Southwest Missouri Council of Governments

Comprehensive Economic Development Strategy

2006 Update
October 14, 2007

Membership of the Southwest Missouri Council of Governments
State and Federal Legislators
Local, State, and Federal Agencies

Ladies and Gentlemen:

It is a pleasure to transmit to you the update of the Comprehensive Economic Strategy (CEDS) for Southwest Missouri. The document, prepared by the Southwest Missouri Council of Governments, presents an evaluation of Southwest Missouri’s opportunities, resources and constraints to economic development and identifies a strategic plan of action to achieve greater economic diversity, economic growth and employment opportunities within our region. The preparation of the CEDS includes opportunities for input from our region’s local government officials and staff, citizens, and representatives from area agencies and organizations interested in economic development.

The Southwest Missouri CEDS was developed in accordance with the guidelines of the U.S. Economic Development Administration and is a requirement for EDA continuance of the Southwest Missouri Economic Development District. The proposed Southwest Missouri Economic Development District includes the counties of Barry, Christian, Dade, Greene, Lawrence, Polk, Stone, Taney and Webster.

We hope that you will review the enclosed document for information on our region and the activities and implementation strategies proposed to establish intergovernmental cooperation and coordination in promoting regional economic development in Southwest Missouri. Any comments you may have on the CEDS and the strategic action plan to be undertaken by the Economic Development District would be appreciated.

Respectfully,

Diane May, AICP, Executive Director

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ABSTRACT: The Southwest Missouri Comprehensive Economic
Development Strategy Update will focus on opportunities that
facilitate regional marketing efforts, encourage collaboration among
stakeholders, and leverage private and public resources to achieve
regional economic success.

This document complies with the revised Comprehensive Economic Development Strategy
(CEDS) Guidelines, as published by the Economic Development Administration (EDA) in 2006.

In addition to the EDA Denver Regional Office, copies of this report will be submitted to the
Missouri Department of Economic Development, the State office of USDA Rural Development
and the EDA Missouri representative. The CEDS will be available for review and comment at the
SMCOG offices as well as committee meetings. The plan also will be available to our regional
economic partners and local interest groups.

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crediting of the source.
Introduction

The Southwest Missouri Comprehensive Economic Development Strategy (CEDS) is an update of the original plan prepared in 1998. The principle of the CEDS is to continue a local, intergovernmental network for promoting regional economic growth, development, and diversity, while collectively bringing together the local public and private sectors in creating an economic strategy to strengthen the regional economies of all 10 counties located in Southwest Missouri. The CEDS presents an analysis of the regional economy as the basis for developing and implementing goals and objectives, investment priorities, and funding sources. All cities with over 5,000 population within the 10-county area, except for Marshfield and Bolivar, are members of SMCOG. SMCOG membership also includes many smaller cities located throughout the entire region.

Local elected officials and representatives from the various socio-economic public and private sectors in the region were appointed to participate in and guide the development of the Southwest Missouri CEDS. This document is a result of SMCOG’s cooperative regional approach to economic development in Southwest Missouri.

Established in 1990, SMCOG is a voluntary organization of local governments organized pursuant to the Missouri State and Regional Planning and Community Development Act of 1966 (251.032 – 251.440, RSMo.). SMCOG membership included six member counties and 28 cities in 1998. Current local government membership includes all 10 counties in the region (Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney and Webster) as well as 30 cities and villages throughout the region. SMCOG administers various Federal, State and local programs and provides planning expertise and services for the southwest Missouri region.

According to SMCOG’s current bylaws, the presiding commissioner of the county or the mayor of any city, town or village is the appointed representative, or his or her designee. The SMCOG Board of Directors also includes at-large members representing various facets of the region. State Senators and Representatives of the region are invited as ex-officio, non-voting members, as is a representative of the Missouri Office of Administration.

Officers of the SMCOG Board include the Chair, Vice-Chair, Secretary and Treasurer. The SMCOG Board Executive Committee meets semi-monthly while the full Board meets quarterly. Figure 2.1 shows SMCOG’s geographic jurisdiction and spatial distribution of local government members. Of the current membership on the Board, 12 are non-governmental citizen members. The list of SMCOG’s participating governments agrees with the recognized membership as shown below.

### Officers
SMCOG Board of Directors, 2007-2008
- George Cutbirth, Chair
- Billy Dryer, Vice-Chair
- Cindy Stephens, Secretary/Treasurer

### Executive Committee
- George Cutbirth
- Billy Dryer
- Cindy Stephens
- David Coonrod
- Allen Kunkel
- Mark Dixon
- Jane Hood
- Dana Louderbaugh
- Nancy Edson

- 5 -
Government Representatives
Barry County:
Cherry Warren, Presiding Commissioner
Scott Young, Mayor, Washburn
Christian County:
John Grubaugh, Presiding Commissioner
John Inmon, Mayor, Billings
Ed Westerman, Clever
Doug Marrs, Mayor, Nixa
open, Ozark
Ron Elkins, Jr., Mayor, Fremont Hills
Dade County:
open, County Commissioner
Dallas County:
Kenneth Bacon, Commissioner
Greene County:
David Coonrod, Presiding Commissioner
Iver Johnson, Alderman, Ash Grove
Dana Louderbaugh, Fair Grove
Chris Coulter, City Administrator, Republic
open, City Council, Springfield
open, Willard
Tom Vicat, Mayor, Strafford
Lawrence County:
Robert Walster, Commission Representative
Donna Elery, Aurora
Doris Rapp, Mayor, Marionville
Jane Hood, Mount Vernon
Carol Hirsch, Mayor, Pierce City
Polk County:
Billy Dryer, Commissioner
John Homer, Mayor, Pleasant Hope
Stone County:
George Cutbirth, Presiding Commissioner
John Rhodes, Mayor, Branson West
Jack Swearingen, Crane
Kathy Isaacs, Indian Point
George Quest, Mayor, Kimberling City
Taney County:
Chuck Pennel, Presiding Commissioner
open, Branson
Michael Elliott, Mayor, Forsyth
Rick Ziegenfuss, Hollister
Webster County:
Paul Ipock, Presiding Commissioner
Jean Bowers, Chairman, Diggins
Deana Fishel, Marshfield
Nancy Edson, Rogersville
Non-Government Representatives
Dorothy Knowles, Community Groups
Yolanda Lorge, Community Relations
Cindy Stephens, Education
Brian Fogle, Finance
Michelle Garand, Health
Allen Kunkel, Small Business, Tourism, & Industry
J. Howard Fisk, Transportation
Cy Murray, Utilities
Mark Dixon, Workforce Development
Jeff Seifried, Economic Development
open, Homeland Security

SMCOG Administration

SMCOG has a Cooperative Agreement with the Center for Resource Planning and Management at Missouri State University to provide professional and administrative services for the Council. Under the terms of this Agreement, the University provides for all staffing, facilities and administrative/operational services for SMCOG. The Center’s full-time staff includes:

1. Diane May, Executive Director (faculty member, Geography, Geology and Planning Department)
2. Anita Davis, Assistant Director
3. Dan Watts, Transportation Planner
4. Dorothy Wittorff-Sandgren, Community Development Coordinator
5. position open, GIS Technician
6. Saundra Dane, Accounting Clerk

The Center also employs student interns and graduate students on a part-time basis to assist with CEDS activities.
CEDS Planning Area

U.S. Economic Development Administration has designated all 10 counties within SMCOG’s geographic jurisdiction as the Southwest Missouri Economic Development District. The planning area includes Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney, and Webster counties as well as 27 cities. Member cities in the region are Seligman, Washburn, Billings, Clever, Fremont Hills, Nixa, Ozark, Ash Grove, Fair Grove, Republic, Springfield, Willard, Strafford, Aurora, Marionville, Mount Vernon, Pierce City, Fair Play, Morrisville, Pleasant Hope, Branson West, Crane, Indian Point, Kimberling City, Branson, Forsyth, and Hollister.

CEDS Planning Process

The CEDS planning process involved participation from governmental units within the region, public sector agencies and organizations, private sector organizations, and citizens. In order to provide adequate representation that would reflect the region’s diverse economy and population, the Committee was composed of 66 percent government representatives, 44 percent non-government representatives, and 0 percent at-large representatives.

Those citizens and local non-government representatives that participated in the work of the CEDS Committee are:

1. Cindy Stephens, Chief Administrative Officer, Ozarks Technical Community College
2. Brian Fogle, Director of Community Development, Great Southern Bank
3. J. Howard Fisk, Owner, Fisk Limousines, Inc.
4. Phil Hutchens, Hutchens Construction Company
5. Steve Coller, Commercial Sign Group
6. Mark Dixon, African-American Agenda Collaborative Chairman
7. Jane Hood, Mount Vernon Economic Development Director
8. Ed Westerman, City of Clever representative

The CEDS Committee members represent the following interests: five members represent business, one represents minorities, one represents professions, on represents labor, one represents the unemployed, one represents education, two represent women, one represents finance, one represents transportation, one represents industry, one represents the underemployed, one represents the disabled, and one represents local government.

Citizens, board members, and public officials were encouraged to provide input from the region’s various socio-economic sectors by way of a survey. In addition to the CEDS Committee members, other SMCOG board members, agency representatives, public officials, and interested citizens were encouraged to attend CEDS Committee meetings and contributed to the preparation of the CEDS. Community members include representatives from the Ozarks Regional Economic Partnership (OREP), chambers in the region, planning staff from several cities throughout the area, non-profit organization representatives, and local citizens. The Committee worked with community members, SMCOG members, and our partner agencies such as Missouri Department of Transportation, Missouri Department of Natural Resources, USDA Rural Development, Missouri Department of Economic Development as well as State and national representatives of the region. SMCOG also collaborates with OREP working with outlying chambers of commerce to focus on fostering economic development within in the 10-county SMCOG region.
Under the guidance of the SMCOG Board of Directors, the CEDS Committee and staff held working meetings to discuss regional economic development issues and to formulate economic development strategies for the CEDS. Staff was primarily responsible for research, data collection and analysis of existing conditions, characteristics and resources of the CEDS planning area. The work of the CEDS Committee focused on determining the goals, objectives, and action plan elements of the CEDS. In addition to feedback comments from the SMCOG Board, staff met with SMCOG’s Executive Committee to further review and edit the CEDS document prior to final presentation to the SMCOG Board of Directors.

Both the SMCOG Board and staff are invested in the economic health of the region. SMCOG is governed by an experienced Board of Directors with strong leadership skills. The staff also brings extensive experience in community and regional planning and development. Diane May has over 30 years of experience in city and regional planning and has served as the SMCOG executive director for 17 years. Anita Davis, assistant director, brings experience in regional planning and private sector experience in design, public relations and business management. Ms. May will provide general oversight for the program and Ms. Davis will provide direction for day-to-day implementation of the project. Additional staff include Dan Watts, transportation planner; Dorothy Wittorff-Sandgren, community development coordinator; and Saundra Dane, accounting clerk. SMCOG is administered through Missouri State University. This collaborative partnership between SMCOG and the University brings the strong leadership capacities and resources of the University to the implementation of this project.

**Local Review and Program Evaluation**

The SMCOG Board of Directors serves as the governing body for the Southwest Missouri Economic Development District. Membership on the Board of Directors has been modified to ensure citizen, minority, and economic sector representation in decision-making for the economic development district. In cooperation with the Board of Directors and the CEDS Committee, staff will monitor and evaluate the implementation and progress of the CEDS for the Southwest Missouri Economic Development District.
Background

In the 1700’s, the French traders came to the Ozarks. Primarily German-Scotch-Irish and others who arrived from the St. Louis area settled in the northern, prairie-like portion of the Ozarks. In the northern portion of the region, farming in an easier and less labor intensive style was the predominant industry. With the coming of the railroads in the later portion of the 19th century, transportation within the region improved and opened opportunities to export the region’s agricultural products to larger urban communities outside of the region.

The southern area was settled by primarily by Scotch-Irish homesteaders who preferred farming the hilly, rugged terrain. The area had as its primary economy an extremely labor intensive style of farming with hand-picked crops such as tomatoes and strawberries for export. Local industries were based on the area’s resources, such as an occasional factory that manufactured buttons from the mussels along the river banks, and of course, the support services of wagon makers, boat manufacturers, etc. Lumbering was also an important industry in this heavily forested area.

The Industrial Revolution reached the Ozarks during the Roaring Twenties. Springfield and surrounding communities became the focal point of industry, due to service by several railroads running through Springfield. The end of World War II brought rural electrification, radio, and road construction to the region.

Historically, farming has been a significant factor in the economy of the 10-county region and continues today. Dade County has the highest concentration of farming. Polk, Webster, and Barry each represent over 7 percent of the region’s agricultural land use. The amount of farmland in the region has been decreasing, especially in the past 10-20 years. However, an increase in the estimated market value for the agricultural land and buildings has grown significantly between 1997 and 2002. According to the U.S. Department of Agriculture, Table 1.2, in the five-year span, the average farm has increased in value by $344,898 or $1,700 per acre for the region. The number of farms is stable with small increases from 1997 to 2002.

Chart 1 - Urban, Rural, and Farm Populations that Composite the Region

![Chart 1 - Urban, Rural, and Farm Populations that Composite the Region](image)


The region is 31.3 percent urban and 68.7 percent rural, however, only 6.5 percent are live on a farm; according to the Missouri Census Data Center. However, the State of Missouri has 69.4 percent urban, 30.6 percent rural, and 2.5 percent farms; virtually the opposite of the region.
Table 1.1. The eight primary urban areas represent regional communities with populations greater than 5,000.

**Demographic and Socio-economic Data**

The population density of 81.7 people per square mile for the region; slightly above the 81.2 people per square mile for the State of Missouri. The national average is 79.6 people per square mile. In 2000, a total of 278,053 (54.1 percent) lived in incorporated areas while 235,819 individuals (45.9 percent) lived in unincorporated areas. Table 1.3.

The population in the region continues to grow as more families relocate to southwest Missouri. According to the 2000 U.S. Bureau of Census estimates, the region has an estimated population of 513,872; a 9.3 percent increase during the period of 1990-2000. All 10 counties have experienced growth throughout the 1980’s and 1990’s, indicated in Tables 1.4 and 1.5. In 2000, population figures further increased by 105,183; a 25.7 percent growth during this time, compared to the State’s growth of 9.3 percent. The increase is close to double the expansion rate from 1980 to 1990. With the exception of Dade County, all counties are projected to continue to see population growth, giving the 10-county region an estimated 7 percent growth rate for the period from 2000-2005. Table 1.6. SMCOG city populations extend as high as 151,580 in the City of Springfield to the City of Arcola with a population of 45. The greatest concentration of residents occurs in Greene County with 240,391, which includes the City of Springfield.

**Population Trends**

Christian County has the second-highest population at 67,266. It is the fastest growing county in the SMCOG region, the State of Missouri, and number 49 of the 100 fastest growing counties in the United States according to the U.S. Census Bureau. Cities such as Nixa and Ozark are experiencing significant population growth. From 1990 to 2000, Christian County grew at a rate of 66.3 percent; although the projection for growth was estimated to continue at a rate of 8.1 percent from 2000 to 2005. The growth for all cities in the region is displayed in Table 1.7. Table 1.8 demonstrates the population trends for the major cities in the region from 1980 to 2005. All the major cities observed growth in population up to 2005, with the exception of the City of Springfield, which declined slightly (.9 percent) in population by 1,288 residents, Table 1.9. The City of Branson and the City of Ozark had the greatest increases with a percentage of 57.9 each. The City of Nixa grew by 31.4 percent. The 2005 growth rate is 10.2 percent for the entire region.

Age characteristics for the region, based on Table 1.9, shows the age discrepancy during the period of time from 1980, 1990, and 2000. A separate list is composed for just the year 2000 in Table 1.10. Over this brief period of time, the under-17 age group has been slightly decreasing, as well as the over-65 group; while the 18 to 64 age group has been increasing. These figures are comparable to the State of Missouri projections.

**Population Projections**

Population projections listed in Table 1.11, indicate the southwest Missouri population will exceed 600,000 sometime around 2015. The projections also indicate that the growth in the number of people will slow somewhat and the rate of growth will slow even more. Nevertheless, growth will remain imperative in southwest Missouri. All counties are expected to grow, with rapid growth continuing in Christian, Stone, and Taney counties. Polk, Dallas, and Webster will also see significant growth, forming a new northeastern ring for the Springfield suburban fringe. Growth in Barry and Lawrence counties will continue while Dade, Lawrence, Polk, and Greene counties will grow at a rate slower than the regional average.
Cultural Diversity
The age structure in the region is very diverse with the under-19 age group accounting for 28.2 percent, the 20-64 age group accounts for 56.5 percent, and the 65-and-over group accounts for 15.3 percent. Table 1.10.

Minority populations in the region were minimal at 3.8 percent in 2000, and have been gradually increasing in recent years. Table 1.12. Much of the growth can be attributed to the influx of Hispanic population expanding within the last few years. This figure was significantly lower than the State’s 15.2 percent minority population in 2000. Local officials estimate that the Hispanic population has grown significantly in the region since 1990. At best guess, the Hispanic population in the region could number well over 9,000. Table 1.13.

Education Trends
According to the 2000 Census listed in Table 1.14, 39.1 percent of the region’s population has graduated high school compared to Missouri’s 32.7 percent. Only Greene County, at 30.9 percent, was below the State’s average. Dade County had the best score with 45.4 percent. The primary educational facilities in the region have seen a 4 percent growth between 2001 and 2005 for ages 5-18. Table 1.15. Many of the regional school districts already have experienced population growth and increases in the number of students will continue into the future. However, the high school drop-out rate for the region is 2.7. Table 1.41.

Only the counties of Greene and Christian had a higher percentage of individuals over the age of 25 who have a college degree compared to the State of Missouri’s 14 percent. Christian County in 2000 had 15.3 percent, while Greene County had 15.9 percent. Dallas County had the lowest percentage with 6.5. Collegiate institutions in the region include Missouri State University, Drury University, Southwest Baptist University, Evangel University, College of the Ozarks, Ozarks Technical Community College (with campuses in Springfield and Ozark/Nixa), Southwest Area Career Center in Monett, several truck driving schools, and other educational establishments. (Tables 1.14 and 1.15)

Housing Units
In the past 10-20 years, the housing market has grown at a steady pace in the region. As the population continues to increase, so does the number of housing units. In 2000, the U.S. Census estimated the number of housing units at 226,933 for the region. Table 1.16. Of this total, 89.8 percent were occupied. The State of Missouri actually had the same percentage (89.8 percent) of occupied residences. The average estimated market value for the region was $90,441 with an average age of 1970. The average estimated market value for the State was $114,482. The average home was built in 1965.

Diversity in Housing Units
Single-family homes are by far the norm in the region. In 2000, 68.2 percent of the total 226,933 units were single family, Table 1.17; as well as a significant portion number of mobile homes in the region. An additional 15 percent of housing types include town homes, duplexes, apartments, condos, and other multi-housing establishments. The majority of these residences are located in Greene County and Taney County.

Owner/Renter/Vacant Occupancy
When compared to the State (70.3 percent) and nationally (66.2 percent), the region has a higher percentage of homeowners at 74.9 percent. Table 1.18. The percentage of renters in the region (25.1 percent) is lower compared to 29.7 percent for the State and 33.8 percent for the nation. In
2000, there were 55,226 units for rent in the SMCOG region. Most of these units; 33,561, or 60.8 percent; were in Greene County. Table 1.19.

In 2000, 87.1 percent of all housing was occupied in the 10-county region. This is lower than the estimated 89.9 percent for the State. Barry (16.1 percent), Dade (14.8 percent), Stone (27.2 percent), and Taney (17.9 percent) counties all had vacancy rates greater than the regional average of 12.9 percent. This may be due to the abundance of vacation homes near Table Rock Lake in Stone and Taney counties.

**Regional Gross Rent**

Of the 55,226 units, 60.3 percent were rented for $300 to $500 a month. Nearly a quarter of the units averaging below $300 rent per month. Christian County had the greatest median price of rent at $511, while Dade County had the lowest at $297 per month. When compared to the State of Missouri, the region has units typically below the average of the State. The median gross rent for the State in 2000 was $484 while the median gross rent for the region was $414.

**Median House Value**

The 2000 median house value for the region is estimated at $80,310. Table 1.20. This is an increase over $34,000, a 76.2 percent growth between 1990 and 2000; much higher than the 50.3 percent State increase. During this period, Dallas County had the greatest percent increase with 119.1 percent. Greene County had the lowest percent increase of all 10 counties with 51 percent. The State was 50.3 percent.

Stone County had the highest median house value in the region with $102,700; while Dade County had the lowest with $54,500. Only three counties (Stone, Taney, and Christian) had a median house value greater than the State of Missouri’s $89,900.

*Chart 3 - Median Household Income/House Value for the Region in 2000*

Source: Missouri Census Data Center. *Demographic Profile 3, 2000 Census.*
Median Household Income
The region has a substantially lower median household income of $31,395 compared to the State’s $37,934 in 2000. Table 1.21. Only Christian County had a greater median household income than the State at $38,085.

Per Capita Income
For the region, the 2000 per capita income was $16,080. Table 1.22. This was an increase of 59.5 percent from 1990, but still considerably lower than the State’s $19,936. The percentage at which the region increased was above the percentage increase estimated for the State with 53.5 percent, but still close to $4,000 below the average income per person.

Greene County was the only county to come close to the $19,936 average for the State with $19,185. The lowest per capita income was in Polk County, with $13,645. Overall, every county, excluding Dade (50.2 percent), had a greater increase percentage from 1990-2000 than the State of Missouri’s 53.5 percent. Dallas County had the greatest percentage with 77.1 percent. This correlates with Dallas also boasting the greatest increase in median house value during the same period.

Poverty Level
The region has a greater percentage of residents below the poverty level than the State of Missouri. In 2000, the region recorded an estimated 12.4 percent, 1 percent higher than the 11.4 percent for the State of Missouri. Table 1.23. Dallas (17.7 percent) and Barry (16.4 percent) counties had the largest percentage of population below the poverty level. Only Christian County, at 9 percent, was below the State average.

Dependency Ratios
The dependency ratio is a general indicator of the number of dependents (youth and retired) that are supported by the working age population. It also provides information pertaining to populations that may supported by various Federal, State and local programs. The ratio for the region increased from 54.8 in 1990 to 59.3 in 2000, which indicates there are more dependent persons per 100 wage earners. Table 1.24. All counties, with the exception of Greene, Christian, and Webster, decreased their dependency ratio between 1990 and 2000. The State’s 2000 dependency ratio was 61. Greene County had the highest dependency ratio of 64.1, while Dade had the lowest (55.4).

Median Age
The region’s population is getting older as certain areas of the region are attracting retirees, especially in Stone County. Other areas, such as Greene and Christian counties, continue to attract younger residents, including families with children. The median age for the region in 2000 was 37.7 years; an increase from the 1990 median age of 36.3 years, located in Table 1.25. The increase in median age reflects the retirees and the aging baby boomers. As the retirement-aged population grows, the region will likely face changing needs and demands for public facilities and services to meet the needs of the older population.

Labor Force Characteristics
The Economic Development District (EDD) includes three regional Missouri Career Centers for workforce development. Offices in Springfield, Branson, and Monett provide job training, dislocated worker assistance, career assistance, GED classes, and job postings. SMCOG has strong ties with the Springfield Missouri Career Center. Table 1.26 displays the labor force for
all 10 counties and the region, from 1997 to 2005. In nine years, the regional labor force has increased by 28,838; Greene County accounted for 13,231 new workers. Taney County had the greatest decrease with 5,109 workers.

According to the Springfield Chamber of Commerce, SMCOG’s 10-county region includes 314,274 employees as of July 2007. The Springfield MSA accounts for 226,316 of those employees and Greene County had 91% of all 293,284 employees in the region. Regionally, 75% of employees work for relatively small businesses of less than 300 employees. Service industries generally dominate employment in Christian, Dallas, Greene, Lawrence, Polk, Stone, and Taney. Webster County’s highest sectors are farming and services with 18 percent in both sectors. Barry County’s top sector is manufacturing at 30.6 percent while Dade’s largest sector is farming at 24.8 percent.

**Unemployment**

Regional unemployment generally runs from 5% to 5.5%. With the exception of Stone and Taney counties, the region’s unemployment rate was between 4 percent and 6 percent from 1997 to 2005. Over half the counties had a lower unemployment average between 1997 and 2005 than the State of Missouri’s 4.6 percent, Table 1.30. Barry and Dallas counties averaged 4.8 and 5 percent, respectively. Stone County (8.6 percent) and Taney County (8.3 percent) had a higher rate of unemployment through the winter months, directly related to seasonal tourism in the Branson and Table Rock Lake areas.

Unemployment numbers for the region has fluctuated from 5.9 percent in 1997 to 3.7 percent in 1999 to 5.5 percent in 2005. The nine-year average was 4.6 percent for the region. Greene County had the lowest average percentage of unemployment with 3.2 percent, followed by Christian County with 3.3 percent. Stone County had the greatest percentage of unemployment with an average of 7.8 percent, followed closely by Taney County with 7.4 percent.

**Chart 4 - Unemployment Rates for the Region from 1997-2005**

Source: Bureau of Labor Statistics
Wages
The average wages, with the highest and lowest industry wages for the counties, are shown in Table 1.28. The 2000 regional average wage is $23,857. Average wages in 2000 were highest in Greene County ($30,493), followed closely by Barry County ($25,950). Christian, Lawrence, Polk, Stone, Taney, and Webster counties all had annual average wages over $22,000. Dade County’s annual average wage was $20,835, and Dallas County had the lowest annual average wage at $20,148. All 10 counties had a lower wage level compared to the State of Missouri’s average annual wage of $34,548 for 2000.

On the other end of the regional wages, Table 1.29 provides statistical information as of May 2005. The 10 top-earning professional occupations are general internists (including cardiologists, sub-specialists, and other internists), dentists, surgeons, judges, podiatrists, physicians and surgeons, and chief executives, optometrists, actuaries, and mental health counselors. Annual salaries range from $192,502 to $94,511.
Geographic and Climatic Data

The region comprises 6,093 square miles, 8.7 percent of the total area for the State of Missouri. An additional 105 square miles consist of water resources. The Ozarks is home to a temperate climate, 2.3 million acres of farmland, pristine forests, caves (both wild and commercial), and an abundance of lakes, streams, rolling hills, and scenic vistas.

The topography of the region includes plateaus, rolling hills, forests, and valleys, with rivers, streams, and other bodies of water. The land is mainly agricultural or forested. The Ozarks Plateau physiographic province is subdivided in two areas within the region. Most of the northern and northwestern portions, including Lawrence County and segments of Barry, Christian, Dade, Dallas, Greene, Polk and Webster; are located on the Springfield Plateau. The Springfield Plateau is characterized by fairly level to moderate rolling plains and hills covered by the fertile Springfield soils. The Salem Plateau includes the rugged hills and deeply entrenched stream valleys of Taney, Stone, and portions of Barry and Christian counties. Bedrock in the Salem Plateau consists of sedimentary rock at varying depths. Limestone, is the most dominant sedimentary rock such as chert, dolomite, sandstone, and shale. Karst topographic features are prominent with caves, sinkholes, springs, and losing streams.

Environmental and Natural Resources Profile

Natural resources play a large part in the economic health of the region. Public land totals 114,907 acres that include managed forests, smaller lakes, stream accesses and hatcheries. Another 12,000 acres are enjoyed by visitors to State parks. The region is home to pervasive karst terrain that provides an abundance of caves such as Fantastic Caverns and Marble Cave (both tourist attractions). On the other hand, the fragile nature of karst calls for careful deliberation in planning for infrastructure and building sites. The Mark Twain National Forest which includes the Hercules Glade U.S. Forest Wilderness and the Piney Creek U.S. Forest Wilderness as well as Wilson’s National Battlefield, Bennett Spring State Park, Table Rock State Park, and Roaring River State Park. Table 1.31.

Endangered species are ranked as “imperiled” or “critically imperiled.” According to the Missouri Conservation Department, Table 1.32, the SMCOG region includes Bachman’s Sparrow, Ozark Cavefish, Neosho Mucket, Black-tailed Jackrabbit, Yellow Mud Turtle, Northern Herrier, Greater Prairie Chicken, Mead’s Milkweed, Geocarpon, Eastern Hellbender, Niangua Darter, Redfin Darter, Swainson’s Warbler, Tumbling Creek Cavesnail, Indiana Bat, and the Plains Spotted Skunk.

Research did not identify any prime/unique agricultural lands in the region designated by the U.S. Department of Agriculture under the Federal Farmlands Protection Act.
Hydrology/Water Quality

Missouri has no single source aquifers according to EPA. The Southwest Missouri region’s hydrological system is divided into two pieces. The majority of the counties are located above the Springfield Plateau aquifer. Only two counties, Dallas and Taney, lie above the lower Ozark aquifer. Between the Springfield Plateau aquifer and the Ozark aquifer is the Ozark confining unit which consists of shale and limestone of Late Ordovician through Mississippi age. The Ozark aquifer consists of dolostones, limestones, and sandstones of the Late Cambrian age through Devonian age (USGS, 1998). Currently, water resources are in danger of becoming scarce in the western portions of the region.

Several lakes and numerous river systems provide water for practical usage such as thermoelectric power, irrigation and livestock. Recreational water activities are very popular in the region and provide tourism to several counties. The region’s five major surface reservoirs, numerous streams and rivers are popular sites for swimming, fishing and canoeing.

Protection of surface water and groundwater quality is an important environmental concern throughout the region. Much of southwest Missouri exhibits karst topographic features such as sinkholes, caves, lineaments, springs, and losing streams. The underlying bedrock is easily dissolved, allowing surface waters and pollutants into the groundwater system. Pollutants from wastewater treatment facilities, on-site waste disposal systems, animal wastes, and urban runoff can be detrimental to both surface water and groundwater quality.

The major lakes – Bull Shoals, Fellows, Stockton, Lake Taneycomo, Table Rock, and Pomme de Terre – account for roughly 124,000 acres. Tables 1.33 notes the major rivers in the region include James River, Sac River, Little Sac River, Niangua River, and Pomme de Terre River. A study is in progress to better understand non-point pollution concerns on the 303(d) listed James River. Significant creeks include Flat Creek, Beaver Creek, Swan Creek, and Bull Creek.

Brownfields

The City of Springfield includes 18 completed brownfield sites and 16 active brownfield sites. Branson completed three brownfield assessments: the Branson Convention Center, Branson Landing, and Skaggs Community Hospital. Ozark had three brownfield assessment sites that are completed and inactive. There are no Superfund/CERCLA or RCRA sites within the region.

Soils

The soils of southwest Missouri are very diverse and are capable of sustaining a wide variety of human activities. Prime farmland soils are found primarily in Dade, Dallas, Polk, Lawrence, and Webster. In the rugged hills of Taney, Stone, Barry, and Christian, the steep slopes are prone to soil erosion, karst, and sedimentation of surface waters.

Many of the soils have severe restrictions for building development and septic tank use, necessitating careful design, installation, and maintenance of individual on-site waste disposal systems. Many municipalities have their waste and water utilities serviced through the use of septic tanks, private water providers, and personal wells. This can create environmental problems with waste and chemicals leaking into the ground; especially in karst areas.
Floodplains
Eight of the 10 counties have floodplain maps as well as many cities. Only Dade and Lawrence counties have not been mapped. Flooding has occurred in low-lying areas of Greene County as well as the cities of Branson, Monett, Mount Vernon, and Reeds Spring. However, torrential and extended rains did cause serious damage to roads and homes in the summer of 2007 in the Polk County area.
Climatic Conditions
The climate for the southwest Missouri region is considered continental: hot summers, and moderately cool winters. The average winter temperature is between 34-35 degrees Fahrenheit, with the average daily minimum between 21-25 degrees Fahrenheit. The average summer temperature ranges between 75-77 degrees Fahrenheit, with the average daily maximum temperature recorded between 87-90 degrees Fahrenheit. Annual precipitation for the region ranges between 39-44 inches, with 55-69 percent of the precipitation falling between April through September. The average seasonal snowfall ranges from 10 inches to 19.5 inches. The sun shines 65-70 percent of the time in the summer, and 50-75 percent of the time in the winter. The prevailing winds typically come from the south, varying between the SSW to SSE, except for Stone County during February and March, when the prevailing winds come from the Northwest. The average wind speed is between 11-13 mph, and occurs during the late winter-spring periods.

Forests and Timberlands
The Ozarks region contains vast acreage of forestland, particularly in the mountainous, southern portions of the region. Forestlands are a defining feature of the natural landscape as well as an important economic asset. Approximately 70 percent of Taney County’s land area and over 40 percent of the land area in Barry, Christian, Dallas, and Stone Counties are classified as forestland. The region has close to 34.7 percent of its total quantity of land covered with forests.

Of the region’s forestland, over 1,238,000 acres are designated by the U.S. Department of Agriculture as timberland. Timberland is forest land that is producing or capable of producing at least 20 cubic feet per acre, per year, of industrial wood crops under natural conditions, that is not withdrawn from timber utilization, and that is not associated with urban or rural development. Portions of the Mark Twain National Forest, managed by the U.S. Forest Service, are located in Barry, Christian, Stone, and Taney counties. A total of over 143,000 acres of the Mark Twain National Forest are located in these four counties, designated as timberland.

Hardwood species account for the majority of the region’s timberland. Principal hardwood forest types include Eastern Red Cedar-hardwood, Black-Scarlet Oak, and Post-Blackjack Oak. In Barry County, pine is the principal growing stock and saw timber species.
Infrastructure:
Transportation, Water, Sewer, Electrical Distribution Systems, and Communications

Highways
The major transportation routes consist of an interstate, and a number of State highways. Interstate 44 is a primary east/west transportation system that progresses through Lawrence, Greene, and Webster counties. The interstate serves as a connector to the cities of Joplin, St. Louis, and Tulsa, Oklahoma. Four major State highways located in the region: Highway 60 (Lawrence, Christian, Greene, and Webster), Highway 160 (Christian, Greene, Stone, and Taney), Highway 65 (Christian, Greene, Taney, and Dallas), and Highway 13 (Greene, Polk, and Stone). On a larger scale, Interstate 44 connects the eastern United States with the southwestern United States and Mexico. Because of the continental importance of Interstate 44, numerous trucking companies benefit from their placement in southwest Missouri. A number of other highways and county roads connect the counties and cities throughout the region. A significant number of workers in Stone, Barry, and Dade counties drive 34 to 48 minutes to work. The average travel time to work within the region is 25.7 minutes while the State average is 23.8 minutes.

Freight
Southwest Missouri is strategically located for freight transfers. In addition to rail facilities and freight shipping facilities at the Springfield-Branson Regional Airport, numerous trucking companies make their home in the region. This includes the U.S. Postal Service, FedEx, UPS, DHL, and other shipping carriers.

The proximity to Interstate 44 and Highway 65 enables local motor carriers’ easy access to the greater North American highway network. The region's location at the center of the continent means that southwest Missouri is in a prime location for motor freight shipping.

Airports
Of the 12 public use airports in the region, the largest is Springfield-Branson National Airport, providing regular freight and passenger service for the region. The airport is in the midst of a major addition to accommodate more tourist/business trips and additional freight facilities. The airport includes the Air Centre Industrial Park, which contains facilities for handling air freight, a U.S. Port of Entry and Customs Service, and an Enterprise Zone. The airport served 700,000 passengers in 2004, and is in the top 100 of 500-plus airports in the amount of air cargo shipped annually. The airport has six airlines with service to 12 non-stop destinations. Several general aviation airports also service the region, including the Springfield Downtown. Public general aviation airports are located in Aurora, Bolivar, Buffalo, Cassville, Monett, Mount Vernon, Ozark, Point Lookout, and Seymour.

Transit
Southwest Missouri's transit agencies are usually oriented to providing specialized transit services for a special needs component of the population. Four of the transit agencies are general providers: OATS, Incorporated; Springfield City Utilities; the City of Marshfield; and Missouri State University. Missouri State University provides a public shuttle bus service in a limited area within downtown Springfield. City Utilities of Springfield provides regular bus service for a large portion of the City of Springfield. The City of Marshfield has a small para-transit system for service to the community. The only general transit provider serving the entire region is OATS, Incorporated. OATS focuses its efforts on providing transit service to the elderly and disabled, but will also provide transit service to the general public when needed.
Bike and Pedestrian Facilities
For the majority of Southwest Missourians, bike and pedestrian needs are met by the various individual municipalities. From a transportation standpoint, most facilities in Southwest Missouri for bike and pedestrian transportation are intended more for recreational purposes than practical transportation. Still, as the region's bike and pedestrian facilities are developed, crucial linkages between the activity centers could provide a viable alternative to the automobile. Ozark Greenways, headquartered in Springfield, is leading a regional effort to construct pedestrian and bikeways in Southwest Missouri. Among their projects are the Galloway Trail and the South Creek Trail in Springfield, and the regional Frisco Highline Trail running north from Springfield to Willard and into Bolivar. The Frisco Highline Trail is being developed on the former Frisco Railway.

Regional Transportation Planning
Transportation planning in Southwest Missouri usually is centered on the individual planning efforts of each community or county. Several recent efforts are taking a multi-jurisdictional approach to transportation planning. However, in 1995, the Intermodal Transportation Study for Stone and Taney Counties and the City of Branson addressed many of the transportation issues and needs of the Tri-Lakes area. One result for the plan is the ongoing Ozarks Regional Advisory Board for Intermodal Transportation, that continues to provide leadership and input on transportation planning issues in Stone and Taney counties. The City of Springfield and the Springfield Area Transportation Study Organization also have formulated a transportation plan as part of the Springfield/Greene County Vision 20/20 Comprehensive Plan. This plan will cover transportation needs and priorities for the City of Springfield, the Springfield Metropolitan Planning Organization (MPO) area, and Greene County.

Water Systems
The Missouri Department of Natural Resources lists 59 city water systems and 9 public water supply districts in the region. The region also includes 172 community water systems; 201 transient, non-community systems; and 87 non-transient, non-community systems in unincorporated areas of the counties.

Most of the community public water supply systems and public water supply districts rely on groundwater as the source of potable water. This incorporates municipal water suppliers, public entities, and privatized use such as wells. Only a few communities, such as Springfield and Branson, utilize surface water reservoirs for water supplies.

Wastewater Treatment Systems
Much of the natural resources in Southwest Missouri exhibit karst topographic conditions. Karst features, such as sinkholes, lineaments, fractures, caves, and losing streams, provide relatively easy passage of surface waters and contaminants into the groundwater system. Contamination of the aquifers is a serious concern throughout the region as most communities and rural area residents depend on groundwater for their potable water supplies. Therefore it is imperative that the disposal of wastewater be closely monitored.

Most of the region’s rural areas rely upon septic systems for wastewater disposal. However, several areas do have sewer districts. All of the region’s larger communities (population over 5,000) and some smaller communities have public wastewater treatment facilities. Rapid population growth has necessitated improvements to both municipal water and sewage systems in order to keep pace with the demands of growth and to protect the environment. The region includes 58 municipal wastewater treatment systems, numerous septic systems and one wetland treatment system. In addition, Table Rock Lake Water Quality, Inc., a not-for-profit, was formed
to basically manage the installation and/or correction of onsite sewer systems as well as cluster systems. As well, SMCOG is administering an 604b grant to form a wastewater district that includes a portion of Dallas County. Appendix B provides a complete listing of permitted municipality wastewater treatment facilities in the region.

Communications
Most counties have E-911 emergency communications. Generally, television and radio remain the most pervasive forms of public communication. The region includes four television stations and numerous radio stations as well as cable and satellite television. However, the proliferation of cell phones and the Internet is a boon for communications. Virtually all areas of the region have access to either cable or satellite television and many of the more populated areas have access to the Internet.

Electrical Distribution Systems
There are numerous electric, utility, and cooperatives that operate in the 10-county region to provide electrical services to the citizens in their designated areas, Table 1.34. Municipalities with their own electrical services include the cities of Springfield, Nixa, and Crane. There are 28 out of the total 39 services, which are cooperative electrical service providers. Empire Electric District Company and Ozark Electric Cooperative provide the major portion of electrical services.

Natural Gas
Natural gas is offered in 7 out of 10 of the counties in the region. Dallas, Polk, and Taney counties do not have access to natural gas. The other seven counties, with the exception of Webster County, have Missouri Gas Energy as their provider. Webster County is serviced by Southern Missouri Gas Company. Only Christian County has two providers: Missouri Gas Energy and Springfield City Utilities. The natural gas providers are listed in Table 1.35.

Solid Waste Disposal
There are currently eight registered landfills by the Missouri Department of Natural Resources in the region. This is listed in Table 1.36. The Springfield Sanitary Landfill is the only permitted sanitary landfill in the region. There are five transfer stations located in Greene, Lawrence, Stone, and Taney counties. Two demolition, utility, and special waste landfills also are located in Greene County.

Cultural Assets
In addition to the natural assets, the region enjoys an abundance of cultural assets. These include 11 museums on a range of subjects including general histories of the area, as well as museums on military history, railroads, sports, art, and American presidents, and the Hubble Space Telescope replica.

Government-Sponsored or Supported Plans
The State Department of Economic Development’s (DED) vision is to stimulate and support economic security, opportunity, growth and a high quality of life in Missouri communities. The Department administers a wide array of programs designed to enhance Missouri's economy. It is composed of agencies that execute statutory requirements and department policy in the areas of community, economic and workforce development. DED’s Missouri Economic Research and Information Center also publishes an annual Missouri Economic Report.
The Missouri Career Centers’ Target Missouri II initiative to determine which industries should be chosen for ‘targeting’ in a given region. Targeting in this sense serves the purpose of prioritizing those industries that currently have the greatest competitive advantage. They have a greater presence in a region, have potential for the greatest economic impact under expansion, have the highest levels of current employment, and the greatest likelihood of a mis-match between the skills available in the area workforce and those skills needed for a particular industry. All of these factors are directly or indirectly related to the critical need for integrating workforce planning into the consideration of economic development needs for the area.”

OREP’s focus is to collaborate among a wide array of stakeholders in regional planning. This approach for regional planning is ongoing in SMCOG’s region under a collaboration between the Workforce Development Council of the Springfield Area Chamber of Commerce and OREP. The Partnership completed a Workforce summit in March 2001 and is moving forward with developing and prioritizing regional workforce strategy needs. There are 15 chambers of commerce in the region (Table 1.47).

SMCOG works closely with the Missouri Department of Transportation (MoDOT) to identify needs and projects throughout the region. The Regional Transportation Plan for SMCOG was approved by MoDOT in 2006. SMCOG also coordinates the Transportation Advisory Council for southwest Missouri.

**The State of the Regional Economy**

The region continues to experience economic growth. Regional income, 1990-2000, rose by 59 percent (Table 1.22). Regional employment grew by 36 percent between 1990 and 2000 with a projected 2010 employment of 300,221 jobs (Table 1.45). The main factors that contribute to this growth are the low cost of living, low crime rate, an average unemployment rate of 5.2 percent from 1997 to 2005 (Table 1.30), and relatively low population density.

Major centers of commerce include the greater Springfield area and the Ozark/Nixa area as well as the Bolivar, Monett, Aurora, Branson, and Marshfield areas. Several of the smaller communities also have local industrial employment. The balance of the region is dominated by agriculture; primarily cattle and dairy cow operations.

Within the region, according the Missouri Department of Economic Development, the economic momentum of a county is based on growth in employment, population, and income. An index score of “0” means the county grew at the same rate as the State. The average score for the region is .71; meaning the region grew at a greater rate than the State. Individual county scores are shown below.

<table>
<thead>
<tr>
<th>County</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dade</td>
<td>-.03</td>
</tr>
<tr>
<td>Barry</td>
<td>.02</td>
</tr>
<tr>
<td>Greene</td>
<td>.09</td>
</tr>
<tr>
<td>Lawrence</td>
<td>.21</td>
</tr>
<tr>
<td>Webster</td>
<td>.72</td>
</tr>
<tr>
<td>Taney</td>
<td>.74</td>
</tr>
<tr>
<td>Polk</td>
<td>.79</td>
</tr>
<tr>
<td>Stone</td>
<td>.99</td>
</tr>
<tr>
<td>Dallas</td>
<td>1.67</td>
</tr>
<tr>
<td>Christian</td>
<td>1.87</td>
</tr>
</tbody>
</table>
Christian and Dallas counties exhibit the greatest economic momentum while Dade exhibits a negative momentum. The remaining seven counties have scores of 0 to 1.

**Major Employers**

The City of Springfield has 49 major employers and accounts for 71% of major employer jobs. Five major employers are located in cities adjacent to Springfield: Nixa, Ozark, Republic, Rogersville, and Willard. Other major employers are located in the cities of Aurora, Bolivar, Branson, Buffalo, Butterfield, Cassville, Marshfield, Monett, Mount Vernon, Reeds Spring, and Seymour. Three regional firms operate in multiple counties. Dade County is the only county without a major employer (*Table 1.27 and 1.27a*). The number of those working for major employers is shown below by county:

<table>
<thead>
<tr>
<th>Location</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greene County</td>
<td>27,875</td>
</tr>
<tr>
<td>Barry County</td>
<td>5,879</td>
</tr>
<tr>
<td>Polk County</td>
<td>2,255</td>
</tr>
<tr>
<td>Stone County</td>
<td>2,320</td>
</tr>
<tr>
<td>Taney County</td>
<td>1,150</td>
</tr>
<tr>
<td>Christian County</td>
<td>1,115</td>
</tr>
<tr>
<td>Webster County</td>
<td>1,010</td>
</tr>
<tr>
<td>Lawrence County</td>
<td>800</td>
</tr>
<tr>
<td>Dallas County</td>
<td>300</td>
</tr>
<tr>
<td>Dade County</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>42,704</strong></td>
</tr>
</tbody>
</table>
### Major Sectors of the SMCOG Economy

In 1990, manufacturing employed the most workers, transportation and warehousing provided the best wages, and the highest sales tax revenues were retail trade (Table 1.45). The past employment, weekly wage, and revenue data are shown below.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>31,609</td>
</tr>
<tr>
<td>Retail trade</td>
<td>21,296</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>20,720</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>15,464</td>
</tr>
<tr>
<td>Educational services</td>
<td>11,099</td>
</tr>
</tbody>
</table>

The major sectors by 1990 average weekly wages were:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Weekly Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation and warehousing</td>
<td>$351</td>
</tr>
<tr>
<td>Information</td>
<td>$331</td>
</tr>
<tr>
<td>Education</td>
<td>$323</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>$322</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>$321</td>
</tr>
</tbody>
</table>

The major sectors in regard to 1990 taxable sales revenue were:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail trade</td>
<td>$429,612,190</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>$377,651,723</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>$217,501,456</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>$128,438,824</td>
</tr>
<tr>
<td>Information</td>
<td>$83,100,309</td>
</tr>
</tbody>
</table>

In 2000, manufacturing continued to employ the most workers. Transportation and warehousing gave way to the construction sector for the best wages. Retail trade continued to show the highest sales tax revenues were retail trade. The 2000 employment, weekly wage, and revenue data are shown below.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>33,007</td>
</tr>
<tr>
<td>Retail trade</td>
<td>32,081</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>28,924</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>22,468</td>
</tr>
<tr>
<td>Educational services</td>
<td>15,101</td>
</tr>
</tbody>
</table>

The major sectors by 2000 average weekly wages were:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Weekly Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>$524</td>
</tr>
<tr>
<td>Retail trade</td>
<td>$502</td>
</tr>
<tr>
<td>Information</td>
<td>$474</td>
</tr>
<tr>
<td>Real estate, rental, leasing</td>
<td>$469</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>$467</td>
</tr>
</tbody>
</table>

The major sectors in regard to 2006 taxable sales revenue were:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail trade</td>
<td>$3,782,897,310</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>$1,021,161,388</td>
</tr>
</tbody>
</table>
The 2010 projections show retail trade on top with manufacturing dropped to third place in number of employees. The arts, entertainment, and recreation sector is forecast to show the best wages. Retail trade continued to show the highest sales tax revenues were retail trade. The 2010 employment, weekly wage, and revenue data are shown below.

The 2010 projections of major sectors by employment are shown below.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail trade</td>
<td>48,328</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>40,376</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>34,367</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>32,644</td>
</tr>
<tr>
<td>Administrative and waste services</td>
<td>22,946</td>
</tr>
</tbody>
</table>

Major sectors for 2010 projections on income are:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Weekly Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts, entertainment, and recreation</td>
<td>$2,122</td>
</tr>
<tr>
<td>Real estate, rental, leasing</td>
<td>$1,418</td>
</tr>
<tr>
<td>Management of companies and enterprises</td>
<td>$1,181</td>
</tr>
<tr>
<td>Administrative and waste services</td>
<td>$1,115</td>
</tr>
<tr>
<td>Retail trade</td>
<td>$1,098</td>
</tr>
</tbody>
</table>

Major sectors of taxable sales revenue for 2010 projections are:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sales Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail trade</td>
<td>$4,621,218,590</td>
</tr>
<tr>
<td>Accommodations and food services</td>
<td>$1,182,068,804</td>
</tr>
<tr>
<td>Information</td>
<td>$680,303,742</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>$498,573,791</td>
</tr>
<tr>
<td>Professional and technical services</td>
<td>$253,210,990</td>
</tr>
</tbody>
</table>

Major Sectors by Employment

The past, present and projected employment by NAICS sectors does not show any radical changes from 1990 to 2010 (Table 1.45).

- Manufacturing employment was number one in the region for 1990 and 2000; however, manufacturing did drop to third place in the 2010 projection.
- Retail trade had the number-two ranking for the past two decades and is projected to be the number-one sector in 2010.
- Health care and social assistance was third in 1990 and 2000. Projections show that this sector will rise to number two in 2010.
- Accommodations and food services are solidly in fourth place through 2010.
- Educational services ranked fifth in 1990 and 2000; however, it is projected to rank sixth in the future.

Major Sectors by Wages

Six sectors show modest growth in wages (Table 1.45). Those sectors are:

- management of companies and enterprises, 6% growth;
- arts, entertainment, and recreation, 4% growth;
real estate, rental, and leasing, 2% growth;
- mining, a 1% growth; and
- agriculture services, forestry, fish, other, 1% growth.

**Major Sectors by Sales Tax Revenue**

Taxable sales revenues in the major sectors show that retail trade has the highest dollars from 1990 to 2010 with accommodations and food services second. Wholesale trade was in third place in 1990, then dropped to fourth for 2006 through 2010. Projections also show a decrease in finance and insurance. However, the information industry is up by 6% in 2006 and expected to rise in 2010. The primary revenue generators include:

- Agriculture services, forestry, fish, and other, 17% growth;
- Transportation and warehousing, 11% growth;
- Retail trade, 8% growth;
- Information, 5% growth; and
- Utilities, 3% growth.

From 1990 to 2006, taxable sales revenue in the region grew by 3.26 percent. In regard to business taxes, the Tax Foundation, a nonpartisan educational organization, shows Missouri ranks 15th in the nation for a favorable business tax climate. The index includes corporate, individual income, sales, unemployment insurance, and property taxes. The report ranked Missouri’s business tax environment as first among all neighboring states. Neighboring states are Arkansas, Illinois, Iowa, Kansas, Kentucky, Nebraska, Oklahoma, and Tennessee.

**Identified Economic Clusters**

The Missouri Department of Economic Development identifies eight "industry clusters" for targeting. The clusters are based on research provided by the Missouri Economic Research and Information Center (MERIC), existing initiatives, industry strength, and future growth potential. Missouri’s primary clusters are agribusiness, automotive, defense, energy, finance, information technology, life sciences, and transportation/logistics. Five of the eight State clusters coincide with the SMCOG region. The five are:

- agribusiness (primarily cattle and dairy) throughout the region;
- a high concentration of energy clusters in Barry County;
- Greene County’s finance cluster is third in the State; and
- Dade and Greene counties have a high quotient of transportation/logistics clusters along with Lawrence and Dallas counties.

The most evident cluster in the region is the a family entertainment that spans Taney and Stone counties. This popular vacation destination provides all manner of family entertainment: live music and comedy shows, shopping, dining, golf, go-cart tracks, hotels, lake cabins, camping, fishing, boating, hiking as well as Shepherd of the Hills entertainment. Herschend Family Entertainment’s primary activities include Silver Dollar City theme park, Celebration City amusement park, The Branson Belle steamboat and show, and Whitewater water amusement park. Geographically, the entertainment cluster includes Highway 76 from Lake Taneycomo and Bull Shoals Lake on the east to Branson West and Table Rock Lake to the west and south. City of Branson alone chalked up recording-breaking $173.6 million in new construction for 2005 and $215.9 million in 2006. From June to December 2006, sales tax revenues rose by 19% and tourism revenues rose 11% compared to the same period in 2005. Other major tourist attractions include commercial caves, Springfield’s zoo, an interactive science center for children and adults, and Bass Pro Shops (Tables 43-46).
The other large cluster in the region is the “Medical Mile” in Springfield as well as hundreds of physicians and all manner of health-related businesses. The cluster is anchored by St. John’s on the north end and Cox Health Centers on the south end of the “mile.”

**Past, Present and Future Investments**

*Past Investments*

In the 1950’s, Kraft Foods was the first major manufacturer to set up shop and provide a much greater source of jobs in the region. Many employers followed soon after Kraft and they continue doing business in the region today. For example, Herschend Family Entertainment (Silver Dollar City), Missouri State University (Southwest Missouri State College), O’Reilly Auto Parts, and Burlington Northern Santa Fe (St. Louis-San Francisco Railway) have deep roots in the region.

Based on competitive advantage, available workforce skills, and infrastructure needs, the region’s current list of industries includes engines and turbines, general industrial machinery and equipment, household audio and video equipment, electronic components and accessories, meat products, dairy products, communications, miscellaneous chemical products, preserved fruits and vegetables, grain mill products, bakery products, miscellaneous petroleum and cola products, and offices of health practitioners. The Partnership Industrial Center, Springfield’s first official industrial park, was built out by August 2006. As of November 2006, the main investments included:

- Cox Health Systems, 8,815, regional jobs;
- St. John’s Health System, 8,000 regional jobs;
- Wal-Mart Stores, regional, 4,773 jobs;
- Springfield R-12 Public Schools, Springfield, 3,000 jobs;
- Bass Pro Shops/Tracker Marine, Springfield and Branson, 2,615 jobs;
- U.S. Government, Springfield, 2,540 jobs;
- Herschend Family Entertainment, Branson, 2,500 jobs;
- Springfield’s Partnership Industrial Center now provides more than 2,397 jobs for investments totaling $182.7 million;
- State of Missouri, Springfield, 2,385 jobs;
- Missouri State University, Springfield, 2,130 jobs;
- Jack Henry & Associates, Monett, 2,000 jobs;
- Chase Card Services, Springfield, 1,595 jobs;
- Citizens Memorial Healthcare, Bolivar, 1,580 jobs;
- City of Springfield, 1,535 jobs;
- O’Reilly Auto Parts, regional, 1,500 jobs;
- Tyson Foods, Inc., Springfield, 1,500 jobs;
- EFCO Corporation, Monett, 1,400 jobs;
- General Council, Assemblies of God, Springfield, 1,140 jobs;
- Kraft Foods, Inc., Springfield, 1,120 jobs;
- Burlington Northern Santa Fe, Springfield, 1,050 jobs;
- Hutchens Industries, Springfield and Seymour, 950 jobs;
- T-Mobile Customer Service Center, Springfield, 700 new jobs;
- Springfield’s Air Centre Industrial Park with an air freight handling facility, a U.S. Port of Entry and Customs Service, and an Enterprise Zone;
• 22-story Hammons Tower built in 1986 houses high-profile law firms and accountancy firms, Springfield;
• Phase I of the Jordan Valley Park downtown redevelopment project (ice rink and park) completed, Springfield;
• University Plaza Hotel, Convention Center and Expo Center has become a popular site for various conventions, Springfield;
• Springfield Cardinals AA League franchise, 8,000-seat stadium; and
• Juanita K. Hammons Hall for the Performing Arts, Springfield.
• Barry County has an industrial park in Monett;
• Christian County has four industrial parks (Clever, Nixa and two in Ozark);
• Lawrence County has two industrial parks (Aurora and Mount Vernon);
• Polk County has an industrial park in Bolivar;
• Stone County has an industrial park in Crane;
• Taney County has an industrial park in Hollister; and
• Webster County has an industrial park in Marshfield.

Tables 1.27 and 1.27a show detail the major employers with more than 300 jobs.
Table 1.42 provides detail on industrial parks in the region.

Present Investments (in progress)
The five-county metropolitan area (Greene, Christian, Webster, Polk and Dallas counties) enjoys health care (life sciences) and education as the top economic drivers. Health care contributes $4.5 billion annually generating, directly and indirectly, more than 51,000 jobs. Higher education contributes $896 million and accounts for 13,400 jobs. Health care and education account for nearly 25 percent of the region’s jobs.

Following the build-out of the first Partnership Industrial Center, the Partnership Industrial Center West was created adjacent to the Springfield-Branson National Airport. The project has generated $200 million in private investment and 2,400 jobs have been retained or created.

The Springfield Business Development Corporation (SBDC) is a wholly-owned subsidiary of the Springfield Area Chamber of Commerce, also represents a valuable asset for the region. The leadership is focusing on international business development capital formation, and partnerships to help market the Springfield-Branson National Airport to a national audience. In addition, according to a Springfield Chamber 2006 impact analysis for the region, manufacturers spend more than $6.74 billion per year, while area logistics firms spend $5.2 billion per year. Direct jobs in manufacturing and logistics make up 16.6 percent of all jobs in the region.

Present economic development investments in progress include:
• Jordan Valley Innovation Center, Springfield;
• Major expansion of St. John’s Hospital, Springfield;
• Missouri State University hockey stadium, Springfield;
• College Station a development of major retail, theatre complex, loft housing, and parking garage in downtown Springfield;
• Springfield’s Partnership Industrial Center West has 18 lots available; one includes an industrial building; Projected jobs at build-out are 500 jobs and $16.5 million in investments; 397 new jobs currently;
- Major additions to Springfield-Branson National Airport, including a second control tower and more runways;
- Ozark Technical Community College Richwood Valley campus, between Ozark and Nixa;
- City of Branson’s RecPlex, a 42-acre state-of-the-art sports and recreation complex in Branson Hills combining fitness, recreation, and organized athletics;
- Branson Hills Plaza, a 141-acre development, includes Target, Home Depot, TJ Maxx, and several restaurants; an investment of $33 million and 300,000 square feet of lease space;
- Branson Landing is a 95-acre, high end mixed-use project in downtown Branson along Lake Taneycomo; and
- Pierce City tornado recovery.

Future Investments
The State DED has several economic benefit programs to encourage economic development. These include seed/venture capital programs, competitive project incentives, quality of life programs, public infrastructure development programs, affordable housing development programs, community development programs, hybrid programs, and worker training programs. The major investments on the horizon include:

- Springfield has a proposed agreement to sell the 10-story, landmark Heer’s building to a St. Louis developer for $3 million, redevelopment could begin as soon as December 2007;
- An old quarry site in downtown Springfield is slated to be the second phase of the larger Jordan Valley Park project;
- Springfield’s Missouri State University is building the JQH Arena, $67 million;
- Springfield’s Ozarks Technical Community College addition (primarily for a technical education center), $2.4 million;
- Bolivar’s Southwest Baptist University as renovated the Jim Mellers Center classrooms, $1.5 million in private donations;
- Branson Hills Plaza’s phases two and three include more shops and restaurants with over the next 10 years the project will expand to one million square feet in Branson;
- Possible ethanol plant in Rogersville;
- Ozark has approved a 47-acre, $50 million downtown redevelopment project named the Finley River Neighborhood District;
- Branson plans to build the Branson Convention Center to create a more year-round destination;
- Branson is expected to have a regional private airport in two years.

In addition, the regional Workforce Investment Board announced in August 2007 that Missouri Customized Training grants are coming to five southwest Missouri companies to help boost the skills of local incumbent workers. Companies will receive from $10,000 to $35,000 each. The training projects help improve the skills of the workforce as a means to improve productivity for companies and profitability for the local economy. The grant benefits include four Monett firms: EFCO Corporation, Jack Henry and Associates, Monett Metals, and Schreiber Foods as well as Schreiber Foods in Mount Vernon and BCP Ingredients in Verona. The grants originated from the Missouri Department of Economic Development’s Division of Workforce Development.
SMCOG’s Economy in Relation to Missouri

Missouri’s 2005 per capita income is $30,608 while SMCOG’s per capita income is $27,113 or 88% of the State’s figure. Unemployment as of June 2007 is two points lower than the State.

SMCOG is the third populated region in the State. The region exhibits several locational advantages to that of the State. The main locational advantage is the abundance of four-lane highways and airports to move both people and freight. Although a few passenger trains provide short recreational trips, railroad operations are virtually all freight.

Although the region does not have mammoth heavy industry such as automotive plants, residents from all over the State visit the region for tourist attractions, lakes, National forests, and abundant shopping. The Springfield Convention and Visitors Bureau’s 2005/2006 statistics show the average visitor is more than 35 years old, nearly half have some college or a college degree, and the average family income is $61,200 per year. The 1,515,919 overnight visitors paid $1,548,507 in room taxes. These numbers include only Springfield metropolitan area.

In addition to the Springfield area, prime attractions in Taney and Stone counties are Silver Dollar City, Whitewater, Shepherd of the Hills, Branson Belle, and Celebration City as well as fishing, boating and water sports on any of three nearby lakes. Branson, the nation’s number-one tour bus destination, offers nonstop family fun highlighted by more than 100 live music and variety shows, including country, jazz, bluegrass, gospel and classical, plus magic, comedy, acrobats and much more. Given the tourism numbers, it seems southwest Missouri is the main playground for the rest of the State.

SMCOG’s three industries that ranked in the State’s top 10 growth industries dovetail perfectly with the wealth of tourism in the region. Retail, food services, and administrative services are not only growing, but are essential to the vacation economy. The Branson ‘playground’ reaps tax revenues in the south while industry grows in the west side of the region, healthy agribusiness to the north, agriculture and industry to the east and the Springfield Cardinals and Bass Pro Shops in the middle.

The region’s top NAICS sectors were ranked in order of growth potential and were compared to the State. Five of the six industries also are included in the State’s top 10 high-growth industries. Seven sectors on both lists include management of companies and enterprises, administrative and waste services, other services except public administration, professional and technical services, retail trade, and accommodation and food services. Using the percentage change of growth from 1990 to 2000, the regional growth sectors (Table 1.47) are listed in order from highest to lowest:

1. Management of companies and enterprises
2. Administrative and waste services
3. Arts, entertainment, and recreation
4. Real estate, rental, and leasing
5. Construction
6. Other services, except public administration
7. Professional and technical services
8. Retail trade
9. Finance and insurance
10. Accommodation and food services
The State list also is listed in order from highest to lowest sectors:

1. Accommodation and food services
2. Professional and technical services
3. Other services, except public administration
4. Health care and social assistance
5. Educational services
6. Wholesale trade
7. Retail trade
8. Utilities
9. Management of companies and enterprises
10. Administrative and waste services

Factors that Directly Affect Economic Performance

Transportation Costs

The State transportation agency has been affected by the national cuts in transportation funds. MoDOT has an $18 billion shortfall in this fiscal year and next Federal funding outlook is not favorable. The SMCOG region has MoDOT funds, including match, for a total of $55,000 in 2007-2008. Commuting patterns show a rise in the mean travel time to work in the region with the price of gas ranging between $2.60 and $3.50 per gallon or more. In 1990, the mean travel time was 22.8 minutes. In 2000, the mean travel time rose to 25.7 minutes. Table 1.39 (Employment).

Energy Costs

Electric service in the region is provided by 13 companies and one company provides natural gas service. The average rate for the region is .05236 cents per kilowatt hour. All rates were based roughly on mid-range commercial rates. See Table 1.34.

Taxes

Table 1.48 shows assessed valuations totaling over $7 million for the region; more than half represent Greene, Taney and Christian counties. Valuation per resident ranges from $18,686 in Taney County to $8,301 in Dallas County. Missouri law sets the assessment ratio for personal property at one-third of true value throughout the state. Real properties (land and buildings) classified as commercial and industrial, are assessed at 32 percent; residential, 19 percent; and agricultural, 12 percent of true or fair market value. The local property tax rate is an aggregate of school, city, county and state levies expressed in tax per $100 assessed valuation. Commercial and industrial real property is assessed an additional county surcharge designed to replace revenues lost by the tax exemption of business inventories. The average county surcharge is about $1.02 per $100 assessed valuation, for a total commercial/industrial real property average tax rate of about $6.89 per $100. The average total personal property tax rate is about $5.87 per $100 valuation.

Land Use Patterns

The region includes two first-class counties, one second-class county, and seven third-class. By Missouri state statutes, second-class and third-class counties have the powers to implement
planning and zoning; however it would require a vote of the jurisdiction. An affirmative vote would be a rare event in the region’s rural counties. Greene County and Taney County, first-class counties, do not need a vote before implementing planning and zoning regulations. The City of Springfield and Greene County have extensive planning and zoning regulations. Taney County recently became a first-class county and they are in the process of implementing planning and zoning.

SMCOG cities that have planning and zoning are: Springfield, Monett, Aurora, Nixa, Ozark, Ash Grove, Fair Grove, Republic, Willard, Strafford, Branson West, Kimberling City, Branson, Marshfield, and Rogersville. These communities use traditional planning and zoning techniques. However, Springfield and some of the larger communities are adding downtown (or on the square) loft homes above street-level shops. Springfield, in particular, has an overabundance of newly built apartments for rent. As well, Springfield and several other communities are using industrial parks and/or office parks to draw economic development. Land use patterns outside of the larger cities are virtually rural with few regulations.

Regional Problems and Opportunities

Problems

The main issues for the region pertain to the economic climate, housing, education, employment, environmental concerns, infrastructures (transportation, water, sewer, electrical distribution, communications).

Economic Climate

- For the most part, the region has a reliance on services and retail trades. Services (16.9 percent) and retail trade (11.3 percent) account for 28.2 percent of the region’s commerce. However, these two sectors historically pay minimum wage or less.
- Agriculture has been decreasing; however, farming represents 6.5 percent of the economy and 3,600 square miles of land in the region.

Housing

- Housing is significantly dominated by single-family residences with the exception of the City of Springfield. Single-family housing units account for 80.3 percent of the housing in the region, Tables 25 and 26. More and more affluent families are building larger homes on larger lots than ever before. However, the wholesale sprawl into the countryside is eroding the natural infrastructure’s capacity to protect clean water, clean air, native trees and plants, and endangered species.

Education

- The region has several issues regarding the average education level. When compared to the State of Missouri, the region is below on every category listed in Table 6, except for the percentage of high school graduates. The table is based on persons over the age of 25. The percentage of individuals in the region with less than a 9th grade education is 7.2 percent versus the State’s 6.5 percent and individuals with some high school is 13.9 percent versus the State’s 12.1 percent. The percentage of individuals with a college education is 9.7 percent versus the State’s 14 percent. The region should address the high school dropout rate and the lower percentage of college graduates.
• The continuing influx of non-native students requires opportunities to learn the English language.

**Employment**
• Annual personal income varies throughout the region from $20,148 to $30,493. However, minimum wage jobs are prevalent throughout the tourism areas and the retail trades which brings the regional average wage to $23,857. The generally low wages in the region reflect the dominance of service and retail industries. For instance, high unemployment rate exists in Stone and Taney counties is a result of the heavy dominance of service and tourism occupations. Tourists generate dollars for the communities and businesses while tourism employees generally work for minimum wage. In addition, many of the tourism workers go on unemployment during the winter months. Unemployment for February 2007 was at 13.9 percent in Stone and 15.7 percent for Taney, Table 19.
• Dallas County had the lowest annual average wage in 2000 followed closely by Dade County. The average for the region was $23,857 compared to Missouri’s $34,548.
• Many non-native students and adults in the region need access to English language classes.
• Create a way to teach English for non-native speaking residents (MSU students have a program in Monett and/or contact the Catholic Church to see how their program worked to teach English to Vietnamese residents).

**Environmental Concerns**
• Although the region does have consistent monitoring, the James River that empties into the Table Rock Lake is 303(d)-listed. Significant water pollution could curtail the thriving recreation economy that depends upon the lake. A significant portion of the regional economy depends upon safeguarding the quality of our air, water, forest lands.
• Water resources are becoming fragile. The eastern Kansas aquifer that provides portions of southwest Missouri is seriously low.
• Many municipalities have their waste and wastewater utilities serviced through the use of septic tanks, private water providers, and personal wells. Due to the prevalence of the porous karst terrain, this can create environmental problems with waste and chemicals leaking into the ground. For instance, many community water supply systems rely on groundwater as the source of potable water.
• Springfield has experienced population loss as more affluent residents move farther away from the core of the city. The situation creates urban sprawl without regard for the natural environment. As more and more land and forest areas are disrupted and subdued, the advantages of the region’s natural infrastructure will be impaired.
• Some jurisdictions in the region are generally opposed to the benefits of land use and zoning regulations. This situation tends to create problems and/or conflicts for local government officials.

**Transportation**
• MoDOT’s Federal funding sources are expected to be severely curtailed over the next several years.

**Opportunities**

The analysis of the various problems helps to illuminates the opportunities for improvement within the region addressing problems in the economic climate, housing, education, employment, environmental concerns, and transportation.
**Economic Climate**
- For the most part, the region has a reliance on services and retail trades. Services (16.9 percent) and retail trade (11.3 percent) account for 28.2 percent of the region’s commerce. However, these two sectors historically pay minimum wage or less.
- Agriculture has been decreasing; however, farming represents 6.5 percent of the economy and 3,600 square miles of land in the region.
- Find ways to promote more economic development in Dade and Dallas counties.
- Recruiting more light manufacturing firms may improve the average wage in the region. Therefore, the service and retail sectors may, of necessity, raise employee wages due to a smaller employee pool.
- SMCOG’s partnership with OREP provides numerous collaboration opportunities for the region. SMCOG and OREP could collaborate to construct incentives to attract a range of diverse industries such as technology, manufacturing, and information venues.
- Support the agricultural community by encouraging residents to buy locally and by providing incentives and/or knowledge assistance to protect natural resources. As well, hundreds of acres of corn are being planted for ethanol fuel production.
- Encouragement and incentives can be introduced to establish more diverse, local, small business commerce in the region, thereby, limiting global competitors within the region.

**Housing**
- The possibility exists to promote the development of more environmentally-friendly types of housing such as multi-family housing, smaller footprint housing.
- Cities may need to investigate the possibilities of providing an inclusionary housing program.
- Many communities in the region have a central area that potentially attracts people to reside in or near the city. Revitalizing efforts can contribute to implementing mixed-use areas.

**Education**
- The region should address high rate of 9th grade dropouts and significantly low rate of college education by working with higher education institutions and trade/technical institutions to encourage collaboration with cities and counties in need to businesses and workers.
- Encourage programs to teach English for non-native residents.
- Encourage outreach programs that will decrease the number of children that drop out of school. The overall percentage of dropouts for the region has fluctuated between 2.4 and 2.8 percent from 2002 to 2006, Table 7.
- Parents as Teachers program provides parenting skills and reading programs for pre-kindergarten children. Program volunteers also provide instruction for new mothers during their stay at St. John’s Hospital. These programs help to introduce education at an early age when children are more disposed to the concept of learning.

**Employment**
- Trends indicate that several industries will continue to recruit from the region’s two technical schools.
- Urban core areas may need to be revived.
- The region enjoys a wealth of recreational opportunities due to the abundance of lakes, rivers, and caves as well as shopping, entertainment, and sporting events to name a few.
- The region’s Missouri Career Centers are a valuable resource for the entire region for training and/or finding jobs.
- While current employment opportunities are somewhat limited in some areas of the region, SMCOG will work with chambers of commerce and economic developers to identify ways to diversify the types of businesses that would enhance the economic mix of the region. As for
the low wages associated with the tourism market, many tourism businesses are seeing the low wages translate into a much smaller pool of workers. However, the Missouri minimum wage went from $5.15 to $6.50 per hour as of January 1, 2007.

- SMCOG could provide collaboration between Dallas and Dade counties and their more prosperous neighboring counties to identify possible economic activities.

**Environmental Concerns**
- SMCOG staff will consider the natural environment in all projects and activities. SMCOG will work with environmental organizations and development organizations to heighten awareness of the fragile balance between the natural environment and the built environment.
- Consider the natural environment in all projects and activities. For example, encourage the use of green construction, such as the LEED system, throughout the implementation of projects.
- The region’s environmental attractions represent economic development, therefore, we may need to partner with Missouri Department of Resources and the U.S. Army Corps of Engineers to identify pollution sources plan ways to protect these natural resources. Efforts to preserve the forests and natural features could include growth boundaries, penalties for pollution and misuse, and conservation plans keep the economically valuable landscape intact. Ideally, any new development must successfully blend with, and enhance, the natural environment.
- SMCOG plans to provide a summit on the issue of water resources in southwest Missouri and portions of Arkansas.
- The region needs to come together to identify and implement better waste and wastewater techniques.
- SMCOG will work to educate officials about the consequences of sprawl.
- SMCOG continues to educate officials about the benefits of land use and zoning regulations in cities and counties.

**Transportation**
- Four major State highways span the region. As well, the Springfield-Branson National Airport provides for next-day air freight, a U.S. Port of Entry and Customs Service, and an Enterprise Zone. Rail freight remains healthy and the region enjoys rail lines that run in all four directions.
- SMCOG will continue to work closely with MoDOT and the Ozark Transportation Organization (OTO) as well as the cities and counties to address transportation needs as funds become available.

**Vision Statement**

SMCOG created a mission statement March 9, 2006 at a retreat with members, partner agencies, and staff. A survey was administered prior to the retreat. The results of the survey were used as a starting point for discussion and an in-depth analysis of SMCOG’s reason for being, services provided to members, the value of the organization. The mission is to continue to enhance the quality of communities through regional cooperation. This theme runs through all activities including services and facilitation, partnerships and cooperation, networking, assistance, and quality of life within the 10-county region. We implement our vision by:

- providing staff expertise in planning and community development;
- creating networking opportunities to address issues of common concern;
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- assisting governments in accessing resources; and
- advocating for Southwest Missouri.

The vision statement for the CEDS is derived from SMCOG’s mission: SMCOG will advocate for, and administer, economic development projects and programs by providing expertise, networking opportunities, and resource assistance. The overall vision for SMCOG is to enhance quality of life, encourage collaboration, diversity the economy, protect the environment, and provide SMCOG expertise.

Goals and Objectives

The Southwest Missouri Council of Governments (SMCOG) will provide planning and technical assistance in Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney and Webster counties and their respective communities to enhance quality of life and economic prosperity.

In addition to annual review of the CEDS and update of strategic actions as determined necessary, SMCOG will provide planning and technical assistance, information and data services, workshops, marketing and professional development services to implement the strategies of the CEDS Action Plan in areas including but not limited to infrastructure, natural resources preservation and sustainable development, workforce development and leadership, economic development and diversification, and community participation. SMCOG’s action plan will provide strategies to support the goals and objectives.

The CEDS update included a strategic planning process to determine the problems and opportunities affecting regional economic development. The CEDS Committee, along with staff, help three meetings over several weeks. The first meeting provided a list of economic issues confronting economic development in the region and a review of the strengths and weaknesses in the region. The second meeting yielded preliminary goals and objectives to improving economic conditions in the region. At the third meeting the goals and objectives were reviewed and prioritized. Throughout the process, several email “meetings” to further refine the strategy. From the discussion of the goals and objectives an action plan was developed. The action plan set the strategy for accomplishing the goals and objectives that will lead to economic opportunities for the region. Short-term and long-term goals were determined and strategic actions were identified and prioritized.

Throughout the process, staff and the Committee attempted to identify opportunities to encourage economic stability and diversity, create jobs, and stimulate economic growth. Although the region is diverse in culture and geography, each governmental entity should collaborate with others in the region to expand economic options and possibilities.

Goal 1: Expand infrastructure to support business and technology growth.

Objectives

1. Work with local governments and community and economic development organizations to identify and prioritize infrastructure needs.
2. Work with local governments and community and economic development organizations to encourage sustainable practices.
Goal 2: Encourage collaboration and public-private partnerships to address regional and interstate economic development issues.

Objectives
1. Provide regional advocacy for SMCOG member governments. Work with various public and private organizations to address social and community needs.
2. Work with public and private organizations to promote awareness of, and access to, job training, business development, school-to-work programs, educational and distance learning opportunities to residents of the region.

Goal 3: Expand the manufacturing base and support industry cluster growth and diversification.

Objectives
1. Work with economic development organizations and educational institutions to assist in identifying industry clusters and cluster groups.
2. Encourage recycling industries, especially those that represent high-value end uses and "closed loop" recycling that circulate more dollars locally.
3. Continue to partner with the Ozarks Regional Economic Partnership (OREP).

Goal 4: Promote economic development planning in the region.

Objectives
1. Work with local communities to develop plans that will lead to sustainable economic development within the region.

Goal 5: Provide organizational support services to the region.

Objectives
1. Provide staff expertise in planning and economic development to member jurisdictions.
2. Assist local governments and organizations in preparing grant applications and financing packages for infrastructure and community development that will foster community vitality and economic development.
3. Work as a member of the Missouri Association of Council of Governments (MACOG) to support economic development efforts and legislation that will enhance the business community and employment base of the State of Missouri.

Development Strategies

The quality of our communities is closely tied to economic development. This CEDS will promote economic development through market-driven results; strong leadership; economic advancement; forward-looking diversification; and a high degree of commitment. The overall strategy is to increase visibility and participation in SMCOG economic development programs, projects, and issues. Therefore, SMCOG will focus on the following strategies for the next five years (2006 through 2010). Criteria for decision-making on the resources available to achieve goals and implement projects and programs are:

- How the unemployed and underemployed will benefit,
- What funding programs are available for development activities,
- The geographic locations of development activities where collaboration exists, and,
How economic development programs will be sponsored and managed.

In addition, a noticeable success early on will help promote the regional economic development effort more than any other action. One achievable goal should be addressed and achieved quickly. The experience of accomplishing a shared goal will result in the strengthening continuing commitments to regional cooperation.

**Action Plan**

**Action 1: Expand infrastructure to support business and technology growth.**

**Short-Range Action Plan (1-5 years)**

1.1. Work with local governments and community and economic development organizations to identify and prioritize infrastructure needs.

- Survey members and partners to identify current and future infrastructure local needs for transportation, education, internet connections, water systems, sewer systems, stormwater systems, energy sources, and interoperable communications as well as important natural infrastructures such as clean air, water, aquifers, groundwater, caves, forests, native plants, and native animals.
  
  Agency: SMCOG
  Project Time Frame: Immediate

- Provide survey results to all member jurisdictions and partners for use in determining capabilities and limitations for economic growth.
  
  Agency: SMCOG
  Project Time Frame: Immediate

**Long-Range Action Plan (5-10 years)**

1.2. Work with local governments and community and economic development organizations to encourage sustainable practices.

- Educate citizens, developers, and member government employees about the impacts of land use on natural infrastructures. For example, provide community and economic development best practices on SMCOG’s website.
  
  Agency: SMCOG and environmental partners
  Project Time Frame: Continuous

- Support lower impact development (LID) by encouraging the use of the U.S. Green Building Council’s Leadership in Energy and Environmental Design (LEED) rating system. For example, investigate the life-cycle costs of concrete sidewalks versus environmental materials, or using native plants and low-impact/recyclable materials in economic development projects.
  
  Agency: SMCOG, contractor associations, environmental partners, and others
  Project Time Frame: Continuous
- Provide at least one training opportunity annually for members on plan development and land development regulations to enhance sustainable private development and investment.
  Agency: SMCOG, environmental partners, and others
  Project Time Frame: Annual

- Hold at least one SMCOG Board meeting per year at a “showcase” economic venue within the region to demonstrate economic possibilities for members and partners.
  Agency: SMCOG
  Project Time Frame: Annual

Action 2: Encourage collaboration and public-private partnerships to address regional and inter-state economic development needs and issues.

2.1. Provide regional advocacy for SMCOG member governments. Work with various public and private organizations to address social and community needs.

Short-Range Action Plan (1-5 years)

- SMCOG will host a regional summit on water availability and potential impact of sustaining regional as well as inter-state economic development. SMCOG will invite officials from northwest Arkansas to collaborate on the water availability issue.
  Agency: SMCOG and partner
  Project Time Frame: Immediate

- Work with Workforce Development to encourage high school dropouts to obtain a high school certificate.
  Agency: SMCOG and Workforce Development partners
  Project Time Frame: Immediate

- Work with foreign language agencies to institute English classes for non-native speakers.
  Agency: SMCOG, Workforce Development partners
  Project Time Frame: Immediate

- Work with OREP to encourage economic development in Dade and Dallas counties.
  Agency: SMCOG and OREP
  Project Time Frame: Immediate

Long-Range Action Plan (5-10 years)

- Work with public and private organizations to promote economic development projects that will create jobs and increase the region’s economic base.
  Agency: SMCOG and partners
  Project Time Frame: Continuous

- Encourage more economic developers in the region to become members of SMCOG.
  Agency: SMCOG
  Project Time Frame: Continuous
2.2. Work with public and private organizations to promote awareness of, and access to, job training, business development, school-to-work programs, educational and distance learning opportunities to residents of the region.

**Long-Range Action Plan (5-10 years)**

- Work with the region’s Missouri Workforce Development program, vocational/technical institutions, and other community programs to find ways to increase the number of employable residents.
  
  Agency: SMCOG  
  Project Time Frame: Continuous

- Hold SMCOG’s annual meetings at one of the region’s major facilities involved in regional economic development, technology research, or best practices.
  
  Agency: SMCOG and partners  
  Project Time Frame: Annually

**Action 3: Expand the manufacturing base and support industry cluster growth and diversification.**

3.1. Work with economic development organizations and educational institutions to assist in identifying or creating industry clusters and cluster groups.

**Short-Range Action Plan (1-5 years)**

- Develop a cluster framework for understanding how regional economies can provide counties a reason for working together.
  
  Agency: SMCOG and economic partners  
  Project Time Frame: Immediate

- Work with industrial park businesses, developers, and operators to include community-based organizations as partners in joint ventures.
  
  Agency: SMCOG, community-based organizations, and economic partners  
  Project Time Frame: Immediate

  3.2. Encourage recycling industries, especially those that represent high-value end uses and "closed loop" recycling that circulate more dollars locally.

- Educate local manufacturers on the advantages of using recycled materials.
  
  Agency: SMCOG, community-based organizations, and economic partners  
  Project Time Frame: Immediate

**Long-Range Action Plan (5-10 years)**

- Identify financing incentives for recycling-based enterprises in the region.
  
  Agency: SMCOG, community-based organizations, and economic partners  
  Project Time Frame: Future

3.3. Continue to partner with the Ozarks Regional Economic Partnership (OREP).
• Assist the Ozarks Regional Economic Partnership in promoting the Ozarks Regional Community Development Corporation’s (ORCDC) gap financing program for expanding existing business or new business startups in the region.
  Agency: SMCOG and OREP
  Project Time Frame: Continuous

• Continue SMCOG’s partnership with the Jordan Valley Innovation Center at Missouri State University in support of advanced technology research, education, and business development.
  Agency: SMCOG and OREP
  Project Time Frame: Continuous

• Continue to provide staff for the operation of the LocationOne website at Ozarks Regional Economic Partnership to provide data on current community profiles and available industrial sites.
  Agency: SMCOG and OREP
  Project Time Frame: Continuous

Action 4: Promote economic development planning in the region.

4.1. Work with local communities to develop plans that will lead to sustainable economic development within the region.

• Work with disadvantaged counties to increase economic development and diversification opportunities.
  Agency: SMCOG and OREP
  Project Time Frame: Continuous

• Research possibilities for new clusters and recruit businesses.
  Agency: SMCOG and OREP
  Project Time Frame: Immediate

• Continue to collaborate with Missouri State University’s Community and Social Issues Institute to assist in marketing the Institute’s new Greater Ozarks Leadership Development (GOLD) program designed to develop leadership capacity in communities throughout the region.
  Agency: SMCOG and OREP
  Project Time Frame: Continuous

Action 5: Provide organizational support services to the region.

5.1. Provide staff expertise in planning and economic development to member jurisdictions.

Long-Range Action Plan (5-10 years)

• Gather, analyze and distribute census data and population projections to the region’s constituents.
  Agency: SMCOG
  Project Time Frame: Annual
• Include on the SMCOG website current city, county and regional data as well as media sources, brochures, newsletters, public service announcements, annual reports, and other communication resources for use by members and partners.
  Agency: SMCOG
  Project Time Frame: Continuous

• Assist jurisdictions with GPS and GIS needs in planning for sustainable economic development, particularly in the areas of land use planning, transportation and environmental resource management.
  Agency: SMCOG
  Project Time Frame: As needed

5.2. Assist local governments and organizations in preparing grant applications and financing packages for infrastructure and community development that will foster community vitality and economic development.

*Long-Range Action Plan (5-10 years)*

• Provide grant-writing and project management expertise.
  Agency: SMCOG
  Project Time Frame: As needed

• Assist jurisdictions in preparing environmental reviews and assessments.
  Agency: SMCOG
  Project Time Frame: As needed

• Provide training to community boards and commissions on plan development and land development regulations to enhance local capabilities to encourage sustainable private development and investment.
  Agency: SMCOG
  Project Time Frame: As needed

• Distribute information to SMCOG members on funding opportunities, training opportunities and program policy changes.
  Agency: SMCOG
  Project Time Frame: As needed

• Each year, provide funding for at least one member jurisdiction representative to attend a professional training on community development or governmental administration.
  Agency: SMCOG
  Project Time Frame: Annual

5.3. Work as a member of the Missouri Association of Council of Governments (MACOG) to support economic development efforts and legislation that will enhance the business community and employment base of the State of Missouri.

• Attend national, state, regional and local meetings and forums that will improve professional capacities to assist local communities in community and economic development.
  Agency: SMCOG
  Project Time Frame: As needed
Vital Projects Identified and Prioritized

The following vital projects to be completed within five years are listed below in order of priority:

1. Discern infrastructure needs in the region.
2. Work with member jurisdictions to prioritize infrastructure needs.
3. Create an ongoing program to educate the region about natural resource conservation (for example, water conservation), low-impact development, green building techniques, and development regulations to enhance sustainability in the region.
4. Work with OREP and others to bring more sustainable, diversified, and well-paying jobs to the region.
5. Work with Missouri Career Centers and educational institutions to increase the number of employable residents.

Funding Sources and Programs

Local and regional resources include SMCOG, member governments, CEDS Committee members, OREP, chambers of commerce, infrastructure providers, Missouri Association of Councils of Governments (MACOG), Missouri Municipal League, Missouri State University GOLD program for governmental administrators, Missouri Department of Economic Development, Missouri Department of Conservation, Missouri Department of Natural Resources, Missouri Department of Agriculture, Missouri State Treasurer, Missouri cities and counties, financial institutions, and low-impact development sources.


Federal and State funding could include:
- The Missouri Technology Investment Fund
- Jobs Retention Training Program
- Missouri Community College New Jobs Training
- Missouri Job Development Fund
- Competitive Technology (CT)
- Annual Missouri Department of Transportation funding
- Public Water Supply District and Small Municipal Water Supply System Grants
- Enhancement Grants
- Interactive Distance Learning (IDL)
- Local/State Improvement Grant
- Safe Schools Grant
- Technology Acquisition and Enhancement (TAG)
- Technology Education Grants
- Tax Increment Financing
- Missouri Downtown and Rural Economic Stimulus Act (MODESA)
- DREAM Initiative for Downtown Revitalization
- Missouri Rural Economic Stimulus Act (MoRESA)
- Community Improvement Districts (CID)
- Transportation Development Districts (TDD)
Community and Private Sector Participation

SMCOG will continue to work with OREP, member jurisdictions, chambers of commerce, economic developers, community groups, educators, business owners, and residents to support the goals of the CEDS.

Projected Numbers of Jobs to be Created

Total regional employment was 317,974 in 2000. Based on the percent change in employment from 1990 through 2000, employment could rise to 431,605 jobs by 2010 (Table 1.45.). As the CEDS projects move into implementation, SMCOG will have actual data on jobs created.

Annual Evaluation and Update

SMCOG’s annual evaluation and update will show 2007 economic statistics for the region compared to 2006. The evaluation will use data on education rates, jobs created, per capita income, new businesses, and business expansion.
Conclusion

The SMCOG region enjoys an abundance of resources, both natural and man-made. This CEDS will provide direction and foresight to protect and enhance the economic climate for 300,000-plus residents. The CEDS Committee as well as good-hearted citizens and economic developers have been instrumental in bringing this CEDS “product” to market for the residents of the region. We are eager to begin the on-the-ground work of creating a better quality of life in these 10 counties of southwest Missouri.

Public Comments
Appendix

CEDS Data
Data gathered in the preparation of the CEDS are included in a Microsoft Excel document.

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