



Greater Greybull WY Community Review

August 4-6, 2020

PHASE 1 - LEARN

A service of the Wyoming Business Council in partnership with the University of Wyoming Extension, the University of Idaho and University of Montana.

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COMMUNITY REVIEW REPORT

Greater Greybull Area, Wyoming

August 4-6, 2020

Executive Summary

The Greater Greybull Community Review team would like to thank the organizers and citizens of Greybull and Shell for their time and hospitality. The Greater Greybull area is a beautiful area with many assets to build upon. The Community Review is a low-cost process to find out what citizens want for their community and begin action planning to make things happen.

This Review is the fifth in our new process, but unique in that it combined the resources and talents of two communities. The new program is a hybrid of our long standing (20+ year) and successful Community Assessment Program, with new processes and a partnership with Montana and Idaho. During this three-state grant project, the Wyoming Business Council and University of Wyoming are collaborating with the University of Idaho, Idaho Rural Partnership, Montana State University and the Montana Economic Development Agency to develop the very best review process in each of our states. This project is funded in part by a USDA Agriculture and Food Research Initiative (AFRI) grant with Dr. Lorie Higgins, University of Idaho Extension, as the principal investigator.

As part of the three-state collaboration, each state has its own design team. The Wyoming Design Team is guiding the four-phase process to help identify community needs, build community capacity, and provide resource information to address community needs.

The tri-state Community Review website can be found at <http://www.comunityreview.org>, where there is a searchable database of resources for community development and other useful information. It will prove to be of immense help to communities now and far into the future.

Thank you again, for sharing your hopes and vision for the Greater Greybull area during the Community Review. Working together, much will be accomplished.



Wyoming Community Review Process Overview

The Wyoming Community Review Process has four phases. Not every community will go through all the phases, but the opportunity is available to grow and achieve success through four phases of assistance. A community coach is made available to help the community prepare for success. The Greater Greybull area completed Phase I.

- Phase I – LEARN - Includes the application, community pre-assessment survey and exploration, community team training, the Community Review with priority setting, and initial report.
- Phase II – LEAD - Community training (if needed and in areas identified), Home Team members with the assistance of a community coach develop a workplan/action plan using the Strategic Doing process, set up committees to work on areas identified, and a final report outlining the activities to be undertaken.
- Phase III – LAUNCH – Determine funding sources, identify consultants or other community success stories, follow-up, and technical assistance. In-depth training, if needed.
- Phase IV – EVALUATION/CELEBRATION – One-year follow-up and celebration, report out of community successes and return on investment. Celebrating successes.



Ripple Effect Mapping (2013 Greybull Community Assessment)

Ripple Effect Mapping (REM) around the 2013 Community Assessment kicked off the Community Review. REM is a versatile participatory evaluation tool to collect the untold stories and behind-the-scenes activities that can ripple out from a specific program or activity. It uncovers both the intended and unintended outcomes of the previous assessment. For example, on the REM on the next page, one priority was weekend activities. As a result of that priority, a little more than 20 “unintended” outcomes happened.

The following priorities were identified in 2013:

Priorities - 2013

Economic Development

- Job recruitment
- Support existing business
- Powell Merc
- Call Center
- Clean up and develop Industrial Park
- Distribution center
- Develop Airport

Tourism and Recreation

- Museums – Flight, Geoscience, Dinosaur, Cultural
- The Shack
- Antelope Butte
- Swimming pool, splash pad, waterpark
- Encourage people to stay here, develop day trips
- Develop more uses at city parks, band shell
- Frisbee golf course
- Update Recreation Center
- Community involvement and enhancements
- More weekend activities
- Signs and entrances
- Volunteers

Housing

- Affordable, quality rentals
- Assisted living

As depicted on the REM on the next page, many projects were completed from the 2013 Assessment, including:

Weekend activities

Updated Rec Center

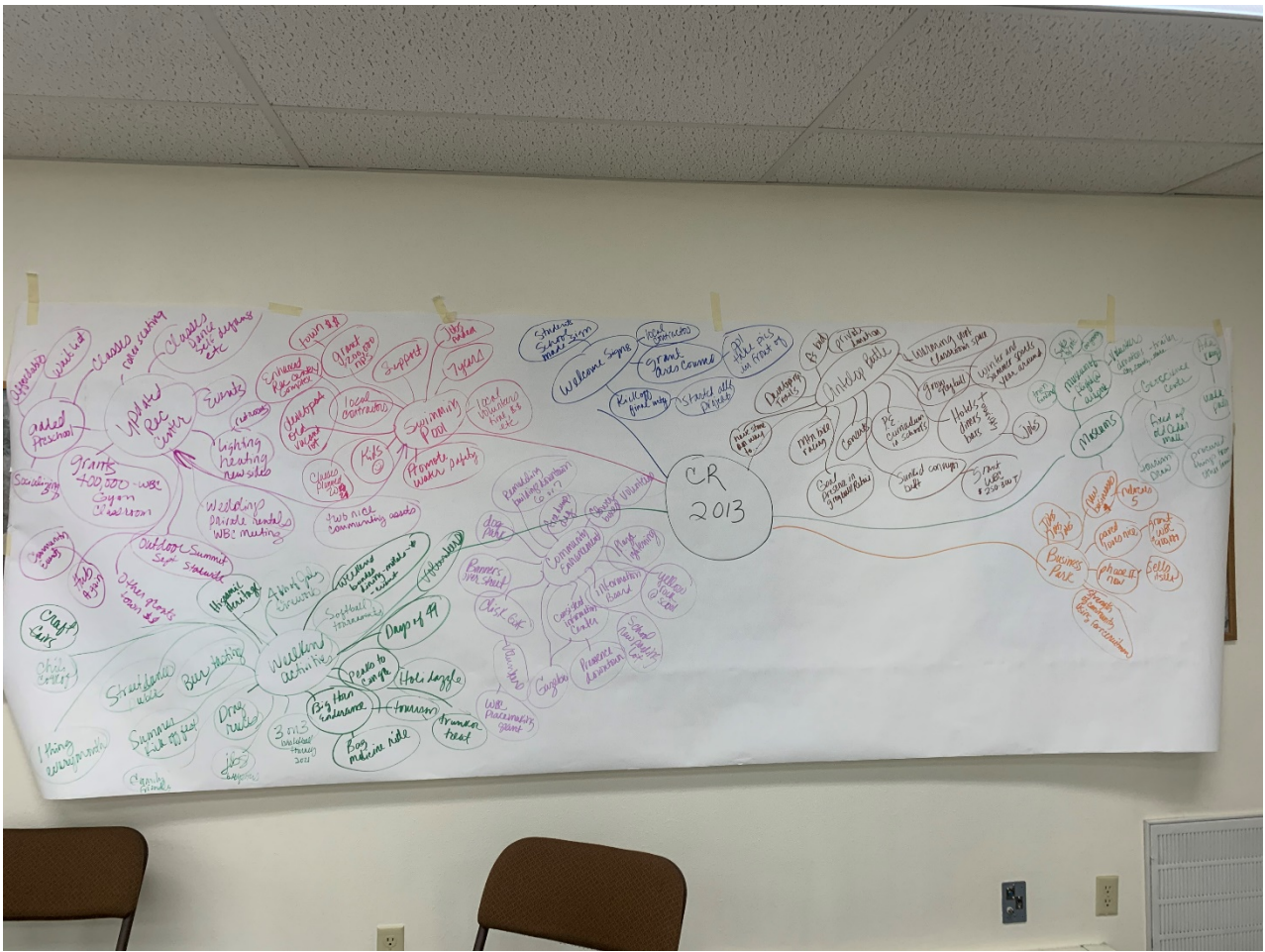
Welcome signs

Antelope Butte Area

Museums

Business park





We ran out of time mapping the assessment due to the great work accomplished. More was completed than is depicted on this map.

Asset Mapping

The assets of the Greater Greybull Area were mapped as a springboard to using area assets to realize the vision and the goals. These assets can be built upon for greater success.

SKILLS	GREYBULL ASSETS - SOCIAL	GREYBULL ASSETS - NATURAL	GREYBULL ASSETS - BUILT
<ul style="list-style-type: none"> Welding mechanics dentist Concrete Construction Farming/Ag/retail Artist educators hospitality engineering outdoor rec Speakers bureau 	<ul style="list-style-type: none"> Coffee Clubs Greybull Needs a Pool BCED WV Lifeline BOCES The Shack Rec Dist BBORC 	<ul style="list-style-type: none"> River Priceville Mtns Winter fall Chimney rock Devils Kitchen dino tracks Levet/Levit reservoir benotonic minerals 	<ul style="list-style-type: none"> Priceville walk Antelope Butte Pool Rec Center Visitor Center MOFAF MAIN ST. GBP AIRPORT Papa Pano Service Center Parks jewelry dist Call center distillatone

What makes a great community?

In the spirit of continuing to make the process better each time, we started the Listening Session's off by adding a different question: **What makes a great community?** This is an awesome question to get people thinking about communities they have been in that they admire, even if it is their own community. It gets the creative juices flowing and is a great ice breaker to get to know one another and develop commonalities among what people think makes a great community. The question starts people thinking about what in their community are strengths and visioning about what they would like for the future of their community.

As you can see by the Word Cloud below, many agreed that people are what makes a community great. Safe, friendly, activities, diversity, events, restaurants, services, and vibrant are among other things that make a community great.



This word cloud visually represents the most frequently voiced responses. Larger text indicates items mentioned most often.

What are the strengths for the Greater Greybull Area?

The Greater Greybull Area has many strengths that match the question, what makes a great community? People, safe, community, small, pool, schools and friendly were among the top strengths. Notice many of the strengths of the area match what people think makes a great community. This area is well on its way toward creating a vision for the community! These strengths will help the two communities build their vision into reality. Notice as you dig deeper into the report, these strengths can be built upon to address the main themes.



Major Themes

Listening sessions were held in both communities, with the same three questions asked of each group for consistency. The state team felt the themes from each community were too different to combine, so below you will find themes for both Greybull and Shell broken out. Because the communities are so tied to each other, we recommend working together and supporting each other's goals. Each community depends on the success of the other.

Greybull Major Themes

Taking into consideration all three questions the major themes heard in Greybull are as follows:

- **Job Creation**
Diversified Industries
Fill the Business Park
- **Downtown**
Retail
Restaurants
- **Senior Living**
Independent
Assisted
Nursing Home
- **Clean up Entrances/Town**
- **Maximize River**



Shell Major Themes

Taking into consideration all three questions the major themes heard in Shell are as follows:

- **Planned Growth**
Resource Management
- **Broadband**
- **Outdoor Leadership and Stewardship**
- **Jobs to keep families here**
Vocational
Non-Traditional



These are the areas the Community Review team will focus on in Phase II. Because there was so much variety in describing the components of the themes, the team listed sub-themes to keep track of the important thoughts in each theme.

Town Hall Meeting

A Town Hall Meeting was conducted on August 6th to report what was heard from the community during the Review. Attendance at this meeting was relatively low. However, after the report out, attendees were asked to vote for the most important theme then worked in small groups on the theme most important to them to come up with other community members who should be at the table and action items. This work sets the stage for Strategic Doing, which is scheduled for October 13 & 14, 2020. The priorities identified in the town hall meeting were:

<u>Theme</u>	<u>Total Votes</u>
<u>Greybull</u>	
Job Creation	7
Downtown	1
Senior Living	3
Clean up Entrances/Town	5
Maximize River	6

Shell (Shell prioritizing will happen at the Strategic Doing Session in October)

Planned Growth
Broadband
Outdoor Leadership and Stewardship
Jobs to keep families here

Additional Community Engagement Around Themes

After the Review, additional community engagement was held to get more feedback on priorities. 78 people responded to the survey. The survey gave people the opportunity to pick their top 2 priorities. The results were as follows:

<u>Theme</u>	<u>Total Votes</u>
<u>Greybull</u>	
Job Creation	18
Downtown	14
Senior Living	7
Clean up Entrances/Town	7
Maximize River	8
<u>Shell</u>	
Planned Growth	1
Broadband	7
Outdoor Leadership and Stewardship	0
Jobs to keep families here	1

Priorities for Greybull and Shell

The priorities from the Town Hall Meeting and Additional Engagement were added to get the priorities listed below:

<u>Theme</u>	<u>Total Votes</u>
<u>Greybull</u>	
Job Creation	25
Downtown	15
Maximize River	14
Clean up Entrances/Town	12
Senior Living	10
<u>Shell</u>	
Broadband	7
Planned Growth	1
Jobs to keep families here	1
Outdoor Leadership and Stewardship	0

Strategic Doing

There is another opportunity to see work done around any of these Major Themes. On October 13 and 14, Strategic Doing sessions are scheduled where people will be asked to work on themes they are most passionate about and give an hour per month toward that effort. This will be another effort to prioritize and put in place an action plan to get things done! More details in Next Steps on page 15.



Town Hall Small Group Work

CLEAN-UP ⑤

ENTRANCES & TOWN

● ● ● ● ●

- Big Horn Redi-Mix owner
- Davies Pallet Shop owner
- Murdoch's owner
- Live Stock Yard owner
- Kenny Gilbert

DOWNTOWN ①

- RETAIL
- RESTAURANTS

● Cloth Spinning Co.
Pastries
ATV

Holton
Lisa D.
Todd D.
Karla

SENIOR LIVING ③

BCED

- INDEPENDENT
- ASSISTED
- NURSING HOME

JOB CREATION ⑦

- DIVERSIFIED INDUSTRIES
- FILL BUSINESS PARK

John Coyne
Casey

● ●

Bob Hankins
Carl Bert
Deeabauer
Kevin Clark
Jeff Grant

John Coyne
Casey Sorensen
Mike McCulloch
Holton Harter
Myles Foley
Todd Zelter
Todd Dalin
Chris + watch hunt
Ron Fiene

MAXIMIZE THE RIVER ⑥

WY GrF
BBORC
Weed + Pest
USACE
EPA

Shack
GAC
Kids
Boater

Lighting
Beach Stairs
Riverbank Trail
Workshop

Recommendations

Below are a few recommendations from the state team for the local review team to start considering. More planning work will be carried out in Greater Greybull in October to get efforts started and moving forward with actionable items that can be carried out in a short period of time.

Greybull Recommendations

Job Creation (Partner with Shell)

Diversified Industries

- Alignment of workforce and skill sets within the community to determine best fit for diversification

Fill the Business Park

- Industry study to identify potential industry/business targets
- Develop a marketing plan to promote the business park as well as other vacant businesses in the area
- Outreach to existing businesses that might be interested in expanding/moving into the business park (including regional outreach/marketing of the business park)

Downtown

Retail

Restaurants

- Check out our new Main Street Lite Program at <https://www.wyomingbusiness.org/MainStreetLite>. This program is designed to be easy and help a community build excitement and passion in three phases.
- While Placemaking is Phase 2 of the Main Street Lite Program, it is also a stand-alone program. Visit <https://www.wyomingbusiness.org/placemaking> for more information. This is a great way to test B4 you invest, energize underutilized spaces and get people excited about their community.
- Capitalize on community events that get people downtown and excited about the area.
- Help market the variety of restaurants and retail options that already exist, including food trucks, etc.
- Look into pop-up shop type events to promote local artisans (i.e. Etsy sellers) that might be interested in a storefront in the future. This is a great idea going into the holiday season. Rotate thru vendors each weekend. Invite a different food truck each of those weekends that would be near the pop-up. Check out this cool CBS news story about pop-ups: <https://www.cbsnews.com/video/pop-ups-are-popping-up-all-over/>
- We promised we would not send a super large report, but see the Northwest Wyoming Retail Response to Shopko Closures report in Appendix A. This has great information about retail gaps and possible opportunities as a result.

Senior Living

Independent

Assisted

Nursing Home

- Work with BCED on activities already in motion

Clean up Entrances/Town

- Community clean-up day/event. Sponsor an annual town-wide Spring beautification day (or contest). Teams (churches, seniors, businesses, police, fire, Scouts, etc.) could compete for prizes. This could be combined with an annual BBQ and street dance. Make it fun!
- Work with school organizations for community service projects
- Again, Placemaking is a great way to tackle this.
- Mural projects combine art and activities and clean up unsightly areas. Laramie has a stellar Mural Project: <http://www.laramiemuralproject.org/>

Maximize River

- Signage to promote river trail. The Lander Arts Center/AtLAS is working on a river project that is pretty awesome, <https://www.landerartcenter.com/ATLAS>. Ps-they got a placemaking grant.
- Lighting along the pathway along with some sort of a dock. Perhaps the recreation department or another group could do classes or things that encourages kids and families to be using the river.
- This is an older report, but Steamboat Springs had the same issue with having a great resource but underutilizing it. http://co-steamboatsprings.civicplus.com/DocumentCenter/View/4504/yampa_river_corridor_master_plan_1984?bidId=. They used this report to help them develop their river front, even though the plan was 10 years old when they started.
- Other reports/successes that may get the juices flowing about the river:
 - <http://www.ohioanderiecanalway.com/Main/Pages/56.aspx>
 - Green River [Whitewater Park](#)

Miscellaneous Ideas

- Welcome baskets for new residents, random act of kindness baskets for residents to include local businesses coupons, gifts, calendars, amenities.
- Volunteer plan/reach out to more community members. Start small and ask them to help for a certain time at an event. Give them responsibilities and thank them.
- Start a Citizen Academy to help residents learn about town government. Call Amy Quick for more information

Shell Recommendations

Planned Growth

- Visit <https://www.wyomingbusiness.org/placemaking> for more information. This is a great way to test B4 you invest, energize underutilized spaces and get people excited about their community.
- Visit with Amy Quick, NW Regional Director for the WBC about different planning options to meet the towns goals. The Strategic Doing session in October may be helpful.

Broadband

- The Greybull/Shell Valley was recently awarded CARES Act ConnectWyoming dollars for fiber to the home and wireless.

- From Greybull Lane 33 to Shell: Fiber to home Trapper Creek, Sharon Gulch, Beaver Creek and Lane 33 in Greybull AND Fiber to the Tower for wireless at Horse Creek.
- Is gig capable; minimum 25/3
- Should be complete by December 31, 2020
- Ryan Kudera with the WBC and the Broadband Board will start working on a project soon to start movement for an online marketplace and how to market this. This will help answer the questions: How can you capitalize on the enhanced broadband in the area? What businesses can people start, what products can they sell online, who can you now attract?

Outdoor Leadership and Stewardship

- Outreach to NOLS for education/stewardship projects

Jobs to keep families here (Partner with Greybull)

- Develop a marketing/outreach plan for Shell ... who do you want to attract to your "town", what do you want them to know, etc.?
- Diversified Industries (Partner with Greybull)
 - Alignment of workforce and skill sets within the community to determine best fit for diversification
 - Industry study to identify potential industry/business targets
- Outreach to existing businesses that might be interested in expanding/moving to Shell (including regional outreach/marketing of the business park)

Next Steps

WHAT CAN WE DO TOGETHER WITH JUST ONE HOUR A MONTH?

On October 13 & 14, 2020, Greater Greybull will enter Phase II of the Community Review process. Two Strategic Doing Workshops will be held: one in Greybull and one in Shell. During this interactive, 3-hour session, we will work together to identify strategies to meet each communities' goals. Strategic Doing™ is a new approach that helps local communities, regions, or organizations form the collaborations needed to address complex challenges. Instead of just talking about what can be done, this workshop will allow us to set doable goals that can be achieved in a short time. Workshops will be divided by major themes so individuals interested in one or more themes can engage to move those priorities forward through manageable actions.

Along with this Strategic Doing support, \$1500 in grants are available for completing the Community Review and another \$1,000 for a community coach is available also.

Overview

What is Strategic Doing?

Strategic Doing is a process that enables civic leaders to form collaborations quickly, guide them toward measurable outcomes, and make adjustments along the way.

The process focuses on four key questions:

What to Expect

During a Strategic Doing Workshop participants are led through a structured set of conversations and guided by workshop exercises, which define five things:

1. Opportunities
2. At least one outcome with characteristics and metrics
3. At least one initiative or project
4. A complete action plan
5. A plan to meet again

1 What *could* we do together?

- Look first at assets within the group at the table.
- Next look to see how combining the known assets might offer new opportunities.
- Evaluate who is not at the table but might have an interest or resources helpful to the solution.

2 What *should* we do together?

- Evaluate the options for action and help the group narrow the scope of activity by suggesting the group focus on no more than three goals initially.
- Analyze the suggested activities to see which would have the highest impact but it still do-able.
- Define an outcome with specific characteristics of success and metrics.

3 What *will* we do together?

- Draft an activity/action plan including the first action steps, the responsible entities and “due dates.”
- Make a public commitment to “do” the action step

4 What's our 30/30?

- Decide how the group will communicate (face-to-face, internet, email, weblogs, etc.).
- Set a date, in the next 30 days, for follow-up, reporting and adjustments.



Strategic Doing allows your community, organization or network to create an action plan, with measurable outcomes and accountability, in a 3-6 hour period.

Contact us at info@strategicdoing.net to learn more about Strategic Doing.
Follow our blog at www.strategicdoing.net to stay up to date with activities and opportunities.

Strategic Doing Workshop



Strategic Doing™ Workshop

What is Strategic Doing™?

Strategic Doing™ is an exciting new approach that helps local communities, regions, or organizations form the collaborations needed to address complex challenges. Instead of just talking about what can be done, this workshop will allow us to actually set doable goals that can be achieved in a short time period. Visit <https://youtu.be/Vqk1ibe9sDw>



Strategic Doing™ builds complex collaboration networks by helping groups answer four simple questions.

TOPICS OF DISCUSSION

October 13
Greybull

Job Creation*
Downtown
Senior Living
Clean up Town
Maximize River

October 14
Shell

Planned Growth
Broadband
Outdoor Leadership/
Stewardship
Jobs*

*Those working on jobs in both towns may want to coordinate



Please RSVP by Oct. 9:

Greybull: Paul @ greybulladmin@wyonet.net
Shell: Bill @ khaki75@aol.com

Moving Forward!

Greybull/Shell Community Review

Greybull/Shell has been selected by the Wyoming Business Council and University of Wyoming Extension to participate in a Community Review. This is an amazing opportunity for our community to receive expert insight and guidance on creating a locally driven vision for our future.

Watch for the Survey!

You will receive a community satisfaction survey, as part of the review. The survey will give us valuable information about what is important to people in the Greybull/Shell area.

Join us!

Join us at one of the listening sessions below and answer a few simple questions about your dreams for the future of Greybull/Shell.

You are welcome to attend any session; these are only suggested common topic/ experiences sessions.

Aug. 4, 2020	Session	Location
3:00 pm - 4:00 pm	Business/Professional	Town Hall
4:00 pm - 5:00 pm	Remote Biz/Entrep/Sm Biz	Town Hall
7:00 pm - 8:00 pm	Hotel/Motel/Restaurant	Town Hall

Aug. 5, 2020	Session	Location
10:00 am - 11:00 am	Healthcare	Senior Center
11:30 am - 1:30 pm	Seniors	Senior Center
2:00 pm - 3:00 pm	Trades/Heavy Industry	Town Hall
3:00 pm - 6:00 pm	Open House*	Information Center

Online Options	Session via Zoom	Location
10:00 am	Open Listening Session	Register at https://tinyurl.com/GreybullReview
2:00 pm	Open Listening Session	Register at https://tinyurl.com/GreybullReview

Aug. 6, 2020	Session	Location
7:00 am - 9:00 am	Breakfast & Ag/Ranch	Shell Store
9:00 am - 10:00 pm	Outdoor Rec	Shell Store
10:30 am - 11:30 am	Art/Music/Theater	Town Hall
11:30 am - 12:30 pm	Civic Groups/Church	Town Hall
12:30 pm - 1:30 pm	Kid's Open House	Rec Center Area
7:00 pm	Town Hall Meeting	Town Hall

Online Option	Session via Zoom	Location
10:00 am	Open Listening Session	Register at https://tinyurl.com/GreybullReview

*Stop by anytime during this session to answer the questions and enjoy a treat.

Participating communities receive up to \$1,000 to implement a project identified as a need by their review.

Benefits

Reach agreement about community priorities and economic development opportunities.

Support future grant applications with an objective, professional assessment of local conditions and opportunities.

Identify sources of funding for technical assistance and best practices.

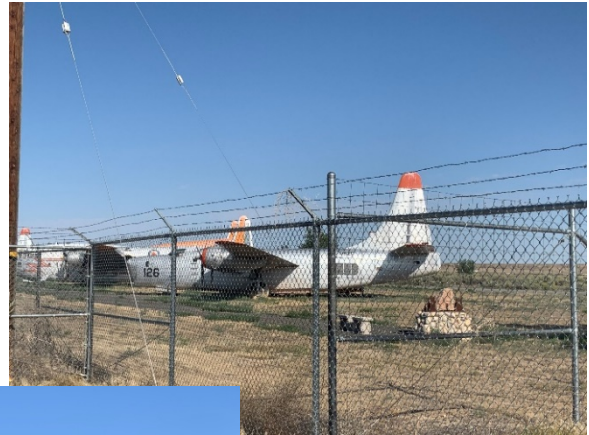
Improve community decision making and leadership strategies.

Increase the number of residents involved in community organizations and projects.

Strengthen relationships with agencies that provide funding and assistance.

Tour of Greater Greybull

Several Greater Greybull Home Team members provided a tour to the team. The tour highlighted Greater Greybull's natural resources and abundant outdoor opportunities as well as businesses and buildings, and amenities people enjoy in the community. The tour gave the team a great sense of Greater Greybull before starting the Review.



Community Listening Sessions

Community Listening Sessions were open-ended, focus group-like discussions with stakeholders in the community. We asked the same questions at each session and offered several sessions to encourage as many participants as possible. We interviewed nearly 106 people during 12 sessions and surveyed 49 people regarding priorities after the Review.

Sponsoring Agencies and Organizations

- City of Greybull
- Big Horn County Citizens for Economic Development
- Old Shell Store/Campground
- Grow Greybull
- UW Extension
- University of Idaho, Extension
- Bank of Greybull

Acknowledgments

Thank you to the many individuals who generously shared their time, opinions, and knowledge by serving on the home team, completing a survey, and participating in a listening session

Greater Greybull Home Team Organizers

- Mayor Miles Foley, Town of Greybull
- Paul Thur, Town of Greybull
- Jeff Thornton, Grow Greybull
- Kay Fleek, Greybull Chamber of Commerce
- Lisa Kunkel, The Henne Group
- Bill Hayes, Big Horn County Citizens for Economic Development
- Amy Quick, Wyoming Business Council

Visiting Team

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Amy Quick

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Greater Greybull Area Community Survey Report

Step One of a Wyoming Community Review

September 2020

Community Satisfaction Survey Results

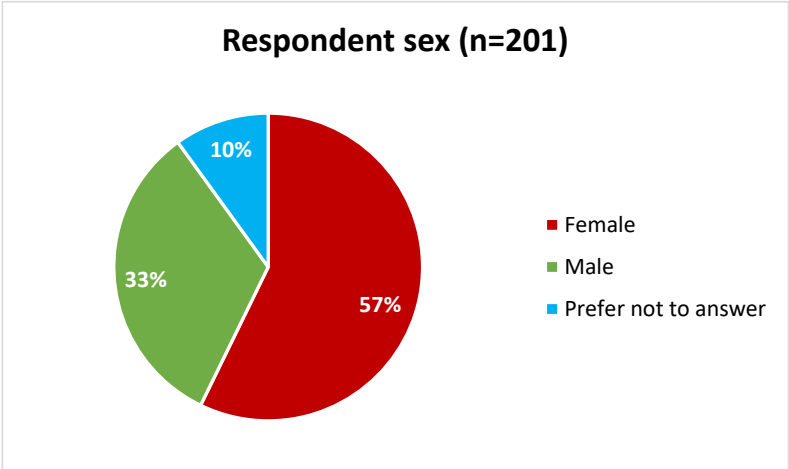
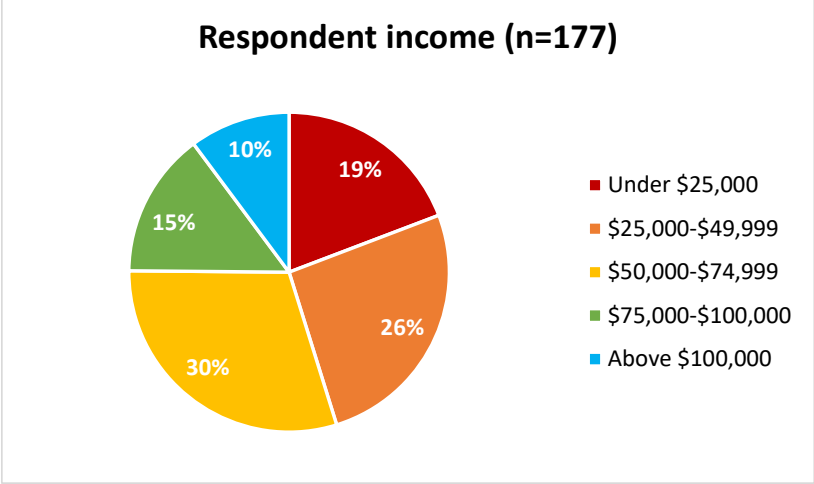
A “Community Satisfaction Survey” was conducted in Greybull and Shell and included all households located in and around those communities. A community survey is conducted as part of a Wyoming Community Review, a program of the Wyoming Business Council (WBC) in partnership with University of Wyoming Extension, and is typically conducted six to eight weeks before a WBC team visits the community to conduct listening sessions with multiple groups, discuss survey and listening session results, and plan for bringing action teams together to implement projects prioritized by the community. The survey was conducted by University of Idaho and the HELPS Lab at Montana State University and is included in the appendix of this report.

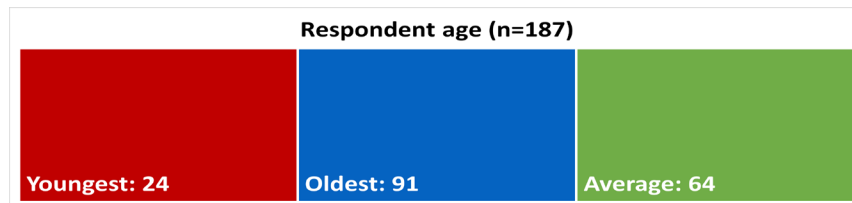
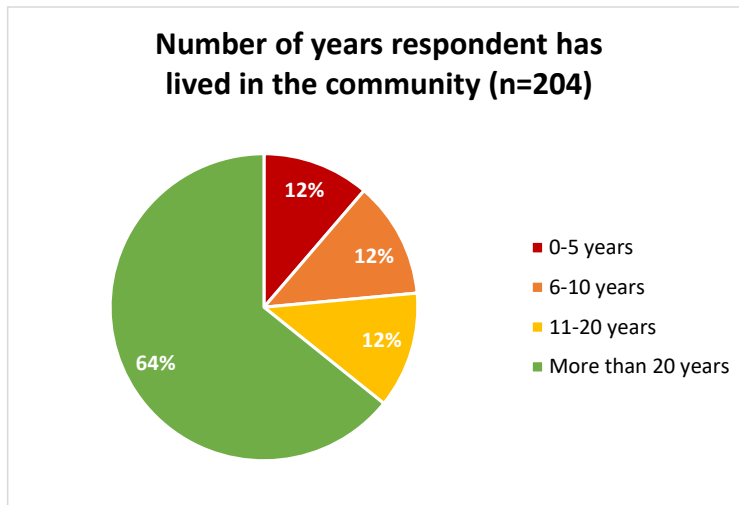
Survey results serve several purposes and serve communities in multiple ways. Results can be used to bolster community grant proposals and demonstrate support for new policies or the status quo. Citizen groups and municipalities can also use this data as a guide for planning and identifying future initiatives.

In addition, Community Review delivery organizations and partnering Universities use this data to identify common interests and concerns across multiple communities, which in turn helps these organizations develop programs and resources to better assist rural communities like yours. To identify commonalities and differences across communities, surveys need to be relatively standardized. Therefore, some questions in a standardized survey may be relevant to particular communities. That said, most of the questions on your survey are relevant to the greater Greybull area.

For this survey, the response rate is 23%, with 209 surveys completed (16 were completed online and the rest were completed on paper and mailed – helping to keep the USPO alive and well!). 1044 surveys were mailed out and 125 were undeliverable.

Demographics (characteristics of those responding to the survey)





Respondents tended to be longtime residents living within Greybull or Shell city limits who are older, and female, with incomes between \$25,000 and \$75,000.

The first survey question is a list of community attributes that were ranked by respondents on a five-point scale – from Very Satisfied to Very Dissatisfied plus an option to mark “I don’t know.” In the tables below, Very Satisfied and Satisfied responses are combined as are Very Dissatisfied and Dissatisfied responses. A table providing a more detailed breakdown is included in the appendix.

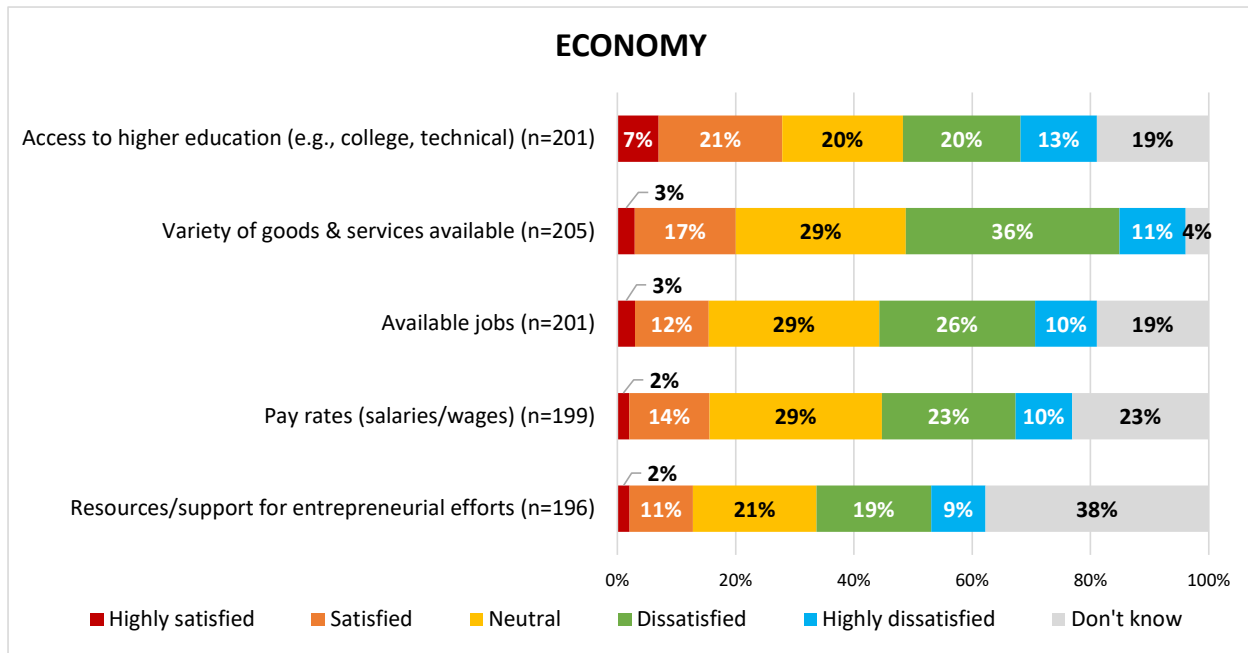
	Satisfied	Dissatisfied	Neutral	Don't Know	Responses
<i>Friendliness of Residents</i>	70%	8%	22%		203
<i>Parks & Playgrounds</i>	68%	6%	24%	2%	204
<i>Police Protection/Law enf.</i>	67%	11%	17%	5%	202
<i>Bike & Pedestrian Access</i>	65%	9%	22%	4%	203
<i>Local K-12 School System</i>	57.5%	5.5%	14%	23%	200
<i>Senior Citizen Support Services</i>	55%	9%	21%	15%	202
<i>Appearance of Downtown</i>	55%	13.5%	31%	.5%	203
<i>Internet Service</i>	40%	25%	28%	7%	202
<i>Medical Care</i>	40%	27%	28.5%	4.5%	204
<i>Responsiveness of Local Government</i>	36%	23%	27%	14%	198
<i>Civic & Non-Profit Orgs</i>	32%	16%	30%	22%	202
<i>Childcare/Early Ed.</i>	26%	12%	22%	40%	199

	Satisfied	Dissatisfied	Neutral	Don't Know	Responses
--	-----------	--------------	---------	------------	-----------

<i>Variety of Goods & Services Available</i>	20%	47%	29%	4%	205
<i>Arts, Entertainment, & Cultural Activities</i>	22%	44%	25%	9%	199
<i>Public Transportation</i>	14%	43%	13%	30%	189
<i>Available Jobs</i>	15%	37%	29%	19%	201
<i>Pay Rates</i>	16%	32%	29%	23%	199
<i>Resources/Support for Entrepreneurial Efforts</i>	13%	28%	21%	38%	196

The following sections provide additional detail on all Question 1 items by the categories of Economic Issues, Infrastructure & Housing, Services, Placemaking and Leadership. 88 people who took the survey chose to share comments in response to Question 2, “Would you like to comment or explain why you rated your satisfaction with any of these public services and community amenities in the way you did?” The Word Cloud below is created from the text of those comments (word size is related to the number of times it is mentioned overall).





Most comments related to the economy had to do with empty storefronts and the lack of places to purchase clothing and household goods. Employment opportunities for youth, adults and older workers is also in short supply.

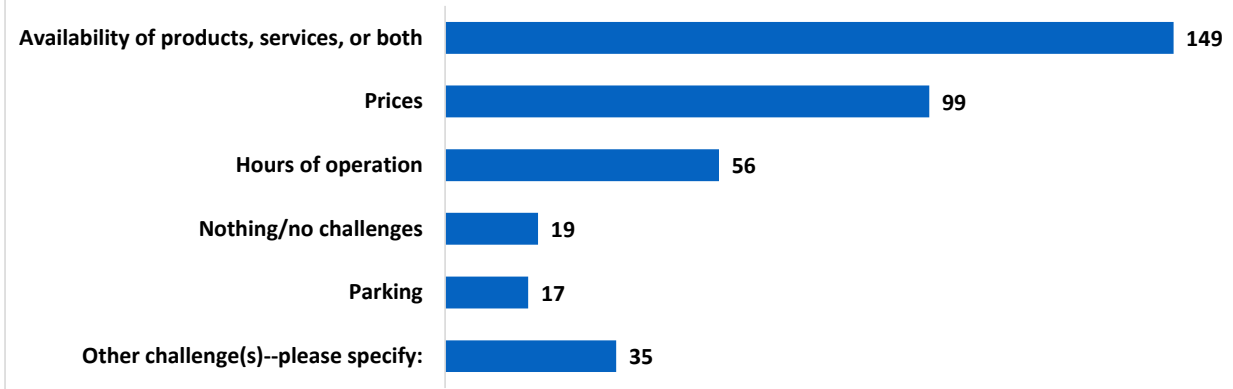
- *Definite lack of shopping options especially affordable clothing unless you go out of town or online.*
- *Our downtown is practically empty...it's disheartening.*
- *We live in a small town with no major retailers just small stores and as such it is hard to get a variety of goods and groceries etc., at a decent price and good in stock availability. It is just the way it is. It makes it hard to buy local for a lot of items so must travel out of town to get what one needs.*

There were a few suggestions for changing the economic outlook for the area.

- *Rent for buildings on main street may need to be lowered to attract renters. Would love to see someone be able to build a bowling alley (non-smoking) in our town. I feel a shady mini golf course would help to attract out of town guests.*
- *Would like the town to help support the midway gold course. It's a benefit to both Greybull and Basin. It increases property value, recreation and senior citizen involvement. If it closes people would have to drive 35+ miles to golf.*
- *Need a fishing/boating guide to Bighorn River for tourists and others.*
- *It would be great if there was a store that carried underwear, socks, and other basic clothing appropriate for all ages. The Dollar Store is okay, but the clothing is not for all. A reasonably priced clothing store/general store would be well-visited by many locals.*

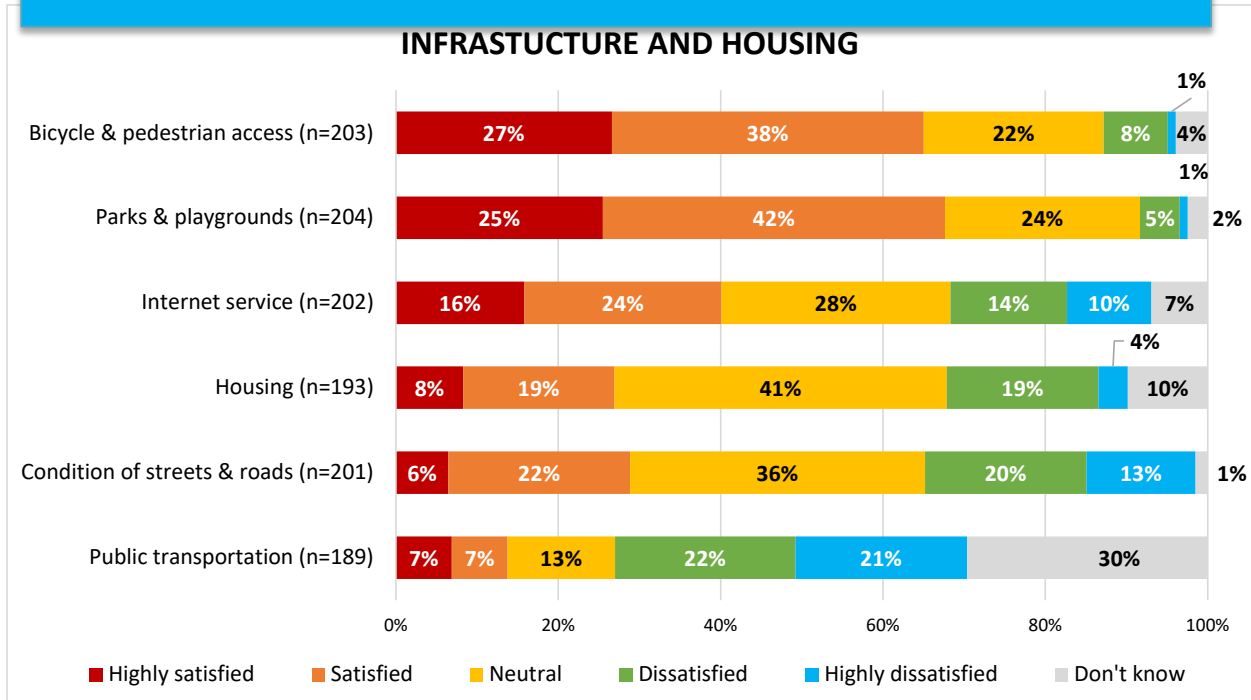
This next table focuses on challenges to supporting local businesses. Availability of goods and services and prices are often the two major factors identified small town surveys.

**Number of people saying each factor CHALLENGES their ability to support the Greater Greybull area's locally owned businesses
(n=200)**



INFRASTRUCTURE & HOUSING

INFRASTRUCTURE AND HOUSING



Considering most infrastructure-related comments focused on the poor condition of streets, roads, and alleys it is surprising that only 33% of respondents reported being dissatisfied with the condition of streets and roads.

- *City and county need to take more care cleaning gravel and debris from the road shoulders, particularly within the north, south, and east bridges. Due to debris, bikers either risk flat tires or risk diverting out into the traffic lane.*
- *I think the streets are terrible for the most part. Potholes and the lack of winter care are a problem.*

Similarly, internet was rated high but there were several comments about poor internet service. This might be due to uneven quality across the greater Greybull region.

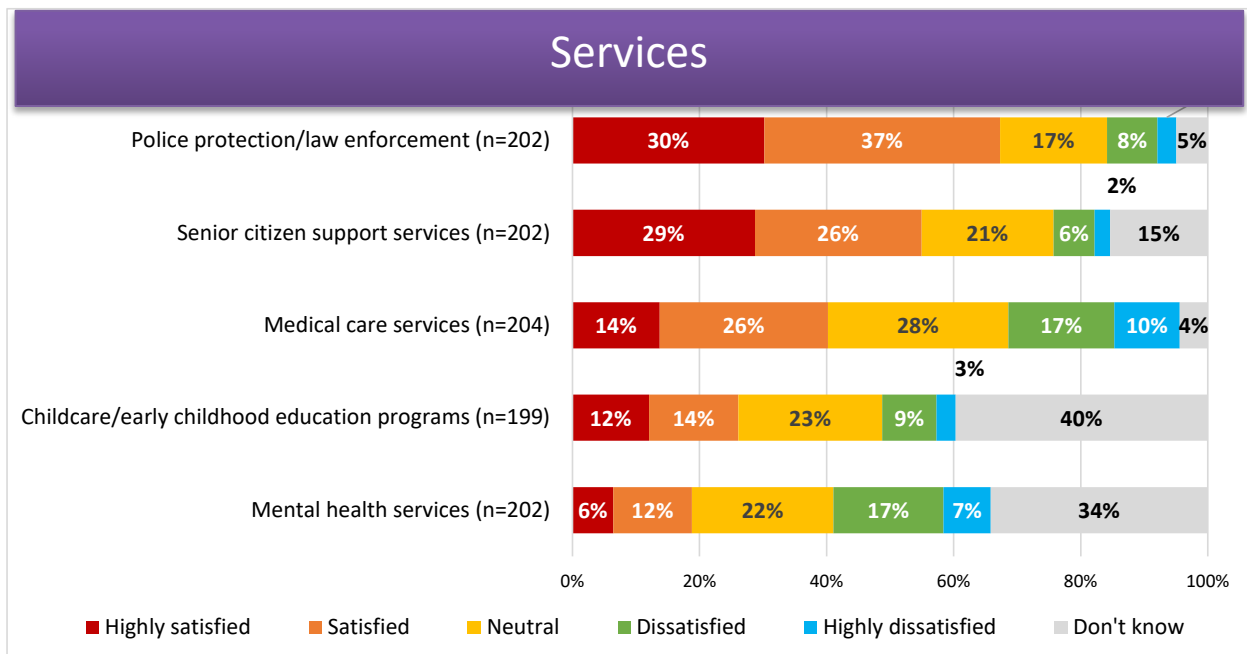
- *Shell community is fighting for improved internet service.*
- *Broadband internet is becoming an essential service. Outside of a few select neighborhoods it's basically non-existent.*

Weeds, abandoned buildings and junky properties was the third area of infrastructure concern represented by survey comments.

- *Our neighborhoods really need cleaned up. Weeds, junk--south end and far north ends of town in disrepair and allowed to keep it junky.*
- *Too many abandoned homes and trailers, dangerous fire hazards; no ordinance for fallen trees.*

Two respondents commented that housing is very expensive, and one person was specific about needs.

- *Housing--need improvements to assisted living, more affordable housing/ disapprove of subdivision on bluffs; bluffs should be kept public access and protected, recreational.*



Though police/law enforcement was highly ranked, a few commented that there may be too many police for the size of the community(ies). Meanwhile, some traffic issues seem to need some attention.

- *Too many police officers in our opinion.*
- *I would like to see police walking around visiting with people – not sitting at the entrances to town waiting for speeders.*
- *The speed limit from Shell down the hill to bridge not enforced, nor is the speed limit leaving town across bridge going towards Shell.*
- *The speed of motorists, both locals and visitors - through Shell is a big problem. We need a speed sign (the kind Greybull has as you come into town) or speed bumps, or both. Because our community is so small, we have quite a few pedestrians, especially now that they Shell Store is open. Trucks and large RVs are especially scary as they come roaring through towns.*

Though not asked about specifically in the survey, one person wanted the VFD to know they are appreciated.

- *THANK YOU TO THE TOWN VOLUNTEER FIRE DEPARTMENT!!!! You do a great job!*

The senior center received all high marks.

- *I think the senior citizen center does a great job of supporting the seniors.*

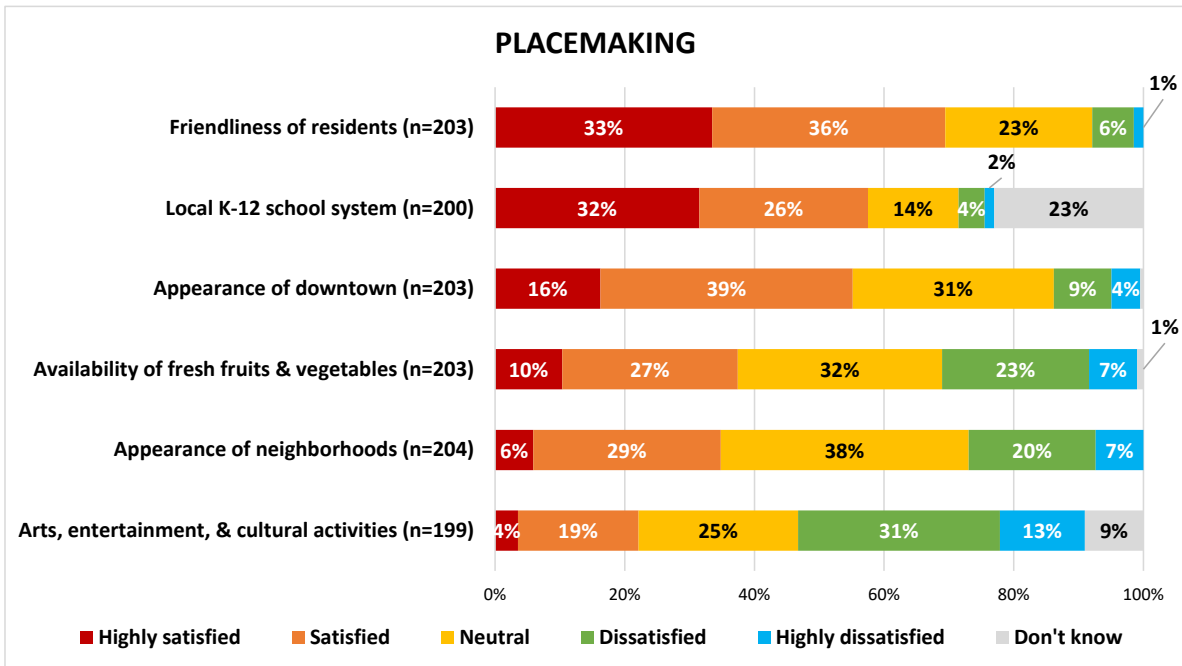
Most respondents did not have an opinion about childcare/early childhood education, which makes sense since most respondents tended to be older. A few comments, however, indicate some possible issues in this area.

- *Childcare is horrible.*
- *We need more early childhood education.*

Quite a bit of concern was expressed about the hospital but with recognition that improvement efforts are underway.

- *South Big Horn Hospital Emergency needs improvement!*
- *I know the hospital in our area is working hard to improve but their reputation is horrible.*

Placemaking



As noted earlier, the appearance of some neighborhoods is a big concern for some residents. Appearance of downtown was ranked higher, with the concern there being about the loss of businesses and inability to recruit new ones.

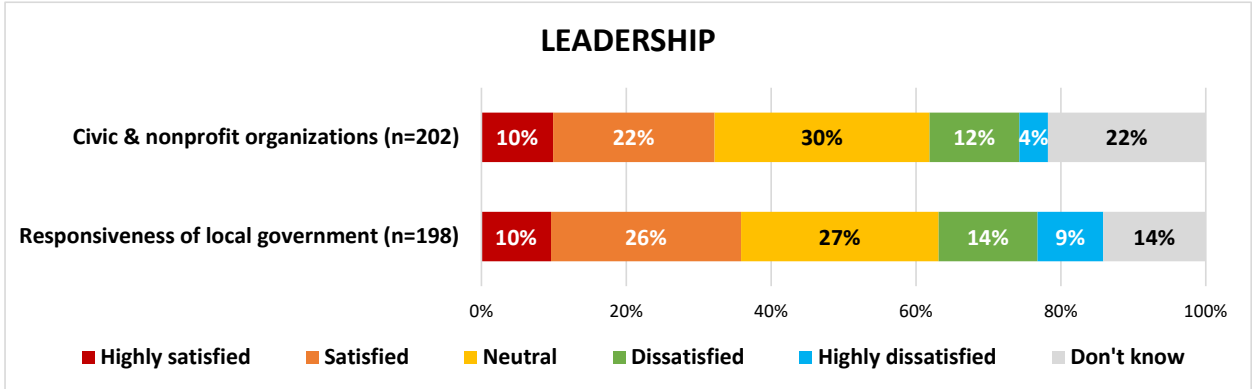
The school system also received compliments as did friendliness of residents and the livability of the community in general.

- *We have good schools. People are friendly. I like our wide-open spaces and proximity to Big Horns.*
- *Downtown looks nice and all my dealings with the school system have all been excellent.*
- *Our school system is student oriented and continues to improve.*

Some folks like new amenities like the dog park, but others feel it is a waste of tax dollars. There were similar sentiments expressed about the swimming pool, with some very happy about having it while others feel the town has other needs that should take priority. Other amenities getting a shout out included the disc golf course.

- *Help support non-profit organizations like the Shack and its disc golf course. It would be helpful if the town would mow the course as it draws community members and people passing through.*

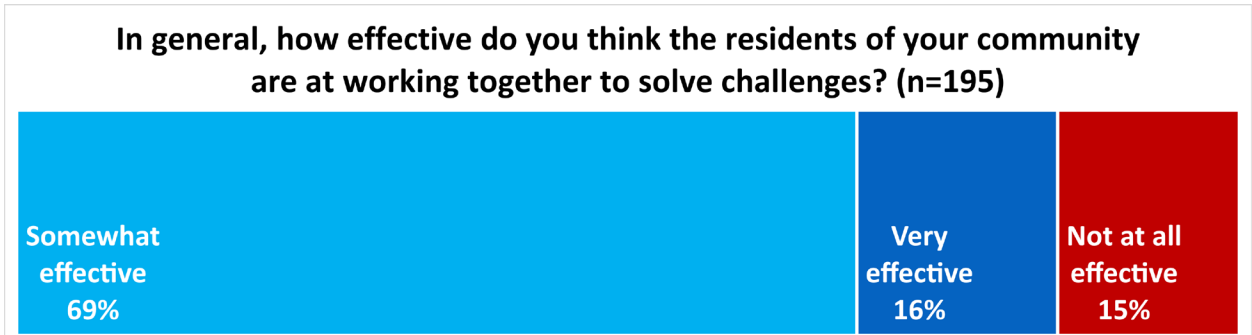
Community Leadership



There were several criticisms of the city but with regard to informal leaders, comments were more appreciative.

- *There are more citizens trying to make a difference. When changes are illustrated then it becomes clearer as to how much has been accomplished. Suggest this be on town website as an illustration. More people are saying you can do something rather than we tried that before and it does not work. It is hard to break down the negative sentiments that have built up over the years.*
- *Town government is somewhat dysfunctional; council members support their own agendas and have difficulty reaching a consensus on nearly every issue.*

Several comments suggested it might be time for new elected leadership as well as leadership in several city departments, such as law enforcement.



As happens in every small town, there are opposing views when it comes to community priorities. Some like the town just as it is and do not favor changes that cost taxpayers money, while others would like to grow the community, attract younger families and grow businesses and the tax base so the community can improve amenities. The following are representative of the comments in response to Question 5, which asked respondents to explain why they answered Question 4 the way they did.

- People are friendly here, but I think only a few are really involved in problem solving. I admire those who are doing what needs to be done to improve Greybull.
- There are two mindsets here: don't want change or you do.
- Everyone seems to pull together especially now that Miles Foley is mayor.
- Seldom do citizens form groups to address community issues--most community issues are discussed "over the fence."

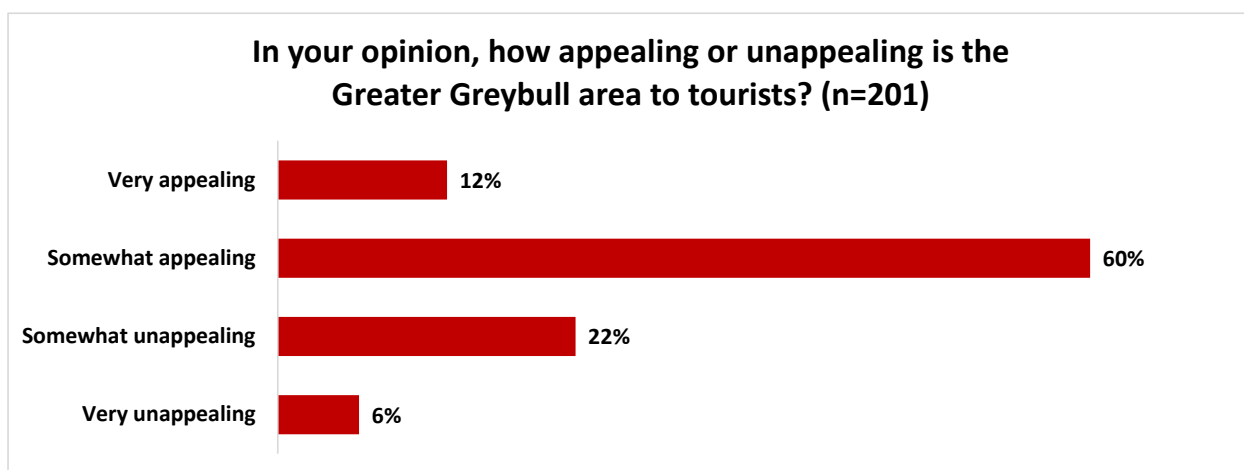
By far the most comments were about the swimming pool, with roughly half applauding getting the pool and the other half miffed because it was voted down but somehow happened regardless.

- Greybull needs a pool. a group of people pushed for the pool and were able to make it happen.
- The community has a lot of people who force others to do what they want done even if the community has voted against numerous times.

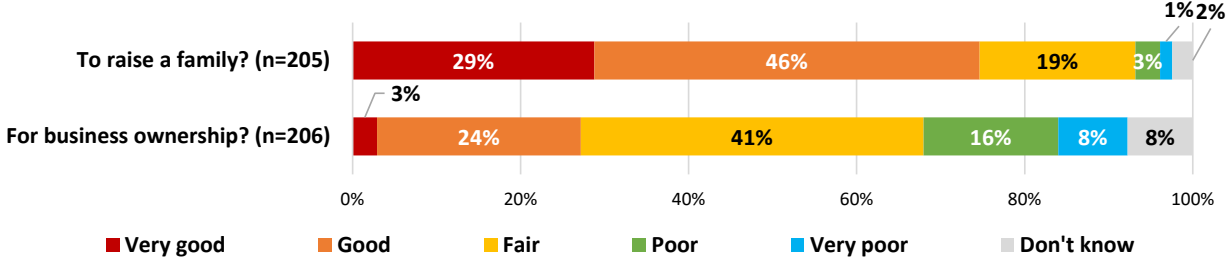


Of those responding to the question above (Question 6), 147 had not been involved in a community or neighborhood project while 52 had. Question 7 asked that the 52 who responded affirmatively “Please tell us the type(s) of projects you have been involved in.” This table on the next page categorized the variety of activities in which these civic-minded residents have engaged.

Cultural	Economic Development	Health & Safety
Days of 49 car show and activities (3) Summer festival Library and friends Holiday downtown celebration (2) Seasonal downtown decorations Halloween trick or treat for city Salvation Army Bell ringer at Christmas Bazaar Shell community hall preservation and fundraisers (2) Bake sales and flea markets for church in Shell Airport museum Musical Greybull arts council Bad Medicine Ride Base camp through church AWANA, MOPS, church	Big Horn county economic development (3) Chamber Thrift store	City pool project (7) Meals on Wheels Hands Across the Saddle food service Search and rescue volunteer (husband) EMT/Fireman for volunteer service Church assistance to low income Fire dept fundraiser Fundraisers for families in need and individuals with medical costs (3)
Quality of life	Youth	Civic
Antelope Butte Foundation Community beautification Picking up garbage on the walk path Highway clean up Cleaning up yards, painting neighbors houses Promoting golf course Mowing the disc golf course, setting the baskets in concrete, etc. Mixer for economic groups, State Parks people, drag race organizers, and WBC directors	Working with youth and adolescents (2) Big time with school prior to covid Girl scout leader Boy scouts Youth baseball AWANA youth program The shack, which provides outreach to youth in community Supporting youth and handicap hunting on individual's ranch Children, youth center Putting on kids camp Mentorships	Distributing voter registration information Shell Town Water Improvement District Greybull Elks which supports many programs Talking with residents to see their opinions This survey Unspecified fundraisers (3)



How would you rate the Greater Greybull area as a place . . .



Community Profile

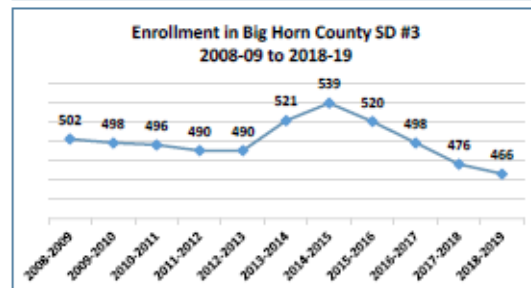
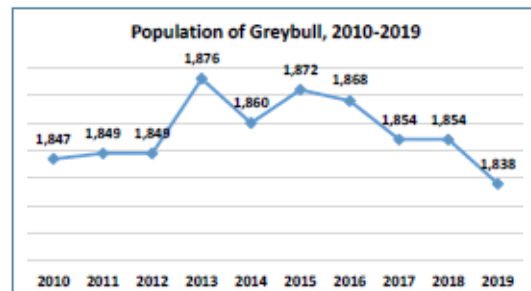
GREYBULL, WYOMING COMMUNITY PROFILE



POPULATION

	Big Horn County	Greybull City
Total population		
2019	11,790	1,838
2010	11,668	1,847
Change 2010-2019	1%	0%
Population by race, 2014-2018 average		
White alone	95%	94%
American Indian or Alaskan Native alone	1%	0%
Other	4%	6%
Population by ethnicity, 2014-2018 average		
Non-Hispanic	91%	78%
Hispanic	9%	22%
Population by age group, 2014-2018 average		
Under age 18	26%	25%
Age 18-64	54%	56%
Age 65 and older	21%	18%
Median age, 2014-2018 average, years	41.3	35.5

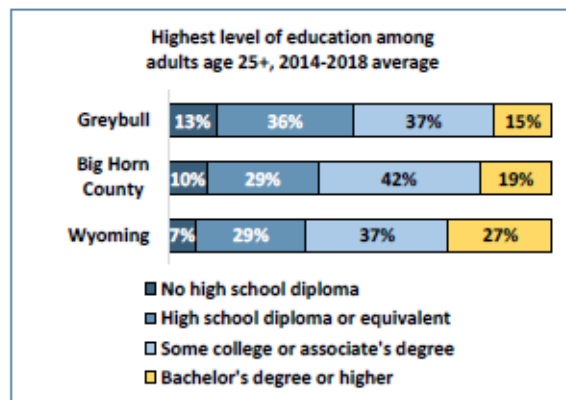
SOURCES: US Census Bureau, US Department of Education



SOCIAL CHARACTERISTICS

	Wyoming State	Big Horn County	Greybull City
Income, 2014-2018 average			
Per capita income	\$32,295	\$23,978	\$22,327
Median household income	\$62,268	\$53,435	\$48,438
Poverty, 2014-2018 average			
Overall poverty			
Number	63,311	1,446	190
Rate	11.1%	12.5%	10.2%
Children living in poverty			
Number	17,332	408	70
Rate	12.8%	13.7%	14.8%
Food Insecurity, 2018			
Overall rate	12.2%	13.4%	---
Rate among children	15.9%	17.7%	---

SOURCES: US Census Bureau, Feeding America



This project is supported by USDA's Agriculture and Food Research Initiative (AFRI) of the National Institute of Food and Agriculture, Grant #2016-10945. It is part of the AFRI Foundational program.

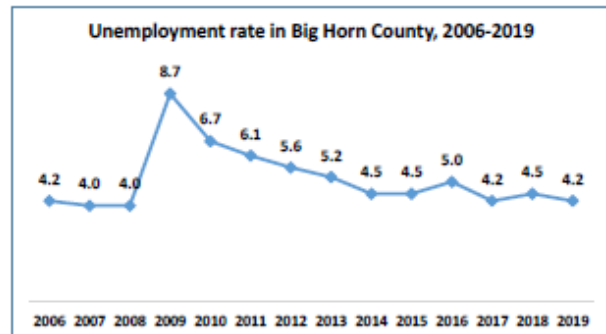
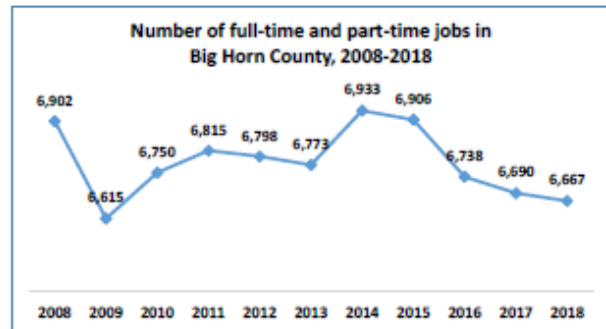


UNIVERSITY of WYOMING
EXTENSION



ECONOMIC CHARACTERISTICS

	Big Horn County	Greybull City
Full- and part-time jobs		
Total, 2018	6,667	---
Total, 2013	6,773	---
Total, 2008	6,902	---
Change, 2013-2018	-2%	---
Change, 2008-2013	-2%	---
Top five industries, by number of jobs, 2018		
Total number of full- and part-time jobs	6,667	---
Government & government enterprises	1,526	---
Farm employment	789	---
Mining, quarrying, oil/gas extraction	543	---
Construction	487	---
Retail trade	464	---
Employment characteristics		
Labor force participation rate, 2014-2018 average	59%	63%
Unemployment rate, 2014-2018 average	5.1%	6.6%
Self-employment rate, 2018, percent	33%	---
Average annual pay, 2018	\$41,016	---
Business establishments with paid employees, by size, 2017		
Total number of business establishments	307	---
With 1-4 paid employees	200	---
With 5-9 paid employees	50	---
With 10-19 paid employees	35	---
With 20-49 paid employees	14	---
With 50 or more paid employees	8	---



SOURCES: US Census Bureau, US Bureau of Economic Analysis, US Department of Labor

HOUSING CHARACTERISTICS

	Big Horn County	Greybull City
Total housing units, 2014-2018 average		
Number of housing units	5,461	866
Housing tenure for occupied housing units, 2014-2018 average		
Owner-occupied units	73%	69%
Renter-occupied units	27%	31%
Housing type, 2014-2018 average		
1 unit, attached or detached	79%	79%
2-4 units	4%	7%
5 or more units	3%	2%
Mobile home, boat, RV, van, etc.	15%	12%
Housing affordability, 2014-2018 average		
Households spending 30% or more of income on housing costs		
Owner-occupied units	15%	17%
Renter-occupied units	24%	26%

SOURCES: US Census Bureau

PROJECT PARTNERS
 University of Wyoming
 Wyoming Business Council

CONTACT INFORMATION
 Kim Porter
 kim.porter@wyo.gov
 www.wyomingbusiness.org
 www.communityreview.org

MORE DATA

For more information about your community, view the demographic and other profiles at Headwaters Economics' Economic Profile System: <https://headwaterseconomics.org/tools/economic-profile-system/>.

20 CLUES TO RURAL COMMUNITY SURVIVAL

1. Evidence of Community Pride:

Successful communities are often showplaces of care, a history, and heritage.

2. Emphasis on Quality in Business and Community Life:

People believe that something worth doing is worth doing right.

3. Willingness to Invest in the Future:

In addition to the brick-and-mortar investments, all decisions are made with an outlook on the future.

4. Participatory Approach to Community Decision Making:

Even the most powerful of opinion leaders seem to work toward building consensus.

5. Cooperative Community Spirit:

The stress is on working together toward a common goal, and the focus is on positive results.

6. Realistic Appraisal of Future Opportunities:

Successful communities have learned how to build on strengths and minimize weaknesses.

7. Awareness of Competitive Positioning:

Local loyalty is emphasized, but thriving communities know who their competitors are and position themselves accordingly.

8. Knowledge of the Physical Environment:

Relative location and available natural resources underscore decision-making.

9. Active Economic Development Program:

There is an organized, public/private approach to economic development.

10. Deliberate Transition of Power to a Younger Generation of Leaders:

People under 40 regularly hold key positions in civic and business affairs.

11. Acceptance of Women in Leadership Roles:

Women are elected officials, plant managers, and entrepreneurial developers.

12. Strong Belief in and Support for Education: schools are the norm and centers of community activity.

13. Problem-Solving Approach to Providing Health Care: Health care is considered essential, and strategies are in place for diverse methods of delivery.

14. Strong Multi-Generational Family Orientation: The definition of family is broad, and activities include younger as well as older generations.

15. Strong Presence of Traditional Institutions are Integral to Community Life:

Churches, schools and service clubs are strong influences on community development and so activities.

16. Sound and Well-Maintained Infrastructure: Leaders work hard to maintain and improve sidewalks, water systems, and sewage facilities.

17. Careful Use of Fiscal Resources:

Frugality is a way of life and expenditures are considered investments in the future.

18. Sophisticated Use of Information Resources: Leaders access information that is beyond the knowledge base available in the community.

19. Willingness to Seek Help from the Outside:

People seek outside help for community needs, and many compete for government grants and contracts for economic and social programs.

20. Conviction that, in the Long Run, You Have to Do It Yourself:

Thriving rural communities believe their destiny is in their own hands. Making their communities good places is a pro-active assignment, and they willingly accept it.

*Reprinted from Heartland Center Leadership Development, Spring 2002 *Visions Newsletter*.

Northwest Wyoming Retail Response to Shopko Closures

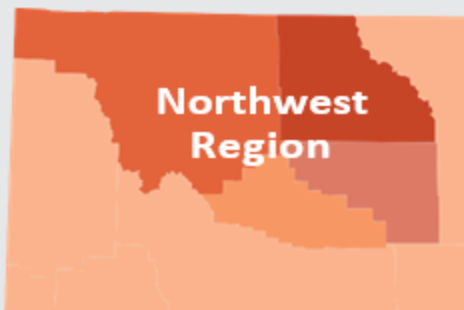


A row of four logos on a blue background. From left to right: 1. Wyoming Business Council logo with a cowboy silhouette. 2. Wyoming SBDC Network logo with 'SBDC' in large bold letters. 3. Main Street America logo with a stylized leaf and 'MAIN STREET AMERICA' text. 4. National Main Street Center logo, a circular emblem with a building, and text 'National Main Street Center a subsidiary of the National Trust for Historic Preservation'.

TURNING LOSS INTO OPPORTUNITY

In Spring 2019, four communities in northwest Wyoming suffered the closure of their local Shopko retail stores. This meant a significant loss of sales tax revenue, jobs and the convenience of local shopping outlets.

Regional area of focus



Northwest Wyoming
Big Horn // Hot Springs // Park // Washakie

The Wyoming Business Council joined with the Small Business Development Center (SBDC), the Market Research Center, local economic development organizations and community leaders to contract with the National Main Street Center (NMSC) to seek solutions. The NMSC sent Matt Wagner, vice president

- of revitalization programs, to: identify potential retail and product gaps, highlight opportunities for business expansion and startups, educate communities about available resources for building a more robust local entrepreneurial ecosystem.

The evaluation of retail gaps anticipated by the loss of Shopko may create opportunities for current downtown businesses to recapture that product revenue through expansion, or it may represent new entrepreneurship opportunities.

The long-term strategy is to build a pipeline and sustainable support system for new business creation in diverse sectors as a mechanism for future job and business growth. This effort is underway at various levels by state, regional and local entities.

ANALYSIS AND ENGAGEMENT Short-Term Strategy

1. Pre-Visit - Pre-Visits consisted of data gathering and analysis to determine:

- a. The current goods and services mix of Shopko stores regionally to better understand category/segment losses.
- b. The current business mix in the four communities for potential alignment with Shopko categories. *(Completed by WBC and Partners.)*
- c. The sales-gap analysis for the region to better understand category leakages and surpluses.
- d. Current entrepreneurship programming within the region and state.



ENGAGEMENT

2. Initial Visit - These visits covered two days and included the following components:

- a. A 1/2 day tour each of the four communities: Thermopolis, Greybull, Worland and Powell.
- b. Focus-group meetings scheduled by the Business Council and local officials with key economic/downtown leaders, local consumers and local business owners.



3. Follow-up Deliverables

- a. Webinar presentation to local retailers and economic/downtown leaders on:
 - i. Trends impacting retail overall
 - ii. Results of market review and opportunities for expansion/new business
 - iii. Recommended support systems/programs to implement - Q&A
- b. Summary report on market review and opportunities, including expanded recommendations with examples.
 - i. Sales leakage and capture projections
 - ii. Square-footage projections

- iii. Purchase/spending potential index analysis
- iv. Target inventory categories for start-up and/or expansion

DATA, DATA, DATA

The primary step in the process was to collect information through a variety of sources to better understand the current situation and future for potential retail opportunities for the communities.

1. **Local Business Inventory** – Economic development leaders in each community conducted informal inventories of existing businesses, highlighting product categories similar to those that were available at Shopko stores. This information helped identify other sources for key products as well as potential business expansion opportunities.
 - a. **IMPORTANT NOTE:** *Prior to the launch of this project, many local economic developers had already contacted Shopko and existing businesses to start identifying gaps and opportunities.*
2. **Market Research Center** – The Wyoming Business Council and Small Business Development Center regional directors requested ESRI statistics for the four affected communities in the region (Powell, Greybull, Worland and Thermopolis) from the Market Research Center (MRC), including:
 1. **Demographic and Income Comparison Profile:** Population, Household, Housing, Income, and Homeownership with 2010, current year and 5-year projections
 2. **Demographic and Income Profile:** Population, Income, Age, Gender and Race Breakouts
 3. **Retail Goods and Services Expenditures:** Top Tapestry (psychographic segments), Spending potential, Average amount spent per household, and Total spending for the area for a number of retail types.
 4. **Retail Market Place Profile:** Retail leakage report that compares what households purchase with what supply is available.
 5. **Tapestry Segmentation Area Profile:** Tapestry is a psychographic profile system that takes each US household and assigns it to one of 68 segments or groups. These segments give you information on the behaviors of the households.

3. **Community Visits** – Over two days, Matt Wagner, Business Council Northwest Regional Director, Amy Quick, and Bruce Morse, with the SBDC, visited the four affected communities. In each half-day visit they focused on:
 - a. **Focus Groups** – We held listening sessions with three different demographic groups, organized and invited by local leaders, to gather important information on product gaps, shopping trends, etc. Below are the conversation starters we used for each of the groups:
 - i. **Small-Business Owners**
 - Where do you perceive opportunities to capture particular product categories resulting from Shopko’s closure?
 - Where do you suspect local shoppers will go for products they were typically purchasing from Shopko? (Note: participants may break this down into certain categories, which would be helpful.)
 - Do you see opportunities for your own business to expand and/or offer select product categories?
 - Do you see new store opportunities resulting from the closure? If so, what type?
 - What are the barriers to expanding into these new product opportunities?
 - What programs from the public sector might be helpful in making this transition?
 - ii. **Local Consumers**
 - How often would you say you frequented the local Shopko on a monthly basis?
 - What product categories did you most commonly shop for at Shopko? (Facilitators might want to share the categories with the group based on the list provided by the SBDC. See appendix)
 - Given the closure, what aspects of having the Shopko will you miss most?
 - What characteristics of the store were most important to you? (Convenience, product selection, price, quality, etc.)

ENGAGEMENT

- Where will you shift your shopping now? (Local options? Cody? Casper? Billings? Online? Other?)
- What product categories would you most like to see picked up or expanded locally?

iii. Economic Development/City Officials, etc.

- What actions have you already taken as a result of the closures?
- What local opportunities do you believe exist for replacing the lost shopping and jobs?
- Have any of the other national chains (Family Dollar/Ace Hardware, etc.) or local store owners reacted by shifting and/or adding product categories from Shopko, that you are aware of?
- What existing resources are available to potentially assist local store owners and/or entrepreneurs with expansion or start-ups to replace certain product categories?
- What is the status of the property and are there proposed uses; opportunities for site control, etc.?

b. **Community Tours** - In addition to the listening sessions, the team toured each of the four communities to get a better, firsthand sense of the opportunities and community retail makeup. They visited local amenities such as recreation centers and other destinations, as well as existing businesses that offer potential product expansion opportunities. This was another chance to gather feedback from community members related to the topic at hand.

4. SurveyMonkey Survey - The National Main Street Center team crafted a brief survey to disseminate throughout the region to capture feedback from a broader audience. Each community helped disseminate the survey information through their appropriate channels in hopes of reaching as many people and opinions as possible. The survey was open for about two weeks before the NMSC team began synthesizing the data.

5. Additional Activities - Economic development professionals in each of the four communities were extremely proactive on this issue and continue to collect feedback from stakeholders, business owners and consumers, including surveying members

ENGAGEMENT

at Rotary meetings, promoting the activities through their local newspapers and other media channels, etc. They also have brainstormed many diverse follow-up activities to help raise awareness in their communities about existing retail opportunities and to promote the positives rather than focus on the negatives. Some ideas include retail maps highlighting where you can find certain products in town, community business tours, community events, scavenger hunts and more.



SYNTHESIS, ANALYSIS & PRESENTATION

1. Data Synthesis and Analysis - Matt Wagner and the NMSC reviewed all the feedback from the focus groups and community tours, as well as regional market research data provided by MRC, national retail trends and best practices to compile a report and put together a public presentation of findings and recommendations (See appendix for link to full report).

Recommendations

Matt Wagner presented both short-term and long-term recommendations in his webinar and final report. Immediate suggestions included sharing report findings with existing businesses, developing financial tools and regional business directories, as well as events and campaigns to encourage residents and visitors to shop locally.

Long-term ideas ranged from mapping the regional entrepreneurship ecosystem to develop programs to fill the gaps, creating new entrepreneurial programming and educational opportunities, and testing product categories through pop-ups and other creative retail opportunities.

FOLLOWING ARE SOME OF THE FINDINGS FROM MATT WAGNER'S REPORT

Potential Recapture

The following table highlights categories with the highest potential recapture, along with the respective square footages the recaptured sales would support:

Product Category	Recapture Range (in \$)	Average Sales/Sq.ft. (National)	Supportable Square Footage
Overall Retail Trade	\$38.2M	\$468/sq.ft.	81,623 sq.ft.
Overall Food and Drink	\$6.7M	\$200/sq.ft.	33,500 sq.ft.
Grocery	\$2.9M to \$5.8M	\$350/sq.ft.	8,285 to 16,571 sq.ft.
Specialty Grocery	\$250K to \$500K	\$663/sq.ft.	375 to 750 sq.ft.
Health and Beauty	\$2M to \$4M	\$325/sq.ft.	6,153 to 12,306 sq.ft.
Sporting Goods and Hobby	\$400K to \$800K	\$246/sq.ft.	1,624 to 3,248 sq.ft.

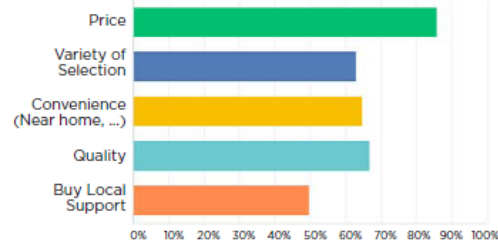
A special note on the inclusion of "Overall Food and Drink" as this is not an area covered in the Shopko categories. However, as part of the Big Horn Basin retail analysis, the area is dramatically underserved in the area of restaurants and drinking establishments. These are key for tourism support, which is typically a large economic development tool for rural economies. As such, national trends are pointing to an increasing rate of household spending in the category of "food away from home."

In addition, the Big Horn Basin trade area for Spending Potential Index also supported this category.

Shopping behavior

Question 3 evaluated key purchasing drivers. This is helpful as existing businesses and new entrepreneurs seek opportunities to recapture purchases from Shopko's closure. It can also be helpful even for businesses not in a position to recapture, but perhaps better understand the local mindset of the Big Horn Basin consumer.

Q3 What factors do you consider when shopping (Select all that apply)?



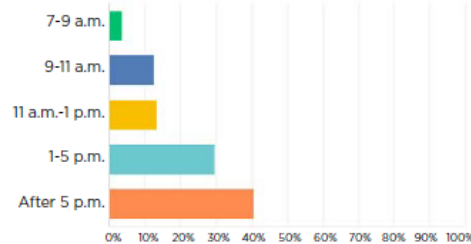
In evaluating the responses, price sensitivity is key with local consumers. Given the lack of national data, it is difficult to read too much into whether 50 percent considering Buy Local as a consideration is above or below average. We can only evaluate it as having the least consideration among the considerations when shopping. **This should not however, deter communities from utilizing this factor as a marketing tool, as it may swing consumers when other factors are held constant.**

Questions 4 and 5 seek to understand the timing in which there is consumer preference for shopping. The NMSC has collected data in nearly 100 other communities using these same two questions. **The Big Horn Basin consumer is highly consistent in their desire to shop after 5 pm and primarily on weekends, with Friday through Sunday as key shopping days for consumers.** Given the trends, even if recapture potential exists for Shopko categories locally, if local stores do not offer some evening shopping hours along with weekend shopping (and that includes offering some limited Sunday hours) it will be very difficult to recapture these sales at the

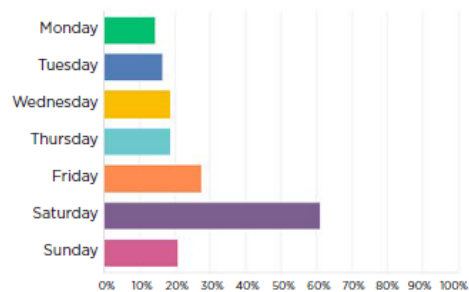
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highest rate. This remains one of the biggest challenges for “Main Street” retail. Suggestions include trying to create “programming” density around evening and weekend times as to add other activities and events that bring traffic to the community/downtown while consumers are building awareness of local shopping and store hours. In addition, it is important that a critical mass of stores stay open at the same time. If only one or two stores attempt to stay open during evening or Sundays for example it will be difficult to attract enough consumers. In other words, a coordinated effort is required.

Q4 What time of the day do you most typically do your shopping (not just downtown)?



Q5 What day of the week do you most frequently shop (not just in downtown)?



ANALYSIS

What is an entrepreneurial ecosystem?

By most definitions, entrepreneurial ecosystems refer to the strategic alignment of a variety of public and private efforts—including government policies, funding and finance, human capital, and regulatory frameworks—to provide necessary financial, social, and human capital to foster entrepreneurship in innovative and creative ways. Frequently overlooked in these definitions is the value of place and the physical environment as central factors in creating and growing successful enterprises.



By emphasizing the creation and support of great places and spaces for people to live and work, commercial districts can attract new businesses and new ideas, thus contributing directly to the development of the local entrepreneurial ecosystem.

Tapestry segment

Tapestry psychographic data helps communities and businesses understand consumer lifestyle choices, what they buy, and how they spend their free time. Tapestry classifies US residential neighborhoods into 67 unique segments based on demographic and socioeconomic characteristics. The top psychographic profiles for the Big Horn Basin are used to gauge possible shopping characteristics of the region’s largest potential shopping demographic.

The following chart highlights the largest psychographic segments, with Prairie Living (33 percent) and Old and Newcomers (9 percent)

Rank	Tapestry Segment	2018 Households Cumulative		2018 U.S. Households Cumulative		Index
		Percent	Percent	Percent	Percent	
1	Prairie Living (6D)	32.9%	32.9%	1.1%	1.1%	3076
2	Old and Newcomers (8F)	9.1%	42.0%	2.3%	3.4%	305
3	Heartland Communities (6F)	8.6%	50.6%	2.3%	5.7%	165
4	Midlife Constants (5E)	7.3%	58.1%	2.5%	8.2%	293
5	Green Acres (6A)	5.9%	64.0%	3.2%	11.4%	184
	Subtotal	64.0%		11.4%		

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percent) as the two largest segments. As part of the report, accompanying files will be provided that go into greater detail for these two segments. Highlights are provided below.

• **Prairie Living (33%)**

- This segment has very consistent pattern shoppers. Change is difficult.
- They are primarily buy-local oriented.
- They are reluctant online shoppers.
- Spend on pets, outdoor leisure activities, and lawn/garden.
- This group was your most likely Shopko shopper.

• **Old and Newcomers (9%)**

- More technology-savvy and are thus most likely to switch from Shopko to online shopping.
- Would be your typical appliance shopper given age and starting households.
- Into environmental concerns. As such, consider: green products, organics, natural products as a specialty offering to lost Shopko categories.
- This may be positioned through adding niche inventory to existing stores and/or new boutique store offerings.

- 2. Webinar Presentation** - A public presentation to statewide stakeholders of project findings and recommendations took place Thursday, June 6, 2019. A link to the webinar is available on the Wyoming Business Council website: www.wyomingbusiness.org/news/when-retail-giants-fall-sense-of-11417
- a. Many communities in the Big Horn Basin and across the state held "viewing parties" to get as much attendance and participation as possible. Follow-up discussions were very robust and engaging, and they will help guide the direction for local economic developers and civic leaders to move forward following this project.
 - b. The WBC and NMSC were both contacted by organizations and individuals in other states interested in learning more about this project and how they might be able to replicate it in their affected communities.

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NEXT STEPS

- 1. Local Implementation** - The efficacy of this project will be judged in the local implementation of recommendations presented and resources utilized. Many communities have plans to launch public awareness campaigns to educate locals and visitors about the shopping, dining and other amenities available in their area. Fun, engaging community events such as shopping tours, eating and shopping maps, kick-off campaigns and other ideas are being explored and implemented following Matt's presentation and final report. The WBC and other partners will continue to work closely with local and regional partners on these activities.
- 2. State and Local Resource Guide** - In collaboration with the SBDC, Amy Quick with the Wyoming Business Council compiled this basic resource guide to support state and local assistance for small businesses. This guide is by no means complete and should be updated with more local information from individual communities and organizations. It should also be continually reviewed and revised as necessary. This guide also pinpoints some potential gaps in resources, funding and assistance that should be looked at further as we work on the second phase of the project to develop a sustainable and robust entrepreneurial ecosystem statewide.

RESOURCES

Business Resource Guide: www.wyomingbusiness.org/resourceguide/ - Find local, state and federal resources based on what stage you are on in your entrepreneurial journey.

Small Business Development Center (SBDC): www.wyomingsbdc.org/ - The Small Business Development Center offers consulting, government procurement assistance, market analysis, website and marketing advice, market research and analysis and more for your business.

University of Wyoming Institute of Innovation and Entrepreneurship (IIE): www.uwo-iie.org - The UW IIE provides mentorship, internship opportunities, funding resources and more to Wyoming startups.

RESOURCES

Startup:Wyoming: wyoingbusiness.org/startupwy - The Business Council's Startup:Wyoming program offers small grants designed to kickstart your innovative idea to the next level. The program also provides matching dollars for federal research grants.

Made on Main (a pilot program of Wyoming Main Street: wyoingbusiness.org/mainstreet - Wyoming Main Street is launching a Made on Main pilot program aimed at placing small manufacturers and producers in vacant downtown spaces to enhance entrepreneurship and business diversity in downtown communities. Such businesses could include home brewers, artisans, food production, furniture makers, clothing, health/wellness products and more. This program can be a great complement to the work initiated with this project.

SUCCESS STORIES

Entrepreneurs in each of the four Big Horn Basin communities affected by the Shopko store closures have risen to the challenge and are realizing some retail success.

Greybull - Former Shopko pharmacists have repurposed the building to open a new pharmacy in the vacant store.

Powell - Entrepreneurs have opened shops and boutiques in the downtown area and only one storefront currently sits vacant. The new owners of Powell Drug expanded their offerings and capitalized on some of the items mentioned by survey and focus group participants as big voids in the community, including children's toys and gift items.

Thermopolls - The owner of The Print Zone listened carefully to project feedback and purchased an adjacent building to expand his business to include office supplies, party and decoration items, gifts and other novelties, in addition to his printing services.

Worland - A local flooring and mattress store expanded into linens, a local appliance store now carries televisions and other small electronics, and Kennedy Ace Hardware purchased the Shopko building and is renovating it to expand its business. The county will purchase Kennedy Ace's former downtown location to use for a new library and expanded ambulance service.

APPENDIX

Matt Wagner's final report: <https://tinyurl.com/shopkoanalysisreport>

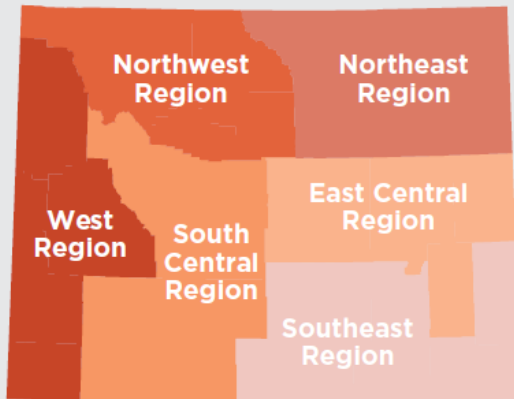
Shopko product categories: <https://tinyurl.com/shopkoproductcategories>

TIPS FOR LEADING FOCUS GROUPS:

- **Primary purpose:** To discover more about the impacts of the Shopko closure on consumer shopping habits within the local area, program/project models for compensating for the loss of jobs and product offerings, and opportunities for replacement.
- **Introduce yourselves.** Explain your primary purpose without suggesting a motivation/bias around local opportunities. Otherwise, participants may not hit on any barriers, etc. impacting strategic implementation.
- **Have everyone introduce themselves.**
- **Present some minor ground rules.**
 1. Everything is held confidential.
 2. This is intended to be a conversation; there are no bad ideas.
 3. Ask everyone to provide input, as it's important to get a broad perspective.
- **Other Tips:**
 1. Watch out for folks dominating the conversation. If so, when there is an opening, ask someone else directly for their opinion to get the conversation circulating.
 2. If conversation is getting into areas that are not helpful or completely off-topic, use a timekeeper strategy to suggest you're really tight on time so you'll have to table that discussion.
 3. At the end, provide contact info so if thoughts come up afterwards, participants know there is an opportunity to contact someone. It may be better to just provide the local contact, and have that person collect additional thoughts and get them to us. Also helpful to get contact information from participants in order to share future information.

Please contact your area Regional Director below for details.

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