Town of Wamsutter Economic and Community Development Study

Community Economic Development Study and Accompanying Objectives & Implementation Strategies

Summer 2002

A partnership effort through the cooperation and support of the Wyoming Business Council, Sweetwater County, Wamsutter Town, America Production Company (BP), and local industries and businesses.
RESOLUTION 02-06-GR-01

WHEREAS, the Wyoming Business Council (WBC) allocated $69,820 to the state of Wyoming for the Planning Only portion of the Economic Development segment of the Community Development Block Grant (CDBG) for the 2001 program year; and

WHEREAS, the Sweetwater County Board of County Commissioners received CDBG funding from the Wyoming Business Council to assist the Town of Wamsutter, Wyoming, to look at the opportunities for the creation and retention of permanent primary jobs which are above the current average wage that would benefit low and moderate income families, strengthen existing businesses and aid in the diversification of the Wyoming economy; and

WHEREAS, the Sweetwater County Board of County Commissioners also received funding for the Town of Wamsutter, Wyoming, to encourage the leveraging of public and private economic development dollars through the incentive of money available through the CDBG program; and

WHEREAS, the Sweetwater County Board of County Commissioners used CDBG funding that it was awarded by the Wyoming Business Council of up to $25,000, and a 25% CDBG match of up to $8,333 from the company BP, to benefit low and moderate income families in the Town of Wamsutter, Wyoming, by hiring Bear West to (took out feasibility) perform a study related to increased economic development and community development; and

WHEREAS, the Sweetwater County Board of County Commissioners complied with all applicable rules and regulations included with the state application packet for the Community Development Block Grant for the 2001 program year;

THEREFORE, the Sweetwater County Board of County Commissioners has reviewed and approved the “Town of Wamsutter Economic and Community Development Study” that was conducted by Bear West to look at the opportunities for the creation and retention of permanent primary jobs which are above the current average wage that would benefit low and moderate income families, strengthen existing businesses and aid in the diversification of the Wyoming economy.

DATED this 18th day of June, 2002.

Attest:

Loretta Bailiff
Sweetwater County Clerk

SWEETWATER COUNTY
BOARD OF COUNTY COMMISSIONERS

John D. Pallesen, Chairman

Carl Maldonado, Member

Tad Ware, Member
RESOLUTION 02-7-8

WHEREAS, the Wyoming Business Council (WBC) allocated $69,820.00 to the State of Wyoming for the Planning Only portion of the Economic Development segment of the Community Development Block Grant (CDBG) for the 2001 program year; and

WHEREAS, the Sweetwater County Board of County Commissioners received CDBG funding from the WBC to assist the Town of Wamsutter, Wyoming to look at the opportunities for the creation and retention of permanent primary jobs which are above the current average wage that would benefit low and moderate income families, strengthen existing businesses and aid in the diversification of the Wyoming economy; and

WHEREAS, the Sweetwater County Board of Commissioners also received funding for the Town of Wamsutter, Wyoming to encourage the leveraging of public economic development dollars through the incentive of money available through the CDBG program; and

WHEREAS, the Sweetwater County Board of Commissioners used CDBG funding that it was awarded by the Wyoming Business Council of up to $25,000.00, and a 25% CDBG match of up to $8,300.00 from the BP America Production Company, to benefit low and moderate income families in the Town of Wamsutter, Wyoming, by hiring Bear West to perform a study related to increase economic development and community development; and

WHEREAS, the Sweetwater County Board of County Commissioners complied with all applicable rules and regulations included with the state application packet for the Community Development Block Grant for the 2001 program year;

THEREFORE, the Town Council for Wamsutter, Wyoming has reviewed and approved the “Town of Wamsutter Economic and Community Development Study” that was conducted by Bear West to look at the opportunities for the creation and retention of permanent primary jobs which are above the current average wage that would benefit low and moderate income families, strengthen existing businesses and aid in the diversification of the Wyoming economy.
Dated this 8th day of July, 2002

Wamsutter Town Council
Wamsutter, Wyoming

Robert W. Ferguson, Mayor

W. C. Hippe, Councilman

Joe L. Carnes, Councilman

Robb Phipps, Councilman

Kenneth R. Waldner, Councilman
ACKNOWLEDGEMENT

STATE OF WYOMING  )  ) SS
COUNTY OF SWEETWATER  )  )

THE FOREGOING INSTRUMENT WAS ACKNOWLEDGED BEFORE ME BY

ROBERT W. FERGUSON, W.C. HIPPE, JOE CARNES, ROBB PHIPPS, THIS
KENNETH R. WALDNER

_8_ DAY OF _July__, 2002.

WITNESS MY HAND AND OFFICIAL SEAL.

_Susan Carnes_

NOTARY PUBLIC

SEAL:

MY COMMISSION EXPIRES _2/8/03_
Wamsutter Economic Development Study and Community Planning Project
Spring-Summer 2002

The Wamsutter Economic and Community Development Study was a partnership effort including the support and participation of the Wyoming Business Council, Sweetwater County, Wamsutter community leaders, America Production Company (BP), local businesses and industries, and Wamsutter residents. Funding for the project was provided by the Wyoming Business Council through a Community Development Block Grant (CDBG). Local matching funds for the project were provided by BP. Sweetwater County provided grant application preparation expertise and other professional and in-kind contributions. Special thanks to all contributors and participants in the project.

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Background &
Introduction
INTRODUCTION

The 2002 Wamsutter Economic Development Study and Community Planning Project is an effort by the Wyoming Business Council and Sweetwater County to assist the community of Wamsutter in the identification of existing and potential economic and community development opportunities. The project, and accompanying report, includes an in-depth study of the community’s economic environment relating to continued development of regional natural gas reserves and increases in I-80 traffic. Primary objectives of the project include improving employment opportunities for low-to-moderate income households, strengthening existing businesses, and diversifying the local economy. The planning element of the project includes pursuing these objectives through clearly articulated community objectives and community-selected implementation strategies.

Preparation of the Wamsutter study/plan comes at an opportune time due to the recently completed Sweetwater County Comprehensive Plan. Many of Wamsutter’s objectives are supported by the County’s stated/adopted direction. In addition, Wamsutter is currently in the process of updating their community land use plan and ordinances. It is anticipated that community objectives identified during the economic development study/plan (particularly those relating to capital facilities, housing, community aesthetics, and community layout) will be incorporated in the community’s updated land use plan and development guidelines.

KEY COMMUNITY CHARACTERISTICS AND STUDY OBSERVATIONS/FINDINGS

The primary impetus for this study is the current increased natural gas development activity in the Wamsutter area, and its potential for both impacts and benefits to the Wamsutter community and economy. It is thought that the boom-bust nature of natural resource development activities, and the magnitude of the related economic activity, present particular challenges to nearby communities and may also present unique opportunities.

For reasons discussed in this report, several of the conditions anticipated to be created by natural gas development in the Wamsutter area don’t appear to be occurring. For example, it was anticipated that increased well drilling activity would produce significant housing demands in Wamsutter, and corresponding demands for governmental services and retail products and services. Because most rig hands live in company-provided temporary housing while in the Wamsutter area, and return to permanent residences elsewhere during time off, effects (both positive and negative) to
Wamsutter housing availability and government and private services are minor. This seems to be the case during times of both high and low drilling activity.

Gas field production activity, which is more stable and longer-term than drilling activity, has different effects on the community and economy than does drilling activity. Although the jobs created by gas field operation are more stable than those created by drilling activity, many of the service companies are located, and the job holders elect to live, outside the Wamsutter community. Reasons identified include a lack of service, shopping, and leisure activity opportunities; lack of a high school; and the overall aesthetics/attractability of the community.

Wamsutter’s proximity to Interstate 80, on the other hand, generates significant effects both in terms of community impacts and economic development opportunities. This report identifies significant job-creation and economic opportunities related to commerce on Interstate 80 and also identifies several potentially limiting factors, present in Wamsutter, that may prevent full exploitation of those opportunities. For example, the small resident population of Wamsutter creates a shortage of employees to fill the low-to-moderate income jobs that expansion of retail and service businesses often creates. The community has experienced difficulty in attracting and retaining full-time resident families for the reasons discussed above.

In short, the economic activity created by natural gas drilling in the Wamsutter area is significant, but it is highly variable and has a relatively small positive or negative effect on the Town of Wamsutter. The economic activity created by long-term gas field operation and proximity to Interstate 80 is much more significant, but its exploitation is limited by factors relating to the character of the community itself. Strategies to enhance the attractiveness of the community and increase the long-term population seem to offer the best opportunities to expand and diversify the economy of the Town of Wamsutter.

ELEMENTS OF THE WAMSUTTER ECONOMIC STUDY/COMMUNITY PLAN

The Wamsutter Economic Development Study and Community Plan includes two complementary elements. First, the study is intended to provide accurate, reliable “numbers” relating to the community’s economic situation. Due to Wamsutter’s proximity to developing gas fields, the study explores impacts to the community at various levels of gas field activity and during a modeled “boom and bust” development cycle. The economic analysis portion of the project also identifies community impacts and economic development opportunities associated with I-80.

For purposes of this study, these issues are discussed through the development of three alternative scenarios. These scenarios reflect low, moderate, and high activity levels within the area’s gas fields and relating to I-80 corridor traffic. Numbers generated through the scenario development exercise provide realistic, reliable input for a
Wamsutter-specific economic development model. The model is designed to identify economic development opportunities and the anticipated results. The scenarios and the economic model are discussed in Chapter 3 of this report. Additional background information, a Wamsutter community “profile”, is included as Attachment A.

As noted, the second element of the project is a “planning” component that identifies the community’s aspirations for the future and articulates them as community goals and objectives. Objectives identified as community priorities are further discussed through a series of alternative implementation strategies and specific community actions. Wamsutter’s community goals, objectives, and implementation strategies relating to this project are summarized in Chapter 2 of this report.

COMMUNITY INVOLVEMENT AND THE STUDY/PLAN DEVELOPMENT PROCESS

Prior to the formal initiation of this project, Wamsutter residents met several times as participants in various community and Sweetwater County planning processes. As a result, the first Wamsutter meeting relating to the economic development study included clarifying and confirming previously identified community issues and objectives. During the first few months of the project, Wamsutter residents and the Town Council met with project consultants to review/discuss draft materials and provide additional feedback. The end product of these discussions was a council-approved list of specific community objectives.

Local businesses and industries were also involved throughout the process. A highlight of the project was a “roundtable” discussion with America Production Company (BP) officials to discuss gas field practices and procedures, workforce profiles and characteristics, and potential community/industry partnerships. In addition, other local businesses and service providers were contacted to gather information concerning the area’s business/economic climate. These discussions were extremely helpful and provided “reality check” insights to the project and the community. Information gathered during these work sessions and interviews provided the baseline data for the scenario development exercise and the economic model refinement process.

Wamsutter community officials and residents also participated in the development and discussion of alternative plan implementation strategies. Based on the input generated through the economic development model and the overall community profile, local leaders, business interests, and residents identified specific actions needing immediate community attention. Plan implementation strategies identified by the community as priorities for the next 1-3 years are noted in Chapter 2.

UTILIZING THE WAMSUTTER ECONOMIC DEVELOPMENT STUDY/COMMUNITY PLAN

Sweetwater County and Wamsutter officials should be commended for their proactive commitment to planning. It is anticipated that the 2002 economic development study, in
conjunction with the updated Wamsutter land use plan, will serve as a framework for community decision-makers as they consider future development decisions. As stated, the 2002 study and community plan provide a formal foundation for improving County and community relations, pursuing community-based economic development activities, coordinating capital facilities improvements, and improving community aesthetics. The study also provides a comprehensive review of pertinent numbers/facts that should be used to substantiate community decisions.

Successful implementation of plan recommendations requires proactive effort on the part of community leaders. Constant attention must to paid to ensure that citizens and affected/interested businesses are involved and that implementation strategies are producing the desired results.

As a follow-up effort to this study/planning project, Wamsutter community leaders have committed to prioritize the community-selected implementation strategies and develop proactive community-initiated implementation measures. This task will include identifying specific action items, time-lines, funding mechanisms, partnering interests, and "responsible parties" for all strategies pursued.

While this study and accompanying community plan reflect the thoughtful direction of Wamsutter in 2002, it is anticipated that these materials will be updated as circumstances change and new challenges arise. At a minimum, it is recommended that the study/plan be reviewed annually.
Community Goals, Objectives & Implementation Strategies
WAMSUTTER COMMUNITY GOALS, OBJECTIVES, AND IMPLEMENTATION STRATEGIES
Chapter 2.

INTRODUCTION

This chapter includes community goals and objectives identified by Wamsutter residents and refined by the Town Council and Planning Commission. It is anticipated that the following statements and accompanying implementation strategies will complement the Community’s ongoing process to pursue community-based economic development efforts and update the Wamsutter land use plan and development regulations.

Wamsutter community leaders and residents have identified specific goals and objectives in the following areas of interest:
- community land use and planning
- Wamsutter Town and Sweetwater County relations
- community-based economic development
- community infrastructure
- emergency services
- natural resources
- public lands and resources

WAMSUTTER COMMUNITY GOALS - An Overview

The following goal statements are considered the long-term ambitions and aspirations of the Wamsutter community. Interest-specific objectives and implementation strategies have also been developed for each goal and are presented in subsequent sections.

A. Land Use/Planning
   Community Goal: Develop, adopt, and implement community land use plans and policies that promote sound planning principles and result in land uses and development patterns consistent with the community’s desired lifestyle and character.

B. Wamsutter Town and Sweetwater County Relations
   Community Goal: Improve coordination, cooperation, and communication between Wamsutter Town and Sweetwater County elected officials and departments.

C. Economic Development
   Community Goal: Create a community that is conducive to long-term economic and residential development. Identify and pursue economic development opportunities and activities that capitalize on Wamsutter’s unique characteristics.
D. Infrastructure  
Community Goal: Provide/maintain adequate infrastructure (water, sewer, and roads) services to support community land uses and encourage economic development.

E. Emergency Services  
Community Goal: Provide well-trained and adequately-staffed emergency response and law enforcement personnel and services.

F. Natural Resources  
Community Goal: Support the continued development of the region’s natural resources.

G. Public Lands and Resources  
Community Goal: Support the continued public use of federal and state lands and resources within the area. Encourage local participation in public land planning and decision-making processes.

WAMSUTTER COMMUNITY OBJECTIVES AND IMPLEMENTATION STRATEGIES

The following sections provide additional direction for Wamsutter leaders and business interests as they pursue the community’s stated economic and community development goals in each of the identified “interest areas”. Following a brief description of the topic/issue, each section restates the relevant goal, followed by several supporting objectives. To assist the community in plan implementation, each section also includes specific community-selected implementation strategies. It is anticipated that these activities will be pursued/accomplished within the next 1-3 years.

It is important to note that the community’s goals, objectives, and implementation strategies have been developed/discussed with Wamsutter leaders and residents with full benefit of the various economic and community development opportunities identified in Chapter 3. Careful attention has been paid to ensure that these recommendations are sensitive to the community’s limited financial and professional resources.

As noted, a follow-up effort to this study/planning project includes prioritizing the community-selected implementation strategies and developing proactive community-initiated implementation measures. This task will include identifying specific action items, time-lines, funding mechanisms, partnering interests, and “responsible parties” for all strategies pursued.
A. Community Land Use/Planning

Wamsutter community leaders adopted a land use plan and supporting zoning regulations in 1984. Since that time, the plan has been used on a limited basis and the community’s land use regulations referenced only when responding to development proposals. Emerging public sentiment indicates that the Town, as the governing entity, should take a more proactive interest and role in community land use and development issues. Specific comments include improving the community’s overall “attractiveness” and residential appeal, and creating a planning/land use regulatory environment that is conducive to expanded economic development.

Community Goal: Develop, adopt, and implement community land use plans and policies that promote sound planning principles and result in land uses and development patterns consistent with the community’s desired lifestyle and character.

Community Objectives: Community-identified objectives relating to land use and community planning are noted below. Italicized statements indicate the community’s priority objectives for the immediate future. The remaining objectives will be pursued as additional resources become available or as opportunities arise.

a) Maintain land use plans and regulations that clearly articulate the community’s preferred land uses and development standards. These documents will also identify appropriate areas within the community for these uses to occur. Plans and regulations will be amended as necessary to address emerging issues and opportunities.

b) Encourage growth and development in an attractive, orderly manner and in locations that complement other community interests (permanent residents, economic development, adequate public facilities, quality of life, etc.)

c) Maintain community land use plans and regulations that improve community character and aesthetics. Encourage the separation of incompatible land uses.

d) Enforce adopted land use regulations and guidelines consistently.

e) Encourage residential land uses within the existing community. Promote a variety of housing options and residential development opportunities consistent with community standards and responsive to local/regional housing needs and opportunities.

f) Promote appropriate industrial uses within designated industrial parks. Encourage additional industrial development as adequate services can be provided.
g) Balance growth and development with facility/service capacity (e.g. water, sewer, waste disposal, transportation and roads, law enforcement, and emergency services).

h) Cultivate planning and development partnerships with Sweetwater County.

i) Coordinate community planning efforts with special service districts and other service providers.

Community-selected Implementation Strategies: This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years.

1) *Update the 1984 Land Use Plan.* This project will incorporate the community’s land use objectives as stated above and involve community residents in all stages of the planning process.

2) *Update the community’s land use regulations and development guidelines.* This task will also include County and community (citizen) involvement in all stages of the process. It is anticipated that the revised regulations will incorporate the objectives as listed above as well as clarify the community’s policies and procedures regarding land use and development decision-making processes. The revised regulations will also identify appropriate development standards and enforcement measures/mechanisms. The revised regulations will complement other community efforts including economic development, community aesthetics, and infrastructure planning.

3) *Provide training opportunities for community leaders.* Planning commission and town council members will participate in ongoing training and education work sessions regarding community planning issues and land use plan/regulation implementation and enforcement.
B. Wamsutter Town and Sweetwater County Relations

Wamsutter residents identify community “size” (population) and distance to Green River (County offices) as challenges to soliciting and receiving County assistance. Residents expressed frustration over limited community/County interaction unless “the County needs our support”. Considering Wamsutter the “largest community in eastern Sweetwater County”, residents feel that improved coordination and communication can be mutually beneficial.

Community leaders and residents also identified the need for County assistance in several areas due to limited community resources (staff, expertise, funds, and equipment). In particular, County expertise and funding is needed to address economic development, community infrastructure (roads, water, and sewer), and land use/planning issues. On this point, it was noted that improved community awareness of available County services and professional expertise/experience is needed. It was also mentioned that in some cases, Wamsutter can do a better job informing County leaders about the community’s unique situation and needs.

Overarching Goal: Improve coordination, cooperation, and communication between Wamsutter Town and Sweetwater County elected officials and departments.

Community Objectives: Community-identified objectives relating to improved Wamsutter and Sweetwater County relations are noted below. Italicized statements indicate the community’s priority objectives for the immediate future. The remaining objectives will be pursued as additional resources become available or as opportunities arise.

a) Encourage Wamsutter and Sweetwater County cooperation and coordination in planning and economic development activities.

b) Increase County awareness of Wamsutter-specific issues and interests.

c) Encourage community/County partnerships to identify/pursue mutual objectives.

d) Encourage County-to-community assistance and funding to address community-specific quality of life, public facilities and services (parks, school, library) economic development, infrastructure (roads, water, sewer), and land use issues.

e) Encourage County-to-community assistance for the development and implementation of community-specific land use plans and regulations.

f) Improve community awareness of, and accessibility to, County services and resources.
g) Improve community leader understanding of County prioritization and funding policies and procedures.

f) Improve community/citizen accessibility to County elected officials and staff-level decision makers.

Community-selected Implementation Strategies: This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years.

1) Provide quarterly updates to County leaders concerning Wamsutter interests and issues. It is proposed that this occur during formal Board of Commissioner meetings. Wamsutter presentations are to be well prepared and focused.

2) Cultivate constructive, proactive relationships with County officials and departments. Mutual interests include planning, economic development, and emergency services planning/delivery.

3) Identify a formal community-level County liaison. Wamsutter will identify an individual or office to act as formal contact point for Sweetwater County officials and departments. The community will inform Sweetwater County concerning this position and its anticipated roles and responsibilities.
C. Economic Development

As confirmed by the accompanying economic study and model (Chapter 3), Wamsutter’s economic development opportunities are closely connected to natural resource development and I-80 corridor traffic. During discussions on this matter, local leaders and residents expressed an interest in developing proactive economic development plans and business expansion/retention strategies that pursue three main objectives: 1) creating a community that is attractive to potential businesses and long-term residents, 2) diversifying the community’s economic profile by capitalizing on Wamsutter’s unique situation and strengths (located on the I-80 corridor, distance to other communities, etc.) and 3) encouraging “secondary” businesses associated with the interstate and natural resource development to locate within the community (e.g., employee housing, trucker staging areas, company offices, support services, etc.). As identified in the study, community aesthetics/design and consistent enforcement of adopted land use regulations/standards were identified as two critical components to sustained economic development.

Overarching Goal: Create a community that is conducive to long-term economic and residential development. Identify and pursue economic development opportunities and activities that capitalize on Wamsutter’s unique characteristics.

Community Objectives: Community-identified objectives relating to economic development are noted below. Italicized statements indicate the community’s priority objectives for the immediate future. The remaining objectives will be pursued as additional resources become available or as opportunities arise.

a) Maintain a clear, comprehensive vision for community economic development activities. This effort includes maintaining a community-based economic development plan that clearly articulates Wamsutter’s economic development objectives and incorporates realistic implementation strategies.

b) Maintain land use plans and regulations that complement the community’s economic development objectives. Recognize that community appearance and land use/development patterns are crucial components to long-term economic benefits and sustained community development.

c) Maintain/cultivate an environment favorable to the expansion and retention of existing businesses.

d) Recruit businesses that complement existing operations.

e) Ensure that economic development activities enhance the community and complement other community interests and objectives.
f) Encourage community-based economic development activities that complement broader Sweetwater County economic development objectives.

g) Develop an identifiable Wamsutter commercial center.

Community-selected Implementation Strategies: This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years.

1) **Prepare and adopt a Wamsutter-based economic development plan.** This project will incorporate the community’s economic development objectives as stated above and involve community residents, local business interests, and Sweetwater County officials throughout the process. Plan development efforts will include utilizing the economic opportunities study prepared as part of this project (Chapter 3) and its accompanying recommendations. (Several of the study’s recommendations were not selected as community implementation strategies at this time, nevertheless, they should be reviewed and discussed as part of a more detailed economic development planning effort.)

Community-proposed economic development strategies warranting further discussion during plan preparation include: establishing a recognizable community/commercial center, improving public awareness of available services (e.g., highway signage, advertising), improving community aesthetics and “attractability” (e.g., well-designed, well-maintained), and securing additional background data/numbers (e.g., requesting annual traffic counts WYDOT).

2) **Incorporate the community’s economic development objectives in the Wamsutter land use plan and accompanying regulations.** It is anticipated that the community will use these planning documents/tools as vehicles to encourage and support residential and economic development within the community in an organized, well-designed manner.

3) **Reactivate the Wamsutter economic development committee.** It is anticipated that committee tasks will include participating in the preparation of the Wamsutter economic development plan and coordinating community/County economic development efforts. This committee may also play a key role in helping the community secure and administer economic development funds.

4) **Continue community-sponsored clean-up activities.** Expand the Town’s annual “take pride in Wamsutter” clean-up day to involve local businesses, industries, and residents.
D. Infrastructure

**Water and Sewer** - Wamsutter community leaders realize that adequate water and sewer facilities must be in place to attract additional development. Existing wells, storage tanks, and distribution lines need upgrading. Extending culinary water service lines “south of the tracks” was identified as a top community priority.

**Roads** - Wamsutter Town acknowledges County maintenance of local roads and is generally satisfied with the current level of service (considering community size, remote location, etc.). Nevertheless, concerns were raised over future upgrades, long-term maintenance, and construction of the long-awaited overpass.

**Overarching Goal:** Provide/maintain adequate infrastructure (water, sewer, and roads) services to support community land uses and encourage economic development.

**Community Objectives:** Community-identified objectives relating to infrastructure are noted below. Italicized statements indicate the community’s priority objectives for the immediate future. The remaining objectives will be pursued as additional resources become available or as opportunities arise.

a) *Maintain a community-specific capital facilities and infrastructure services plan.*

b) Coordinate community infrastructure planning, financing, and construction efforts with Sweetwater County, special service districts, and other service providers.

c) Encourage economic development in the community through proactive infrastructure needs assessment and planning.

d) Encourage development in locations where services are available or readily expandable/upgradable. Extend services to areas only as planned/scheduled.

**Community-selected Implementation Strategies:** This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years.

1) *Prepare and implement a community-specific capital facilities and services plan* consistent with the above objectives. Specific items to be addressed include the feasibility of extending community water lines “south of the tracks”.

2) *Coordinate community infrastructure planning efforts* with special service districts and other service providers.

3) *Participate proactively on the Sweetwater Transportation Planning Committee.*
E. Emergency Services

Law Enforcement - At present, community law enforcement resources are stretched to the limit, particularly when responding to calls in the surrounding unincorporated areas and adjacent gas fields. Coordination/cooperation with County law enforcement and emergency response agencies and departments remains a top priority.

Fire Protection - Wamsutter Town sponsors a well-trained volunteer fire department and maintains a 25 mile service area. As with law enforcement, community resources are stretched thin, particularly when responding to calls outside of the town’s formal, jurisdictional boundaries. Currently, no County reimbursement is provided for service calls/emergency runs to the unincorporated areas.

Emergency Services - Wamsutter’s emergency services department/personnel provide ambulance and “first response” assistance within a 25 mile service area and along the I-80 corridor. As with fire protection and law enforcement, Wamsutter is not reimbursed for emergency services provided in the unincorporated County.

It was also noted that improved County/community cooperation and coordination is needed during extended, weather related interstate closures. Providing emergency food and lodging to stranded motorists often taxes limited community resources to the limit.

Overarching Goal: Provide well-trained and adequately-staffed emergency response and law enforcement personnel and services.

Community Objectives: Community-identified objectives relating to law enforcement and emergency services are noted below. Italicized statements indicate the community’s priority objectives for the immediate future.

a) Coordinate the provision of law enforcement and emergency services with Sweetwater County and local business interests.

b) Explore adequate compensation agreements for services provided beyond the community’s jurisdictional boundaries.

c) Maintain adequately-staffed and well-trained law enforcement and emergency response teams.

Community-selected Implementation Strategies: This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years.

1) Coordinate law enforcement and emergency services efforts with the Sweetwater County Emergency Management Department. Explore appropriate “cost recovery” processes and procedures with same.
F. Natural Resources

Similar to other Wyoming communities, Wamsutter's overall economy fluctuates according to the profitability of natural resource development. Recognizing this sector as an important component of the community's economic profile, residents support continued resource exploration and development in the region and encourage the location of associated industries and businesses within the community.

As noted in the Wamsutter-specific study discussed in Chapter 3, increased gas field activity impacts the community primarily through increased retail sales. Population numbers (mostly short-term, "man camp" housing) may jump initially during the drilling and completion phases then taper off during production and maintenance.

As an important side note, although only a small percentage of workers associated with development of the area's natural resources actually live in Wamsutter, these individuals and their families play a vital role in community affairs and are a significant percentage of the community's "permanent" population. Recognizing this intangible asset, the community will implement proactive land use and development guidelines that encourage attractive long-term residential development and housing options.

Overarching Goal: Support continued development of the region's natural resources.

Community Objectives: Community-identified objectives relating to natural resources are noted below. Italicized statements indicate the community's priority objectives for the immediate future.

a) Anticipate development-initiated community impacts. Proactively plan for and address the associated infrastructure, housing, and community service needs. These efforts are to be coordinated with Sweetwater County, associated industries, and service providers.

b) Maintain community land use regulations that support natural resource development and allow for the expansion, recruitment, and relocation of associated businesses.

c) Encourage support industries and businesses to locate within the community's industrial park (as consistent with community land use regulations).
Community-selected Implementation Strategies: This section identifies specific actions to be pursued by the Wamsutter community over the next 1-3 years. The remaining objectives will be pursued as additional resources become available or as opportunities arise.

1) **Incorporate the community’s natural resource development objectives in the Wamsutter land use plan and accompanying regulations.** Create an attractive community conducive to appropriate industrial and residential development.

2) **Coordinate community planning efforts with relevant industries and service providers.**
G. Public Lands and Resources

Due to the high percentage of public lands and resources within Sweetwater County, local economic development and recreational interests are directly affected by public land management decisions. Wamsutter residents hold the position that local concerns and interests must be an integral part of all public land management planning and decision-making processes.

**Overarching Goal:** *Support the continued public use of federal and state lands and resources within the area. Encourage local participation in public land planning and decision-making processes.*

**Community Objectives:** Community-identified objectives relating to public lands and resources are noted below.

a) Encourage/support Sweetwater County’s participation in public land and resource planning and decision-making processes.

b) Encourage/support cooperative interaction between local, state, and federal agencies and private land owners.

c) Promote agency awareness of community and County issues and interests. These include, but are not limited to, natural resource exploration and development, multiple-use land and resource management practices, and adequate public access to and across public lands.

d) Continue support for resource-based industries including mineral/oil/gas exploration and development.

**Community-selected Implementation Strategies:***

* Wamsutter community did not develop specific implementation strategies regarding public lands and resource as part of this planning effort due to higher priorities in other areas.
Economic Activity Scenarios & Economic Development Model
INTRODUCTION

One aspect of planning for future community development involves the evaluation of potential economic development opportunities. Greater insights concerning potential economic development opportunities help focus the scope and approach to other community development objectives associated with future growth, land use, and business development.

For Wamsutter, potential economic development opportunities were analyzed through the development and application of a statistical model that calculated potential demands and expenditures for various types of retail sales, overnight accommodations, retail services, and housing. The economic model, which was developed by Pedersen Planning Consultants (PPC), was based upon three economic scenarios that reflected a range of "low", "moderate", and "high" economic activity conditions. Variable levels of economic activity were established using potential changes in truck and passenger traffic along I-80, as well as different levels of natural gas development. Consequently, potential expenditures for retail sales and services, overnight accommodations, as well as housing demands are considered for each economic scenario.

Potential demands and expenditures identified for each scenario were subsequently used to evaluate and identify potential economic development opportunities. These potential opportunities are presented following an initial discussion of the economic scenarios and the assumptions used to develop and apply the economic model.

ECONOMIC ACTIVITY SCENARIOS

A. Common Assumptions Associated with All Scenarios

During the next 10 years, the economy of Wamsutter will continue to be influenced by truck and passenger traffic from Interstate 80, as well as future gas exploration, production, processing, and transport activities in the vicinity of Wamsutter. Discussions with a number of local small business entrepreneurs in Wamsutter led to the identification of various economic trends that are relevant to the 2003-2012 period. These assumptions were applied to each of the three scenarios in the following sections.

Local entrepreneurs individually provided PPC with customer expenditure ranges for different types of retail sales and services. When necessary, assumed rates of expenditures were adjusted to reflect a realistic median expenditure and respect the confidentiality of individual business information. Subsequently, expenditure rates were applied to each economic scenario.
**Interstate and Intrastate Truck Traffic**

Based on the identified economic trends, interstate and intrastate truck traffic (vehicles larger than light trucks) will likely continue to generate local purchases for:
- fuel, food and snacks, as well as tobacco products from local truck stops;
- tire, batteries and accessories from local truck stops;
- meals at local cafes and truck stops;
- truck repairs at local truck stops;
- liquor purchases from restaurants and/or truck stops; and,
- the occasional use of available laundromat services.

Potential expenditures may also be realized from the limited use of a potential private enterprise that would offer a combination RV park and KOA campground type facility. Similarly, some limited use might also be generated from the development of a new, moderately priced motel facility.

**Passenger Traffic**

Based on the identified economic trends, passenger traffic (light trucks and smaller vehicles) will likely continue to generate local purchases for:
- fuel, food and snacks, and tobacco products from local truck stops;
- tire, batteries and accessories from local truck stops;
- meals at local cafes and truck stops; and,
- automobile and emergency repairs from local truck stops.

Similar to interstate and intrastate trucking, potential expenditures may also be realized from the limited use of a potential private enterprise that would offer a combination RV park and KOA campground type facility. Similarly, some limited demand could be generated from the development of a new, moderately priced motel facility.

**Natural Gas Labor Force**

Based on discussions with natural gas operators and industry representatives, it is expected that the natural gas development labor force will exhibit the following work patterns, living arrangements, and spending patterns during the 2003-2012 period:
- Each drill rig will be operated by two rotating exploration crews. Each crew will consist of 10 drillers, one tool pusher, and one foreman. Each crew member will continue to work 7 days on and 7 days off. During 7 days off, exploration crews will return home and not live in Wamsutter.
- Exploration crews will be receptive to living in other temporary or rental housing in Wamsutter during 7-day working periods rather than remaining in skid-mounted housing. However, pushers and foremen will continue to live on drill rig site.
Drillers on exploration crews will continue to receive $30 per diem while based in Wamsutter. Most of this per diem ($23/day) will be spent in local restaurants and secondarily for liquor purchases ($7/day).

A very limited amount of workers associated with well completion will make occasional use of a potential private enterprise that will represent a combination RV park and KOA campground type facility.

Roughly half of the lease operators associated with long-term production in the Wamsutter area will live in Wamsutter. Seventy percent of those residing in Wamsutter will choose to own a home; the remaining 30 percent will desire long-term rental housing.

Personnel associated with gas processing and transmission will primarily reside in Rawlins; the number employed in gas processing and transmission is not expected to expand with increased exploration.

B. Scenario Assumptions and Descriptions

Low Activity Scenario Assumptions

The low activity scenario is indicative of a period when natural gas prices would be lower and/or the gas market has surplus supplies. Companies who have established asset positions would continue with some limited exploration and seismic activities to prepare for future exploration and production when gas prices and market conditions become more favorable. The low activity scenario assumes that only two drill rigs would be operating in the Wamsutter area.

The volume of truck and passenger traffic that passes the Interstate 80/Wamsutter interchange is based upon the average daily traffic in 2000 and an assumed annual increase of three percent in 2001 and 2002. Truck traffic during the 2003-2012 period would increase at a rate of 3 percent per year.

According to Wyoming Department of Transportation (WYDOT) traffic counts, approximately 7.7 percent of all vehicular traffic exits at the Wamsutter interchange. Similar to 2000, truck traffic continues to represent almost 59 percent of all traffic counted at the Wamsutter interchange. Under this scenario, 11 percent of truck and passenger traffic that exits at Wamsutter would purchase fuel from local truck stops.

Under this scenario, the Town of Wamsutter, local residents, and local businesses would make no concerted effort to cleanup or improve the attractiveness of the community beyond the efforts that are already being made in 2002.
Moderate Activity Scenario Assumptions

The moderate activity scenario represents an economic period when natural gas prices and market conditions would encourage natural gas companies to begin exploration and production of natural gas. The moderate activity scenario assumes 10 drill rigs would be operating in the vicinity of Wamsutter.

Overall vehicular traffic passing by the I-80/Wamsutter interchange would increase at a rate of 4 percent per year during the 2003-2012 period. However, the proportion of overall traffic (7.7 percent) that exits at Wamsutter would remain the same. Under this scenario, 50 percent of truck and passenger traffic that exit at Wamsutter would purchase fuel from local truck stops.

Some limited cleanup efforts would occasionally be carried out by the Town of Wamsutter and local residents to make the community more attractive to gas industry workers, truckers and other visitors associated with passenger vehicle traffic.

High Activity Scenario Assumptions

Natural gas prices and market conditions would be very attractive to gas exploration and production companies during the high activity scenario. In the vicinity of Wamsutter, companies with existing asset positions are motivated and poised to increase both exploration and production. Under this scenario, 17 drill rigs would be operating in the Wamsutter area.

Overall vehicular traffic that passes the Interstate 80/Wamsutter interchange would increase 4 percent per year during the 2003-2012 period. However, the proportion of overall traffic (7.7 percent) that exits at Wamsutter would remain the same. Under this scenario, 100 percent of truck and passenger traffic that exit at Wamsutter would purchase fuel from local truck stops.

The Town of Wamsutter, local residents, and local businesses would organize and carry out regular periodic efforts to keep Wamsutter physically attractive. Local retail businesses would be well-known for their responsiveness to incoming customers and related customer service. Greater truck and passenger traffic coming into Wamsutter would be due, in part, to the combined efforts of the community and local businesses, as well as some limited marketing of the community to truckers and natural gas companies.
PROSPECTS FOR ECONOMIC DEVELOPMENT

A. General

As the statistical foundation for Wamsutter to address community issues such as employment, affordable housing, and business diversification, the following paragraphs and tables provide an overview of the potential opportunities associated with retail sales, retail services, accommodations, and housing. Additional data was generated by PPC during the development and evaluation of the economic model to document the detailed assumptions underlying each potential economic opportunity. Due to the confidential nature of this information, it is not included as part of this report.

B. Retail Sales

Potential Market and Sales Volumes

A significant amount of retail sales can continue to be derived from interstate and intrastate trucks and passenger vehicles, as well as workers who are associated with gas exploration and production. Potential retail sales are for diesel and unleaded fuels; food and snacks; tires, batteries, and auto accessories; and tobacco. Interstate and intrastate trucking represents the primary market for retail sales under all three scenarios. The secondary market shifts dependent upon the level of natural gas development.

In the low activity economic scenario, annual retail sales would range between $11.7 and $15.3 million dollars over the 2003-2012 period (Table 1). Under this scenario, interstate and intrastate truck traffic from Interstate 66 constitutes the primary market for retail sales. Roughly 31 percent of the retail sales would be gained from passenger vehicle traffic along Interstate 80. The remaining three percent of retail sales would be expected from natural gas exploration and production workers.

Under the moderate growth scenarios (Table 2), the volume of annual retail sales would increase substantially over the sales generated during a low activity economic scenario. Aside from greater traffic volumes, the moderate and growth scenarios assume that significantly greater proportions of the exiting truck traffic would make fuel purchases. Annual retail expenditures in the moderate activity scenario ranges $22 to almost $29 million.

In the high activity scenario (Table 3), retail expenditures could rise between roughly $35 and $45 million.

Potential sales from natural gas exploration and production workers would understandably become more important in the moderate and high activity scenarios. Nevertheless, these potential sales would continue to lag significantly behind potential sales from interstate and intrastate truckers.
**TABLE 1**

POTENTIAL RETAIL SALES EXPENDITURES IN WAMSUTTER
'LOW ACTIVITY SCENARIO'
2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Well Exploration</th>
<th>Expenditures</th>
<th>Truckers</th>
<th>Passenger Vehicles</th>
<th>Total Annual Expenditures</th>
<th>3 Discounted Annual Expenditures 2003-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$7,759,520</td>
<td>$3,669,115</td>
<td>$11,688,089</td>
<td>$12,343,790</td>
</tr>
<tr>
<td>2004</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$8,009,271</td>
<td>$3,779,189</td>
<td>$12,047,913</td>
<td>$12,723,801</td>
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<tr>
<td>2005</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$8,266,514</td>
<td>$3,892,564</td>
<td>$12,418,531</td>
<td>$13,115,211</td>
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<tr>
<td>2006</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$8,531,474</td>
<td>$4,009,341</td>
<td>$12,800,269</td>
<td>$13,518,364</td>
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<tr>
<td>2007</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$8,804,383</td>
<td>$4,129,621</td>
<td>$13,193,458</td>
<td>$13,933,611</td>
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<tr>
<td>2008</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$9,085,480</td>
<td>$4,253,510</td>
<td>$13,598,443</td>
<td>$14,361,316</td>
</tr>
<tr>
<td>2009</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$9,375,009</td>
<td>$4,381,115</td>
<td>$14,015,578</td>
<td>$14,801,852</td>
</tr>
<tr>
<td>2010</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$9,673,225</td>
<td>$4,512,549</td>
<td>$14,445,227</td>
<td>$15,255,604</td>
</tr>
<tr>
<td>2011</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$9,980,386</td>
<td>$4,647,925</td>
<td>$14,887,765</td>
<td>$15,722,969</td>
</tr>
<tr>
<td>2012</td>
<td>$250,967</td>
<td>$8,487</td>
<td>$10,296,763</td>
<td>$4,787,363</td>
<td>$15,343,579</td>
<td>$16,204,354</td>
</tr>
</tbody>
</table>

Notes:
1. Low activity scenario assumes that 7.7% of all vehicular traffic will exit at Wamsutter.
2. Assumes a 3% annual increase on all truck and vehicular traffic on I-80.
3. The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
### TABLE 2
**POTENTIAL RETAIL SALES EXPENDITURES IN WAMSUTTER**

**1/MODERATE ACTIVITY SCENARIO**

<table>
<thead>
<tr>
<th>Year</th>
<th>2Retail Sales</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Well Exploration</td>
<td>Well Production</td>
<td>Truckers</td>
<td>Passenger Vehicles</td>
<td>Total Annual Expenditures</td>
<td>3Discounted Annual Expenditures 2003-2012</td>
</tr>
<tr>
<td>2003</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$15,497,599</td>
<td>$4,554,359</td>
<td>$22,431,899</td>
<td>$23,690,329</td>
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<tr>
<td>2004</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$16,002,014</td>
<td>$4,690,990</td>
<td>$23,072,945</td>
<td>$24,367,337</td>
</tr>
<tr>
<td>2005</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$16,521,561</td>
<td>$4,831,720</td>
<td>$23,733,222</td>
<td>$25,064,656</td>
</tr>
<tr>
<td>2006</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$17,056,695</td>
<td>$4,976,671</td>
<td>$24,413,307</td>
<td>$25,782,894</td>
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<tr>
<td>2007</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$17,607,883</td>
<td>$5,125,971</td>
<td>$25,113,796</td>
<td>$26,522,679</td>
</tr>
<tr>
<td>2008</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$18,175,607</td>
<td>$5,279,750</td>
<td>$25,835,298</td>
<td>$27,284,658</td>
</tr>
<tr>
<td>2009</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$18,760,362</td>
<td>$5,438,143</td>
<td>$26,578,446</td>
<td>$28,069,497</td>
</tr>
<tr>
<td>2010</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$19,362,660</td>
<td>$5,601,287</td>
<td>$27,343,888</td>
<td>$28,877,880</td>
</tr>
<tr>
<td>2011</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$19,983,027</td>
<td>$5,769,326</td>
<td>$28,132,294</td>
<td>$29,710,515</td>
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<tr>
<td>2012</td>
<td>$2,345,994</td>
<td>$33,947</td>
<td>$20,622,004</td>
<td>$5,942,406</td>
<td>$28,944,351</td>
<td>$30,568,129</td>
</tr>
</tbody>
</table>

Notes:

1. Moderate activity scenario assumes 7.7% of all vehicular traffic will exit at Wamsutter.
2. Assumes a 4% annual increase in all vehicular traffic along I-80.
3. The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
TABLE 3
POTENTIAL RETAIL SALES EXPENDITURES IN WAMSUTTER
HIGH ACTIVITY SCENARIO
2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Well Exploration</th>
<th>Well Production</th>
<th>Truckers</th>
<th>Passenger Vehicles</th>
<th>Total Annual Expenditures</th>
<th>3Discounted Annual Expenditures 2003-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$25,949,953</td>
<td>$5,717,144</td>
<td>$35,712,573</td>
<td>$37,716,048</td>
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<tr>
<td>2005</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$26,785,917</td>
<td>$5,888,658</td>
<td>$36,720,050</td>
<td>$38,780,045</td>
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<tr>
<td>2006</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$27,646,959</td>
<td>$6,065,318</td>
<td>$37,757,753</td>
<td>$39,875,963</td>
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<tr>
<td>2007</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$28,533,833</td>
<td>$6,247,277</td>
<td>$38,826,586</td>
<td>$41,004,757</td>
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<tr>
<td>2008</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$29,447,313</td>
<td>$6,434,696</td>
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<td>$42,167,416</td>
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<tr>
<td>2009</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$30,388,197</td>
<td>$6,627,737</td>
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<td>$43,364,955</td>
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<tr>
<td>2010</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$31,357,308</td>
<td>$6,826,569</td>
<td>$42,229,353</td>
<td>$44,598,419</td>
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<tr>
<td>2012</td>
<td>$3,988,190</td>
<td>$57,286</td>
<td>$33,383,622</td>
<td>$7,242,307</td>
<td>$44,671,405</td>
<td>$47,177,470</td>
</tr>
</tbody>
</table>

Notes:
1High activity growth assumes that 7.7% of all vehicular traffic will exit at Wamsutter.
2Assumes a 4% annual increase in all vehicular traffic along I-80.
3The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
Sales Environment

Potential retail expenditures for fuel; food and snacks; tires, batteries and automotive accessories; and tobacco products will continue to be conducive to a multi-service truck stop setting. This retail environment is complementary to interstate and intrastate truckers, passengers in light trucks and smaller passenger vehicles, as well as natural gas workers.

Continued restaurant sales can be derived from separate restaurant operations, e.g., Broadway. However, greater sales can more likely be gained if restaurants are located within a truck stop complex, or in close proximity to existing truck stops. Existing and potential entrepreneurs should be reminded that the potential retail customer is en route to somewhere else:
- east or west on Interstate 80;
- going to work in the natural gas fields in the vicinity of Wamsutter; or,
- embarking or returning from work in the natural gas fields.

Opportunities for Future Investment

The potential volumes retail sales for each economic scenario warrant examination by local entrepreneurs who may wish to consider business expansions to meet anticipated retail sales. This information should be shared and discussed with local entrepreneurs to determine any potential barriers to economic investment that can be addressed by the Town of Wamsutter and/or the community.

If potential expenditures do not appear attractive to local entrepreneurs, other companies seeking a truck stop location may become interested if the information gained from this study is shared with other truck stop developers and operators. For example, Love’s Travel Stops, based in Oklahoma City, recently failed in its effort to obtain a zone change, which could have allowed for the establishment of a new truck stop on the south side of Rawlins in neighboring Carbon County.

Each of the three scenarios assumes a diversion of 7.7 percent of the average daily traffic at the I-80/Wamsutter interchange. The Town of Wamsutter and local entrepreneurs should consider the establishment of truck parking areas on the north and south sides of Interstate 80 to facilitate the exit of a greater proportion of truck and passenger vehicle traffic to Wamsutter. More truck and passenger traffic will likely generate more retail sales. The Town may be able to secure and develop surplus public lands immediately adjacent to the Town. Subsequently, local truck stops could work cooperatively to maintain the truck parking areas.
C. Retail Services

Potential Market and Sales Volumes

Potential retail services are for truck and passenger car repairs, emergency towing and road services, and bulk fuel deliveries. These potential expenditures represent retail services that are already being provided to interstate and intrastate truckers, persons traveling in light trucks and passenger vehicles, as well as natural gas companies and their contractors.

Potential sales volumes vary under the three development scenarios. Under the low growth scenario, annual retail service expenditures range from roughly $2.0 million to almost $2.5 million during the 2003-2012 period (Table 4). The greatest proportion of retail services would be generated from truck repairs. Retail service expenditures from passenger vehicle repairs, as well as emergency towing and repair services would follow.

Considerably higher retail service expenditures would be anticipated under the moderate and high growth scenarios that would generate greater fuel deliveries to natural gas companies (Tables 5 and 6). For example, some $1.3 million of fuel sales could be generated from the moderate activity scenario.

Sales Environment

Potential retail services including truck and passenger car repairs, emergency towing and road services, and bulk fuel deliveries are conducive to a truck stop. However, the same services could logically be provided by two separate companies. One company could provide towing and vehicular repair services. Another company could exclusively make bulk fuel delivery services. In either case, these retail services are best located within or immediately adjacent to a multi-service truck stop complex.

The adjacency of retail services to retail sales is also an important consideration. Retail sales of tires, batteries and accessories are directly related to truck and passenger car repairs. Retail sales of convenience foods, tobacco products, and restaurant sales also support vehicular repairs as customers wait for vehicular repairs to be completed.

Opportunities for Future Investment

It is recommended that existing truck stop owners also review potential retail service opportunities because of the relationship of potential retail sales and service expenditures. The potential expansion of one or more of the existing truck stops becomes more feasible in consideration of combined opportunities for both retail services and retail sales. At the same time, independent retail services can operate effectively as long as they are in close proximity to truck stop locations.
### TABLE 4
POTENTIAL RETAIL SERVICE EXPENDITURES IN WAMSUTTER
LOW ACTIVITY SCENARIO
2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>¹Bulk Fuel</th>
<th>²Vehicle Repair</th>
<th>³Trucks</th>
<th>⁴Passenger Vehicles</th>
<th>⁵Trucks</th>
<th>⁶Passenger Vehicles</th>
<th>Total Annual Expenditures</th>
<th>⁷Discounted Annual Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$675,000</td>
<td>$786,013</td>
<td>$248,860</td>
<td>$109,059</td>
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<td>$2,161,893</td>
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<td>2004</td>
<td>$675,000</td>
<td>$809,594</td>
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<td></td>
<td>$2,088,215</td>
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<td>2005</td>
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<td>2010</td>
<td>$675,000</td>
<td>$966,697</td>
<td>$306,066</td>
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<td>$280,560</td>
<td></td>
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<td>2011</td>
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<td>$995,698</td>
<td>$315,248</td>
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<td>2012</td>
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<td>$324,705</td>
<td>$142,298</td>
<td>$297,647</td>
<td></td>
<td>$2,465,219</td>
<td>$2,603,517</td>
</tr>
</tbody>
</table>

Notes:

1. Low activity scenario assumes 500,000 gallons of fuel per year sold at $1.35/gallon.
2. Low activity scenario assumes that 7.7% of all vehicular traffic will exit along Wamsutter, as well as a 3% annual increase of all vehicular traffic on I-80.
3. Assumes that 1% of trucks exiting at Wamsutter will need or want repair.
4. Assumes that 3% of passenger vehicles exiting at Wamsutter will need or want repair.
5. Assumes that 37% of trucks exiting at Wamsutter will require towing or emergency repair from a service provider in Wamsutter.
6. Assumes that 1.1% of passenger vehicles exiting at Wamsutter will require towing or emergency repair from a service provider in Wamsutter.
7. The discounted annual expenditure include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk Fuel</th>
<th>Vehicle Repair</th>
<th>Towing and Emergency Repair</th>
<th>Total Annual Expenditures</th>
<th>Discounted Annual Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>3Trucks</td>
<td>4Passenger Vehicles</td>
<td>5Trucks</td>
<td>6Passenger Vehicles</td>
</tr>
<tr>
<td>2003</td>
<td>$1,350,000</td>
<td>$809,110</td>
<td>$256,172</td>
<td>$112,264</td>
<td>$234,825</td>
</tr>
<tr>
<td>2004</td>
<td>$1,350,000</td>
<td>$841,474</td>
<td>$266,419</td>
<td>$116,755</td>
<td>$244,218</td>
</tr>
<tr>
<td>2005</td>
<td>$1,350,000</td>
<td>$875,133</td>
<td>$277,076</td>
<td>$121,425</td>
<td>$253,986</td>
</tr>
<tr>
<td>2006</td>
<td>$1,350,000</td>
<td>$910,139</td>
<td>$288,159</td>
<td>$126,282</td>
<td>$264,146</td>
</tr>
<tr>
<td>2007</td>
<td>$1,350,000</td>
<td>$946,544</td>
<td>$299,685</td>
<td>$131,333</td>
<td>$274,711</td>
</tr>
<tr>
<td>2008</td>
<td>$1,350,000</td>
<td>$984,406</td>
<td>$311,673</td>
<td>$136,586</td>
<td>$285,700</td>
</tr>
<tr>
<td>2009</td>
<td>$1,350,000</td>
<td>$1,023,782</td>
<td>$324,140</td>
<td>$142,050</td>
<td>$297,128</td>
</tr>
<tr>
<td>2010</td>
<td>$1,350,000</td>
<td>$1,064,734</td>
<td>$337,105</td>
<td>$147,732</td>
<td>$309,013</td>
</tr>
<tr>
<td>2011</td>
<td>$1,350,000</td>
<td>$1,107,323</td>
<td>$350,589</td>
<td>$153,641</td>
<td>$321,374</td>
</tr>
<tr>
<td>2012</td>
<td>$1,350,000</td>
<td>$1,151,616</td>
<td>$364,613</td>
<td>$159,787</td>
<td>$334,229</td>
</tr>
</tbody>
</table>

Notes:
1. Moderate activity scenario assumes 1,000,000 gallons of fuel per year sold at $1.35/gallon.
2. Moderate activity scenario assumes that 7.7% of all vehicular traffic will exit along Wamsutter, as well as a 4% annual increase of all truck and passenger vehicle traffic on I-80.
3. Assumes that 1% of trucks exiting at Wamsutter will need or want repair.
4. Assumes that 3% of passenger vehicles exiting at Wamsutter will need or want repair.
5. Assumes that 3.7% of trucks exiting at Wamsutter will require towing or emergency repair from a service provider in Wamsutter.
6. Assumes that 1.1% of passenger vehicles exiting at Wamsutter will require towing or emergency repair from a service provider in Wamsutter.
7. The discounted annual expenditure include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
# TABLE 6
## POTENTIAL RETAIL SERVICE EXPENDITURES IN WAMSUTTER
### HIGH ACTIVITY SCENARIO
#### 2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th><strong>1</strong>Bulk Fuel</th>
<th><strong>2</strong>Vehicle Repair</th>
<th><strong>3</strong>Towing and Emergency Repair</th>
<th><strong>4</strong>Total Annual Expenditures</th>
<th><strong>5</strong>Discounted Annual Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>3</strong>Trucks</td>
<td><strong>4</strong>Passenger Vehicles</td>
<td><strong>5</strong>Trucks</td>
<td><strong>6</strong>Passenger Vehicles</td>
</tr>
<tr>
<td>2003</td>
<td>$2,025,000</td>
<td>$809,110</td>
<td>$256,172</td>
<td>$112,264</td>
<td>$234,825</td>
</tr>
<tr>
<td>2004</td>
<td>$2,025,000</td>
<td>$841,474</td>
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<td>$116,755</td>
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</tr>
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<td>2005</td>
<td>$2,025,000</td>
<td>$875,133</td>
<td>$277,076</td>
<td>$121,425</td>
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</tr>
<tr>
<td>2006</td>
<td>$2,025,000</td>
<td>$910,139</td>
<td>$288,159</td>
<td>$126,282</td>
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</tr>
<tr>
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<td>$946,544</td>
<td>$299,685</td>
<td>$131,333</td>
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</tr>
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<td>$147,732</td>
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<tr>
<td>2011</td>
<td>$2,025,000</td>
<td>$1,107,323</td>
<td>$350,589</td>
<td>$153,641</td>
<td>$321,374</td>
</tr>
<tr>
<td>2012</td>
<td>$2,025,000</td>
<td>$1,151,613</td>
<td>$364,613</td>
<td>$159,787</td>
<td>$334,229</td>
</tr>
</tbody>
</table>

**Notes:**
1. High activity scenario assumes 2,000,000 gallons of fuel per year sold at $1.35/gallon.
2. High activity scenario assumes that 7.7% of all truck and passenger vehicle traffic will exit at Wamsutter, as well as a 4% annual increase of all truck and passenger vehicle traffic on I-80.
3. Assumes that 1% of trucks exiting in Wamsutter will need or want repair.
4. Assumes that 6% of passenger vehicles exiting in Wamsutter will need or want repair.
5. Assumes that 3.7% of trucks on I-80 will require towing or emergency repair from a service provider in Wamsutter.
6. Assumes that 1.1% of passenger vehicles will require towing or emergency repair from a service provider in Wamsutter.
7. The discounted annual expenditure include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
D. Accommodations

Potential Market and Sales Volumes

A smaller market exists for overnight accommodations that could include:
- a new moderately-priced motel; as well as,
- a combination recreational vehicle (RV) park/campground.

A small proportion of passenger vehicles and trucks exiting at Wamsutter could be attracted to a new motel facility in Wamsutter. Potential demands could likely support a 16-20 room motel. The low activity scenario is expected to generate an annual gross income of roughly $219,000 to $274,000. The moderate and high activity scenarios are somewhat more favorable as annual gross income would range between $219,000 to $310,000 (Tables 7, 8 and 9).

Light trucks, passenger vehicles towing U-Haul vans and small trailers, and motor homes traveling along Interstate 80 could generate demands for a new RV park and related KOA campground type facility. Such a facility could also support some natural gas exploration and well completion workers who might choose to stay at the facility during, at least, the summer months.

In the low activity scenario, there would be a daily demand for a combination of RV spaces and small cabin units that could serve customers traveling in 11 vehicles. The demands for this facility under the moderate activity scenario would be to serve customers from approximately 32 vehicles per day. In contrast, the high activity scenario would generate demand for RV spaces and cabin units that could support customers from up to 50 vehicles per day.

Potential sales volumes vary under the three development scenarios. Under the low growth scenario, annual sales would range from roughly $57,000 to $63,000 during the 2003-2012 period. With the presence of more customers associated with well completion, expenditures would probably rise between $160,000 to almost $173,000 per year in the moderate activity scenario. The high activity scenario would generate annual sales that range from approximately $253,000 to almost $266,000 per year (Tables 7, 8 and 9).
<table>
<thead>
<tr>
<th>Year</th>
<th>Motel Expenditures</th>
<th>RV Park/Campground Expenditures</th>
<th>Total Annual Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Trucks</td>
<td>Passenger Vehicles</td>
<td>Trucks</td>
</tr>
<tr>
<td>2003</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$25,840</td>
</tr>
<tr>
<td>2004</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$25,840</td>
</tr>
<tr>
<td>2005</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$25,840</td>
</tr>
<tr>
<td>2006</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2007</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2008</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2009</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2010</td>
<td>$164,250</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2011</td>
<td>$164,250</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
<tr>
<td>2012</td>
<td>$164,250</td>
<td>$109,500</td>
<td>$25,840</td>
</tr>
</tbody>
</table>

Notes:
1 Assumes that 0.1% of all truck traffic and passenger traffic will stay at a new local motel. Assumes trucks and passenger vehicles will spend $50 per night for a motel room.
2 Assumes well completion trucks and passenger vehicles will spend $17 per night for an RV/Campground space.
3 For every two drill rigs in operation, it is expected that 5 spaces in a RV Park will be leased by transient well completion workers.
4 Assumes that 0.1% of all incoming passenger vehicle traffic will stay at a RV Park/Campground.
5 The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
### TABLE 8
POTENTIAL OVERNIGHT ACCOMMODATION EXPENDITURES IN WAMSUTTER MODERATE ACTIVITY SCENARIO 2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>¹Motel Expenditures</th>
<th>²RV Park/Campground Expenditures</th>
<th>Total Annual Expenditures</th>
<th>⁵Discounted Annual Expenditures 2003-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Trucks</td>
<td>Passenger Vehicles</td>
<td>³Well Completion Trucks</td>
<td>⁴Passenger Vehicles</td>
</tr>
<tr>
<td>2003</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$129,200</td>
<td>$31,025</td>
</tr>
<tr>
<td>2004</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$129,200</td>
<td>$31,025</td>
</tr>
<tr>
<td>2005</td>
<td>$146,000</td>
<td>$91,250</td>
<td>$129,200</td>
<td>$31,025</td>
</tr>
<tr>
<td>2006</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$129,200</td>
<td>$37,230</td>
</tr>
<tr>
<td>2007</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$129,200</td>
<td>$37,230</td>
</tr>
<tr>
<td>2008</td>
<td>$164,250</td>
<td>$109,500</td>
<td>$129,200</td>
<td>$37,230</td>
</tr>
<tr>
<td>2009</td>
<td>$164,250</td>
<td>$109,500</td>
<td>$129,200</td>
<td>$37,230</td>
</tr>
<tr>
<td>2010</td>
<td>$164,250</td>
<td>$127,750</td>
<td>$129,200</td>
<td>$43,435</td>
</tr>
<tr>
<td>2011</td>
<td>$182,500</td>
<td>$127,750</td>
<td>$129,200</td>
<td>$43,435</td>
</tr>
<tr>
<td>2012</td>
<td>$182,500</td>
<td>$127,750</td>
<td>$129,200</td>
<td>$43,435</td>
</tr>
</tbody>
</table>

**Notes:**

¹Assumes that 0.1% of all truck traffic and passenger traffic will stay at a new local motel. Assumes trucks and passenger vehicles will spend $50 per night for a motel room.

²Assumes well completion trucks and passenger vehicles will spend $17 per night for an RV/Campground space.

³For every ten drill rigs in operation, it is expected that 25 spaces in a RV Park will be leased by transient well completion workers.

⁴Assumes that 0.1% of all incoming passenger vehicle traffic will stay at a RV Park/Campground.

⁵The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
### TABLE 9
POTENTIAL OVERNIGHT ACCOMMODATION EXPENDITURES IN WAMSUTTER
HIGH ACTIVITY SCENARIO
2003-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>¹Motel Expenditures</th>
<th>²RV Park/Campground Expenditures</th>
<th>Total Annual Expenditures</th>
<th>⁵Discounted Annual Expenditures 2003-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Trucks</td>
<td>Passenger Vehicles</td>
<td>³Well Completion Trucks</td>
<td>⁴Passenger Vehicles</td>
</tr>
<tr>
<td></td>
<td>$127,750</td>
<td>$91,250</td>
<td>$222,224</td>
<td>$31,025</td>
</tr>
<tr>
<td>2003</td>
<td>$127,750</td>
<td>$91,250</td>
<td>$222,224</td>
<td>$31,025</td>
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<tr>
<td>2004</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$222,224</td>
<td>$37,230</td>
</tr>
<tr>
<td>2005</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$222,224</td>
<td>$37,230</td>
</tr>
<tr>
<td>2006</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$222,224</td>
<td>$37,230</td>
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<tr>
<td>2007</td>
<td>$146,000</td>
<td>$109,500</td>
<td>$222,224</td>
<td>$37,230</td>
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<tr>
<td>2008</td>
<td>$164,250</td>
<td>$127,750</td>
<td>$222,224</td>
<td>$43,435</td>
</tr>
<tr>
<td>2009</td>
<td>$164,250</td>
<td>$127,750</td>
<td>$222,224</td>
<td>$43,435</td>
</tr>
<tr>
<td>2010</td>
<td>$164,250</td>
<td>$127,750</td>
<td>$222,224</td>
<td>$43,435</td>
</tr>
<tr>
<td>2011</td>
<td>$182,500</td>
<td>$127,750</td>
<td>$222,224</td>
<td>$43,435</td>
</tr>
<tr>
<td>2012</td>
<td>$182,500</td>
<td>$127,750</td>
<td>$222,224</td>
<td>$43,435</td>
</tr>
</tbody>
</table>

Notes:

¹Assumes that 0.1% of all truck traffic and passenger traffic will stay at a new local motel. Assumes trucks and passenger vehicles will spend $50 per night for a motel room.

²Assumes well completion trucks and passenger vehicles will spend $17 per night for an RV/Campground space.

³For every seventeen drill rigs in operation, it is expected that 42.5 spaces in a RV Park will be leased by transient well completion workers.

⁴Assumes that 0.1% of all incoming passenger vehicle traffic will stay at a RV Park/Campground.

⁵The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002

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Wamsutter Economic and Community Development Study

Page 3.17

Economic Activity Scenarios
Economic Development Model
Sales Environment

The potential market for a new motel is for one-night stays. Multiple night stays would be rare as travelers are only resting as they pass through Wamsutter en route to eastern and western destinations. Occasional winter road closures and the infrequent influx of supervisors inspecting natural gas development projects would probably represent the only market opportunities for multiple night stays.

In this context, motel customers will want to find the motel quickly after they exit Interstate 80. Clean rooms, ample vehicular parking, and a clean motel site are essential to attract customers that exit at Wamsutter.

Traffic noise from Interstate 80 is not especially desirable. At the same time, the accessibility and proximity of the motel to McCormick and other roads that provide access to the local truck stops and the Interstate are desirable.

If the motel is located adjacent to a road where travelers pass by a local truck stop, restaurant, or other commercial retail facilities, other commercial operations can gain greater retail sales and generate municipal sales tax revenues.

Opportunities for Future Investment

Under the low activity scenario, a new motel facility would probably generate an income stream that would be sufficient to support one couple that would own and operate the facility. Higher occupancies, which could be anticipated in the medium and high activity scenarios, would be necessary to enable the hiring of one or more housekeepers.

The combination RV park/campground facility likely represents a part-time business opportunity for one person in the low activity scenario. More substantive income and employment opportunities would be possible in the moderate and high activity scenarios if the small business owner already owns the property where the RV park/campground facility would be located.

The former CIG area represents a potential opportunity for, at least, a portion of this type of facility. However, local entrepreneurs report that water distribution and sewer collection lines would likely need to be replaced.

E. Housing

Potential Market and Sales Volumes

The potential housing market derived from potential natural gas exploration and production is generally weak unless drilling contractors do not bring skid-mounted
trailers to Wamsutter (Tables 10, 11 and 12). Temporary housing is provided to well drilling crews who, for the most part, own or rent a home somewhere else.

Lease operators who are working in the Wamsutter gas field represent a more attractive market. While the number of new lease operators is limited, the establishment of a primary residential base in the community would generate greater economic benefits to the community.

Sales Environment

In order to attract the purchase or rental of an existing or new home, fee simple and rental housing sites will need to be generally attractive and clean in appearance. Lease operators will, in most cases, not expect a variety of community amenities. Their motivation to relocate to the community will primarily be the proximity to Wamsutter and other nearby gas fields.

If the marketing of temporary housing opportunities for drilling crews is pursued, older trailers or motel units may be attractive to drilling contractors and their personnel. Given the standard use of most skid-mounted trailers, drilling crews are not expecting attractive housing. They are primarily looking for a place to sleep and rest before another long day or work. Ample vehicular parking will, however, be viewed as an important site requirement.

Opportunities for Future Investment

Wamsutter residents, who already own residential properties suitable for residential development, are the best candidates for future residential investment in the community. Improved residential lots that contain convenient road access, as well as connections to water, wastewater, and electrical services, could be sold to lease operators. The expectation should be that lease operators will install manufactured housing on improved lots since residential contractors are not based in the community.

Wamsutter residents, who may own an older motel or trailer units, may be attracted to potential opportunities to provide temporary housing to drilling crews. The lease of temporary housing should not include newer trailers or other manufactured housing because drill crews will exert a higher degree of impact upon the housing unit. The nature of their work will bring a considerable amount of dirt and oil substances into the living units when workers return from a long day of work in the gas fields.
### Table 10: Flow Activity Scenario: Derived From Natural Gas Development Potential Housing Demand in Wamsutter

<table>
<thead>
<tr>
<th>Year</th>
<th>Temporary Housing</th>
<th>Well Completion</th>
<th>Exploration</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003-2012</td>
<td>40%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Economic Development Model**

**Economic Activity Scenarios**

**Wamsutter Economic and Community**

**Source:** Petroleum Planning Consultants, 2002

Assumes that workers involved in processing and transmission will live in Wamsutter.

Assumes that well completion crew will not require housing, because of their short work duration, on each well. However, some limited use of RV Park/Camping is expected.

Assumes that 100% of children will need temporary housing, while Tool Operators and Foremen are required to stay at well sites.
### TABLE 11
POTENTIAL HOUSING DEMAND IN WAMSUTTER DERIVED FROM NATURAL GAS DEVELOPMENT
**MEDIUM ACTIVITY SCENARIO**
2003-2012

<table>
<thead>
<tr>
<th>YEAR</th>
<th>1 EXPLORATION</th>
<th>2 WELLCOMPLETION</th>
<th>3 PRODUCTION</th>
<th>4 PROCESSING &amp; TRANSMISSION</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Temporary Housing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
</tr>
<tr>
<td>2004</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
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<tr>
<td>2005</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
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<tr>
<td>2006</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
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<td>2007</td>
<td>200</td>
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<td>5</td>
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<tr>
<td>2008</td>
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<td>2009</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
</tr>
<tr>
<td>2010</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
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<tr>
<td>2011</td>
<td>200</td>
<td>0</td>
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<td>11</td>
<td>216</td>
</tr>
<tr>
<td>2012</td>
<td>200</td>
<td>0</td>
<td>5</td>
<td>11</td>
<td>216</td>
</tr>
</tbody>
</table>

**Notes:**
1. Assumes that 100% of drillers will need Temporary housing, while Tool Pushers and Foremen are required to stay at well sites.
2. Assumes that well completion crew will not require housing, because of their short work duration at each well. However, some limited use of RY Park/Campground is expected.
3. Assumes that lease operators will live in Wamsutter.
4. Assumes that workers involved in processing and transmission will live in Rawlins.
Source: Pedersen Planning Consultants, 2002
# TABLE 12

## POTENTIAL HOUSING DEMAND IN WAMSUTTER DERIVED FROM NATURAL GAS DEVELOPMENT

### HIGH ACTIVITY SCENARIO

**2003-2012**

<table>
<thead>
<tr>
<th>Year</th>
<th>Temporary Housing</th>
<th>Well Completion</th>
<th>Production</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>30% Rent</td>
<td>70% Own</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2004</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2005</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2006</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2007</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2008</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2009</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2010</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2011</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>2012</td>
<td>340</td>
<td>0</td>
<td>8</td>
<td>19</td>
</tr>
</tbody>
</table>

**Notes:**

1. Assumes that 100% of drillers will need Temporary housing, while Tool Pushers and Foremen are required to stay at well sites.
2. Assumes that well completion crew will not require housing, because of their short work duration at each well. However, some limited use of RY Park/Campground is expected.
3. Assumes that lease operators will live in Wamsutter.
4. Assumes that workers involved in processing and transmission will live in Rawlins.

Source: Pedersen Planning Consultants, 2002
CUMULATIVE ECONOMIC BENEFITS

Economic activity in smaller communities typically rises and falls in reaction to significant factors that influence the local economy. Wamsutter is significantly influenced by transportation and natural gas industries. While no one can predict the timing and sequence of future cycles, a theoretical combination of the potential expenditures for the low, moderate, and high activity scenarios are presented for the 2003-2012 period (Table 13). Anyone considering potential business investments would be wise to consider the viability of potential business enterprises in the context of ever-changing economic cycles and the ability of the investor to sustain profitability in all three economic scenarios.

A. Potential Expenditures and Small Business Opportunities

Potential economic opportunities in retail sales, retail services, overnight accommodations, and housing could potentially generate significant cumulative expenditures in Wamsutter's economy (Table 13). The most promising benefits are in the retail trade and retail services sectors. Estimated cumulative expenditures for each of the three scenarios suggests that potential retail sales, retail services and accommodations could annually generate $14 to $18 million dollars of expenditures in the low activity scenario, $25 to almost $33 million in the moderate activity scenario, and roughly $39 to $49 million in the moderate and high activity scenarios.

B. Potential New Job Generation

The potential generation of new jobs occurs primarily in the moderate and high activity economic scenarios (Table 14). Most new job opportunities can be expected from natural gas exploration activities, particularly in the moderate and high activity scenarios. However, these jobs are tied to a highly transient labor force.

Most of those jobs will be available to those individuals with low to moderate income levels. Using income criteria determined by the Wyoming Business Council and the average household size information (2.54 persons per household) from the 2000 Census, it is estimated that the maximum household income for low to moderate income households would likely range between $32,500 and $41,750 per year.

In contrast, a nominal number of new job opportunities are also anticipated to support anticipated growth in the retail trade, retail services, and overnight accommodations. Ironically, these lower paying jobs are more important to the Wamsutter economy since these jobs are tied to sales derived from Interstate 80 traffic. Further, new jobs associated with retail trade, retail services and overnight accommodations will gradually bring new residents to the community. In contrast, gas exploration crews will make some retail expenditures, but the majority of their income will be expended where their family and primary place of residence are located.
<table>
<thead>
<tr>
<th>Year</th>
<th>Retail Sales</th>
<th>Retail Services</th>
<th>Overnight Accommodations</th>
<th>Annual Expenditures 2003-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Well Exploration</td>
<td>Well Production</td>
<td>Well Truckers</td>
<td>Passenger Vehicles</td>
</tr>
<tr>
<td>2003</td>
<td>250,967</td>
<td>8,487</td>
<td>7,759,520</td>
<td>3,669,115</td>
</tr>
<tr>
<td>2005</td>
<td>250,967</td>
<td>8,487</td>
<td>8,266,514</td>
<td>3,892,564</td>
</tr>
<tr>
<td>2006</td>
<td>3,988,190</td>
<td>57,286</td>
<td>27,646,959</td>
<td>6,065,318</td>
</tr>
<tr>
<td>2007</td>
<td>3,988,190</td>
<td>57,286</td>
<td>28,533,833</td>
<td>6,247,277</td>
</tr>
<tr>
<td>2008</td>
<td>3,988,190</td>
<td>57,286</td>
<td>29,447,313</td>
<td>6,434,696</td>
</tr>
<tr>
<td>2009</td>
<td>2,345,994</td>
<td>33,947</td>
<td>18,760,362</td>
<td>5,438,143</td>
</tr>
<tr>
<td>2011</td>
<td>2,345,994</td>
<td>33,947</td>
<td>19,983,027</td>
<td>5,769,326</td>
</tr>
<tr>
<td>2012</td>
<td>2,345,994</td>
<td>33,947</td>
<td>20,622,004</td>
<td>5,942,406</td>
</tr>
</tbody>
</table>

Notes:
2. The discounted annual expenditures include the application of a 5.61% annual discount rate that provides a more realistic value of money during the 2003-2012 period.

Source: Pedersen Planning Consultants, 2002
# Table 14

## Potential New Job Generation in Wamsuter
### Low, Moderate, and High Activity Scenarios

<table>
<thead>
<tr>
<th>Economic Sector/Job Classification</th>
<th>Low Activity Scenario</th>
<th>Moderate Activity Scenario</th>
<th>High Activity Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Income Level</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$32,500-37,100</td>
<td>$37,101-41,750</td>
<td>$32,500-37,100</td>
</tr>
<tr>
<td></td>
<td>&lt; $32,500</td>
<td>$37,100</td>
<td>$41,750</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>0</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>Well Exploration</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Well Completion</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Food Servers</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Kitchen Help</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Convenience Store Clerk</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Retail Services</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Truck Drivers</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Overnight Accommodations</td>
<td>0.5</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Manager</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Maintenance Worker</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Motel</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Manager</td>
<td>0.5</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Housekeeper</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>20</td>
<td>0</td>
<td>25</td>
</tr>
</tbody>
</table>

Notes:
1. Well completion involves considerably more workers over very short periods of time. New well completion jobs in this table represent a cumulative equivalent in full-time employment.
2. Source: Pedersen Planning Consultants, 2001
Attachments
**TOWN OF WAMSUTTER COMMUNITY PROFILE**

**DEMOGRAPHICS**

Available demographic information reveals that roughly half of Wamsutter's population is between the age of 20 through 59; the median age of community residents is 33 years. The community has primarily attracted middle-aged and somewhat older residents who are experienced workers in natural gas exploration and production. The cultural diversity of Wamsutter is somewhat greater than the overall diversity of Sweetwater County and more comparable to Carbon County.

<table>
<thead>
<tr>
<th>AGE DISTRIBUTION IN WAMSUTTER</th>
<th>APRIL 2000</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age Range</strong></td>
<td><strong>Number of Residents</strong></td>
</tr>
<tr>
<td>Under 5 years</td>
<td>19</td>
</tr>
<tr>
<td>5 to 9 years</td>
<td>21</td>
</tr>
<tr>
<td>10 to 14 years</td>
<td>33</td>
</tr>
<tr>
<td>15 to 19 years</td>
<td>14</td>
</tr>
<tr>
<td>20 to 24 years</td>
<td>13</td>
</tr>
<tr>
<td>25 to 34 years</td>
<td>13</td>
</tr>
<tr>
<td>35 to 44 years</td>
<td>52</td>
</tr>
<tr>
<td>45 to 54 years</td>
<td>35</td>
</tr>
<tr>
<td>55 to 59 years</td>
<td>18</td>
</tr>
<tr>
<td>60 to 64 years</td>
<td>9</td>
</tr>
<tr>
<td>65 to 74 years</td>
<td>7</td>
</tr>
<tr>
<td>75 to 84 years</td>
<td>0</td>
</tr>
<tr>
<td>85 years and over</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>261</strong></td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, Census 2000

**HOUSING**

Available housing information from the 2000 Census indicates that roughly 32 percent of Wamsutter's housing inventory is vacant. However, incoming natural gas labor force absorbed much of the available inventory in late 2000 and most of 2001.

While family households lived in 65 percent of all occupied households in April 2000, a significant number of homes are occupied by a single person. This again reflects the significant influence of natural gas exploration and production labor force that includes a higher proportion of single status workers who are highly transient. A significant proportion of this workforce often maintains a transient residence in Wamsutter and commutes to a more long-term household location outside of Sweetwater County or Wyoming.
ECONOMY

Available employment and business data for Wamsutter indicates a continued presence of about 16 to 20 business enterprises in Wamsutter between 1995 and 1999. Fewer business establishments were operating in Wamsutter in 1999. The total number of businesses decreased roughly 25 percent from the previous year.

The greatest amount of employment in Wamsutter is associated in natural gas exploration and production (mining sector) followed by retail trade, utilities, and construction. Significant local employment was generated in 1995, but has reduced to more than half of 1995 employment levels. Although a short-term rise in employment also occurred in 1998.

Available employment and business statistics do not include non-employers, or companies that have no employees, e.g., sole proprietors. On a national basis, non-employers account for almost 75 percent of all businesses in the United States, but generate only three percent of all sales and business revenues.

The volatility in local employment since 1995 has expectedly generated variable income to the employed labor force in Wamsutter. Annual payrolls in 1995 were over $6.9 million in 1995, declined to $3.8 million in 1996 and 1997, and rose to over $4.0 million in 1998 and 1999. Available non-employer statistics associated with retail trade in Sweetwater County suggest a close correlation with national non-employer revenues.

WAMSUTTER EMPLOYMENT & BUSINESS ACTIVITIES 1999

<table>
<thead>
<tr>
<th>Sectors</th>
<th>Number of Established Businesses by Size of Employment Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-4 persons</td>
</tr>
<tr>
<td>Mining</td>
<td>1</td>
</tr>
<tr>
<td>Utilities</td>
<td>0</td>
</tr>
<tr>
<td>Construction</td>
<td>0</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>4</td>
</tr>
<tr>
<td>Transportation &amp; Warehousing</td>
<td>2</td>
</tr>
<tr>
<td>Real Estate, Rental &amp; Leasing</td>
<td>1</td>
</tr>
<tr>
<td>Accommodations &amp; Food</td>
<td>1</td>
</tr>
<tr>
<td>Unclassified</td>
<td>1</td>
</tr>
<tr>
<td>ALL SECTORS</td>
<td>10</td>
</tr>
</tbody>
</table>

Economic Trends Influencing Future Community Development

- Increased natural gas development associated with the Great Divide/Wamsutter II Natural Gas Project. The U.S. Bureau of Land Management (BLM) approved the development of up to 2,130 wells with 870 additional wells pending approval. Natural gas development activities offer potential opportunities for expanded retail trade, saturation and expansion of available housing inventory, and the establishment of gas field support service operations.
- Despite the prior authorization by BLM, BP/AMOCO slowed natural gas exploration activities in the 4Q 2001. As a result, a significant amount of exploration and well development activities, as well as the related work of various support contractors, has been discontinued until further notice from BP/AMOCO.
- In the vicinity of Wamsutter, average daily traffic along Interstate 80 was an estimated 10,900 vehicles per day in 2000. Eastbound and westbound traffic volumes are generally similar and include approximately 5,450 vehicles per day in either direction. Almost 60 percent of all vehicular traffic in the vicinity of Wamsutter represents truck traffic (any vehicle heavier than typical pick-up truck). Three truck stops and local restaurants make Wamsutter a popular stopping point along I-80. Vehicular traffic continues to sustain the viability of existing truck stops and restaurants, increases exposure of the community, and offers long-term potential for increased retail trade.