax-credit-program>

Image 7:



Small Business Administration (SBA) 504 Loan Program

This loan program assists new and expanding businesses with projects involving fixed assets, such as land, buildings, machinery and equipment and debt refinance. Total project may be

from \$50,000 and up. The applicant must participate with a private lender. Typical loans require at least 10 percent investment by the applicant, 50 percent by the private lender and the remaining 40 percent (or a maximum of \$5,000,000; for small manufacturers \$5,500,000) by SBA. The SBA portion of the 504 loan will be at a fixed rate for a fixed term, up to 25 years depending on the use of proceeds. One job per \$65,000 must be created or retained or must meet other economic goals. SBA loan applications are prepared by the MRPC staff.

<https://www.meramecregion.org/>

Skilled Workforce Missouri

Missouri is committed to supporting business by leveraging its extensive suite of recruitment and training resources. With Skilled Workforce Missouri, the state will identify, screen, and evaluate the right talent to meet your business needs. Skilled Workforce Missouri will provide pre-employment training so your new hires will be ready when your business opens its doors. Skilled Workforce Missouri goes one step further, by skilling-up your existing workforce as new products or technology occurs. Skilled Workforce Missouri can provide resources and solutions that best fit your business. <https://openforbiz.mo.gov/workforce>

United States Department of Agriculture Rural Development – Business & Industry Loan Guarantees

This program guarantees loans by eligible local lenders to businesses that benefit rural areas through creation and maintenance of employment. Priority is given to applications for loans in rural communities of 25,000 or less population. Maximum guarantee is limited to \$25 million. For more information: <https://www.rd.usda.gov/mo>

Dent County and City of Salem Business Development Programs, Incentives and Opportunities CDBG Loan Programs Available to the City and County

Action Fund Loan: CDBG Program

Provides a loan to certain types of for-profit companies that need funds for start-up or expansion and have exhausted other sources. Cities and counties must apply on behalf of beneficiary companies. For-profit manufacturing, processing and assembly companies that will have wages above the county average and provide medical benefits are prioritized.

MO DED may provide creditworthy suppliers located in non-metropolitan areas a loan of up to 40% of project funding, limited also to \$750,000 per project, or \$25,000 per new job created (whichever is less).

The business must have exhausted other funding sources. Only the least amount needed to complete the project may be provided. Lesser of \$400,000 per project; 50% of the total project cost; or \$35,000 per new job. For startup companies - lesser of \$100,000 per project; 30% of project costs and maximum CDBG cost per job created or retained of \$25,000. Interest Rate: Determined by DED. Term: Determined by cash flow projections that will allow for fastest repayment of principal and interest but not more than 20 years or the depreciable life of the collateral assets. Working Capital loans will have a term not to exceed 10 years. See attached flyer for details.

Interim Financing Loan: CDBG Program

Provide short-term cash flow relief for a company. Cities and counties must apply on behalf of beneficiary companies. For-profit manufacturing, processing and assembly companies that will have wages above the county average and provide medical benefits are prioritized. See attached flyer for details.

Revolving Loan/Microenterprise Loan: CDBG Program

To promote the development of small businesses or facilitate other revitalization/redevelopment activities by providing funds to local governments (or sponsored eligible nonprofit organization sub-applicants) to establish a revolving loan program. The applicant is encouraged to design their program in a manner to best meet the area's needs.

The Applicant and Sub-Applicant have the flexibility to design the revolving loan program to meet the needs of the service area. The program may include low interest loans, forgivable loans, and loan guarantees. The Applicant is responsible for developing the loan application process and loan requirements, such as terms, collateral, underwriting criteria, etc. The loan guidelines must be consistent and fairly implemented. For microenterprise loans, at least one job must be created or retained for every \$15,000 of loan proceeds. Funding may only be used for eligible expenses related to the project. Ineligible uses of CDBG funds include, but are not limited to, refinancing of existing debt, political or religious activities, or lobbying any governmental entity. See attached flyer for details.

Enhanced Enterprise Zone (EEZ) – Dent County

Dent County offers the following options within the Enhanced Enterprise Zone which includes all of Dent County and Salem, MO except for census tract 9604, Big Code 3 in Sinkin Township, the City of Bunker.

1. **A 50% tax abatement on real property** for a qualifying business creating 5 *FTE for 10 years with an investment of \$200,000.
2. **A 62.5% tax abatement on real property** for a qualifying business creating 12 *FTE for 15 years with an investment of \$480,000.
3. **A 75% tax abatement on real property** for a qualifying business creating 25 *FTE for 20 years with an investment of \$1,000,000.

Note* An *FTE or Full Time Equivalent is defined for Dent County as 36 hours or more per week on a regular basis with a minimum of 50% of the cost of the health insurance provided by the employer.

Eligible Enhanced Business Enterprises:

By NAICS Code:

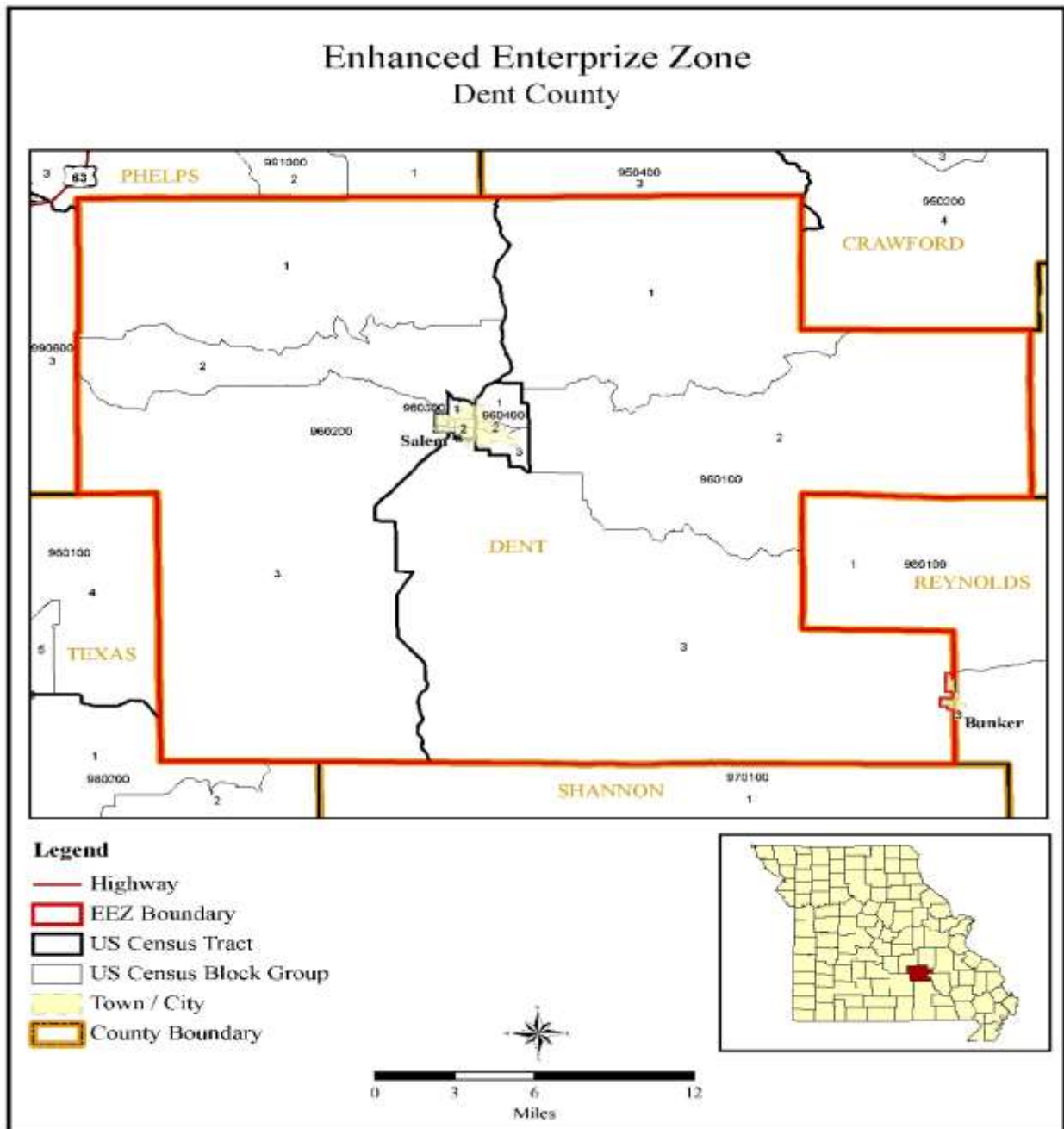
11 - Agriculture, Forestry, Fishing and Hunting	54 - Professional, Scientific, and Technical Services
21 - Mining	55 - Management of Companies & Enterprises
22 - Utilities	56 - Administration and Support and Waste Management and Remediation Services
23 - Construction	61 - Educational Services
31-33 - Manufacturing	62 - Health Care and Social Assistance
42 - Wholesale Trade	71 - Arts, Entertainment, and Recreation*
48-49 - Transportation & Warehousing	81 - Other Services
51 - Information	92 - Public Administration
52 - Finance & Insurance	

* All gambling (7132), retail establishments (44-45), eating and drinking establishments (722) are not eligible.

By Section 348.015(14) RSMo: Value-added agricultural products

By Section 135.950(9)(b) of the RSMo: An international, national, regional or state headquarters of a revenue producing business or enterprise. Allows service industries to be eligible only if a majority of its annual **revenues** will be derived from services provided out of state.

Image 8:



Industrial Development Authority –Created for the purpose of developing commercial, industrial, agricultural or manufacturing facilities under the “Industrial Development Corporation Act” of the state of Missouri, Chapter 349, Revised Statutes of Missouri, 1978 as amended.

Land in Masters Industrial Park - City of Salem

Land in the Masters Industrial Park is free to industry for job creation for qualified businesses.
Email: economic@salemмо.com

Sales Tax Exemptions: Chapter 100 – City AND County Authority

Missouri Chapter 100 industrial revenue bonds allow local governments to offer personal property and/or real property tax abatement to eligible companies looking to expand in or relocate to Missouri. The amount of the abatement and the length of the term is subject to local review and varies by community.

Under Chapter 100, construction materials and certain tangible personal property may be purchased sales tax exempt by the City/County and then leased back to the Company. While the lease of personal property is still subject to sales tax, the State of Missouri can exempt that sales tax through Missouri’s Chapter 100 Sales Tax Exemption, Personal Property program. The lease of real property is not subject to sales tax.

Qualifying Businesses:

Cities and Counties may apply to Department of Economic Development on behalf of Companies for which Chapter 100 bond proceeds are used to purchase tangible personal property used in the process or production which is leased back to the Company. Eligible companies include manufacturing, warehousing, distribution, office, research and development, agricultural processing and services in interstate commerce. Services in interstate commerce are defined with a very narrow definition. Retail and services in intrastate commerce are not eligible. See Attached flyer.

<https://ded.mo.gov/programs/business/chapter-100-sales-tax-exemption>

Sales Tax Exemptions: Chapter 353 – City Authority

An incentive that can be utilized by cities to encourage the redevelopment of blighted areas by providing real property tax abatements.

ELIGIBLE APPLICANTS:

Tax abatement is only available to for-profit “Urban Redevelopment Corporations” organized pursuant to the Urban Redevelopment Corporations Law. The articles of association of Urban Redevelopment Corporations must be prepared in accordance with the general corporations’ laws of Missouri and must contain certain items set forth in Section 353.030, RSMo. of the Urban Redevelopment Corporations Law. There are also special requirements for life insurance companies operating as Urban Redevelopment Corporations. 353.040, RSMo.

<https://www.missouripartnership.com/wp-content/uploads/2016/09/Chapter-353-Tax-Abatement-new.pdf>

Utility Rate Discount - City of Salem

Electrical Rate Reduction for new job creation. The City of Salem is willing to reduce electrical rates (currently \$.0960 per KWH commercial and residential) for job creation. A business can apply prior to creating a minimum of twenty-five new jobs for up to two years.

From Salem City Code:**Section 700.110 Employment Incentive Rate.**

A. Any commercial customer which makes application for the employment incentive rate and qualifies as provided herein shall be charged the sum of \$0.0624 per KWH and five dollars (\$5.00) per KWD.

- 1.** Any commercial utility customer may apply for the employment incentive rate by contacting the City Utility Office.
- 2.** To qualify for the employment incentive rate, the commercial utility customer must create and attain twenty-five (25) new full-time (forty (40) hours per week) jobs (employees working in Salem facilities) following application. The employment incentive rate will be effective in each month for up to twenty-four (24) total months in which the commercial utility customer maintains the twenty-five (25) newly created full-time jobs. Verification of new jobs shall be made in accordance with the policies and procedures adopted and put in use by the City Utility Department.

Section 700.120 Large Industrial Use Rate.

Any commercial utility customer which operates a manufacturing, warehouse, or wholesale distribution facility, as determined by its Standard Industrial Classification (SIC) Code and uses in excess of two hundred twenty-five thousand (225,000) KWH per month shall be charged the sum of \$0.0742 per KWH and four dollars fifty cents (\$4.50) per KWD. The rates are subject to modification at any time by the Board of Aldermen.

Email: economic@salemмо.com

Section 6: Retail Analysis

Definitions

The term “retail” in this strategic plan generally refers to operations involved in the sale of goods, merchandise, or services from a fixed location, such as a shopping center or freestanding store. Retail can generally be classified into two major categories by building configuration: **general retail**, which are typically single tenant freestanding general purpose commercial buildings with parking; and, shopping centers.

The definition of a **shopping center** is standard. As formulated by the former Community Builders Council of the Urban Land Institute (ULI) in the 1950s and reaffirmed over time, a shopping center is a group of commercial establishments planned, developed, owned, and managed as a unit related in location, size, and type of shops to the trade area it serves. It provides on-site parking relating to the types and sizes of its stores.

As shopping centers evolved, five basic types emerged, each with its own function: convenience, neighborhood, community, regional, and super-regional. In all cases, a shopping center’s type and function are determined by its major tenant or tenants and the size of its trade area; they are never based solely on the area of the site or the square footage of the structures.

ULI defines the types of shopping centers that make up most of the retail development in the United States. For purposes of understanding terms and characterizations used in this report, the types of retail centers are summarized:

Convenience Center — Provides for the sale of personal services and convenience goods similar to those in a neighborhood center. It contains a minimum of three stores, with a gross leasable area (GLA) of up to 30,000 square feet. Instead of being anchored by a supermarket, a convenience center is usually anchored by some other type of personal/convenience services such as a minimarket.

Neighborhood Shopping Center — This type of retail center provides for the sale of convenience goods (foods, drugs, and sundries) and personal services (e.g. laundry and dry cleaning, hairstyling, shoe repair and tailoring) for the day-to-day needs of the residents in the immediate area. It is built around a supermarket as the principal tenant and typically contains a gross leasable area of about 60,000 square feet. In practice, neighborhood centers can range from 30,000 to 150,000 square feet.

Community Shopping Center — In addition to the convenience goods and personal services offered by the neighborhood center, a community center provides a wider range of soft lines (wearing apparel) and hard lines (hardware and appliances). The community center makes merchandise available in a greater variety of sizes, styles, colors, and prices. Many centers are built around a junior department store, variety store, super drugstore, or discount department store as the major tenant, in addition to a supermarket.

Although a community center does not have a full-line department store, it may have a strong specialty store or stores. Its typical size is about 150,000 square feet of gross leasable area, but in practice, it may range from 100,000 to 350,000 or more square feet. Centers that fit the

general profile of a community center but contain more than 250,000 square feet are classified as super community centers. As a result, the community center is the most difficult to estimate for size and pulling power.

A **power center** is a type of super community center that contains at least four category-specific, off-price anchors of 20,000 or more square feet. These anchors typically emphasize hard goods such as consumer electronics, sporting goods, office supplies, home furnishings, home improvement goods, bulk foods, health and beauty aids, and personal computer hardware/software.

Regional Shopping Center — This type of center provides general merchandise, apparel, furniture, and home furnishings in depth and variety, as well as a range of services and recreational facilities. It is built around two or more full-line department stores of generally not less than 50,000 square feet. Its typical size is about 500,000 square feet of gross leasable area, but in practice it may range from 250,000 square feet to more than 800,000 square feet. The regional center provides services typical of a business district yet not as extensive as those of the super-regional center.

Super Regional Shopping Center — A super regional center offers an extensive variety in general merchandise, apparel, furniture and home furnishings, as well as a variety of services and recreational facilities. It is built around three or more full-line department stores generally of not less than 75,000 square feet each. The typical size of a super-regional center is about 1 million square feet of GLA. In practice the size can range from about 500,000 to more than 1.5 million square feet. Super regional centers have been typified by enclosed malls for over the past thirty years, but have transitioned to outdoor “town centers” over the past decade or so.

A few additional definitions from Retailminded.com:

Big Box Stores – stand-alone stores that carry assorted merchandise. Examples would be Walmart or Target. Big box stores may also be categorized as department stores, discount stores, or warehouse stores depending on the store itself.

Boutique Stores- Refer to small shops or stores that are independently owned and often sell a product assortment that is not duplicated exactly in any other store.

Kiosk - A free standing structure used in a public place, such as a mall, that is designed to support product or a service to be sold to consumers. It is also used for interactive opportunities and may be on a short-term basis, such as when used during a festival.

Mobile Vending Trucks – a mobile retail, food or other product or service offered from a mobile facility, generally a truck, but may be other motorized or non-motorized yet easily movable conveyance. Historically, this type of business has been utilized for fairs and festivals but has become more mainstream in recent years and can be a temporary or permanent business.

The following table contains the criteria for the four common types of shopping centers over 30,000 square feet of gross leasable area (**GLA**). Although shopping centers of one classification account for the majority of retail inventory in most areas, it should be noted that free standing and “Main Street” retail constitutes a significant amount as well. Older “**Main Street**” style

shopping districts are typically comprised of a collection of single tenant buildings, and national chain pharmacies and grocery stores have increasingly embraced the stand-alone building concept.

Table 12:

Shopping Center Definitions					
Center Type	GLA Range	Acres	# of Anchors	% Acre GLA	Type of Anchors
Neighborhood	30,000-150,000	3-5	1+	30-50%	Supermarket
Community	100,000-350,000	10-40	2+	40-60%	Discount, supermarket, drug, home improvement, large specialty discount
Regional	250,000-800,000	40-100	2+	50-70%	Full line dept, jr dept, mass merchant, discount dept, fashion apparel
Super-Regional	800,000+	60-120	2+	50-70%	Full line dept, jr dept, mass merchant, discount dept, fashion apparel

Urban Land Institute

Retail Opportunity Analysis

A widely accepted measure of retail characteristics is the Retail Market Potential, a comparison of supply and demand that can be used to assess potential sources of revenue growth, and therefore, opportunity. An **opportunity gap** appears when household expenditure levels for a specific geography are higher than the corresponding retail sales estimates. This difference signifies that resident households are meeting the available supply and supplementing their additional demand potential by going outside of their own geography and is otherwise referred to as **leakage**. The opposite is true in the event of an **opportunity surplus**. That is, when the levels of household expenditures are lower than the retail sales estimates. In this case, local retailers are attracting residents of other areas into their stores.

The table below shows a summary of the opportunity gaps/surpluses in annual expenditures for major retail categories under the headings Daily Needs, GAFO (general merchandise, apparel, furniture, and other), and Food Service. Opportunity surpluses are signified by black ink numbers. Supermarkets, Electronics and Appliance Stores, Restaurants and other eating places and Gasoline stations all show surplus in availability and indicate that Salem is a regional shopping hub for these types of items, serving a much broader area and benefitting from tourism travel for some.

Opportunity gaps are signified by numbers in red ink. The most significant retail opportunities in Dent County are in the categories of automobile and other motor vehicle dealers (\$27.9 million gap), grocery stores (\$11.5 million gap) and followed by building materials, garden equipment & supply store (\$5.8 million gap), Restaurants/Other Eating Places (\$5.7 million gap) and clothing and clothing accessories (\$5.2 million gap).

Table 13:

Retail Opportunity Gap/Surplus, Salem & Dent County, MO 2017		
	City of Salem	Dent County
Daily Needs		
Grocery Stores	\$2,265,943	\$11,545,673
Specialty Food Stores	\$257,828	\$468,074
General Merchandise, Apparel, Furniture and Other		
General merchandise	\$2,924,663	\$2,877,443
Clothing and clothing accessories	\$1,561,929	\$5,226,695
Home furnishing stores (Not Furniture Stores)	\$493,935	\$1,428,400
Electronics and appliance stores	\$1,166,022	\$1,205,666
Sporting goods, hobby, book, and music stores	\$757,167	\$3,561,051
Office supplies, stationery, gift stores	\$202,980	\$1,166,874
Bldg. materials, garden equip & supply store	\$598,184	\$5,763,777
Food Service		
Special Food Services	\$116,767	\$402,675
Drinking Places - Alcoholic Beverages	\$124,495	\$394,689
Restaurants/Other Eating Places	\$2,246,475	\$5,651,018
Other Significant Gap Sectors		
Automobile & Other Motor Vehicle Dealers	\$6,013,208	\$27,931,085
Gasoline Stations	\$12,969,159	\$621,321

Location One Information Systems (LOIS), ESRI® Retail Marketplace Profile Report Updated July 17, 2019 with 2017 Industry Info.

The calculation of supportable square feet in the retail market sector is a function of the opportunity gap (“leakage”) in a specific category and the average sales per square foot for that type of store. Opportunity gaps signify that household expenditure levels for a specific geography are higher than the corresponding retail sales estimates and are shown in the table below for specific retail categories. Average sales per square foot are typically expressed as a range of annual dollar amounts in a specific retail category. Actual individual store results vary based on store size, location, and market characteristics. The table below shows the calculations for supportable square feet for the retail categories in the Salem/Dent County marketplace that exhibit opportunity gaps.

Supportable square feet of net new retail space are calculated by dividing the leakage amount by the low and high range of sales per square foot for any given retail category. The midpoint is the mean of the high and low net new supportable square feet and represents a benchmark for additional retail floor area that could potentially be supported in Salem/Dent County based on 2009 retail supply/demand characteristics.

Table 14:

Retail Market Potential-Supportable Square Feet: Dent County, MO						
		Range of Sales/SF		Supportable Square Feet		
	Leakage	Low	High	High	Low	Midpoint
Daily Needs						
Grocery Stores	\$11,545,673	*\$618				18,682
Specialty Food Stores	\$486,074	\$117	\$410	1,186	4,154	2,666
GAFO						
Clothing and clothing accessories	\$5,226,695	\$380	\$702	13,754	7,445	10,600
Home furnishing stores (Not Furniture Stores)	\$1,428,400	\$175	\$410	8,162	3,484	5,823
Electronics and appliance stores	\$1,205,666					
Sporting goods, hobby, book, and music stores	\$3,561,051	\$59	\$146	60,357	24,391	42,374
Office supplies, stationary, gift stores	\$1,166,874	\$222	\$304	5,256	3,838	4,547
Bldg. materials, garden equip & supply store	\$5,763,777	\$380	\$468	15,168	12,316	13,742

Range of Sales /Sf have been adjusted up by 17% to account for inflation, 2009-2018.

**Weekly Sales per square foot of Selling Are - 2016, \$11.89, Food Market Institute*

The key to determining whether retail demand could translate into retail attraction is to understand average space requirements for the various types of stores or categories. For example, a traditional department store falls under the Urban Land Institute's (ULI) classification of general merchandise, although department stores typically have large apparel departments and typically occupy more than 100,000 square feet (examples: JC Penny, Dillard's). Dollar and novelty stores also fall under the general merchandise classification, and typically occupy space ranging from 9,000 to 23,000 square feet in a community shopping center.

One item of note is the Grocery Stores category in Table 14 above. Walmart is classified as a general merchandise store, but it also provides a substantial amount of square footage and sales that would be more appropriately classified as Grocery Store sales. A conversation with an esri representative (Gap/Surplus data from Table 13) confirmed that the gap of \$11M reflects sales data captured from credit/debit cards, checks and Snap EBT sales that occur outside of Dent County by individuals with Dent County addresses. Therefore, the data indicates an additional \$11M in annual sales or roughly 18,700 square feet of Grocery Store business could be supported by the Salem/Dent County community. A final note on Grocery Stores is the closure of Harrison's Discount Groceries, October of 2018. While this does not reflect a large loss of square footage, the loss of sales or square footage would not be reflected in the numbers presented.

Sears and Dollar Tree - It should be noted that the Leakage numbers from the Retail Marketplace information represent 2017 sales data. The new Dollar Tree store which opened

mid-year 2018 and the closure of the Salem Sears store in the fall of 2018 both impact the general merchandise category, although the impact of the two may cancel each other out as far as the general square footage needs for general merchandise in the community.

Traffic Counts

Traffic Count Data from MoDOT updated July 2019 reflects Average Daily Traffic counts and Average Weekday Traffic. Listed below are select counts for specified road sections within Salem and Dent County. A link to the current DOT Traffic Count map is available here: <https://www.modot.org/traffic-volume-maps>.

N Main St -	4 th St to Hwy 68 & 19 split	5,120
N Main St –	Center St to 4 th St. -	7,746
N Main St –	Franklin St to Center St. -	8,858
N Main St –	Scenic Rivers to Franklin St. -	9,038
S Main St -	Scenic Rivers to DCR 5080 -	3,697
E. Scenic Rivers Blvd -	East of Town to Craig Industrial Dr.	5,054
E. Scenic Rivers Blvd -	Craig Industrial Dr. to Doss Rd.	7,452
E. Scenic Rivers Blvd -	Doss Rd to Main St.	10,572
E. Scenic Rivers Blvd -	Main St. to Jackson St.	10,597
E. Scenic Rivers Blvd -	Jackson to MacArthur St.	12,081
E. Scenic Rivers Blvd -	MacArthur to 32/72 Intersection	6,937

Generally, traffic counts are given consideration when identifying retail locations as visibility by passers by offers the best marketing short of word-of-mouth.

Section 7: Recent Economic Development Activities

Public Sector Investments

Good basic infrastructure such as roads and bridges, water and wastewater, energy, communications & broadband access, and transit are critical to the long-term success of a community. Adequate public services such as police, ambulance and fire services, and schools are essential to a community's and society's well-being, and public amenities such as libraries, parks and recreation facilities enhance a community's quality of life and create an attractive environment in which to live and work.

Over the past ten years, the City of Salem has invested over \$7 M and Dent County's investment is \$745,000 for a combined investment in public works and civic projects totaling over \$9M. A list of these public sector projects undertaken in Salem and Dent County from 2009 to 2019 is contained in the table below.

Table 15:

Completed Public Sector Capital Projects, City of Salem & Dent County, 2009-2019				
Year	Name or Description of Project	Owner or Fiscal	Cost	Funding Source
2019	Demolition of Old Middle School Building	City	\$360,000	Local
2019	Repainting Water Tower Inside/Outside	City	\$245,000	Local
2019	Airport Tree Clearing	City	\$300,000	Federal/Local
2018	New Pool Construction	City	\$1,400,000	Local
2018	New Playground and Splashpad	City	\$300,000	State/Private
2018	New Streets by Scenic Rivers Plaza (Dollar Tree)	City	\$400,000	Local
2018	Sewer Plant Improvements	City	\$3,000,000	Local
2014-2018	Sewer Line Rehabilitation	City	\$500,000	Local
2014	CR 3210 Bridge Rehabilitation, District 2	County	\$400,000	State/Local/Private
2014	Water & Sewer Line Improvements – McArthur/Route J	City	\$200,000	Local
2014	Streets – Asphalt Resurfacing, McArthur/Route J	City	\$800,000	Local
2014	Salem Memorial Airport Resurfacing	City	???	Federal/Local
2014	The Armory Remodel	City	\$750,000	Federal/State
2012	Sweeny Bridge, CR 5680, District 1	County	\$345,000	Local
Total Public Investment over the past 10 years			\$9,000,000	

Future public sector investments for Salem and Dent County could well exceed \$30M within the next three to five years. Continuation of work on the Dent County Jail, the Dent County Fire District Station Remodel, a new Gymnasium at The Armory, ongoing remodel and upgrades to

the Old City Hall Auditorium, development of new Soccer Fields, ongoing Sewer Treatment Plant Upgrades, Implementation of the Advanced Meter Reading (AMR) system for City Utilities, Downtown Square Enhancements, and a bridge replacement and section of new paving in the County are the currently planned future projects. See the table below for details.

Table 16:

Planned Future Salem & Dent County Public Projects				
Year	Project	Owner or Fiscal	Estimated Cost	Funding Source
2019	Industrial Park Signage	City	\$50,000	Local
2019	Dent County Fire Station Remodel	County	\$1,133,000	Federal/Local
2019	New Gymnasium @ The Armory	City	\$1,000,000	State/Local
2019	Downtown Square Enhancements – Sidewalk Improvements	City	\$300,000	State/Local
2019	AMR (Advanced Metering Reading) Utility Upgrades	City	\$1,500,000	Local
2019	Sewer Treatment Plant Upgrades	City	\$10,000,000	Local
2020	City Hall Auditorium Remodel	City	\$750,000	Local/Private
2020	New Water & Sewer Line Extensions by SMDH	City	\$1,750,000	Local
2020	New Jail Construction	County	\$12,000,000	Local
2020	Cooley Bridge Replacement, CR 5610, District 1	County	\$365,000	Local
2020	½ mile of new paved road, CR 6670, District 1	County	\$135,000	Federal
2019	Old Middle School Property Reuse Plan	City	TBD	TBD
2019-2025	Downtown Square Enhancements	City	TBD	TBD
TBD	New Soccer Fields	City	TBD	TBD
TBD	Al Brown Park Improvements	City	TBD	TBD
Planned Future Public Investment			\$28,983,000	

Private Sector Investments

One of the primary benefits of public sector investment is the leveraging of private sector investment. Businesses are attracted to areas with adequate infrastructure, accessible services and amenities, and a desirable quality of life. The City of Salem and Dent County have accomplished significant public and civic works projects over the past few years, and combined with their commitment to future public investment, sends a positive signal that they are open for business. The following table shows new and expansion business activity in Salem and Dent County over the past decade.

Table 17:

New Businesses and Business Expansions in the past 5 years (Construction)	
Year	Business/Project
2019	Phelps Health Clinic – Opened in August
2018	Burger King Remodel
2018	Dollar Tree
2017	County Fuels/Sinclair Station
2017	Country Mart Remodel
2016	Air Evac Facility at SMDH
2016	I Can Too! Learning Facility
2015	Dollar General
	Walmart Remodel
	McDonalds Remodel
	Dent County Concrete

Section 8: Downtown Salem

Developing a Snapshot of Downtown

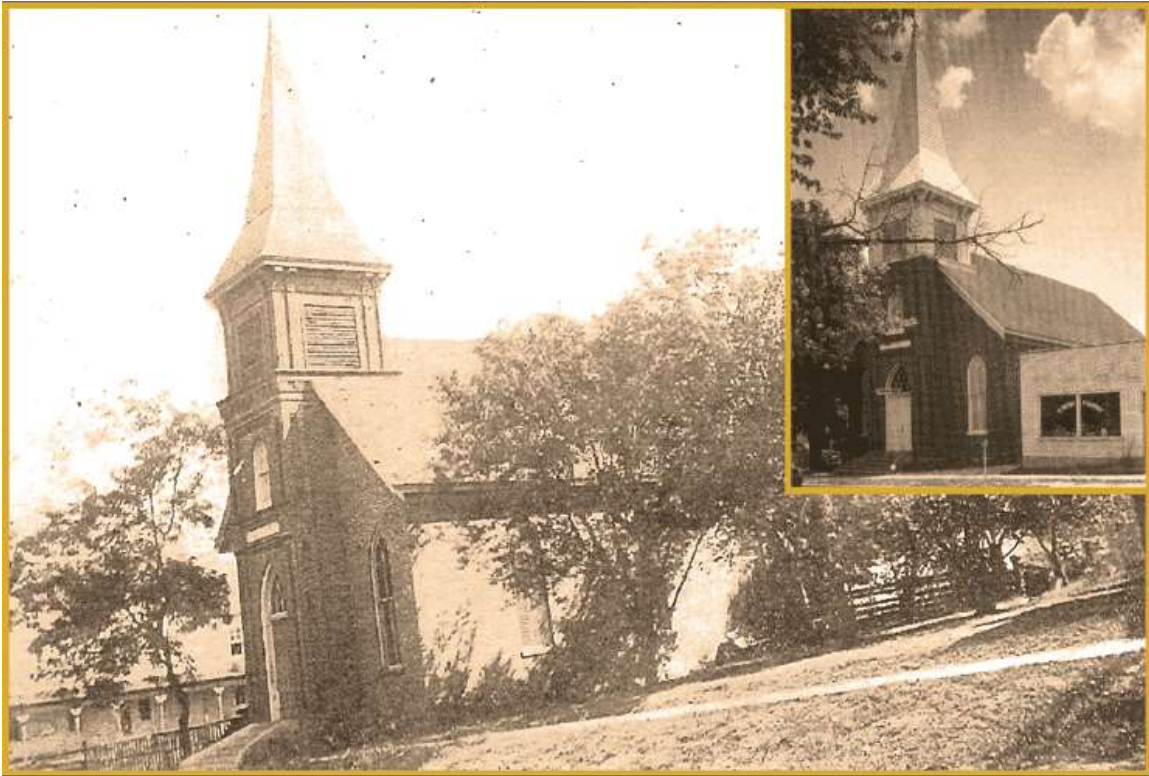
An economically active and viable downtown is often a positive indicator of a city's overall economic wellbeing. This analysis examines the area along Salem's 4th Street from the intersection with McArthur St. on the west to Oak St. on the east. The Downtown area is outlined in Image 7 on the next page. A reconnaissance of this corridor counted approximately 52 storefronts with the capacity to accommodate commercial businesses, many in historic structures such as those in the images below. Identification of this 8 block stretch of 4th Street was due to the finite nature with the ending of 4th St. (for this section) at the intersection with McArthur on the west and continuing east to Oak St. This section has a consistent concentration of commercial businesses for most of the street from one end to the other, and the availability of parking and pedestrian access along the corridor.

Parking in the Downtown area consists of 6 identified public parking lots, 2 privately owned parking lots and parallel parking on both sides of 4th St., except for angle parking on 4th Street between Main and Iron Streets and continuing around the Courthouse Square. There is also parallel parking on most side streets. There are several smaller private parking areas within the defined Downtown area as well. Signage to direct people to designated parking areas, specifically during festivals and Downtown events would be helpful. It would also be helpful for employees and owners of businesses and government offices located within the corridor to utilize the off-street parking in order to free this convenient parking space for customers.

LN Coffman Building, 200 W. 4th St. (depicts building in its original form) - Vacant



Gateway Antiques, 403 W. 4th St.



William Lynch Elementary, 101 N. Main St. (depicts building in its original form)



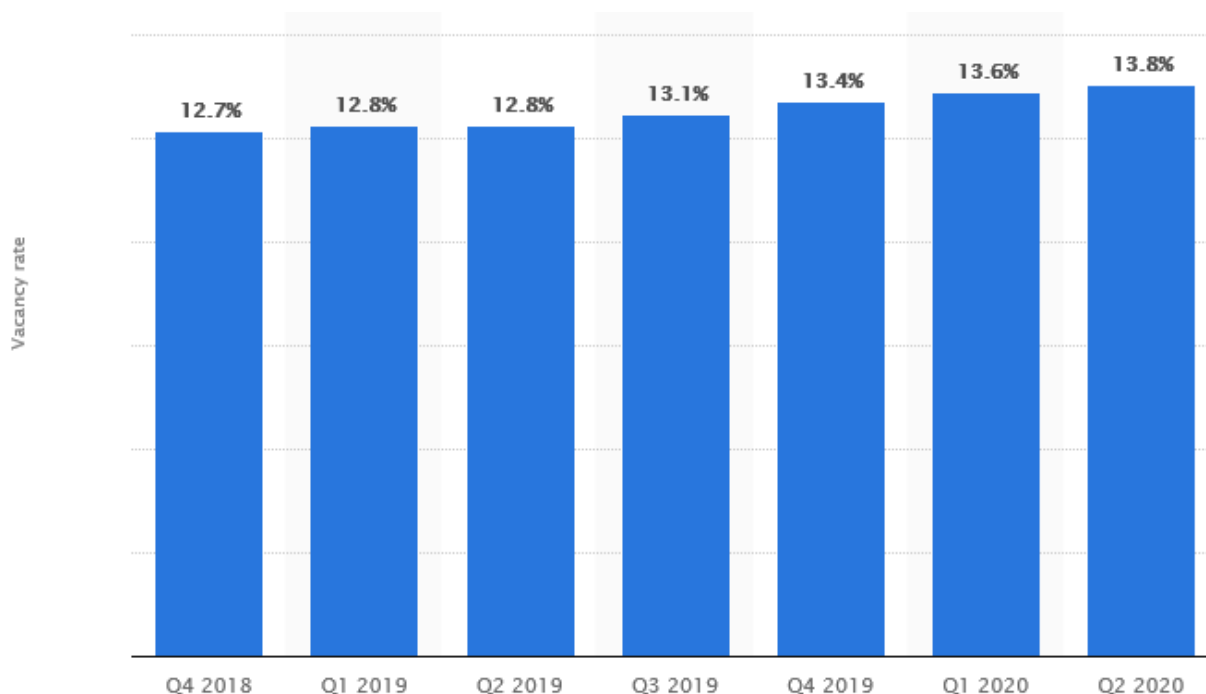
The types of enterprises residing on 4th Street include, but are not limited to the following:

Apparel - 1	Automotive Sales - 1
Computer Services – 1	Church - 1
Finance, Insurance - 3	Food & Beverage - 2
Furniture & Home Furnishings – 4	Gifts, Art & Antiques – 4
Govt Svs/Post Office/Library – 4	Health & Fitness – 1
Home, Farm, Hardware - 1	Legal Services- 5
Medical Services & Pharmacy - 5	Pawn Shop - 1
Personal Services – 5	Plumbing – 1
Real Estate - 1	Residence - 1
Thrift Store – 1	Vacancies – 9

The expanded Salem Downtown area, indicated in Image 9, contains a diverse mix of businesses, including four food & beverage establishments. Nine vacant properties on 4th St. out of approximately fifty-two represent a roughly 17 percent vacancy rate (based on available number of storefront properties) and is a condition of concern for the community. Since there are no identifiable vacancy rates for Downtown districts which vary by size and type for each community, comparison of this rate with the current projections for Retail Vacancy Rates in the table below, give some benchmarking idea.

Chart: 7

Forecast of Retail Vacancy Rates in the US.



<https://www.statista.com/statistics/194102/us-retail-vacancy-rate-forecasts-from-2010/>

High vacancy rates are generally regarded as negative and may indicate job loss and economic downturn in an area, and the opposite is true as well. High vacancy rates can also be an indication that the property is outdated, needs repairs or is in an undesirable location. Regarding Downtown locations, investment in pedestrian friendly atmospheres such as ADA compliant streetscapes, beautification efforts and storefront enhancements can change the perception for the better concerning location. These efforts combined with business investment in Downtown buildings, events, and co-operative marketing efforts can change the atmosphere and community feeling about the Downtown corridor.

Old City Hall/Civic Theater

A discussion of downtown Salem is not complete without also looking at efforts currently underway to renovate the Old City Hall and refit the Auditorium as a dual-purpose Community Event Center and Movie Theater. These efforts have been underway for the past year with more to come. The project is both City and public donation funded as well as using volunteer labor to accomplish some of the work. Everything Cinema, a local business that installs screens, projectors and other components for movie theaters around the country has donated some work and equipment. There are plans to use Salem High Schools Construction Trades Students to build a concession stand area and projection room. There is also an effort through the Dent County Community Foundation to raise money for dedicated theater seating.

It is anticipated that the Civic Theater will offer second-run movies and provide venue space for local arts and cultural programs and events. As such I have put together the following information and projections related to the impact of successful Arts and Culture non-profits as an industry in the community. The info in Table: 18 is excerpted from the source document (indicated at the bottom of the table). Hannibal is the closest in population to Dent County so we will use Hannibal's data in the table for a starting place.

Table: 18

Excerpted MO and NW Arkansas Regions						Total Economic Impact			
Name of Study Region	Type of Region	2015 Population	Estimated Spending by Nonprofit Arts and Cultural Organizations	Estimated Spending by Cultural Audiences	Total Spending by the Nonprofit Arts and Culture Industry	Full Time Equivalent Jobs Supported	Resident Household Income Generated	Local Government Revenue Generated	State Government Revenue Generated
National Estimates of Economic Impact			\$63.8 Billion	\$102.5 B	\$166.3 B	\$4.6 M	\$96.1 B	\$6.9 B	\$7.7 B
City of Hannibal	City	17,893	\$1,399,947	\$3,692,452	\$5,092,399	126	\$2,430,000	\$323,000	\$183,000
City of Joplin	City	51,316	\$1,792,636	\$3,558,721	\$5,351,357	191	\$3,432,000	\$251,000	\$201,000
Buchanan County	County	89,486	\$10,079,729	\$10,978,269	\$21,057,998	869	\$17,207,000	\$875,000	\$843,000
City of Columbia	City	116,906	\$9,152,344	\$5,561,719	\$14,714,063	659	\$10,766,000	\$679,000	\$605,000
City of Springfield	City	165,378	\$9,778,504	\$17,087,113	\$26,865,617	1,065	\$20,543,000	\$1,265,000	\$1,042,000
City of Kansas City	City	470,800	\$161,706,593	\$82,505,241	\$244,211,834	7,515	\$220,798,000	\$7,918,000	\$10,856,000
Greater St. Louis Area	Multi-County Region	1,319,295	\$363,745,576	\$227,188,613	\$590,934,189	19,129	\$476,226,000	\$28,586,000	\$29,110,000
Grand Center Arts & Entertainment District	Cultural District	1,319,295	\$77,174,797	\$29,240,126	\$106,414,923	3,441	\$89,009,000	\$4,712,000	\$5,112,000
Greater Kansas City Metropolitan Area	Multi-County Region	1,747,569	\$179,536,915	\$96,561,206	\$276,098,121	8,970	\$253,634,000	\$10,097,000	\$14,473,000
State of Missouri	State	6,063,589	\$602,903,738	\$436,105,742	\$1,039,009,480	31,925	\$805,621,000	\$42,612,000	\$46,998,000
Northwest Arkansas Region	Multi-County Region	463,113	\$67,503,606	\$63,693,488	\$131,197,094	4,647	\$92,899,000	\$3,466,000	\$10,792,000

Arts and Economic Prosperity 5, Americans for the Arts, 2017 (www.AmericansForTheArts.org/EconomicImpact).

However, this does not give us direct relatable information without making some assumptions:

1. When the Civic Theatre is operating, there will be a person designated who “programs” the theatre, makes sure that every possible day is booked with either movies, performances or other community events;
2. The Programmer is actively MARKETING the programs;
3. We will assume that Dent County is not the arts & culture hub that Hannibal is and will use numbers that are one third Hannibal’s numbers;
4. If our existing local Arts & Culture non-profits participate or organizations are created to utilize the space, a variety of additional artists will be employed.

Based upon the above and 1/3 of Hannibal’s numbers, we could make the following projections:

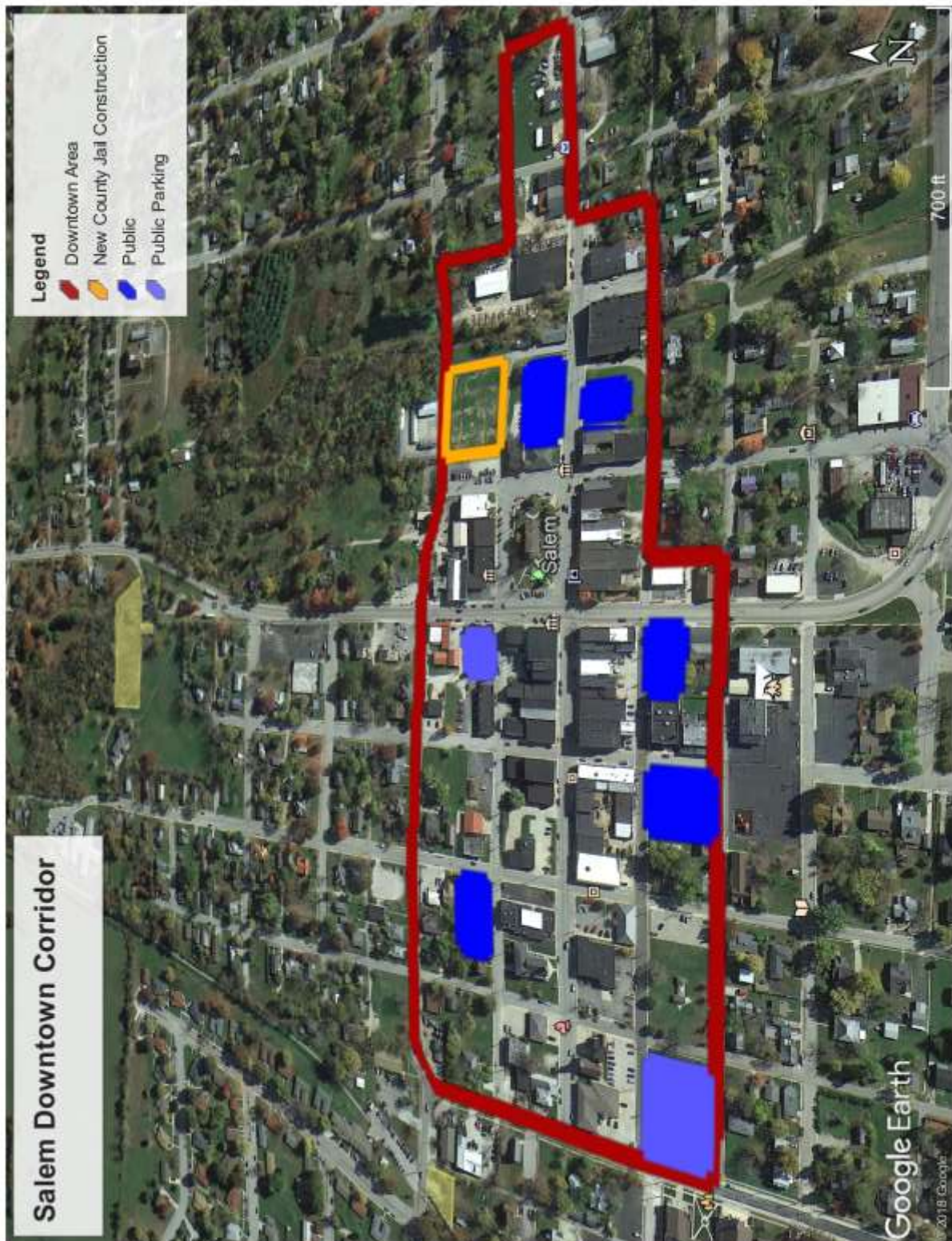
Salem Full Time Equivalent Jobs – 42

Resident Household Income Generated - \$810,000

Local Government Revenue - \$107,667

State Government Revenue - \$61,000

Image 9:



Section 9: Asset Mapping

Overview

Asset mapping is an effective tool for understanding the resources that exist in a region – both those internal assets within the City and County and external assets beyond the City and County that nonetheless impact economic development in the community. From an economic development perspective, internal and external assets include organizations, institutions, destinations, and resources that support business retention, expansion, and development.

Internal Assets

Salem and Dent County boast many organizations, institutions, destinations and resources that enhance business development prospects. The organizational and institutional assets influence such prospects directly, through targeted programs. Destinations and resources influence prospects more indirectly, often by enhancing quality of life and the attractiveness of the area.

Organizations and Institutions:

American Legion + Auxiliaries	Meramec Regional Planning Commission
American Volunteers	Riverways Pregnancy Resource Center
Community Churches	Rotary Club
Community Foundation of the Ozarks	Salem Area Arts Council
Dent County Community Foundation	Salem Area Community Betterment Association
Enhanced Enterprise Zone Board	Salem Chamber of Commerce
FFA & 4H Clubs	Salem Memorial District Hospital Auxiliaries
Garden Club	Salvation Army
Healthy Dent County	Sheltered Workshop
HIS Place (soup kitchen)	SOLVE
Industrial Development Authority	South Central Missouri Community Action Agency
Lifeway Center (Food Pantry)	Veterans of Foreign Wars

Destinations and Recreational Facilities:

Al Brown Sports Fields	JB Malone's
Bonebrake Center	Mark Twain National Forest
Bonita Valley	Meramec River
Dent County Museum	Montauk State Park
Developing Soccer Fields	Ozark Natural and Cultural Resource Center
Farmer's Market	Armory, The
Flat Nasty	Pioneer Forest
Huzzah Lakes	Salem Bowling Center

Indian Trails Archery

Indian Trails Conservation Area

Indian Trails Target Range

Salem Pool and Playground

Shawnee Mack Lake and Recreation Area

Community Facilities:

Cedar Grove Cemetery

Commons, The

Community Garden

Government Administrative Complex City of Salem
and Dent County

Masters Industrial Park

Salem Public Library

Salem Memorial Airport

Salem Memorial District Hospital

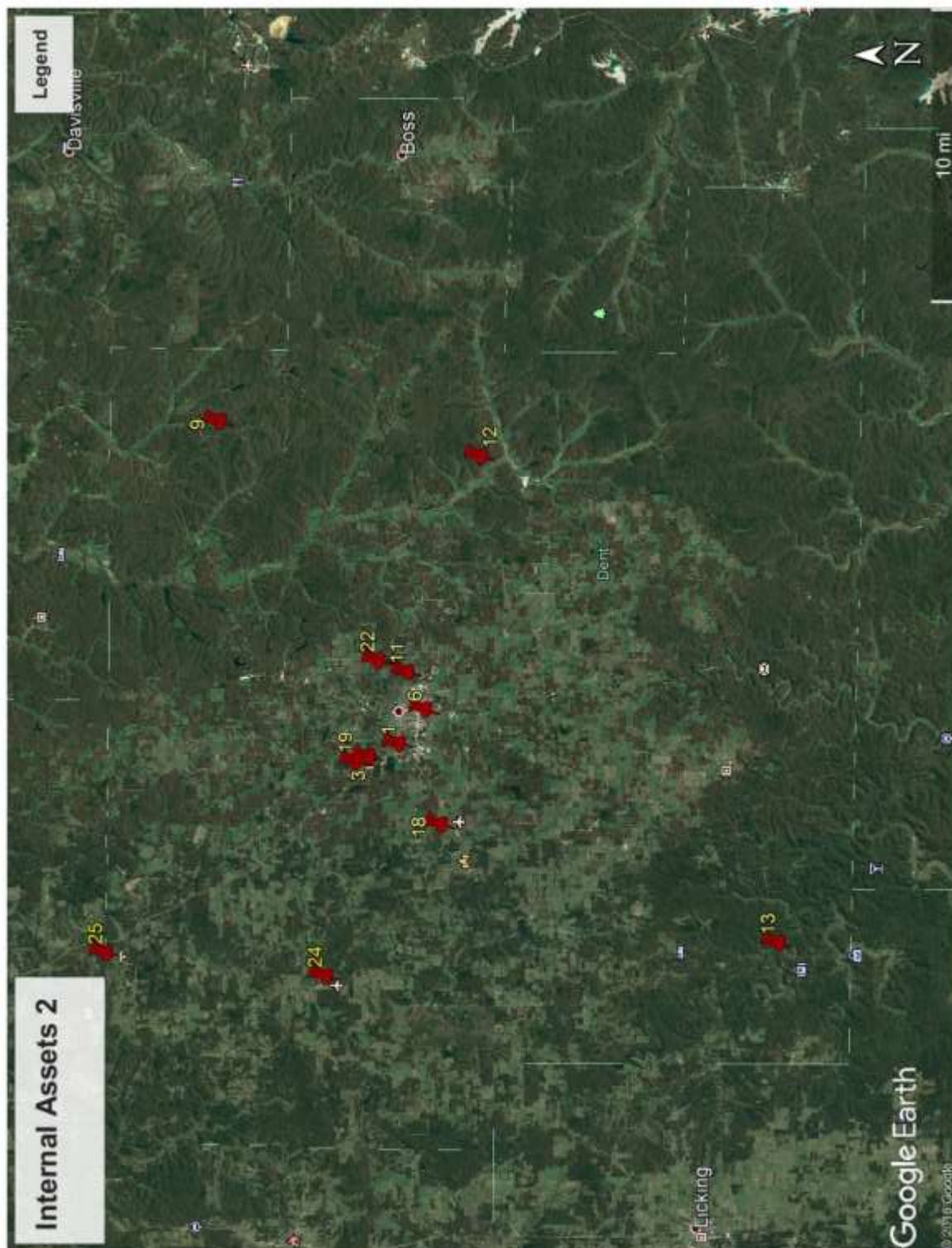
Salem R-80 Schools

Southwest Baptist University

Image 10:



1. Al Brown Sports Field
2. Bonebrake Center
3. Commons, The
4. Dent County Community Foundation
5. Dent County Museum
6. Developing Soccer Fields
7. Government Administrative Complex
8. Healthy Dent County
9. Indian Trails Conservation Area
10. Industrial Development Authority
11. Masters Industrial Park
12. Meramec River
13. Montauk State Park
14. Ozark Natural and Cultural Resource Center
15. Salem Area Community Betterment Association
16. Salem Chamber of Commerce
17. Salem Public Library
18. Salem Memorial Airport
19. Salem Memorial District Hospital
20. Salem Pool and Playground
21. Southwest Baptist University
22. Shawnee Mack Lake and Recreational Area
23. The Armory
24. Domeyer Airport
25. Bubbling Springs Landing Strip

Image 11:

External Assets

The region surrounding Salem and Dent County offers a variety of organizations, institutions, destinations and resources either directly engaged in economic development or offering

amenities that enhance business development prospects. These include the Meramec Regional Planning Commission (which operates the Enterprise Loan Fund); Missouri S&T; and the Central Workforce Development Area Board.

Current River State Park

Echo Bluff State Park

Devil's Well

Alley Mill

Acres Ferry _____ Bo's Hollow _____ Peck Ranch Conservation Area

Section 9: Land for Development

Overview

The availability of vacant land zoned for industrial and commercial use will be an important factor in Salem's economic future. The City of Salem has identified vacant parcels that could accommodate development. The first of which is the City owned Masters Industrial Park consisting of 163.47 acres. Most of this property is forested but there are industrial roads, and infrastructure into the main body including, Electricity, 7200-volt line with a .336 MCM, 12-inch Water mains and 8-inch Wastewater Mains. Natural Gas is currently in place but not connected to one site within the industrial park.

- Over 60% of Site Selectors are looking for buildings.
- If they don't find what they need, the 2nd look is at Certified Industrial sites.
- Only after they have exhausted the above searches do they look at anything else.

Image 12:



One opportunity to assist in marketing the Masters Industrial Park and aid Salem and Dent County's ability to respond to business requests for property is through the Missouri Partnership. Other clearing houses for Site Selection activities include a Certified Site designation with the Missouri Partnership.

Basic criteria to apply for Certified Site status:

- 25 or more contiguous acres under single ownership
- Primarily marketed for business recruitment or expansion
- Not intended for retail
- Minimum 6" water main
- Industrial sewer capacity
- Planned storm sewer commitment
- 3-phase, 12KW line to property line of site
- cleared of dense forestation and underbrush
- reasonably flat to the extent adequate developable space is available without excessive cut and fill effort

The Certified Site Application Packet may be viewed at the following website:

[https://ded.mo.gov/sites/default/files/program/instructions/MCS%20Pgm%20Requirements%20\(1-2018\)_0.pdf](https://ded.mo.gov/sites/default/files/program/instructions/MCS%20Pgm%20Requirements%20(1-2018)_0.pdf)

Below is a list of additional available parcels either actively listed with Real Estate Agents or available by owner.

Table 19:

<u>Dent County Vacant Parcels</u>		
<u>Property Identifier</u>	<u>Acres</u>	<u>Price</u>
Former Cahill Greenhouses	10	\$325,000
13893 S. Hwy 19	10	\$370,000
18370 E. Hwy 32 (Boss Saddle Club)	9.1	\$59,500
0 W Hwy 32	5	\$22,500
Hwy 72 across from SMDH	4.3	\$140,000
0 E. Scenic Rivers Blvd (next to Country Mart) MU	3.15	\$325,000
Hwy 72 West (just past Rolla Road intersection)	3	\$120,000
701 S. Grand St. (Shoe Factory) MU	2.8	Negotiable
1404 W Scenic Rivers Blvd. (across from Phelps Clinic) MU	1	\$69,000
802 S. McArthur St. MU	.638	\$75,000
.5 E. Scenic Rivers Blvd. MU	.47	\$99,900
0 West Scenic Rivers Blvd. (across from Walmart) MU	.43	\$149,000
1503 Jackson St. MU	.39	\$30,000
4 S. Tower St. MU	.31	\$35,000
307 N McArthur St. MU	.24	\$17,500

MU = Municipal Utilities

Findings

Not counting the Masters Industrial Park property, as of February 2019, Dent County had 15 available parcels representing approximately 51 acres that could accommodate industrial and commercial development. These parcels include individual and unimproved parcels, but most have municipal utilities available to them. The largest concentrations of vacant parcels are located along Highways 72 and 32.

Due to a lesser sum, current Commercial/Industrial buildings available in Dent County are included below.

Table 20:

Dent County Available Buildings		
<u>Property Identifier</u>	<u>Square Footage</u>	<u>Price</u>
2 Mullnack Drive (Masters Industrial Park)	25,276	\$199,900
Parts Tek	20,000	\$325,000
Former Walmart 2	12,000	\$4,000/Monthly
104 E. Center St.	10,820	\$94,900
Former Walmart 1	10,000	\$2,500/Monthly
1700 S Main St.	10,000	\$595,000
Former Sears	8,750	\$225,000
9393 W. Hwy 32	8,654	\$120,000
207, 209, 2011, 213, 215 W. 4 th St. (2 adjacent buildings)	7,420	\$165,000
1 S. Main St	6,397	\$299,900
Former Walmart 3	5,000	\$1,800/Monthly
4979 W. Hwy 32	4,600	\$124,500
1100 S. Louise St.	3,600	\$239,000
221 N. 4 th St.	3,538	\$160,000
1514 W. Scenic Rivers Blvd.	3,200	\$250,000
503 S. Main St.	3,136	\$219,500
207 E. 4 th St.	3000	\$950/Monthly
909 W. Scenic Rivers Blvd.	2880	\$260,000
101 Hwy 19	2,868	\$225,000
CR 4245	2700	\$125,000
Former Action Graphics	2,600	\$700/Monthly
202 W. 4 th St.	2,174	\$69,900
108 W. 4 th St.	2,135	\$99,900
Dent County Glass and Door	2,018	\$200,000

25 Private Lane 619	2,000	\$124,900
404 E. Scenic Rivers Blvd.	1,842	\$49,900
503 N. Jackson St.	900	\$114,500
201 E. Roosevelt St.	843	\$58,500
Former Walmart 4	240/760+	\$475/Monthly

Section 10: Educational Institution and Training Assessment

Salem R-80 Schools

- Construction Trades Program - provides students with the creative and technical skills to gain valuable, real-life experience through classroom and on the job training. Much of our training requires extensive hands-on education garnered through paid apprenticeships. Upon graduation, our students are fully prepared to work for small and large contracting firms that can eventually lead to roles in project management or administration, as well as gaining certification as a general contractor. Taught and led by industry professional and teacher, A.J. Tinker, the program will provide students with a curriculum focused on skills attainment and long-term employment, and includes, but is not limited to:
 - Rough and Finished Carpentry
 - Rough and Finished Plumbing
 - Electrical
 - Roofing
 - Flooring
 - Painting
 - Concrete
 - Insulation
 - Plan Reading and Design
 - Material Estimation
 - Tool Management and Use
 - Surveying
 - Safety and Code Requirements
 - Building Inspection
 - Job-site Supervision
 - Energy Efficiency and Solar Energy
- Internships
- Technology Trades Program - Salem High School, in collaboration with Southwest Baptist University (SBU - <https://www.sbuniv.edu/>), the Community Foundation of the Ozarks (CFO), and the Missouri Cybersecurity Center of Excellence (MCCoE – <https://www.mccoe.org>), are forming a strategic partnership to establish a Salem High School Technology Trades Program in Salem. The Salem High School Technology Trades program will leverage courses and resources via SBM, CFO, and the MCCoE to create a Salem Regional Technology Hub (SRTH), based in Salem Missouri, with support to the surrounding communities (i.e. Bunker, Viburnum, Licking, St. James, Newburg, Steelville, etc.). The Salem High School Technology Trades program and the SRTH, via a Salem High School Instructor with support from SBU staff, will provide training in Software Programing, Computer Networking, and Cybersecurity, adhering to SBU sponsored course curriculums and industry best standards (i.e. Code.org, CompTIA A+ Certification., CompTIA Network+ Certification, CompTIA Security+ Certification, Cisco CCNA Certification, etc.).

Southwest Baptist University (SBU)

Majors

- Criminal Justice - both theoretical and practical emphases, you will learn about the criminal justice system, criminal law and law enforcement and will be prepared for a variety of potential career paths, such as law enforcement, corrections, probation and parole, private security, research and more. Some graduates go on to law school or other graduate-level work.

- Elementary Education - become certified to teach in elementary school settings (grades 1-6 in Missouri). Coursework and experiences in local school settings will prepare you to meet the needs of young students and to be aware of young students' growth and development.
- General Business - designed for non-traditional students. Both associate's and bachelor's degrees are offered. You will learn a broad curriculum of study in business administration-related courses with a Christ-centered worldview, preparing you for diverse, ever-changing, global careers, and equipping you for continued education and service.
- General Studies - associate degrees in general studies for students wishing to pursue a college degree that will open increased career opportunities and provide a foundation for further education. You may choose between an Associate of Arts in General Studies (includes required foreign language courses) or an Associate of Science in General Studies.
- Health Sciences - In cooperation with the Mercy College of Nursing and Health Sciences of Southwest Baptist University located in Springfield, Mo., the SBU-Salem campus offers associate and bachelor's degrees in health sciences.

The associate of health science degree is a great option for students interested in earning a healthcare degree to compliment a certificate program (such as EMT, medical assisting, or paramedic) or gaining a foundation degree in the health sciences.

The Bachelor of Science in health sciences degree is a degree-completion program for allied health professionals already in an established career, or for a student interested in pursuing a degree in healthcare.

- Nursing - RN Bridge Program - turn your LPN (Licensed Practical Nurse) into an RN (Registered Nurse). If you have already obtained an LPN or Paramedic license, you may go through the RN bridge program to pursue an Associate of Science in Nursing (ASN) degree at the Southwest Baptist University-Salem Campus in conjunction with the Mercy College of Nursing and Health Sciences of SBU.
- Psychology - scientifically based exploration of the behavioral and mental processes of individuals, preparing you for a variety of career paths. SBU's psychology courses are people-focused and emphasizes applied, hands-on learning opportunities.
Our unique psychology courses provide a wide range from which to choose, allowing you to add breadth and depth to your program while choosing courses that best fit your needs and interests. You also can choose to add a minor in criminal justice or sociology.
SBU's people-focused approach to psychology will equip you with the interpersonal and servant leadership skills that will prepare you for endless career opportunities. You will learn from faculty with a wide range of first-hand real-world experiences in multiple careers.
- Sociology - a very applied field of study and can be used as a springboard for graduate school study or for careers in the private, government, nonprofit or education sectors. You also can broaden your education by adding a minor in criminal justice or psychology to your degree program.

The SBU Salem Campus offers a Bachelor of Science degree in sociology through afternoon and evening classes. This flexibility makes it a great option for you if you're already in the workforce but want to pursue further education or expand your career opportunities.

Minors

Business

Criminal Justice

Leadership

Psychology

Sociology

Other Degree Coursework

Pre-Nursing (pre-requisite courses)

Makerspace program – What is a Makerspace?

A makerspace is a collaborative workspace inside a school, library or separate public/private facility for making, learning, exploring and sharing that uses high tech to no tech tools. These spaces are open to kids, adults, and entrepreneurs and have a variety of maker equipment including 3D printers, laser cutters, cnc machines, soldering irons and even sewing machines. A makerspace however doesn't need to include all these machines or even any of them to be considered a makerspace. If you have cardboard, legos and art supplies you're in business. It's more of the maker mindset of creating something out of nothing and exploring your own interests that's at the core of a makerspace. These spaces are also helping to prepare those who need the critical 21st century skills in the fields of science, technology, engineering and math (STEM). They provide hands on learning, help with critical thinking skills and even boost self-confidence. Some of the skills that are learned in a makerspace pertain to electronics, 3d printing, 3D modeling, coding, robotics and even woodworking. Makerspaces are also fostering entrepreneurship and are being utilized as incubators and accelerators for business startups. There have already been some amazing success stories that have come out of makerspaces to date. www.makerspaces.com

Salem Makers

The Salem Makers is proposed to be a community program housed in the Salem High School Construction Trades facility and funded mainly by fee classes, rental income for use of equipment and facility and community donations. It is anticipated that the programs available through Salem Makers will accommodate elementary school age children through senior citizens who have an interest and curiosity for making things.

It is anticipated that instructors and trainers for the Salem Makers program will come from community and industry volunteers and interested persons; MU S&T Small Business & Technology Development Center Business Counselors, MU Extension, MU Rural Entrepreneurship Class, MU Elementary Engineering Academy Robotics Program (TECH4k5); and other partners and training to be identified to fit the needs and interests of the community members using the Program. The Salem Makers program will need a Coordinator who is anticipated to be an employee of the City of Salem with support from MU Extension and other entities.

It is predicted that a minimum of 130 people of the Salem/Dent County community (15,600 total county population) would utilize such program on a regular basis. In Princeton University's Center for Arts and Cultural Policy Studies, 2001, it was determined that there were 2,511,000 artists in the US with a total population of roughly 3 billion. This equates to .837% of the total population and this figure was used to determine the local users of the program. This

calculation only considers the potential artist population and may not include those who do not consider themselves artist, but craftsmen, and manufacturers.

Specific training offered would focus on safe operations of wood working equipment, shop protocols, resume and basic business plan building and soft skill attainment such as locating information, and entrepreneurial education.

By utilizing the shop tools already in place for the Construction Trades Program, the Salem Makers program will extend basic construction skills and knowledge in the community with a focus to develop value-added products from the timber industry already present in Dent County. These value-added products will focus on opportunities to export products out of the County/State/Country. Startup businesses who export products in the following NAICS Codes are eligible for export research and assistance through the MO Department of Economic Development, International Trade & Investment Office who currently have a federal grant specifically to assist small businesses in Missouri to export products.

Eligible NAICS Codes:

321 – Wood Product Manufacturing

- 3211 - Sawmills and Wood Preservation
- 3212 - Veneer, Plywood, and Engineered Wood Product Manufacturing
- 3219 - Other Wood Product Manufacturing
Millwork; Wood Window and Door Manufacturing; Cut Stock, Resawing Lumber, and Planning; Other Millwork (including Flooring); Wood Container and Pallet Manufacturing; Wood Container and Pallet Manufacturing; All Other Wood Product Manufacturing; Manufactured Home (Mobile Home) Manufacturing; Prefabricated Wood Building Manufacturing; All Other Miscellaneous Wood Product Manufacturing

322 – Paper Manufacturing

- 3221 - Pulp, Paper, and Paperboard Mills
- 3222 - Converted Paper Product Manufacturing

323 - Printing and Related Support Activities

324 - Petroleum and Coal Products Manufacturing

325 - Chemical Manufacturing

- 3251 Basic Chemical Manufacturing
- 3252 Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing
- 3253 Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
- 3254 Pharmaceutical and Medicine Manufacturing
- 3255 Paint, Coating, and Adhesive Manufacturing
- 3256 Soap, Cleaning Compound, and Toilet Preparation Manufacturing
- 3259 Other Chemical Product and Preparation Manufacturing

326 - Plastics and Rubber Products Manufacturing

- 3261 Plastics Product Manufacturing
- 3262 Rubber Product Manufacturing

327 - Nonmetallic Mineral Product Manufacturing

- 3271 Clay Product and Refractory Manufacturing
- 3272 Glass and Glass Product Manufacturing
- 3273 Cement and Concrete Product Manufacturing
- 3274 Lime and Gypsum Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
Abrasive Product Manufacturing; All Other Nonmetallic Mineral Product
Manufacturing; Cut Stone and Stone Product Manufacturing; Ground or Treated
Mineral and Earth Manufacturing; Mineral Wool Manufacturing; All Other
Miscellaneous Nonmetallic Mineral Product Manufacturing

Job Demand:

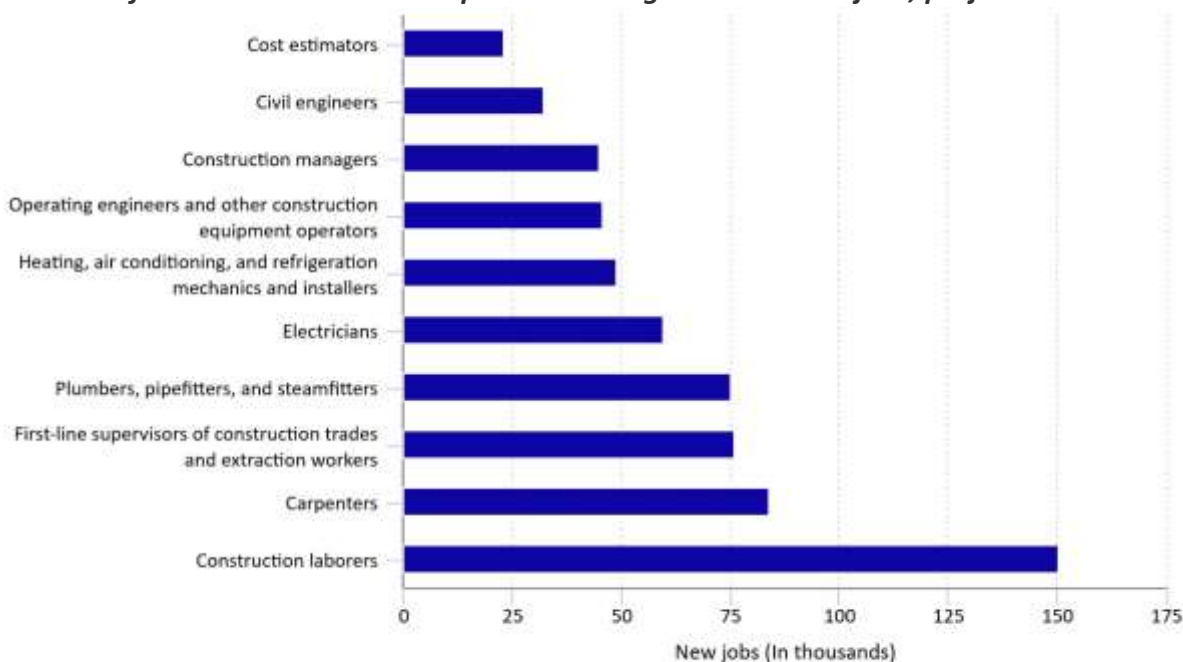
Per the US Department of Labor, Bureau of Labor Statistics, Beyond the Numbers publication, October 2018, Volume 7, No. 17, The employment outlook for occupations tasked with building America's infrastructure;

Most new jobs:

Construction laborers are projected to add the most new jobs among the selected infrastructure-related occupations— 150,400 new jobs from 2016 to 2026. This is also the largest of the selected infrastructure-related occupations in terms of employment size, and these workers perform various physical labor tasks at construction jobsites. Other occupations that build the structure make this top 10 list, including carpenters; plumbers, pipefitters, and steamfitters; and electricians. (See Image 13 below.)

Image 13:

Selected infrastructure-related occupations adding the most new jobs, projected 2016-26.



Click legend items to change data display. Hover over chart to view data.
Source: U.S. Bureau of Labor Statistics, National Employment Matrix.



Link to entire document: <https://www.bls.gov/opub/btn/volume-7/the-employment-outlook-for-occupations-tasked-with-building-americas-infrastructure.htm>

Central Workforce Development Area 2016-2026 Industry Projections for selected Construction Trades and Salem Makers woodworking/timer industry focus related jobs:

Code	Title	Estimated	Projected	Numeric	Percent
236000	Construction of Buildings	2,597	2,917	320	12.31%
238000	Specialty Trade Contractors	6,859	8,221	1,362	19.85%
321000	Wood Product Manufacturing	1,750	1,767	17	0.95%

Missourieconomy.org

- Link vo-tech classes at HS with Makerspace programs

The Armory

The Mo Job Center has had a satellite office at the Salem Community Center @ the Armory since 2017. Sue Nardi, Career Consultant, works with residents and employers to assist with:

Resume Writing

Job Search

Job Referrals

Assists Employers in finding candidates

Interview Skills

Work Keys Testing

Computer Classes

Veterans Representatives are also available to provide case management services to help Veterans eliminate barriers to employment and gain access to resources. Workforce Innovation and Opportunity Act (WIOA) Youth staff also are available to assist youth 14-24 years of age with education and job-related programs.

Healthy Dent County, in cooperation with the City of Salem, has offered this free office space to house the satellite office since June of 2017.

Also, at The Armory

The Missouri Sheriff's Association has a Basic Peace Officer Training annual program available in Salem. <https://www.mosheriffs.com/basic-peace-officer-academy/>

This training is held at the Salem Community Center @ the Armory and is an 11-month program with classes being held Tuesday and Thursday evenings from 6-10 pm, Saturdays from 8-5 and some Sunday classes. This link to their website has a lot of information that could be used for the grant. Students graduate with a Class "A" Peace Officers License.

Healthy Dent County has partnered with the MO Sheriff's Association, Dent County Sheriff's Office and the City of Salem Police Department to bring this program to our local citizens for the past 5 years.

Section 11: Agricultural Industry Assessment

MO STEP=UP

The following MO STEP=UP program information applies to both the Agricultural and Timber Industry Sections of this document, Sections 10 and 11. A reference to the program may also be found in Section 3 of this document, Business Resource Inventory.

MO STEP=UP – Missouri State Trade and Expansion Promotion Grant Program enables the state to carry out export programs that assist eligible small businesses concerns. The aim of the program is to increase the number of small businesses exporting and increase the value of exports for those small businesses that are currently exporting.

The program has two tracks: The Market Expansion track that focuses on companies that are currently exporting to at least one market and demonstrates export sales potential as well as confirmation of export experience; and the New-to-Export Program which targets companies that do not currently export to a foreign market or whose exports are sporadic and very small in volume.

The program includes a three-month Export Training Program which includes onsite visits of the business facility; sessions specific to marketing research for the specific needs; deep-dive into international logistics, legal considerations and general export regulations; and one-on-one coaching, info & resources plus critical analysis and evaluation of an export development plan. Through the program certain eligible expenses may be reimbursed for marketing activities focused on sales and export of goods. Additional information: <https://ExportMissouri.mo.gov>

The table below is the State of Missouri's Department of Economic Development, International Trade and Investment Office list of eligible Advanced Manufacturing NAICS Codes for support and assistance through the STEP=UP program. This table will be repeated later as it applies to additional sections for discussion. For this section the specific Agriculture NAICS Codes that are eligible are highlighted and followed by Table: 21 which lists the matching NAICS Codes that are active in Dent County over the past two years.

Table: 21

Eligible Advanced Manufacturing NAICS Codes				
Agriculture	Food Manufacturing	Wood Manufacturing	Metal Manufacturing	Wholesale Trade
111	311	321	331	424
112	312	322	332	*Merchant Wholesalers of Charcoal -424990
115	313	323	333	Information
	314	324	334	511
	315	325	335	
	316	326	336	Services
		327	337	541
*Logging - 113310		*sawmills - 321113	339	

MO STEP=UP program presentation, March 15, 2019 at the Meramec Regional Planning Commission, given by Natascha Lord, Trade Specialist and Ann Pardalos Managing Director of the International Trade & Investment Office of the MO DED.

Local Activity

Table: 22

Active Agricultural Activities in Dent County 2017-2018	
111150	CORN FARMING
112111	BEEF CATTLE RANCHING AND FARMING
112511	FINFISH FARMING AND FISH HATCHERIES
112990	ALL OTHER ANIMAL PRODUCTION
113210	FOREST NURSERIES AND GATHERING OF FOREST PRODUCTS
115210	SUPPORT ACTIVITIES FOR ANIMAL PRODUCTION

Missouri Department of Revenue, Public Taxable Sales Reports for taxable sales/use taxes for 2018 and 2017 for Dent County, MO. <https://dor.mo.gov/publicreports/>

The following are definitions for the specific NAICS Codes active in Dent County as indicated in the table above.

111150 Corn Farming - Corn farming (except sweet corn), field and seed production, or Popcorn farming, field and seed production

112111 Beef Cattle Ranching and Farming - Backgrounding, cattle; Beef cattle ranching or farming; Calf (e.g., feeder, stocker, veal) production; Cattle conditioning operations; Cattle farming or ranching; Dairy heifer replacement production; Feeder calf production; Stocker calf production; Veal calf production

112511 Finfish Farming and Fish Hatcheries - Baitfish production, farm raising; Catfish production, farm raising; Finfish production, farm raising; Finfish, hatcheries; Fish farms, finfish; Goldfish production, farm raising; Hatcheries, finfish; Hybrid striped bass production; Minnow

production, farm raising; Ornamental fish production, farm raising; Tilapia production; Tropical fish production, farm raising; Trout production, farm raising

112990 All Other Animal Production - Alpaca production; Aviaries (i.e., raising birds for sale); Bird production (e.g., canaries, love birds, parakeets, parrots); Bison production; Breeding of pets (e.g., birds, cats, dogs); Buffalo production; Cat production; Combination livestock farming (except dairy, poultry); Companion animals production (e.g., cats, dogs, parakeets, parrots); Cricket production; Deer production; Dog production; Earthworm hatcheries; Elk production; General combination animal farming; Kennels, breeding and raising stock for sale; Laboratory animal production (e.g., guinea pigs, mice, rats); Llama production; Raising swans, peacocks, flamingos, or other adornment birds; Rattlesnake production; Worm production

113210 Forest Nurseries and Gathering of Forest Products - primarily engaged in (1) growing trees for reforestation and/or (2) gathering forest products, such as gums, barks, balsam needles, rhizomes, fibers, Spanish moss, ginseng, and truffles

115210 Support Activities for Animal Production - Animal semen banks; Artificial insemination services for livestock; Artificial insemination services for pets; Boarding horses (except racehorses); Branding; Breeding, animal, services; Bull testing stations; Cattle spraying; Cleaning poultry houses; Corralling, drovers; Dairy herd improvement associations; Equine boarding; Farriers; Hoof trimming; Horses (except racehorses), boarding; Horses, training (except racehorses); Horseshoeing; Livestock breeding services (except consulting); Livestock spraying; Milk testing for butterfat and milk solids; Pedigree (i.e., livestock, pets, poultry) record services; Poultry catching services; Reproductive flushing services for animals; Semen collection; Sheep dipping and shearing; Showing of cattle, hogs, sheep, goats, and poultry; Stud services; Training horses (except racehorses); Vaccinating livestock (except by veterinarians)

Alternative Opportunities

As indicated in Table: 21 above there is very little crop production happening in Dent County. Partially due to rocky, hilly terrain; karst formations and poor soil quality. In the “Summary of Soil Fertility Status in Missouri by County, Soil Region and Cropping Systems” by M. V. Nathan, Y. Sun, and D. Dunn (Progress Report-2007), it is noted that, “...the highest percentage of low fertility soils occurs in the highly weathered Ozarks region.” Between the years of 1996 and 2006 there were 788 soil samples tested in Dent County which resulted in the following findings:

- Soil pH levels are ≤ 5.3 – needs lime added for economically viable crop production
- Soil P (Phosphorus) levels are low at ≤ 11 mg/kg - P fertilizer is essential to avoid profit loss by major crops.
- Soil K (Potassium) levels are medium at 56-110 mg/kg

The USDA Hardiness Zone map places Dent County in zones 6a and 6b which indicate average temperature lows between -10 and 0 degrees F.

Options

One of the opportunities in Dent County is to look at alternative crops and farm diversification. The USDA has information and recommendations available at the following link:

<https://www.nal.usda.gov/afsic/list-alternative-crops-and-enterprises-small-farm-diversification>.

One such opportunity was an Edible Mushroom Workshop offered by the Missouri University Center for Agroforestry and the Missouri University Extension in April of 2019. Others are offered occasionally throughout the year.

Another example is Meramec Bison which focuses on growing and distributing Bison meat products. This is an alternative or substitute product that has a niche market and provides revenue into Dent County. Other alternative crops and livestock should be researched to identify potential suitable matches for the area climate, resources and opportunities.

Additional crop information for existing crops in Missouri may be found here:

<http://crops.missouri.edu/index.htm>.

Section 12: Timber Industry Assessment

Based upon job growth predictions from the Missouri Economic Research and Information Center for the Central Region Workforce Area as indicated in Chart 2 on page 8 of this document, Support Activities for Agriculture and Forestry are predicted to grow at rate of 14.5% between 2016 and 2026 and indicates very modest growth in forestry and logging at a rate of .48%.

Based upon these moderate predictions and that the State of Missouri's Department of Economic Development, International Trade and Investment Office lists Wood Manufacturing as an eligible Advanced Manufacturing NAICS Code as indicated in the highlighted column in the table below, there are opportunities to grow not only our exporting of wood and lumber goods but value-added wood products as well.

Table 23:

Eligible Advanced Manufacturing NAICS Codes				
Agriculture	Food Manufacturing	Wood Manufacturing	Metal Manufacturing	Wholesale Trade
111	311	321	331	424
112	312	322	332	*Merchant Wholesalers of Charcoal -424990
115	313	323	333	Information
	314	324	334	511
	315	325	335	
	316	326	336	Services
		327	337	541
*Logging - 113310		*sawmills - 321113	339	

MO STEP=UP program presentation, March 15, 2019 at the Meramec Regional Planning Commission, given by Natascha Lord, Trade Specialist and Ann Pardalos Managing Director of the International Trade & Investment Office of the MO DED.

Below are specific industry sectors that fit the NAICS Codes above for Wood Manufacturing:

321 – Wood Product Manufacturing

- 3211 - Sawmills and Wood Preservation
- 3212 - Veneer, Plywood, and Engineered Wood Product Manufacturing
- 3219 - Other Wood Product Manufacturing
 - Millwork; Wood Window and Door Manufacturing; Cut Stock, Resawing Lumber, and Planning; Other Millwork (including Flooring); Wood Container and Pallet Manufacturing; Wood Container and Pallet Manufacturing; All Other Wood Product Manufacturing; Manufactured Home (Mobile Home) Manufacturing; Prefabricated Wood Building Manufacturing; All Other Miscellaneous Wood Product Manufacturing

322 – Paper Manufacturing

- 3221 - Pulp, Paper, and Paperboard Mills
- 3222 - Converted Paper Product Manufacturing

323 - Printing and Related Support Activities**324 - Petroleum and Coal Products Manufacturing****325 - Chemical Manufacturing**

- 3251 Basic Chemical Manufacturing
 - 325194 Charcoal briquettes, wood, manufacturing
 - 325194 Charcoal (except activated) manufacturing
- 3252 Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing
- 3253 Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
- 3254 Pharmaceutical and Medicine Manufacturing
- 3255 Paint, Coating, and Adhesive Manufacturing
- 3256 Soap, Cleaning Compound, and Toilet Preparation Manufacturing
- 3259 Other Chemical Product and Preparation Manufacturing
 - 325998 Charcoal, activated, manufacturing
 - 325998 Activated carbon or charcoal manufacturing
 - 325998 Lighter fluids (e.g., charcoal, cigarette) manufacturing

326 - Plastics and Rubber Products Manufacturing

- 3261 Plastics Product Manufacturing
- 3262 Rubber Product Manufacturing

327 - Nonmetallic Mineral Product Manufacturing

- 3271 Clay Product and Refractory Manufacturing
- 3272 Glass and Glass Product Manufacturing
- 3273 Cement and Concrete Product Manufacturing
- 3274 Lime and Gypsum Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
 - Abrasive Product Manufacturing; All Other Nonmetallic Mineral Product Manufacturing; Cut Stone and Stone Product Manufacturing; Ground or Treated Mineral and Earth Manufacturing; Mineral Wool Manufacturing; All Other Miscellaneous Nonmetallic Mineral Product Manufacturing

For the previous six quarters ending June 2018 the following NAICS Codes/Industries, that correspond with the previously listed Eligible Advanced Manufacturing NAICS Codes, were active in Dent County.

Table 24:

Active Advanced Wood Manufacturing in Dent County	
321113	SAWMILLS
321214	TRUSS MANUFACTURING
321918	OTHER MILLWORK (INCLUDING FLOORING)
321920	WOOD CONTAINER AND PALLET MANUFACTURING
321992	PREFABRICATED WOOD BUILDING MANUFACTURING
321999	ALL OTHER MISCELLANEOUS WOOD PRODUCT MANUFACTURING
322211	CORRUGATED AND SOLID FIBER BOX MANUFACTURING
323111	COMMERCIAL PRINTING (EXCEPT SCREEN AND BOOKS)
323117	BOOKS PRINTING
323120	SUPPORT ACTIVITIES FOR PRINTING
325412	PHARMACEUTICAL PREPARATION MANUFACTURING
325611	SOAP AND OTHER DETERGENT MANUFACTURING
325920	EXPLOSIVES MANUFACTURING
325992	PHOTOGRAPHIC FILM, PAPER, PLATE, AND CHEMICAL MANUFACTURING
325998	ALL OTHER MISCELLANEOUS CHEMICAL PRODUCT AND PREPARATION MANUFACTURING
326119	ALL OTHER PLASTICS PRODUCT MANUFACTURING
326220	RUBBER AND PLASTICS HOSES AND BELTING MANUFACTURING
327320	READY-MIX CONCRETE MANUFACTURING

Missouri Department of Revenue, Public Taxable Sales Reports for taxable sales/use taxes for 2018 and 2017 for Dent County, MO. <https://dor.mo.gov/publicreports/>

All the previously listed NAICS Codes in this section may be eligible for export assistance and support by the MO Department of Economic Development through the MO STEP=UP program explained at the beginning of Section 10.

Of additional note for future planning are the following Trade Shows for all things Wood:



August 25-28, 2020
International Woodworking Fair,
Georgia World Congress Center in Atlanta, GA
<http://www.iwfatlanta.com/default.aspx>

Perhaps a joint, cooperative booth or representative group representing Dent County should consider attendance next year.



www.moforest.org - Opportunities for Education and Certified Logger Certs.

Section 13: Tourism Industry Assessment

Table 25:

SIC CODE	CODE TITLE	FY17 STATEWIDE EXPENDITURES ¹	DENT COUNTY TOURISM \$
5811	Eating Places Only	\$4,648,489,288	\$5,052,908
5812	Eating and Drinking Places	\$5,390,158,187	\$5,859,102
5813	Drinking Places – Alcohol Beverage Only	\$374,054,131	\$406,597
7010	Hotel, Motel and Tourist courts	\$1,735,472,799	\$1,886,459
7020	Rooming and Boarding Houses	\$1,184,267	\$1,287
7030	Camps and Trailer Parks	\$45,185,334	\$49,116
7033	Trailer Parks and Camp Sites	\$16,885,421	\$18,354
7041	Organization Hotel and Lodging Houses	\$98,330,535	\$106,885
7920	Producers, Orchestras, Entertainers	\$39,149,223	\$42,555
7940	Commercial Sports	\$312,164,644	0
7990	Misc. Amusement and Recreational	\$75,134,168	\$81,671
7991	Boat and Canoe Rentals	\$66,520,350	\$72,308
7992	Public Golf Courses and Swimming Pools	\$68,533,244	\$74,496
7996	Amusement Parks	\$130,735,508	0
7998	Tourist Attractions	\$122,286,121	\$132,925
7999	Amusement NEC (not elsewhere classified)	\$150,697,389	\$163,808
8420	Botanical and Zoological Gardens	\$1,006,342	0
	FY17 Totals	\$13,275,986,951	\$13,951,471
	FY18 Totals	\$13,499,644,961	\$15,005,660

¹ 2017 expenditure figures are a preliminary run. Missouri Division of Tourism.

While the above SIC CODES reflect FY17 numbers the FY18 Annual Report for the MO Division of Tourism states there were 301,789 Tourism related jobs statewide which is a reduction of roughly 11,500. Dent County has 331 Tourism related jobs per this same report, an increase of 9 jobs, equaling .102% of the statewide total and the percentage based upon a revenue comparison between the state and county is .1087%. For the previous calculation, we first subtract the dollar amount for Commercial Sports, Amusement Parks, Botanical and Zoological Gardens (Dent County does not have these types of attractions/businesses). Using this calculation, we can then assume Tourism revenue in Dent County roughly equaling the dollar amounts in the far-right column for each indicated SIC Code.

<https://mdt-visitmo-cdn.s3.amazonaws.com/industry-files/programs-%202020%20info/1551806016-fy2020-dmo-guidelines.pdf>

In order to take advantage of the opportunities available to Dent County through the MO Tourism Division, a multi-step strategy should be employed.

1. For the initial step, it is recommended that the City and Chamber partner to educate local businesses and attractions about submitting listings to VisitMO.com. This is a free opportunity for qualifying businesses, events and attractions. Listings for inclusion in the annual Official Missouri Travel Guide are drawn from the VisitMO.com database. Listings

that qualify for inclusion in the Travel Guide will be published in the printed guide unless the listing owner opts out of the guide by checking the appropriate box on the submissions form. Listings are submitted through our industry website at <https://industry.visitmo.com/first-time-users>. These listings need to be updated and refreshed annually to avoid being deleted from the Division website. It should be tracked by the Chamber and/or City to send reminders and ensure annual workshops for businesses.

2. The next step is to develop a Tourism Marketing plan based upon both the local marketing targets that are currently identified by the Salem Chamber and Dent County Tourism Board and incorporating those target markets and marketing medium and placements utilized by the MO Division of Tourism for the 2020 Marketing Year. This information is available on the Division's website: visitmo.com.
3. At the Regional Tourism meeting held in Springfield on March 22, 2019, the concept of regional marketing partnerships in the works, focused on the Ozarks as a destination was mentioned. It is recommended that Salem and Dent County keep tabs on this development through tourism networking and not only follow closely, but actively participate when the opportunity arises.
4. Take advantage of the Mo Division of Tourism Marketing Platform Development program. This program is designed for one-time marketing platform investments that will be used and provide benefit beyond the fiscal year of the initial investment. Approved projects that provide improvement, expansion or creation of tourism marketing programs and projects are matched up to 50 percent. Non-certified DMO's are eligible and funding is only available to smaller organizations. Applications for FY 2021 funding will likely be due in the first part of May 2020.

Following are eligible platforms for the Marketing Platform Development funding:

- Brand Awareness Study - MDT will assist industry partners in the funding of a Brand Awareness Study. A brand awareness study (and analysis) can give a measurement of which consumers are familiar with the brand and product. How much of the target market is aware of the brand? Understanding this information can enable you to market more efficiently and effectively.
- Creative Design - It is important that tourism industry organizations have a strong memorable identity for the brand through image marketing. Much of the advertising communication is centered on this creative and/or logo. Participants may contract with an agency to develop a logo or to design base creative ads.
- Creative Strategy - Participants may contract with an ad agency or marketing communication agency to develop a creative strategy. The contracted agency will evaluate the marketing and promotional situation to determine what needs to be

- communicated to the marketer's target audience. A strong memorable identity for the brand through image marketing communication will be developed.
- Marketing Plan Development - A strong marketing plan is crucial to running a successful marketing campaign. Participants may contract through an agency to layout the advertising and marketing objectives specific to the needs of the organization. A marketing plan must be clear before the creative strategy can be determined.
 - Mobile Optimization - If your website is not yet optimized for mobile, consider a responsive web design. A responsive web design enables your website to react to a user's actions and detects the medium where the site is currently being watched in order to provide the best experience possible to the user in terms of navigability and readability.
 - Social Media Strategy - Develop a social media strategic plan to determine which social network connects you with your target audience, determine best content types and outreach tactics, and reach targeted followers that generate more qualified leads for your organization. Participants may contract with a social media strategist to develop a strategy that includes research and discovery, strategy development, implementation planning and measurement.
 - Visitor Profile Study - MDT will assist industry partners in the funding of a Visitor Profile Study. This research provides you a profile of your visitor based on demographic and behavioral characteristics such as age, income, size of travel party, activities and expenditures. Understanding this information will enable you to target your audience more efficiently and effectively.
 - Visual Asset Procurement - Strong visuals in marketing are vital. Because of this, MDT will assist industry partners in procuring visual assets. Participants may contract with a professional photographer and/or a videographer to build your visual asset library for marketing purposes.
 - Website Development - Design or upgrade your tourism website to include focused calls-to-action, enhanced images and simplified navigation to allow your visitors to find the information quickly and easily. Participants may contract with a web designer to update their site.
5. Finally, one opportunity to expand funding and scope to our existing Tourism Marketing program, is to consider the implementation or creation of a Certified Destination Marketing Organization through the Missouri Division of Tourism. While this has been discussed previously in Dent County, it may be worth looking at again.
- A Destination Marketing Organization (DMO) is a non-profit Missouri corporation or government unit responsible for and actively engaged in the promotion and marketing of travel and tourism and can be a Regional Partnership. Applying to become a Certified DMO would be a multi-year process to pull together resources and partnerships, and to implement a few necessary steps prior to applying for Certified DMO status.

A Certified DMO meets the above qualifications plus the following:

1. The organization is recognized through an adopted resolution by the county commission/governing body as the county's single official countywide DMO for participation in MDT programs;
2. The organization employs an adequate amount of staff to ensure management of the requested funding-For an organization with a CTL of 5 or less, one full-time (32 hours a week, at least minimum wage) paid staff member exclusively dedicated to travel and tourism is required-For an organization with a CTL of 6 or higher, five full-time (32 hours a week, at least minimum wage) paid staff members exclusively dedicated to travel and tourism are required. If an organization's sole purpose is travel and tourism, then all employees (including administration) would be considered a travel and tourism employee. However, an organization that is not strictly dedicated to travel and tourism must only count employees that are directly responsible for promotion of travel and tourism (for example: marketing, PR, group travel, convention sales, etc.);
3. The organization can demonstrate it is currently, and has been, actively engaged in tourism destination marketing for a minimum of two years;
4. The organization has a tourism exclusive marketing brochure;
5. The organization has a tourism exclusive website.

Upon meeting the above requirements, a DMO may apply for a five-year certification through the MDT. Applications are accepted in November or each year. If Certification is approved the newly certified DMO may apply for other opportunities. This opens opportunities for the DMO to apply for the Marketing Matching Grants which are available annually and provide up to 50/50 matching funding for qualified marketing activities and placements.

- Need to promote Flat Nasty a bit more.
- Need to include recommended travel routes in our marketing instead of allowing google to recommend the shortest routes.
- Develop and promote ½ and multi-day itineraries for area with Salem as base.
- Promote trails for horseback and bike riding in area.

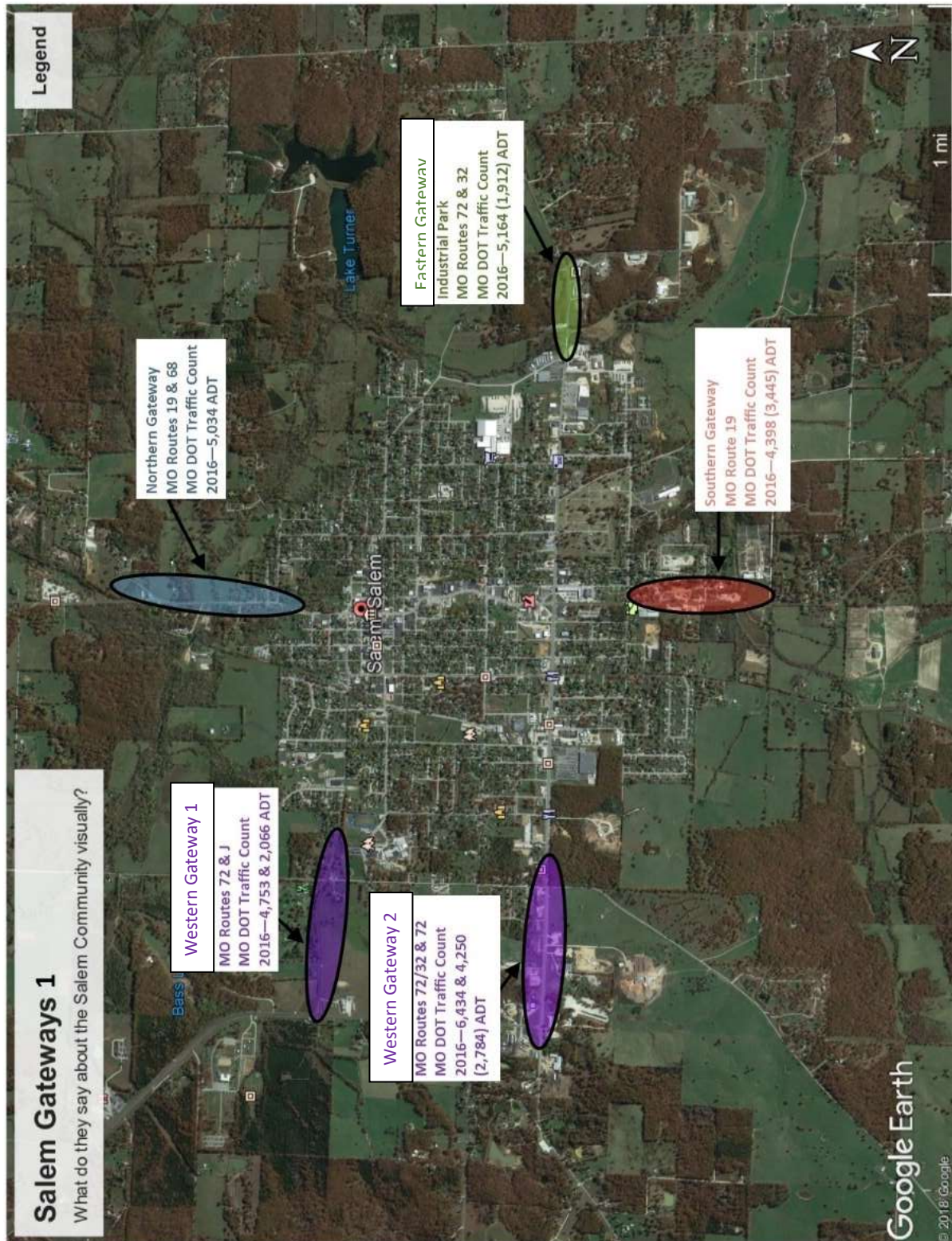
Section 14: Gateways & Community Signage Assessment

Overview

Each entrance to Salem, or “gateway”, that visitors travel shapes their first impression of the community. First impressions are important from an economic development perspective because some of those visitors may be tourists; some may be potential future business owners and residents of the community; and some may be site selection representatives. Those first impressions could influence decisions about stopping in the community for a meal, a night’s stay, or to purchase a gift; they could also influence whether a company, family or individual relocates to the community. Salem contains four major gateways to the community:

- **Northern Gateway/MO Routes 68 and 19:** traveling from St. James, Steelville and points north, this is the gateway visitors experience when traveling along MO Routes 68 and 19 south into Salem.
- **Western Gateway/MO Routes 72 & 32:** visitors from Licking, Houston, Rolla and points west will experience this gateway when traveling along MO Routes 72, 32 or coming from Interstate 44.
- **Southern Gateway/MO Route 19:** entering Salem from Eminence, Echo Bluff, Current River and more state parks to the south, this gateway visitors experience when traveling north along MO Route 19.
- **Eastern Gateway/MO Routes 72 and 32:** visitors from Bunker, Viburnum and points east will experience this gateway when traveling along MO Routes 72 or 32.

Gateways to Salem





What About a Gateway Creates a Positive First Impression?

Gateways should convey a sense of arrival. They can accomplish this through a sign, a landscape feature, a piece of art, an architectural feature (such as a bridge or building), a natural feature, or some combination of the above.

A strong gateway should also express a theme that conveys the community's identity and image to the visitor. The theme can be expressed through not only the logo or font used in signage. But also, through the materials used for constructed elements and landscape features.

When determining the location of a gateway feature, one should consider viewing distance from the roadway and the views a visitor will experience directly before and directly after viewing the gateway feature. The more positive those immediate 'before' and 'after' views, the more positive the overall impression.

Finally, gateway features should help visitors navigate their way into the community and to top attractions. **Wayfinding elements** such as additional signs and landscape features should be planned in tandem with gateways.

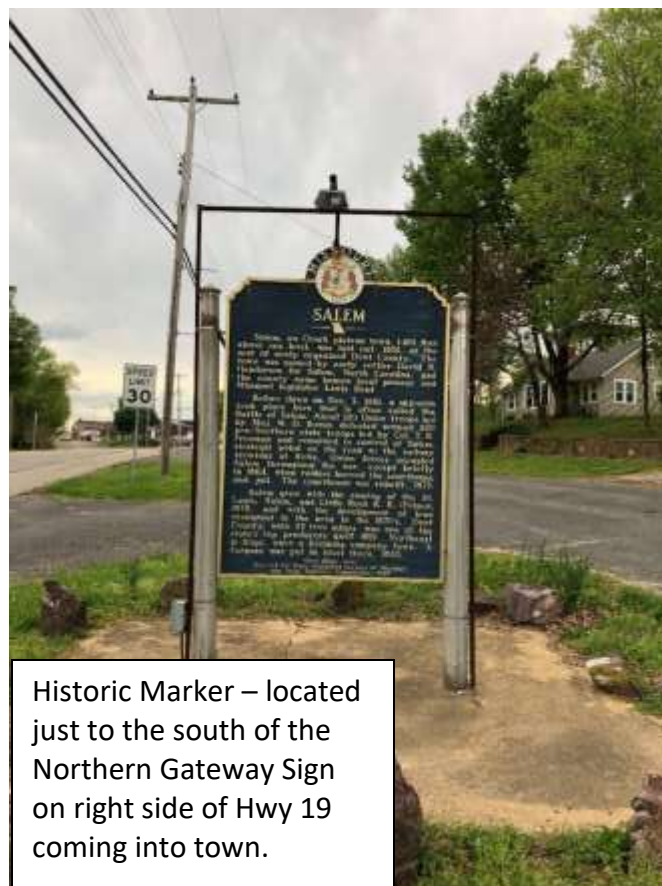
Impressions of Salem's Existing Gateways

The views one experiences when entering from each of these gateways varies, with some positive and some negative items.

- **Northern Gateway/MO Routes 68 and 19:**



Nearly 300 Ft from
Northern Welcome sign.



Northern Gateway Observations:

+ Signs are in good repair and lighted, not faded, hung tightly and landscaping is in good attractive condition.

+ Gateway sign and Historic Marker are located within the same off-road parking area allowing ample space to pull off the road and encourage exploration of the signage.

- Redbud tree is blocking visibility of Gateway sign.

- **Western Gateway/MO Routes 72 & 32 and J:**

Western Gateway Sign –
Rolla Rd/J Hwy.



Western Gateway Sign –
Scenic Rivers Blvd.



Western Gateway– Salem Memorial District Hospital.



Western Gateway – Only signage visible from Hwy 72 for The Commons.



Western Gateway Observations:

+ Existing Gateway Signs are in good repair and lighted, not faded, hung tightly and landscaping is in good attractive condition.

- + Easily visible with a clear non-obstructed line of sight.

- Two separate Gateways that ignore the no-man's land of Hwy 72 coming from Rolla. Area between Salem Memorial District Hospital to the intersection of 72 & 32 coming from Rolla there is a City Limit sign, but no other clear Welcoming signage, messaging or imagery.

- SMDH has clear attractive signage, but no tie-in with community branding. Possible opportunity for collaboration.

- The Commons has no signage to speak of to either promote the facility or ties with the Salem Community. Possible opportunity for collaboration.

- **Southern Gateway/MO Route 19:**

Southern Gateway –
roughly 500 ft from sign.



Southern Gateway –
roughly 100 ft from sign.



Southern Gateway Observations:

- + Existing sign lighted and landscaping is in good attractive condition.
- Sign vinyl is the most faded of all Gateway Signs and it is sagging some.
- Obstructed line of sight. Trees blocking view of sign.

- **Eastern Gateway/MO Routes 72 & 32:**

Eastern Gateway – near Titan Propane at bottom of hill.



Eastern Gateway – Masters Industrial Park sign location.

Possible double as Park and Gateway signage?



Eastern Gateway Observations:

- + Existing Gateway sign is in good repair and lighted, not faded and is hung tightly.
- Limited sight distance coming down hill.
- No landscaping.
- Masters Industrial Park signage is currently non-existent.

- Stop sign in the middle of where the Sign face should be.
- + Possible opportunity to combine signage for Gateway and Park utilizing existing landscaping.

Wayfinding Elements and Community Signage

Where is Downtown?

Can only find 2 signs in Salem that refer to Downtown, 1 on the eastern and 1 on the western side of the Main Street and Scenic Rivers Blvd. intersection.



Currently, we do not welcome or even encourage visitors and residents to come Downtown and quite honestly, for newcomers and pass through visitors, it can be a bit confusing to figure out exactly where Downtown is. Salem's downtown street is 4th Street (not something most visitors would queue in to) and there are no specific visible designations as Downtown.

One new arrival that does direct and invite travelers on Scenic Rivers Blvd to go downtown is the Salem Chamber of Commerce and Tourism Boards sign recently located in the Western Gateway area seen below.



The only other signage that alludes to downtown or a main business corridor are the Business District signs that are located on McArthur St. There is one facing north and one facing south pointing to 4th St. Unfortunately, no one is going to see these unless they have already found their way to the downtown area.



How to Announce Downtown:







Industrial ParkLocal Government Signage**Parking**

Currently, Public Parking signs only appear at the entrance to the actual parking areas. There are no directional signs to indicate how to find the Public Parking.

Salem also currently has two different Public Parking sign styles, three if you include the Library Parking signage.



Alternative Cohesive signage elements for the Salem/Dent Community



Additional wayfinding signage needed:

Shawnee Mack Lake
Trail system

.....

Section 15: Residential Housing and Development

Overview

The entire local housing marketplace must be examined in the context of supporting industry and employment in Dent County. The 2019 ESRI Market Profile for Dent County shows an employed workforce of 6,098 compared to at place employment of 4,976, suggesting that Dent County exports roughly 18% of its workers to surrounding jurisdictions with an average commute time of 25 minutes in 2018. The commuting and employment patterns in the area reflect the proximity (≤ 30 miles) of eight surrounding communities, offering a broad range of employment options to residents within a reasonable commuting distance of any given housing or employment center.

Housing in Dent County flatlined (0%) in the nine-year period from 2010 through 2018, while the number of Households shrunk by 39 in the same period. By contrast, the state of Missouri's housing grew by 3.9% and the number of households statewide grew by 3.4%.

Table 26:

Households and Housing Units						
	Salem		Dent County		State of Missouri	
	#	%	#	%	#	%
2010 Households	2,152		6,338		2,375,611	
2018 Households	2,067		6,299		2,459,948	
2023 Households	2,000		6,151		2,514,590	
2010 Housing Units	2,408	100	7,285	100	2,712,729	100
Owner Occupied	1,177	48.9	4,702	64.5	1,633,610	60.2
Renter Occupied	975	40.5	1,636	22.5	742,001	27.4
Vacant	256	10.6	947	13	337,118	12.4
2018 Housing Units	2,360	100	7,285	100	2,822,100	100
Owner Occupied	1,002	42.5	4,271	58.6	1,617,384	57.3
Renter Occupied	1,065	45.1	2,028	27.8	842,564	29.9
Vacant	293	12.4	986	13.5	362,152	12.8
*2023 Housing Units	2,371	100	7,316	100	2,905,148	100
Owner Occupied	964	40.7	4,143	56.6	1,652,339	56.9
Renter Occupied	1,037	43.7	2,008	27.4	862,251	29.7
Vacant	371	15.6	1,165	15.9	390,558	13.4

**projected, Source: ESRI LocationOne 2019*

The employee to residential population ratio can serve as a benchmark for business expansion and retention efforts. In 2018, Salem's total employees numbered 2,946 and total residential population numbered 4,769, for an employee to resident ratio of 0.62. This is higher than Dent County's ratio of 0.34, and the state's of 0.51. In jurisdictions heavily reliant on sales taxes, a high employee/resident population ratio is desirable from a cost/revenue standpoint.

Business revenues largely support community and resident services provided by the City government – the higher the business revenues, the more government services that can be provided to residents and businesses alike. Many jurisdictions throughout the country operate

with employee/residential population ratios of well over 1.00 and are very prosperous, but also benefit from larger housing inventories in nearby urbanized areas.

Table 27:

Employee/Residential Population Ratio 2018			
	Salem	Dent County	State of Missouri
Total Businesses	330	568	221,366
Total Employees	2,946	5,368	3,169,857
Total Residential Populations	4,769	15,600	6,223,738
Employee/Residential Population Ratio (per 100 Residents)	62	34	51

Source: ESRI LocationOne 2019

If Salem were to maintain its current ratio of 0.62 and continue to decline in residential population as projected to 4,618 in 2023 (-3.2%), using the current household size of 2.31 for Salem, this would require a decrease of 68 housing units to meet demand.

Housing Needs Assessment

Housing Needs Assessments are typically conducted when events of significant economic impact are expected to occur, such as the expansion or relocation of a business that imports a large number of workers into an area, creating a sudden or accelerated demand for housing in the local marketplace. In Salem and Dent County's case, assuming available housing stock were in adequate condition this could be triggered by the influx of roughly 97 new workers. While natural market forces are generally effective at responding to demand under normal circumstances, a Housing Needs Assessment can identify deficiencies in supply to accommodate the influx of new households, and otherwise inform local government of the need and the private sector of the opportunity at hand.

Housing Needs Assessments typically analyze residential market characteristics such as available inventory for sale and for rent, price points, pending projects and units, location, and other salient factors, as well as the economic characteristics of the incoming workforce. Depending on the specific circumstances, an assessment could be as simple as surveying the local professional real estate community. Anecdotally, it appears there is a shortage of housing county wide in the \$100-200K range which would appeal to many working families.

Section 16: Property Taxes

Overall Property Taxes

During discussions at the July workshop the topic of perceived high property taxes within city limits came up as a potential barrier or dis-incentive for businesses to locate in Salem. Based upon that discussion, below is a presentation of the current property tax rates effective in Salem and Dent County.

Table 28:

Taxing Authority	Fund	Levied 2018
Salem Memorial Hospital District	General Revenue	0.1925
City of Salem	General Revenue	.6533
	Library	.2950
Dent County Fire Protection District	General Revenue	.2338
Dent County Health Center	General Revenue	.0953
Salem R-80 School District	Operating Funds - Schools	2.7500
	Debt Service	.4500
Oak Hill R-I School District	Operating Funds – Schools	3.0610
	Operating Funds – Temp	.3690
Green Forest R-II School District	Operating Funds – Schools	2.7500
Dent-Phelps R-III School District	Operating Funds – Schools	2.7500
North Wood R-IV School District	Operating Funds – Schools	3.0500
Dent County	General Revenue	0.0000
	Road & Bridge	.2534
	Developmental Dis. Board	.1341
	Senior Services	.0477
Commercial Sur Tax		1.210

**The Salem Board of Aldermen recently set the 2019 rate at 65.22 cents per \$100 of assessed valuation, down from 65.33 cents last year. The drop is in response to an increase in assessed valuation in the city as determined by the County Assessor's office. Under the Hancock Amendment, cities cannot take in more property tax than the previous year—except for new construction—and are required to reduce their tax levies when property values increase due to reassessment.*

For 2018 generally, commercial property inside the City of Salem, total applicable property tax rates are a combination of individual items highlighted in yellow above: 0.063151 or 6.3151%

For commercial property outside of the city limits, you would simply substitute the appropriate school and fire district rates (additional fire districts cover portions of Dent County but are not listed above) and subtract the City of Salem General Revenue and Library rates. This rate is still for R-80 School District and Dent County FPD: 5.3668%. Included rates above in red type.

By contrast the residential rates for inside the City and out in the County are made up of the same lists of rates minus the commercial sur tax. Inside the City residential property tax rate: 5.1051%. Out in the County: 4.1568%.

Residential property rates in the City are the same combination of rates minus the Commercial Surtax: 0.051051 or 5.1051%.

Commercial Sur Tax

(general information from the Washington County, MO Clerk's Office web page)

At the election held on August 3, 1982, the voters of Missouri approved the amended provisions of section 6 of article X of the Missouri Constitution. The effective date for the amended provisions of section 6 of article X was January 1, 1985.

The amended provisions of section 6 of article X of the Missouri Constitution established an exemption of merchants' and manufacturers' tangible personal property for tax purposes, thus eliminating the tax commonly referred to as the "Merchants' and Manufacturers' Tax."

Missouri Revised Statutes Chapter 139, Section 139.600 implemented the amended changes to the Constitution. To replace the lost revenues resultant from the elimination of the "Merchants' and Manufacturers' Tax, the Statute imposed a replacement tax, commonly referred to as the "Commercial Surcharge" on real property in subclass (3) of class one property (real property).

The Statute established the formula to determine the tax rate of the "Commercial Surcharge" for each County so that the local governments were not at a loss from losing the "Merchants' and Manufacturer's Tax". The Commercial Surcharge tax rate may not be increased and may only be decreased if approved by a majority of the voters of that County. This tax rate does not fluctuate up and down as other property tax rates do.

The revenue collected from the "Commercial Surcharge" is distributed to the taxing authorities in the same manner that the real estate tax is distributed to the taxing authorities.

The tax rate for the "Commercial Surcharge" in Dent County is 1.21 per \$100 of assessed valuation.

2018 County Rates for comparison (includes sur tax rates):

Dent County inside Salem Commercial rate – 6.3151% (Surcharge of 1.21)

Crawford County Inside Steelville Commercial rate – 5.5732% (Surcharge of .36)

Phelps County inside Rolla commercial rate - 4.6426 % (Surcharge of .38)

Reynolds County inside Bunker commercial rate – 4.697% (Surcharge of .01)

Shannon County inside Eminence commercial rate – 4.6546% (Surcharge of 0.41)

Texas County inside Houston commercial rate – 5.2044% (Surcharge of 0.68)

2018 City Specific Rates:

Salem – GR .6533 + Library .2950 = .9483%
 Steelville – GR .5237% + County Library .2046 = .7283%
 Rolla – GR .4598+ Parks & Rec .1132+ Library .1919 = .7649%
 Bunker – GR .6003+ County Library .1121 = .7124%
 Birch Tree – GR .4851%
 Licking – GR.4377 + County Library .0975 = .5352%
 Houston – GR .3202 + County Library .0975 = .4177%

Based upon the above information both the city property tax rates and the commercial sur tax rates are significantly higher than surrounding cities and counties. However, there is one more piece of information to look at before making any determination about changing rates, that is the assessed value within those jurisdictions.

By 2018 City Assessed Value:

City of Salem	-	\$48,069,732
City of Steelville	-	\$15,581,739
City of Rolla	-	\$216,923,884
City of Bunker	-	\$1,969,288
City of Birch Tree	-	\$3,458,870
City of Licking	-	\$13,206,927
City of Houston	-	\$26,683,782

By 2018 County Assessed Value:

Dent	-	\$169,739,228
Crawford	-	\$308,834,489
Phelps	-	\$596,400,274
Reynolds	-	\$175,635,092
Shannon	-	\$79,118,155
Texas	-	\$238,319,769

Since the general rule of thumb is that the higher the assessed valuation, the lower the tax rate needs to be to generate the same dollar, the above assessed values should be taken into consideration when discussing the higher property tax rates for Salem and Dent County.

Only one of the local cities has a higher assessed property valuation than Salem, that is Rolla.

For counties, we are on the opposite end of the spectrum for assessed property value, only Shannon County has a lower assessed valuation than Dent County.

Section 17: Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

Based on the SWOT workshop held on May 20, 2019 the following concepts and items were identified as Strengths, Weaknesses, Opportunities and Threats to the Salem and Dent County community.

It is important to keep in mind that Strengths and Weaknesses are within the community's control, while Opportunities and Threats are outside of the Salem and Dent County community's control.

Strengths

- Large number of engaged citizens
- Low cost of doing business (low labor costs)
- School System ranked in the top 50 state-wide – innovative programs
- Salem is well known throughout the state (location and as a model for programs)
- Medical facilities and programs are growing
- Community Handicap support services

Weaknesses

- Need organizing of the many organizations (duplication of efforts)
- Housing and Building Conditions/ Nuisance Ordinances
- Culture of Procrastination on big community decisions
- Lack of marketable skilled workforce
- Lack of awareness of available business resources
- Not leveraging state and local tourism dollars to best advantage

Opportunities

- Low wages as an economic driver
- Transportation - Roads in good condition
- Available vacant buildings for business growth
- State Investigation/research into value-added food products
- Fall and spring colors

Threats

- Contracts for deed land sales
- Communications – Internet access and cell service
- Mental health/Addiction Issues
- Population loss
- Lack of access to business financing

- Feral Hogs

Based upon the above listed SWOT outcomes we can begin putting together some strategies based upon the following table:

Table 29:

Strategy Sets	Strengths (S)	Weaknesses (W)
Opportunities (O)	SO Strategies Strategies that use Strengths to take advantage of Opportunities	WO Strategies Strategies that use Opportunities to overcome Weaknesses
Threats (T)	ST Strategies Strategies that use Strengths to avoid Threats	WT Strategies Strategies to minimize Weaknesses and avoid Threats

Strategy 1 (SO) - Design and implement Incentives that focus on increasing the average county wage instead of increasing the number of jobs.

Combining the Strength of Low cost of doing business (low labor costs) with the Opportunity of Low wages as an economic driver we can begin looking at policy decisions that take advantage of those low costs of business and labor that may work to increase the average county-wide wage. The below wage information is from the Bureau of Labor Statistics for 2018, 4th quarter, published in May 2019.

Average Weekly Wage for Missouri - \$907

Average Weekly Wage for Dent County - \$578

Historically, the theory behind most economic development incentives offered to businesses was that all focus was on creating or locating “more” jobs. With today’s nationwide, historically low unemployment rates, it may be time to look at a different focus. While there has usually been some focus on the quality of the jobs, such as provided benefits, the focus in the past has been on quantity as evidenced in Salem and Dent County’s current incentive offerings which are all based upon the number of jobs being created by new startups, relocations or expansions of businesses.

Salem and Dent County should look at creating or redesigning some or all their incentive offerings to focus on increased wages that will move the needle on the average wages county-wide. One such existing example in Missouri is with the Missouri Works Program which currently stipulates that for a business to receive benefit through the program its wages must be an average of 80% to 140% of the county’s average wages.

One way to ensure the policies surrounding incentives keep up with changing economic climates over time is to set a trigger or pivot point in the policy to ensure that in times of high unemployment, we are focused on the quantity or number of jobs being created and during times of low unemployment, such as now, we are focused on the quality (things such as average pay and benefits) of jobs. One possible pivot point could be the national unemployment rate. Based upon data from the US Bureau of Labor Statistics, the 30-year

average unemployment rate is 5.9%. Policy could be drafted to state that when the National Unemployment Rate is above 5.9% (or most recent 30 year average) for the previous year incentives kick in for a predefined number of jobs created, and when the National Unemployment Rate is below 5.9% (or most recent 30 year average) for the previous year, incentives kick in for a predefined % above the average county wage and/or specified benefits provided to employees.

To put this into perspective an increase of Dent County average wages based on the above numbers would put wages at \$22 per week below Phelps County and \$4 above Iron County.

Strategy 2 (SO) – In partnership with R-80 Schools work into the Construction Trades Program a section or once a year project focused on Historic Preservation.

Combining the Strength of the Salem School System being ranked in the top 50 state-wide – innovative programs and the Opportunity of Available vacant buildings for business growth, work to develop a partnership or working agreement where the Construction Trades students at Salem High School incorporate one portion of their school instruction to preservation activities (maybe one building or project a year). This could include façade improvements, interior or exterior work as needed. Building owner must cover a portion or all costs and perhaps a community organization could take the lead and contribute to rehabilitation funds on a grant type basis with the owner matching for materials.

Strategy 3 (SW) – Partner and develop opportunities to create a skilled workforce in Dent County.

Combining the Strength of Salem being well known throughout the state (location and as a model for programs) and the Weakness of a Lack of marketable skilled workforce to increase, when opportunity allows and work to create opportunities to partner with other entities on grants and program creation to develop a skilled workforce in Dent County.

Strategy 4 (WT) – Develop and implement a marketing/educational campaign to highlight resources and programs specifically focused on aiding small businesses in Dent County.

Combining the Weakness of a Lack of awareness of available business resources with the Threat of a Lack of access to business financing, focusing on these two issues we can develop an educational/marketing campaign via social media and articles for local media that highlight “snippets” of information about various programs and resources available for businesses. These can include both local resources and programs and national and international opportunities.

Strategy 5 (ST) – Mobilize citizens to actively solicit funding and policy changes for improvements to Internet and Cellular access in Dent County.

Combine the Strength of a Large number of engaged citizens with the Threat of a lack of adequate Communications – Internet access and cell service to mobilize citizens to actively contact, attend meetings, or write letters to secure funding for improvements in Internet and

Cellular access county wide. This is already partially underway with calls to action in The Salem News asking citizens to call Intercounty Electric asking about expansion of future service.

Strategy 6 (WO) – Development of routes and marketing material (including, brochures, ads, social media posts and online ads for seasonal colors.

Combining the Weakness of Not leveraging state and local tourism dollars to best advantage with the Opportunity of Promoting Fall and spring colors in the region we can look at opportunities for grant or program funding/technical support for development of specific driving routes and advertising for the color displays which are very successful in other states.

Section 18: Summary Observations

- Based on the evaluation of existing economic conditions, I have made several observations about Salem and Dent County's current economic climate:
- Salem and Dent County's population has a higher percentage of High School Diploma and High School Equivalency/GEDs than surrounding communities and the state, but lag in Bachelor and higher-level degrees, indicating a need for targeted workforce development and a focus on higher education.
- Salem and Dent County's employment base is currently concentrated in six key industries (68.7%): health care/social assistance, retail trade, manufacturing, construction, accommodations and food, and educational services.
- Lead ore and zinc ore mining and electrical distribution have been prominent contributors to Dent County's tax base. While these two industries do not support the City of Salem's tax base directly, other base industries supporting both City and County include gasoline stations and accommodations & food businesses.
- Employment projections for the region suggest Salem and Dent County could add new jobs in coming years in the areas of Health Care and Social Assistance, Construction and Specialty Trade Contractors, and Leisure and Hospitality/Tourism. Proactive economic development efforts can support such growth.
- As indicated by the results of the industry cluster analysis, Salem and Dent County have many opportunities to recruit, retain and expand industries characterized as currently strong, emerging as strong, or priorities for retention. The mix of industries includes those within the following broad categories: health care/social assistance, retail trade, transportation/warehousing, manufacturing, construction, wholesale trade, and agriculture/forestry/fishing /hunting.
- Top industries to target for recruitment or growth assistance in Salem and Dent County based upon historical significance in the community and upon the best opportunities as outlined in the previous bulleted observation are: Tourism Related Businesses, Agriculture, Timber and Manufacturing.
- Salem businesses and individuals interested in facilitating economic development have access to a wealth of local, regional and state organizations, programs and incentives – indicating a need not to duplicate such offerings in Salem and Dent County, but rather to most effectively make use of these existing resources.
- An assessment of Dent County's retail market shows retail leakage (e.g. gaps in certain store groups where resident spending power exceeds local retail sales, indicating purchases are "leaked" outside of the community), in the highest amounts in the following retail classifications with dollar values: automobile and other motor vehicle dealers (\$27.9 million gap), grocery stores (\$11.5 million gap) building materials, garden equip & supply store (\$5.8 million gap), restaurants/other eating places (\$5.7 million gap) and clothing and clothing accessories (\$5.2 million gap).
- Over the past decade, the City of Salem and Dent County have invested over \$9 million in public works and civic projects. Another almost \$30 million in additional projects are

planned to occur in the next 3-5 years. An accelerated investment in public infrastructure and civic projects should continue for the foreseeable future to ensure acceptable quality of life standards and to encourage business investment in the community.

- Salem's downtown is heavily populated (just under 1/3 of the total businesses) with a variety of medical services, legal services and personal services. The remaining majority of businesses are comprised of furniture & home furnishings, gifts, art & antiques and government services. Of the historic downtown area's approximately 52 storefronts, nine were vacant during a February field survey (for an overall vacancy rate of roughly 17 percent).
- One method of conveying Salem's accomplishments, as well as resources for economic development, is through asset mapping. The information provided in this report can serve as an initial set of talking points for ongoing economic development efforts.
- Though Salem contains land available for industrial and commercial development, the overall supply of such land is limited, comprised of Masters Industrial Park, 163 acres, and an additional 15 parcels representing approximately 51 acres. Through discussions with various entities in town it has become apparent that there are many more acres that could be available should the owners be approached. These are properties, both buildings and vacant land, not actively on the market, but an asset to be kept in mind.
- Higher educational opportunities are available in the region, including Southwest Baptist University (SBU) in Salem. SBU's most popular programs include those that will train workers in industries that show opportunity for expansion, retention and recruitment in Salem (i.e. health care and related industries).
- Construction Trades Program at Salem High School is a unique, early adoption of skills-based training at the High School level. This program not only provides theory and concept education but combines it with hands on learning providing students in the program with actual real-world experience in the field giving them a huge plus when entering the job market after high school. This program and the Technology Trades program that is currently in the planning stage should be supported when possible as the leading workforce development opportunity in Dent County.
- Agriculture, though not a large industry as far as employment, is strong in the broader area of Dent County. Salem benefits from regional agricultural production with a seasonal Farmer's Market and roadside stands. Also, in the agriculture sector in addition to beef, fish and other animal production is the category of Agroforestry and looking at additional non-traditional forestry crops.
- The Timber industry has potential to explore the exporting of wood manufactured products. This can be in the form of lumber itself or value added products such as charcoal, trusses, flooring or other items that are currently and historically produced in Dent County and we have the opportunity to look at expanding the export of these and other products through the Step-Up program with the state of Missouri's International Trade & Investment Office within the Department of Economic Development.
- Tourism is an important element of Salem and Dent County's economy, benefitting foremost from Montauk State Park as well as by attractions outside of the county such as

Echo Bluff and Current River State Parks as well as other nearby natural/recreational offerings. Opportunities to further strengthen Salem's tourism industry will be enhanced by continuing to develop trail systems, improving directional signage to attractions and working to restore downtown to a more historic and marketable opportunity. Additional work to develop numbers-based tourism marketing is also important as we evolve our efforts.

- Salem's gateways offer opportunities for enhancement which the City has opportunities to address once the community has established cohesive branding. There is an opportunity to build upon existing signage and locations and use additional gateway enhancements to help visitors navigate to both the downtown and the community's larger recreational assets within the County.
- Salem's employee/residential population ratio of 0.62 suggests that the City could support more employment relative to housing inventory. Dent County has an employee/residential ratio of 0.34, and many municipalities boast ratios of over 1.0. The City should consider conducting a Housing Needs Assessment only in the event of a significant increase in workforce as a result of a business relocation or expansion.

Section 19: Current Economic Development Activities

Overview

The American Planning Association has identified eight potential strategies local governments can use, either alone or with other institutions, to carry out their economic development vision:

- Coordinate economic development programs and support services
- Business development
- Development incentives and financing
- Business attraction and retention
- Workforce education and training
- Land supply analysis for business growth
- Infrastructure investment
- Investment in quality of life factors conducive to business innovation

A strong economic development plan includes strategies that enhance existing activities as well as recommend new areas of action.

Existing Strategies

The following list shows the economic development strategies in place in the City of Salem and Dent County with descriptions of the activities and programs currently underway and in place, and the lead agencies involved.

Coordination of Economic Development Programs and Services

<i>Activity</i>	<i>Lead Agencies</i>
Intraregional coordination	MRPC, Salem Economic Development Office (EDO)
Economic Development Strategy	Salem EDO, Community Strategy Plan Group

Business Development

<i>Activity</i>	<i>Lead Agencies</i>
Business skills and management training for small business	Dent Co Extension, Chamber of Commerce, SBTDC

Development Incentives and Financing

<i>Activity</i>	<i>Lead Agencies</i>
Construction and leasing of facilities	Industrial Development Authority (IDA)
Revolving loan funds	MRPC, Intercounty Electric REDLG
Tax credits	State, Dent County EEZ

Business Attraction & Retention

<i>Activity</i>	<i>Lead Agencies</i>
Business recruitment	Salem EDO
Marketing to attract business	Salem EDO, MO Partnership, MO DED
Business retention	Salem EDO, Chamber of Commerce

Workforce Education & Training

Activity

Public enrollment

*Lead Agencies*MO Jobs Center – Rolla, Salem HS Construction
Trades

Customized training

MO Jobs Center – Rolla, Armory Satellite Office

Land Supply Analysis for Business Growth*Activity*

Inventory of available sites

Lead Agencies

Salem EDO

Property development

IDA, City of Salem, Dent County, Private sector

Infrastructure Investment*Activity*

Transportation

Lead Agencies

Federal, state, local government

Utilities

Municipal, public & private

Quality of Life factors Conducive to Business Growth*Activity*

Public works & amenities

Lead Agencies

City of Salem

Section 20: Economic Development Action and Implementation Plan

Overview

In order to be successful, an economic development implementation plan should remain flexible and opportunistic. Business assistance and funding programs will be subject to change, trade fairs and business expos will come and go, and businesses in general may be subject to continuing challenges as local, regional and national economies flux.

This section contains tasks crafted to give the City of Salem and Dent County a proactive strategy to help ensure its future economic prosperity. The City and County may choose to accelerate or slow implementation, depending on the availability of their own resources or the availability of outside funding sources. These tasks should be performed concurrently and in conjunction with ongoing Action Items described in the previous section. Some action items may require professional services or capital funding, that information is not included here but is to be addressed in appropriate organizational budgets as necessary. It is also important to note that the Economic Development Director may be responsible for overseeing most of the activities listed, it is not expected that this person will be solely responsible and may act as a liaison or in a support capacity to other organizations or departments performing the activity.

While the overall goal of an Economic Development Strategic Plan is to grow the economy of the community, the specific tasks necessary to achieve this broad goal become much easier if they are also in line with the Vision for the community as well.

The Salem Community Road Map to 2040 (draft 12/10/18) Vision Statement is as follows -

The Salem Community is the heart of a vibrant Ozarks Region, rich with natural resources.

Working together we:

- Encourage education and life-long learning
- Embrace and share our culture, arts, and heritage
- Promote our agriculture, timber & tourism industry
- Foster economic prosperity
- Invest in quality of life for all.

The Vision Statement Definition for Economic Prosperity:

In 2040, our community will be recognized for its innovative rural economy, above average community wealth, and focus on long-range planning for sustainability.

Prioritized Strategic Plan Action Items

Following are the Action Items from the Strategic Plan as prioritized by members of the public during the August 22, 2019 workshop.

1. Strengthen city codes related to property conditions (36 points)
2. Mobilize citizens to actively solicit funding and policy changes for improvements to Internet and Cellular access in Dent County. (31 points)
3. Develop and implement a marketing/educational campaign to highlight resources and programs specifically focused on aiding small businesses in Dent County. (23 points)
4. Utilize Apprentices and Labor from Active Workforce Training Programs to Appropriately Save Dollars for the City and Provide Experience Opportunities for Trainees (20 points)
5. Completion of City Hall Auditorium Remodel for Civic Theater (18 Points)
6.
 - a. New Website (city, County, Chamber) (15 points)
 - b. Support Student Entrepreneurial Education Programs as they develop. (15 Points)
 - c. Partner with other community organizations to improve the quality of housing stock and appearance of neighborhoods (15 points)
7.
 - a. Construction of New Building for Construction/Technology Trades - Workforce Initiative Grant (CDBG) pending funding (14 points)
 - b. Support and assist development of community trail system when appropriate (14 points)
 - c. Assess and Recommend Edits to Local Development Incentives and Policies. Strategy 1 from SWOT (pg 100) (14 points)
 - d. Agreement with Dent County Commons or Purchase to Develop Robust Programming, Marketing & Maintenance (14 points)
8.
 - a. Assess need for housing/building demolition and determine best steps for moving forward (13 points)
 - b. Attain Certified Site Status - Master's Industrial Park (13 points)
9.
 - a. Downtown Street Enhancements (sidewalks & lighting) (12 points)
 - b. Programming and Marketing Plan for Civic Theater Including Arts & Culture Programming (12 points)
10.
 - a. Community/Directional Signage Plan and Construction (11 points)

- b. Research Funding Options for Facade Improvements and Building Rehabilitation (11 points)
- 11.
 - a. Community Re-Branding Strategy (10 points)
 - b. Runway and Apron/Taxiway Improvements (10 points)
- 12. Develop Tourism Marketing Plan for 2020 (9 points)
- 13. Develop Marketing Plan for Downtown Promoting History, Arts & Culture Events (8 points)
- 14.
 - a. Pursue National Historic Designation for Downtown - either as a District or Individual Buildings (7 points)
 - b. Develop Festivals/Events to Draw Crowds Downtown (Halloween Ghost Tour, Xmas Festival, etc.) (7 points)
 - c. Continue visits with local top employers and monitor needs (7 points)
- 15. Work with HSE program and instructor locally to promote and fully utilize opportunities for citizens (6 points)
- 16.
 - a. Partner with R-80 Schools to work into the Construction Trades Program a section or once a year project focused on Historic Preservation (5 points)
 - b. Complete Zoning Review and updates resulting in updated City Zoning Map (5 points)
 - c. Research and implement alternative structuring of Staff to improve Code Enforcement if appropriate (5 points)
- 17. Assess City Electrical system for necessary future upgrades to accommodate industry and residential needs (4 points)
- 18.
 - a. Follow up on initial meeting with Howell, Texas and Pulaski Counties for regional conversations (3 points)
 - b. Attend upcoming Women in Business Connect events in Rolla as schedule allows (3 points)
 - c. Coordinate with local, regional and state entities to offer business management and development education (3 points)
 - d. Identify Economic Partner Trade Shows and Events to Promote Salem/Dent County for Business Attraction (3 points)
- 19.
 - a. Development of Salem Makers - Makerspace with Programming to develop STEM Training (2 points)
 - b. Upgrade Systems at Wastewater Treatment Plant to provide for Industrial & Residential Use (2 points)

- c. Construction of electric feeder line to Masters Industrial Park to accommodate load requirements for industry development (2 points)
 - d. Construction/Development of Pilot's Lounge - Restrooms, drink and snack vending machines, basic info and brochures (restaurants, attractions, etc.) (2 points)
- 20.
- a. Airport Pilot Courtesy Car (1 point)
 - b. Development of "Seasonal Colors" routes and marketing material (Fall Colors and Spring blooms) (1 point)
- 21.
- a. Attend the International Woodworking Fair in Atlanta, GA
 - b. Coordinate economic development programs and support services, using referrals and in-step assistance
 - c. New City Water Well to Increase Capacity for Industrial & Residential Use
 - d. New Water Tower to Increase Capacity for Industrial & Residential Use
 - e. Additional hangar space as funding is identified and available
22. These Items were added based upon comments at or right before the final workshop where prioritization occurred. They have been added here to be included for future consideration but are not ranked.
- a. ASOS/AWOS Weather Reporting system at Airport
 - b. Creation or Development of Campground facilities closer to Salem for Tourism stops
 - c. Assess pedestrian mobility systems and determine where repairs, upgrades and new facilities need to be addressed (sidewalks, crosswalks, connections to trail systems and residential areas, intersection of Main St. and Scenic Rivers Blvd.)
 - d. Facilitate Commercial Property Tax Discussion

The following Economic Development Implementation Strategy Matrix contains all recommended action items including near term, event driven, and ongoing tasks. Implementation timing should be used as a guide – the key to the success of the strategy is flexibility and the ability to apply action items in an opportunistic fashion.

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GREEN	Top Priorities as ranked by Citizens at Public Workshop August 22, 2019.
ORANGE	2nd Round Priorities as ranked by Citizens at Public Workshop August 22, 2019.
PINK	3rd Round Priorities as ranked by Citizens at Public Workshop August 22, 2019.
BLUE	4th Round Priorities as ranked by Citizens at Public Workshop August 22, 2019.
CLEAR	5th Round Priorities as ranked by Citizens at Public Workshop August 22, 2019.
YELLOW	New Additions to workplan brought up at Workshop, not ranked at this time.

“^” Denotes Grant or Outside Funding or Technical Assistance.

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #1 Develop Community Assets to Encourage New Investment and Job Growth	Increase Number of Companies Located in Master's Industrial Park. (6 - July, 2019 - Heartland Metal Finishing, Village Gallery, Quality Machine, Everything Cinema, Family Trash Services, Show Me Helicopters)	Attain Certified Site Status - Master's Industrial Park (13 points) 1. Notice of Intent to DED 2. Phase I ESA 3. Archaeological Study 4. Sell Timber and Log Site 5. Dirt Work to level site	Industrial Development Authority (IDA), MO Dept of Economic Development, CoS Engineering Firm, CoS Public Works, CoS Administration, Tod Kinerk						
		Assess and Recommend Edits to Local Development Incentives and Policies. Strategy 1 from SWOT (pg 100) (14 points) 1. Weighted incentives for companies offering wages 25% or more above the current County-wide average wages (pg 18 in plan) 2. Update City Codes to NAICS from SIC)	IDA, City of Salem (CoS), Salem Chamber of Commerce, Dent County, EEZ Board, MO DED						
	Reduce Downtown Vacancy Rate (17% - February, 2019)	Pursue National Historic Designation for Downtown - either as a District or Individual Buildings (7 points) 1. Research National Historic District Details and Options 2. Investigate Certified Local Government status for Salem	Jay Anderson, Salem Alliance for Historic Preservation, Downtown Businesses						
		^ Research Funding Options for Facade Improvements and Building Rehabilitation (11 points)	Salem Alliance for Historic Preservation, Missouri State Historic Preservation Office						

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #1 Develop Community Assets to Encourage New Investment and Job Growth	Reduce Downtown Vacancy Rate (17% - February, 2019)	Strategy 2 from SWOT - Partner with R-80 Schools to work into the Construction Trades Program a section or once a year project focused on Historic Preservation (5 points)	R-80 Schools, Salem Alliance for Historic Preservation, Downtown Businesses						
	Improve Facilities and Amenities at Salem Memorial Airport	Pilot Courtesy Car (1 point)							
		Construction/Development of Pilot's Lounge - Restrooms, drink and snack vending machines, basic info and brochures (restaurants, attractions, etc.) (2 points)	Airport Advisory Board						
		Runway and Apron/Taxiway Improvements (10 points)	FAA, MODOT, Airport Advisory Board						
		Additional hangar space as funding is identified and available	FAA, MODOT, Airport Advisory Board						
		ASOS/AWOS Weather Reporting system							
GOAL #2 Investment in quality of life factors conducive to business innovation	Downtown Investments	Completion of City Hall Auditorium Remodel for Civic Theater (18 Points)	Everything Cinema, Salem Civic Theater Assoc.						
		Programming and Marketing Plan for Civic Theater Including Arts & Culture Programming (12 points)	Chamber of Commerce, Dent County Tourism Commission						
		Downtown Street Enhancements (sidewalks & lighting) (12 points)	CoS Public Works, CoS Administration	4th St. - Main to Iron	Streets surrounding Courthouse	4th St - Jackson to Main, and Iron to Hickory	4th St - McArthur to Jackson, and Hickory to		
		Develop Festivals/Events to Draw Crowds Downtown (Halloween Ghost Tour, Xmas Festival, etc.) (7 points)	Salem Alliance for Historic Preservation, Salem Chamber of Commerce, Downtown Businesses, Dent County Tourism Assoc. MO Tourism Division						
		Develop Marketing Plan for Downtown Promoting History, Arts & Culture Events (8 points)	Salem Alliance for Historic Preservation, Salem Chamber of Commerce, Downtown Businesses, Naturally Meramec (MRPC)						

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #2 Investment in quality of life factors conducive to business innovation	Downtown Investments	^ Pursue Outside Funding Opportunities Related to Downtown Development							
	Infrastructure Investments	New City Water Well to Increase Capacity for Industrial & Residential Use	CoS Public Works, CoS Administration						
		New Water Tower to Increase Capacity for Industrial & Residential Use	City of Salem (CoS) Public Works, CoS Administration, IDA?						
		Upgrade Systems at Wastewater Treatment Plant to provide for Industrial & Residential Use (2 points)	City of Salem (CoS) Public Works, CoS Administration						
		Construction of electric feeder line to Masters Industrial Park to accommodate load requirements for industry development (2 points)							
		Assess City Electrical system for necessary future upgrades to accommodate industry and residential needs (4 points)							
		Complete Zoning Review and updates resulting in updated City Zoning Map (5 points)	Salem Planning and Zoning Commission						
		Strategy 5 from SWOT - Mobilize citizens to actively solicit funding and policy changes for improvements to Internet and Cellular access in Dent County. (31 points)	State-wide Broadband Initiative, Intercounty (TRAIN), CenturyLink, Fidelity						
		Agreement with Dent County Commons or Purchase to Develop Robust Programming, Marketing & Maintenance (14 points)							
		Creation or Development of Campground facilities closer in to Salem for Tourism stops							

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #2 Investment in quality of life factors conducive to business innovation	Infrastructure Investments	Support and assist development of community trail system when appropriate (14 points)							
		Assess pedestrian mobility systems and determine where repairs, upgrades and new facilities need addressed (sidewalks, crosswalks, connections to trail systems and residential areas, intersection of Main St. and Scenic Rivers Blvd.)							
		^ Pursue Outside Funding Opportunities Related to Asset Development							
GOAL #3 Increase Tourism, Community Pride and Employment Opportunities.	Focus on Targeted Marketing Campaign for Tourism & Locals	Community Re-Branding Strategy (10 points)	Dent Co. Tourism Assoc., Salem Chamber of Commerce, Dent						
		New Website (15 points)	Salem Chamber of Commerce, Dent County, Dent Co. Tourism Assoc.						
		Community/Directional Signage Plan and Construction (11 points)	Salem Chamber of Commerce, Dent County, Dent Co. Tourism						
		Develop Tourism Marketing Plan for 2021 (9 points)	Salem Chamber of Commerce & Dent County Tourism Association						
		Strategy 6 from SWOT - Development of "Seasonal Colors" routes and marketing material (Fall Colors and Spring blooms) (1 point)	Chamber of Commerce, Dent County Tourism Commission, Dent County						
		^ Pursue Outside Funding Opportunities Related to Tourism and Marketing							
	Housing and Rundown Properties	Partner with other community organizations to improve the quality of housing stock and appearance of neighborhoods (15 points)	Riverways FCU, IDA, Ozark Plateau Community Development Corporation (CDC), Salem Housing Authority						
		Strengthen city codes related to property conditions (36 points)							

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #3	Housing and Rundown Properties	Research and implement alternative structuring of Staff to improve Code Enforcement if appropriate (5 points)							
		Assess need for housing/building demolition and determine best steps for moving forward (13 points)							
GOAL #4 Workforce Education and Training	Strategy 3 from SWOT - Partner and develop opportunities to create a skilled workforce in Dent County.	^ Construction of New Building for Construction/Technology Trades - Workforce Initiative Grant (CDBG) pending funding (14 points)							
		Support Student Entrepreneurial Education Programs as they develop. (15 Points)							
		^ Development of Salem Makers - Makerspace with Programming to develop STEM Training (2 points)	Salem R-80 Schools, Salem Library, 4-H, Dent County Extension						
		Utilize Apprentices and Labor From Active Workforce Training Programs to Appropriately Save Dollars for the City and Provide Experience Opportunities for Trainees (20 points)							
		Work with HSE program and instructor locally to promote and fully utilize opportunities for citizens (6 points)	Pat Todd						
GOAL #5 Business Development	Assist Existing Businesses with resources to grow or improve	Strategy 4 from SWOT - Develop and implement a marketing/educational campaign to highlight resources and programs specifically focused on aiding small businesses in Dent County. (23 points)							
		Coordinate economic development programs and support services, using referrals and in-step assistance							

City of Salem and Dent County Economic Development Strategic Plan Action Steps and Timelines

GOALS	OBJECTIVES	STRATEGIES	Partner With?	2019	2020	2021	2022	2023	2024
GOAL #5 Business Development	Assist Existing Businesses with resources to grow or improve	Coordinate with local, regional and state entities to offer business management and development education (3 points)	Chamber of Commerce, Dent County Extension, MO Jobs Center/Satellite						
		Identify Economic Partner Trade Shows and Events to Promote Salem/Dent County for Business Attraction (3 points)							
	Industry/Business Attraction, Retention and Marketing	Attend the International Woodworking Fair in Atlanta, GA							
		Continue visits with local top employers and monitor needs (7 points)							
		Facilitate Commercial Property Tax Discussion							
GOAL #6 Develop Regional Relationships	Leverage Regional Strengths and Relationships to Grow Dent County's Economy	Follow up on initial meeting with Howell, Texas and Pulaski Counties for regional conversations (3 points)							
		Attend upcoming Women in Business Connect events in Rolla as schedule allows (3 points)							

Appendices & References:**Missouri Career Grades 2014-2024**

file:///C:/Users/ECONDEV/Desktop/Sally/Salem%20Documents/Economic%20Development/ED%20Strategic%20Plan/Research%20Support%20docs/career_grades.pdf

Missouri Industry Projections Highlights 2016-2026

<https://www.missourieconomy.org/pdfs/IndustryProjectionsHighlights.pdf>

“Chapter 100” Sales Tax Exemption on the Lease Transaction Between the Municipality and the Company

Chapter 353 Tax Abatement

CDBG Program, Action Fund Loan

CDBG Program, Interim Financing Loan

CDBG PROGRAM REVOLVING LOAN/MICROENTERPRISE LOAN

Retail Marketplace Profile Report, Salem, MO – Attached

Retail Marketplace Profile Report, Dent County, MO – Attached

<https://ded.mo.gov/sites/default/files/2019%20Action%20Plan%20-%20Draft.pdf> – State of Mo Annual Action Plan 2019 (February 2019)

Summary of Soil Fertility Status in Missouri by County, Soil Region and Cropping Systems by M. V. Nathan, Y. Sun, and D. Dunn (Progress Report-2007),

<http://aes.missouri.edu/pfcs/research/prop907a.pdf>

2020 REVISED - Prioritized Strategic Plan Action Items

Following are the Action Items from the Strategic Plan as prioritized by members of the public during the August 22, 2019 workshop and refined to eliminate ties and remove the two completed items during the October 22, 2020 Update meeting. Note – Items 14 and 15 in the below list remain tied.

1. Strengthen city codes related to property conditions
2. Mobilize citizens to actively solicit funding and policy changes for improvements to Internet and Cellular access in Dent County.
3. Develop and implement a marketing/educational campaign to highlight resources and programs specifically focused on aiding small businesses in Dent County.
4. Utilize Apprentices and Labor from Active Workforce Training Programs to Appropriately Save Dollars for the City and Provide Experience Opportunities for Trainees
5. Completion of City Hall Auditorium Remodel for Civic Theater
6. Partner with other community organizations to improve the quality of housing stock and appearance of neighborhoods
7. Support Student Entrepreneurial Education Programs as they develop.
8. Construction of New Building for Construction/Technology Trades - Workforce Initiative Grant (CDBG)
9. Agreement with Dent County Commons or Purchase to Develop Robust Programming, Marketing & Maintenance.
10. Assess and Recommend Edits to Local Development Incentives and Policies.
11. Support and assist development of community trail system when appropriate
12. Assess need for housing/building demolition and determine best steps for moving forward
13. Attain Certified Site Status - Master's Industrial Park
14. Downtown Street Enhancements (sidewalks & lighting)
15. Programming and Marketing Plan for Civic Theater Including Arts & Culture Programming
16. Research Funding Options for Facade Improvements and Building Rehabilitation
17. Community/Directional Signage Plan and Construction
18. Runway and Apron/Taxiway Improvements
19. Develop Tourism Marketing Plan for 2020
20. Develop Marketing Plan for Downtown Promoting History, Arts & Culture Events
21. Develop Festivals/Events to Draw Crowds Downtown (Halloween Ghost Tour, Xmas Festival, etc.)
22. Continue visits with local top employers and monitor needs
23. Pursue National Historic Designation for Downtown - either as a District or Individual Buildings
24. Work with HSE program and instructor locally to promote and fully utilize opportunities for citizens
25. Complete Zoning Review and updates resulting in updated City Zoning Map

26. Partner with R-80 Schools to work into the Construction Trades Program a section or once a year project focused on Historic Preservation
27. Assess City Electrical system for necessary future upgrades to accommodate industry and residential needs
28. Identify Economic Partner Trade Shows and Events to Promote Salem/Dent County for Business Attraction
29. Coordinate with local, regional, and state entities to offer business management and development education
30. Follow up on initial meeting with Howell, Texas, and Pulaski Counties for regional conversations
31. Attend upcoming Women in Business Connect events in Rolla as schedule allows
32. Development of Salem Makers - Makerspace with Programming to develop STEM Training
33. Upgrade Systems at Wastewater Treatment Plant to provide for Industrial & Residential Use
34. Construction of electric feeder line to Masters Industrial Park to accommodate load requirements for industry development
35. Construction/Development of Pilot's Lounge - Restrooms, drink and snack vending machines, basic info and brochures (restaurants, attractions, etc.)
36. Development of "Seasonal Colors" routes and marketing material (Fall Colors and Spring blooms)
37. Airport Pilot Courtesy Car
38. New City Water Well to Increase Capacity for Industrial & Residential Use
39. Coordinate economic development programs and support services, using referrals and in-step assistance
40. Attend the International Woodworking Fair in Atlanta, GA
41. New Water Tower to Increase Capacity for Industrial & Residential Use
42. Additional hangar space as funding is identified and available
43. These Items were added based upon comments at or right before the final workshop where prioritization occurred. They have been added here to be included for future consideration but are not ranked.
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 - d. Facilitate Commercial Property Tax Discussion