ENVISION CHAFFEE CO.

A FUTURE BUILT ON COMMON GROUND

Community Vision
REPORT CARD
January 5, 2018

COMMUNITY VISION	OVERALL GRADE
Our forests, waters and wildlife are healthy and maintained in balance with outdoor recreation. Healthy Forests .... **D** Healthy Wildlife .... **C-** Healthy Waters.. **A** Balanced Outdoor Recreation .... **C-**	**C-**
$$$ Community members remain able to live locally and benefit from an increasingly diversified economy. Livability .... **D** Economy .... **B** Transportation .... **B**	**C**
A friendly, supportive community where participation is encouraged and shared cultural elements connect us. Community Lives Locally .... **C** Local Business Health .... **B** Crime Rate .... **?** Volunteerism .... **A**	**B**
A sustainable agricultural community, open rural landscapes and development focused in and around towns. Sustainable Agricultural Community .... **B-** Rural Landscapes and Growth Concentrated in and Around Towns .... **D?**	**C**

Executive Summary

Fellow Citizens,

This document provides a first – a **Report Card** that shows how we are progressing relative to the vision citizens have for the future. This report card shows some areas to celebrate, and many areas that require new approaches and planning, to create a future where the community's vision becomes reality.

As part of the Envision Chaffee County process, the community defined what is most valued in Chaffee County and then developed four vision statements describing the future citizens want to see. The community then defined measures to show how we are doing relative to these Community Visions. These measures are the basis of our report card.

Agreeing on and using shared measures is important. First, it helps people with different perspectives align their efforts and thinking toward a goal that is broader than any one person or group's definition and creates a common language that everyone agrees to use. Second, measures provide information on whether a group is making progress toward a vision – a critical component of any effort to improve a community's well-being.

So, how did Chaffee County do on our report card? Have a look at the summary above and at the more detailed report cards and discussion for each vision statement in this document. There are areas to celebrate and to reinforce. Our economy is growing, we are adding local businesses and the volunteerism in our community is amazing.

However, many of the things we love about Chaffee County face real challenges. Stunning scenic beauty and abundant recreation are the reason many people live here and also underpin our resilient economy, but the health of these assets received some of our lowest grades. A growing gap between income and housing cost is another area of concern. In addition, much of our rapid growth is happening in the unincorporated county, impacting the rural landscapes citizens indicate are important to local quality of life.

The good news is that these trends can be changed with new ideas, community engagement, collaboration and effort. We are at a pivot point – Chaffee County's population is expected to grow 31% by 2030 and Colorado's population will swell by 1.5 million in that same time frame, according to the State Demographer. Now is the time to get to work to improve the grades and make our community vision for the future reality!

Data for this report were gathered and analyzed through hundreds of hours of collaborative work by volunteers, non-profits, local government and local agency staff. **This is not a report created by a consultant who does not live here! This is an assessment of our community visions measured by members of our community using the most reliable data sources and context from local experts.**

This prototype, of course, is not perfect. Some important measures are likely missing, and others may need refinement – but this is the best scorecard the community has had to-date. We can improve on it as we go. Our hope is that this Community Vision Report Card will provide common information about the things we value most in Chaffee County, forming a platform for us to find local solutions to create the future we want, and a platform on which we can build a future based on common ground.

Greg Felt and Cindy Williams (Envision Chaffee County Program Co-Leaders)

Acknowledgements

COMMUNITY VISION 1

Our forests, waters and wildlife are healthy and in balance with outdoor recreation.

OVERALL GRADE

C-

HEALTHY FORESTS
Insect Infestation .... **F**
Tree die-off affected 16% of all Chaffee County forests in the last 2 years.

Forest Management .... **B**

HEALTHY WATERS
Arkansas River Water Quality .... **A**
Water quality is "good" and improving.

HEALTHY WILDLIFE
Deer and Elk Population .... **C-**
Deer population has declined 58% and elk population 23%
in the last 3 decades.

BALANCED RECREATION
Economic Contribution and Use .... **A**
Economic impact and use are increasing.

Impact .... **D**
Campsites in the Fourmile area expanded 80% since 2004, or 6% per year.

How report card grades were determined: <u>All measures were evaluated relative to the vision statement – not as a statement of overall value – as many of these metrics (like rising housing cost) can be beneficial for some citizens and detrimental to others</u>. An "A" indicates a measure is improving relative to the vision; "B" indicates a decline of less than 1% per year; "C" denotes a decline of 1% to 1.5% per year; "D" indicates a decline of 1.5% to 5% per year; and "F" marks a decline greater than 5% per year.

<div align="center">Context</div>

An *Envision Chaffee Survey* was completed in late 2017 involving more than 1,200 citizens who were highly representative of ages, geographies and income classes from across the county. Survey data indicate the thing that citizens love most about Chaffee County – by far – is forests, mountain landscapes, wildlife, clean flowing waters and diverse outdoor recreation. Eighty percent of the county is public land, and the Arkansas River is a community-defining feature. Our exceptional natural resources are the center of Chaffee County culture and quality of life. They also drive our economy, with 33% of jobs generated by tourism, and another 27% by retirees who are attracted by our special quality of life.

The grade for this vision is a "C-" with some serious concerns. Forest health is declining, and recreational pressures are increasing – both rapidly. Declining wildlife populations are also of concern. On the positive side, our water quality is very good and our local agency leaders and staff are a collaborative part of our community and are actively engaged to manage issues.

The budgets of our local agencies are not increasing at anywhere near the pace of declining forest health and increasing recreational use. During preparation of this report card, local agency staff expressed hope that shared understanding of the challenges facing Chaffee County's forests, wildlife and recreation will result in increased public support for and engagement in collaborative solutions.

1 - Healthy Forests

Chaffee County's forests provide immeasurable social, economic and ecological benefits to citizens and visitors. Forests support diverse wildlife species, fresh water and recreation. But, **the health of Chaffee County forests is of serious concern,** according to local US Forest Services (USFS) and Colorado State Forest Service (CSFS) personnel.

The threat of increasingly large and severe wildfires in Chaffee County is high and rising, as a result of forest density (or high fuel loads) and rapidly increasing insect-related tree mortality. Similar issues across Colorado have resulted in a 400% increase in acreage burned from the 1990's to today (graph right). Management of these issues is challenged by: lack of funding; lack of local markets for timber products; and lack of local citizen understanding of the need for mitigation activities like controlled burns, thinning and private land risk mitigation.

Colorado Wildfires Annual Acreage Burned by Decade (Colorado State Forest Service)
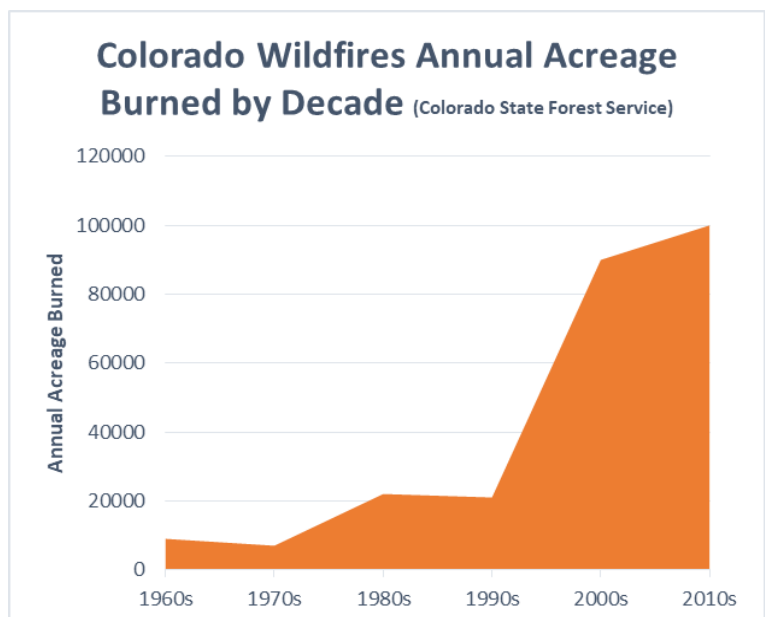
Measure #1A: Insect Infestation – GRADE F
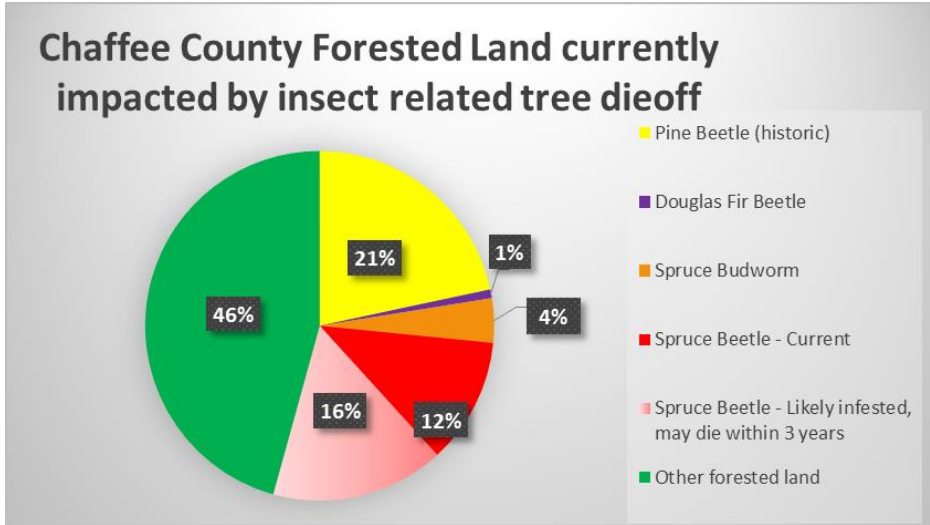
According to USFS and CSFS data, **more than 50% of forested lands in Chaffee County are currently impacted by major insect infestations and substantial timber die off** (some of which will become increasingly visible over the next three years – graph left). The remaining 46% of forested lands are at high risk of additional infestations due to high tree densities.

In the past two years, **44,000 acres of forested land in the County** became brown with dying trees (see graph, photo and map below supported by data from CSFS and USFS aerial surveys). The tree die-off is a result of infestation by spruce beetle. These insect pests are spreading rapidly northward through Chaffee County and causing mortality of 80-90% of infected trees. Visible tree die-off occurs 2 to 3 years after trees are fatally infested; therefore, Forest agencies indicate that as many as 61,000 additional acres, or all the remaining spruce forest, could exhibit tree die off in the next few years. As a result, **the USFS estimates that today's average of 5 standing dead trees per acre in Chaffee County forests will increase to 120 dead trees per acre by 2020.** These infestations, and associated tree mortality, are rapidly changing the forest's ability to hold snowpack, impacting water availability and wildlife habitat and increasing the risk of large, severe wildfire events. Due to the rapid rate of infestation and high mortality this measure is graded as "F."
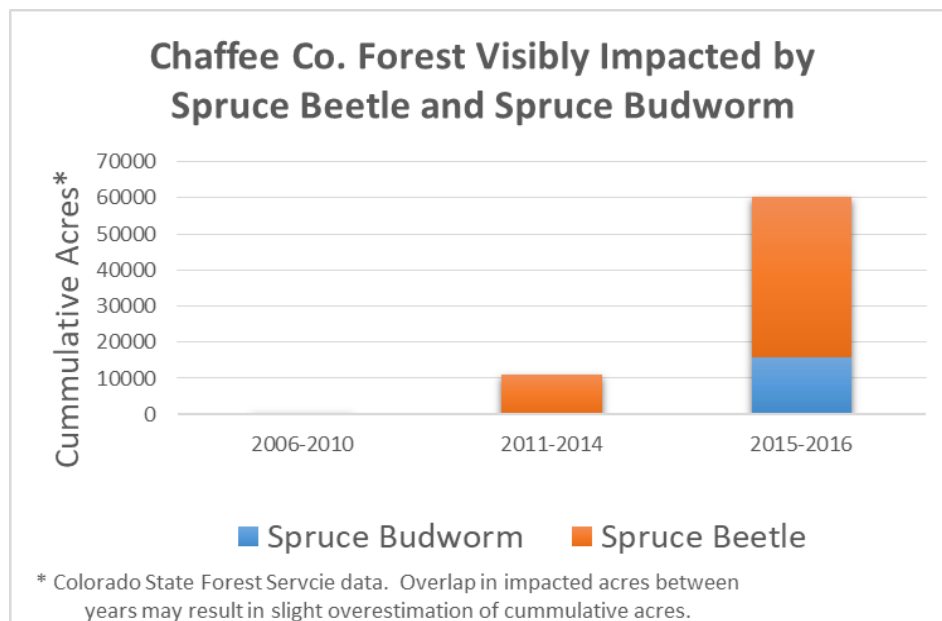
Below left: Collaborative CSFS and USFS map showing progression of visible dead trees due to Spruce Beetle kill in Chaffee County. At right, photo of infested and dying timber.

Spruce Beetle Progression 1996 - 2016
Salida District / Chaffee County

1996-2000   2006-2010   2011-2014   2015-2016
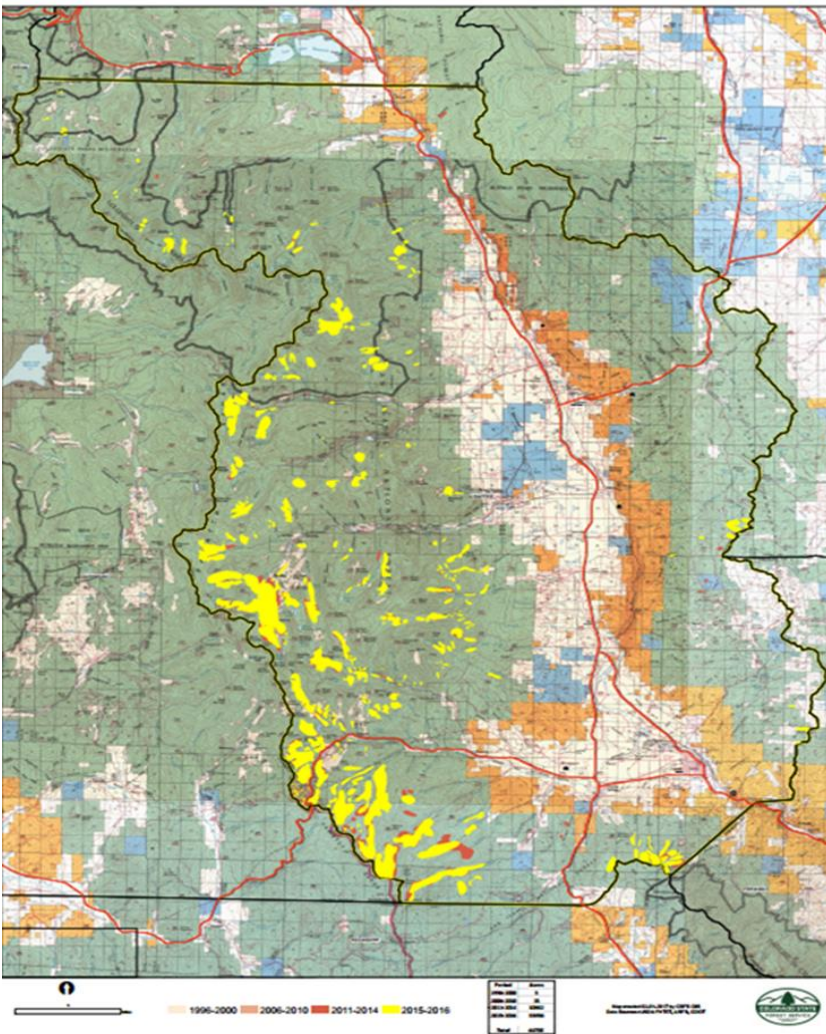
Measure #1B: Forest Management – GRADE B

Forest management, including tree thinning and prescribed fire to improve forest resiliency and to reduce fuel loads, is imperative to effectively address threats to forest health and public safety. Local USFS 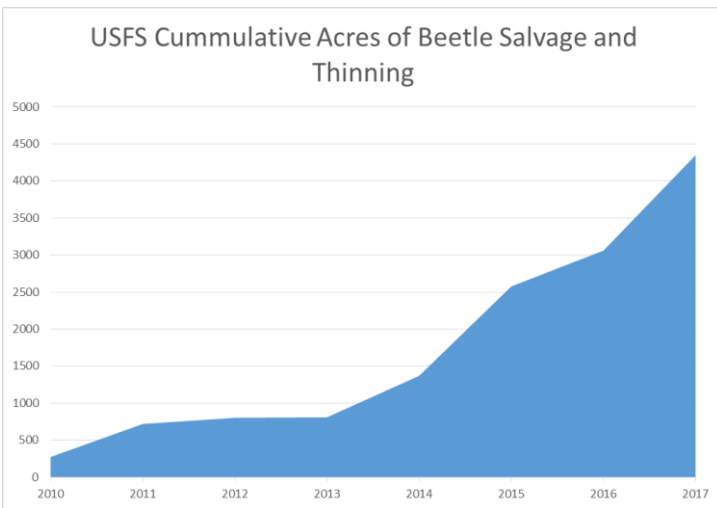and BLM staff advance this work. Protection of homes at the public-private land interface is a priority for local agencies and for the Colorado State Forest Service, who serve as a resource for landowners to manage wildfire risk.

USFS Cummulative Acres of Beetle Salvage and Thinning

In the past three years, the USFS has ramped up forest treatment using beetle kill salvage and thinning operations by four times compared to 2010-2012 rates – a clear "A" (graph left). However, only 1% of all forested lands in Chaffee County have been thinned or salvaged. Additional acres have been treated using prescribed fire. This information is being compiled by our excellent local USFS team and will be available in a supplemental report. The metric is graded a "B" because, while treatment is ramping up quickly, the impact on total acres remains limited.

The Colorado State Forest Service has assessed 1,079 Chaffee County homes for fire risk (roughly 19% of homes in the unincorporated county). Of those, 40% have high or very high fire risk (graph right). **However only 13% of these properties (roughly 160 acres) have been treated by landowners to mitigate fire risk.** The slow response is due to a lack of homeowner understanding of wildfire risk and a lack of desire to invest in mitigation by second home owners, according to CSFS personnel.

Colorado State Forest Service
Fire Risk Assessment of 1,079 Chaffee Co. Properties

■ Low ■ Moderate ■ High ■ Very High ■ Extreme
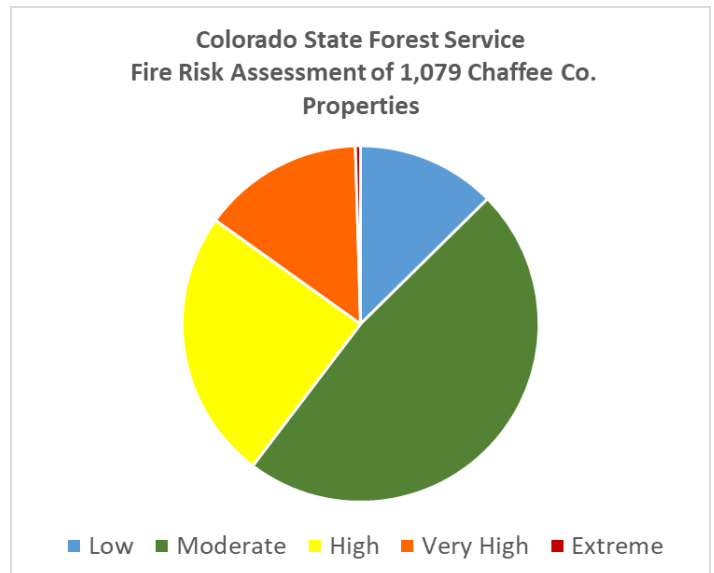
2 – Healthy Waters
Measure #2A: Arkansas River Water Quality – GRADE A
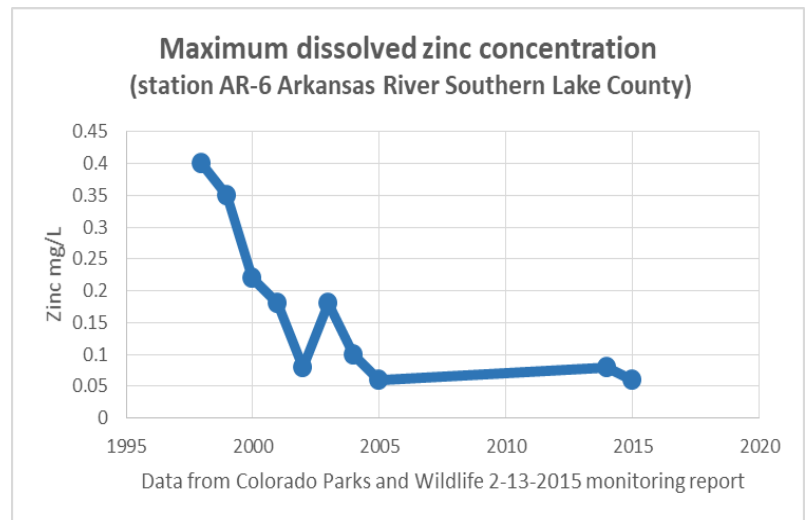
Water quality on the Arkansas River in Chaffee County is good and improving, according to studies by Colorado State University, the US Geological Survey, Colorado Parks and Wildlife (CPW) and others. According to CPW reports, historical mining activities (primarily in Lake County) resulted in heavy metal pollution of the Arkansas River. Large-scale remediation projects in the 1990's greatly reduced concentrations of dissolved metals of concern – such as cadmium and zinc (graph right).

The designation of 102 miles of the Arkansas River as *Gold Medal Water* in 2014 is a testament to the positive impact that improved water quality has had on aquatic life and fish populations. Water quality was assessed as "good" with total dissolved solids and toxic element concentrations below EPA drinking water standards, by a 2011 Colorado State University study measuring water quality at 19 river and tributary sites between 2009 and 2011.

Maximum dissolved zinc concentration
(station AR-6 Arkansas River Southern Lake County)

Data from Colorado Parks and Wildlife 2-13-2015 monitoring report

3 – Healthy Wildlife
Measure #3A: Deer and Elk Population – GRADE C-

Healthy wildlife was identified by Chaffee County citizens as a key asset. Wildlife also directly supports the economy through hunting and tourism revenues. In turn, hunting/fishing license and equipment fees support 78% of the Colorado Parks and Wildlife (CPW) budget. CPW's task of supporting local wildlife populations is currently challenged by decreasing budgets, including a state-wide budget reduction of $40 million and 50 positions in the past eight years. Local wildlife health, as measured by deer and elk population data, is graded a "C-" due to the rate of deer and elk population declines over the past 30 years.

Mule deer population **declined 33% in the past decade** and **58% over the past 32 years** (from an estimated 9,500 to 4,000 deer), according to data from CPW for the game unit most representative of Chaffee County (deer data analysis unit D15 shown below). CPW reports identify multiple reasons for the decline, including:
1) decreasing forest productivity; 2) increasing traffic interactions; and 3) "land conversion from agricultural status to subdivision for residential development" on private lands.

The Colorado Department of Transportation (CDOT) reports that 220 animals (of unknown types) were killed by vehicle collisions in 2016. USDA data indicate Chaffee County agricultural lands decreased 36% from 1982 and 2002, or by 39,000 acres – some of which now have decreased habitat value. According to CPW, the most limiting factor for deer population is availability of winter habitat; deer need to use agricultural lands in winter to survive and these lands comprise only 21% of the total range. According to CPW reports, "much of the important winter range for this deer herd has already been converted or is vulnerable to change in land use from agriculture to residential development." The CPW report goes on to note that "this herd may no longer have the habitat conditions necessary to reach population levels observed in the 1980s." Deer populations have experienced similar declines statewide.

Below: Graph of deer populations in game management unit DAU-D15 highlighted on the map (right)*
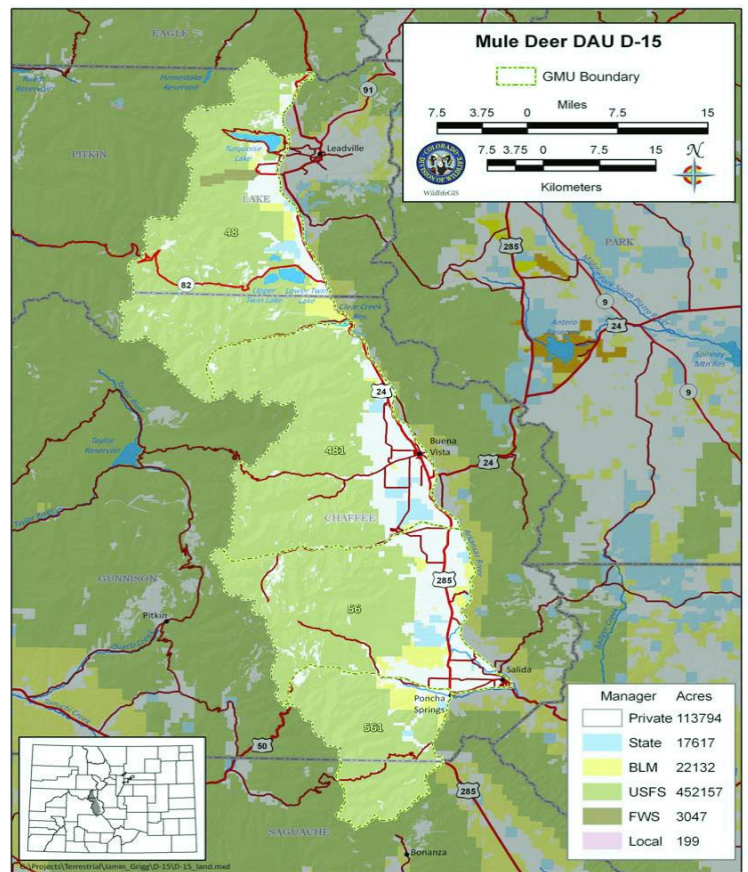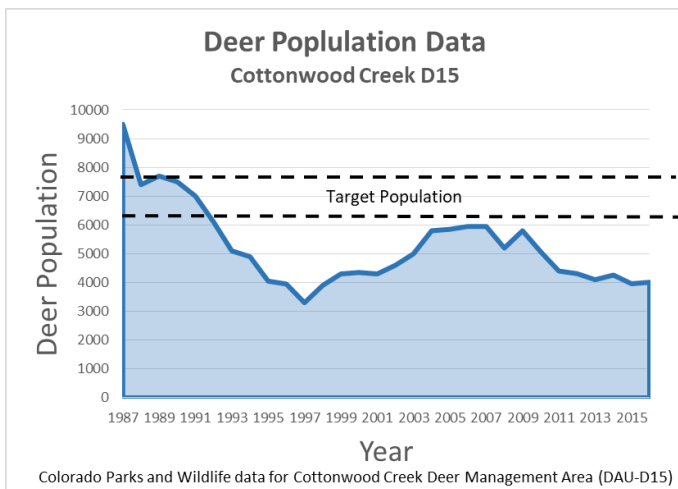
Elk population has declined 23% over the past 26 years, according to CPW data from the game unit most representative of Chaffee County (Elk Data Management Unit E17)*. The decline has leveled off since 2007, and for the last decade the elk population has been successfully managed at the low end of the target range to mitigate elk damage to agricultural lands.

In assessing herd management concerns, CPW's Collegiate Range Elk Management Plan (2005) states the following: "Large cow/calf groups congregate during winter at low elevations along the Arkansas River Valley Floor. There has been a significant loss of elk winter habitat on the valley floor due to changes in the land use. Most of the conversion from agricultural to residential use has occurred in winter and transitional ranges which are critical in determining the carrying capacity of this area."

Below: Graph showing elk population data and map (right) showing the data area and winter range.
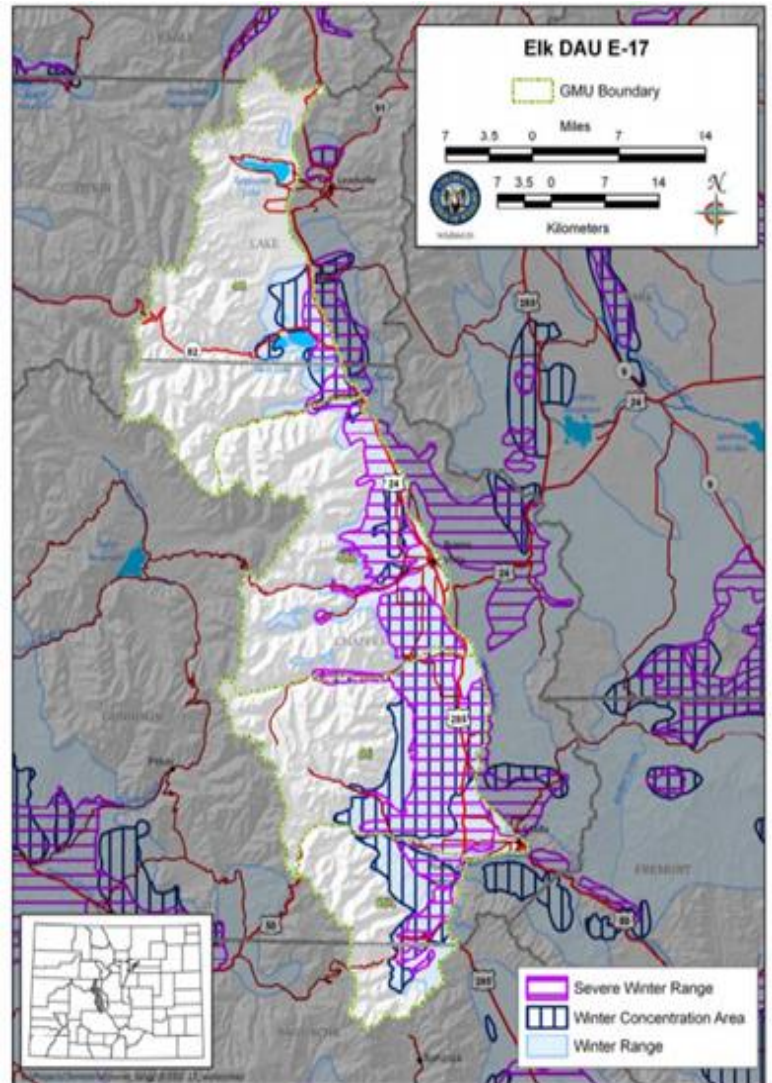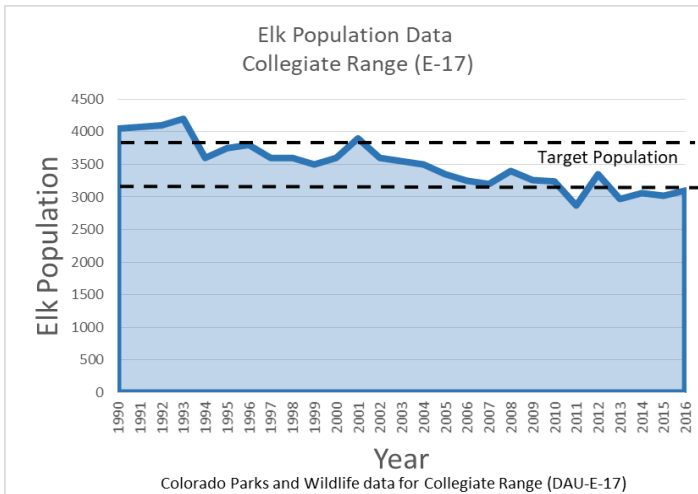
*Deer and Elk population data was sourced from CPW Deer and Elk Management plans and annual population data for the Cottonwood Creek/Collegiate area. This reporting area covers 981 square miles bounded on the north and west by the Continental Divide, on the east by the Arkansas River, and on the south by the divide between the Arkansas and Rio Grande river drainages. The area includes the western two-thirds of Lake and Chaffee counties.

4 – Balanced Recreation

Chaffee County includes 80% public lands which support not only forests, waters and wildlife as discussed above, but also opportunities for diverse, high-quality outdoor recreation – a commodity *Envision Chaffee Survey* results indicate is highly prized by citizens. In addition to the public lands, the Arkansas River is the most-rafted river in the US and a world-class fishery with 102 miles of *Gold Medal Water*. Outdoor recreation helps drive Chaffee County's economy, 33% of which is supported by tourism. Citizens expressed concern in the *Envision Chaffee Survey* about the potential impacts of increasing outdoor recreation on the quality of the experience and on the lands, waters and wildlife in Chaffee County.

Measure #4A: Economic Contribution and Use – GRADE A

Recreational use and its associated economic contribution is increasing rapidly in Chaffee County.
Gross receipts for activities in the Arkansas Headwaters Recreation Area (AHRA) increased 17% from 2007 to 2015. In 2016, 283,000 people participated in commercial rafting, generating $62M in economic impact. CPW data collected from angler surveys indicates **the number of anglers fishing the Arkansas River in Chaffee County increased 65% from 2007 to 2012** – with over 18,000 users recorded over six months on three river segments in Chaffee and adjacent Freemont counties (graph below). Some local guides feel that these numbers may underestimate the rate of user increase, given that "the river has gone from being a third-tier unknown fishery with water-quality issues in 1995, to one of the most popular fisheries in the state by 2007."
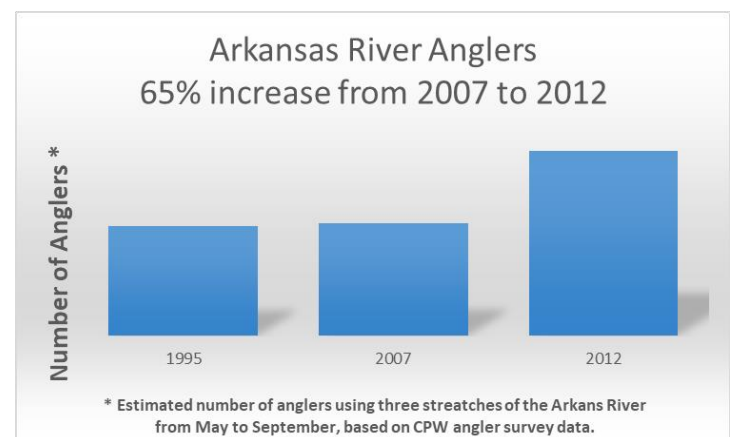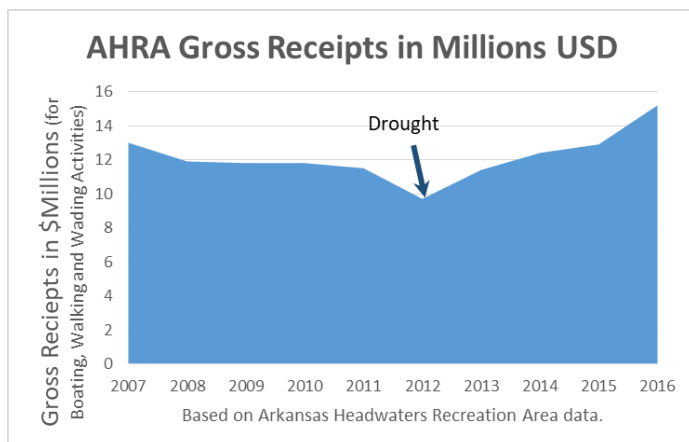
The number of hikers bagging Chaffee County fourteeners is now estimated at **75,000 to 110,000** per year and increasing, according to *Colorado Fourteeners Initiative* data. If each of these high-mountain hikers spends $100 in the County, $11 million per year gross revenue results. Raw data from *Initiative* counters on Mt. Huron and Mt. Shavano suggest a hiker increase of 9% between 2016 and 2017, and **single days when 230 people summited Mt. Huron and 160 summited Mt. Shavano.** Day hikers at lower elevations are more difficult to quantify, but are also significant users.

The number of campers using the Fourmile area over the Memorial Day weekend reached 524 in 2016, an 8% increase from the previous year, according to Greater Arkansas River Nature Association (GARNA) data.

Measure #4B: Impact of Increasing Recreational Use – GRADE D

As documented above, recreational use is increasing rapidly. Almost no data is collected on the potential impacts of the increasing use to forests, waters, wildlife and the recreational assets themselves. What data is available, combined with anecdotal information, suggest that substantial impact is occurring. Without monitoring, impacts could become significant without being addressed, therefore this measure is graded a D.

Only three sources of data relevant to impact could be found. First, the *Friends of Fourmile*, a chapter of GARNA, completed an annual Memorial Day survey of camping units in the Fourmile area (a 100,000-acre area of jointly managed BLM and USFS land). This survey indicates an 83% increase in camping units in the past nine years, with 534 camping units recorded over Memorial Day in 2017 (graph below).
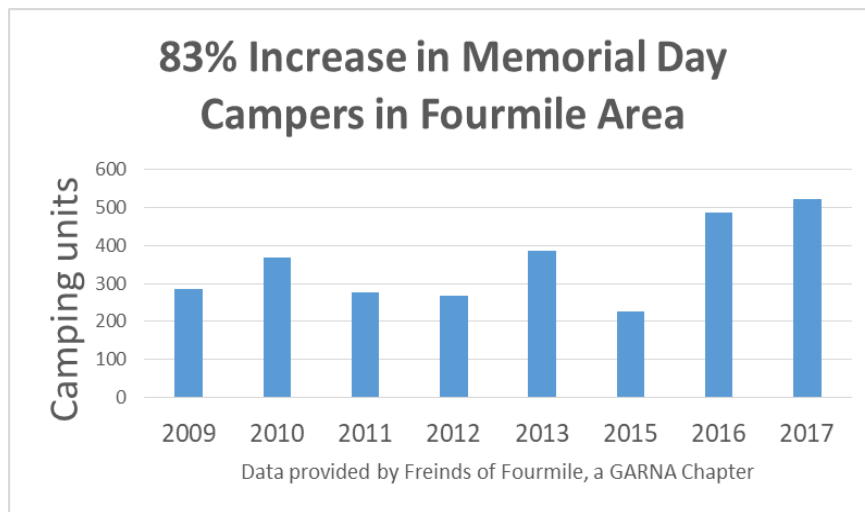
There are no data on the number of campers that carry their human waste out with them, but assuming the majority are toileting outside, **as many as 4,000 human waste deposits could be made in a single weekend**. The group also mapped the number of campsites in the area in 2004 and again in 2017. This data indicate an **80% increase in campsites since 2004**, including 74 new sites and 66 sites that have expanded in footprint by 2 to 5 times (graph below).
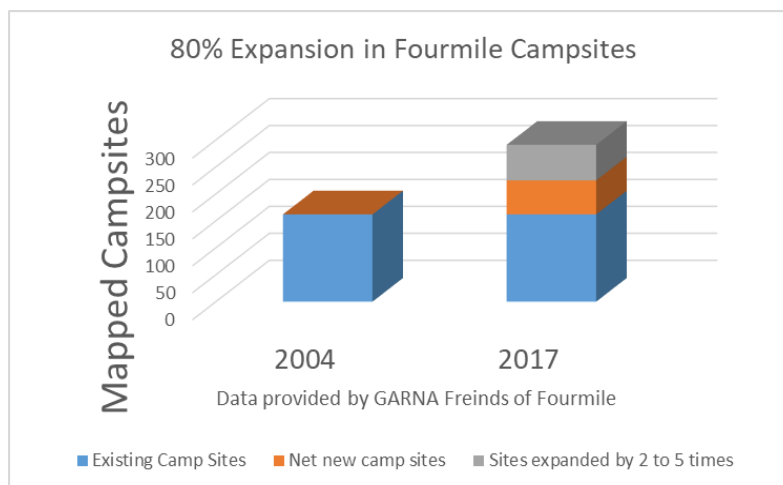
The second data set on impact we found is being collected by the *Colorado Fourteener Initiative*, which produced report cards for trail conditions and impact on two popular fourteeners in Lake County, Mt. Elbert and Mt. Massive (they have not yet mapped peaks in Chaffee County). The data (see below) were collected by GPS mapping and indicate typical impacts from increasing use, including trail braiding and erosion.

As a final measure, data provided by the USFS indicate that 53 abandoned (burning) campfires were logged in the Salida and Leadville Ranger Districts during the 2017 season. Abandoned campfires are a common cause of large regional wildfires.

Colorado Fourteener Initiative - Trail Condition Report Spring 2015	Elbert	Massive
Overall Grade	F	B-
Trail Erosion	F	C
Trail Braiding	F	C+
Trail Widening	F	C+
Existing Structures	F	A
Required Structures	F	B

Community members remain able to live locally and benefit from an increasingly diversified economy.

$$$

OVERALL GRADE

C

LIVABILITY

Housing Cost Burdened Population .... **C**
Housing cost burdened households (spending over 30% of income on housing) increased from 26% in 2007 to 30% in 2016, or 0.4 percent per year.

Housing Cost to Income Growth Ratio .... **F**
The ratio of median single family home price to median household income increased 37% between 2011 and 2016, or 6% a year.

ECONOMY

Economic Diversity .... **A**
Chaffee County experienced 17% job growth from 2010 to 2015, or 3.4% per year. Five of six top job sectors showed near double-digit growth.

Seasonal Employment .... **B**
Seasonal employment increased from 9% in 2007 to 13% in 2016

TRANSPORTATION

Public Transportation .... **B**
Public Transit use increased at 20-25% per year since 2010

How report card grades were determined: All measures were evaluated relative to the vision statement – not as a statement of overall value – as many of these metrics (like rising housing cost) can be beneficial for some citizens and detrimental to others. An "A" indicates a measure is improving relative to the vision; "B" indicates a decline of less than 1% per year; "C" denotes a decline of 1% to 1.5% per year; "D" indicates a decline of 1.5% to 5% per year; and "F" marks a decline greater than 5% per year.

Context

By far the top concern expressed by the 1,200 community members that participated in the *Envision Chaffee Survey* was affordability of housing relative to local wages. Citizens also prioritized traffic/congestion and a desire for an economy that is increasingly diversified to provide more full-time (versus seasonal) career opportunities. The Chaffee County Economic Development Corporation has made excellent progress improving economic diversity in the past decade. Housing affordability issues are also being addressed by local government and the Housing Policy Advisory Committee. Many of the issues and measures relative to this vision are covered in detail by the 2016 Chaffee County Housing Policy Assessment. **Therefore, this report provides only a brief summary and available additional/new data, so as not to duplicate efforts** – this is not intended to imply these issues are less important than others covered in this report.

The overall grade on this vision is a "C" driven by low grades on "livability" driven by a widening gap between housing costs and income/wages. Economic growth and diversity are strengths. Very limited data was discovered relative to traffic and congestion, although available data on public transit is positive.

1 – Livability

According to the 2016 Chaffee County Housing Needs Assessment, the County is evolving in the same way as many other Colorado mountain communities. There are many positive economic changes happening. However, these positive changes also tend to increase housing costs. Chaffee County – a previously "under the radar" gem – is becoming well-known in Colorado and nationally. This is very positive for local business growth prospects. This appeal is also attracting retirees (who generate over a quarter of local jobs), second home buyers and others whose incomes are not tied to the local economy. These more affluent buyers can pay more for housing and, in combination with a currently low housing stock, contribute to rising home prices.

Measure #1A: Housing Cost Burdened Population – GRADE C

Thirty percent of households in Chaffee County (about 2,400) are cost burdened, spending more than 30% of gross income on housing, according to the 2016 Chaffee County Housing Needs Assessment. Most of these households earn less than 60% of annual mean income ($29,000 per year).

	2007	2016
Percentage Housing Cost Burdened*	26%	30%
* More than 30% of income spent on housing.		

The percentage has increased 15% since 2007, from 26% to 30%. Based on the change of 1.5% per year, this metric is graded as a "C."

# Measure #1B: Housing Cost to Income Growth Ration – GRADE F

The median sale price of single family homes in Chaffee County increased 65% from 2011 to 2017 (from roughly $210,000 to $345,000), according to Colorado Association of Realtors data. Gross rental prices increased at a similar pace of about 8% per year (table right).

Gross rent per month	
2007-2012	2012-2016
$878	$1,235

In the same time frame, median household income increased only 13%, from $44,156 to $49,877 and the average weekly wage increased 17% from $568 to $662, according to data from the Colorado State Demographer.

As a single measure of separation between housing cost and income/wages, we are using the **ratio of median single family home price to median household income**. **This metric has increased 37% between 2011 and 2016 – or 6% a year** (table and graph below). A sharp decoupling of housing price and income in the past two years is illustrated in the graph below, charting the growth of housing price, income and wages. We also looked at the ratio of median single family home prices to average wages (recognizing that comparing median and average data is for comparative purposes only). This ratio shows a similar result, increasing 33%, or 5% a year, over six years.

Ratio of Single Family Home Price to Income and Wages			
	2011	**2016**	**Percent Change**
Ratio Single Family Home Price to Median Household Income	4.8	6.5	37%
Ratio Single Family Home Price to Average Weekly Wage	370	491	33%

Relative increase in home prices versus income and wages
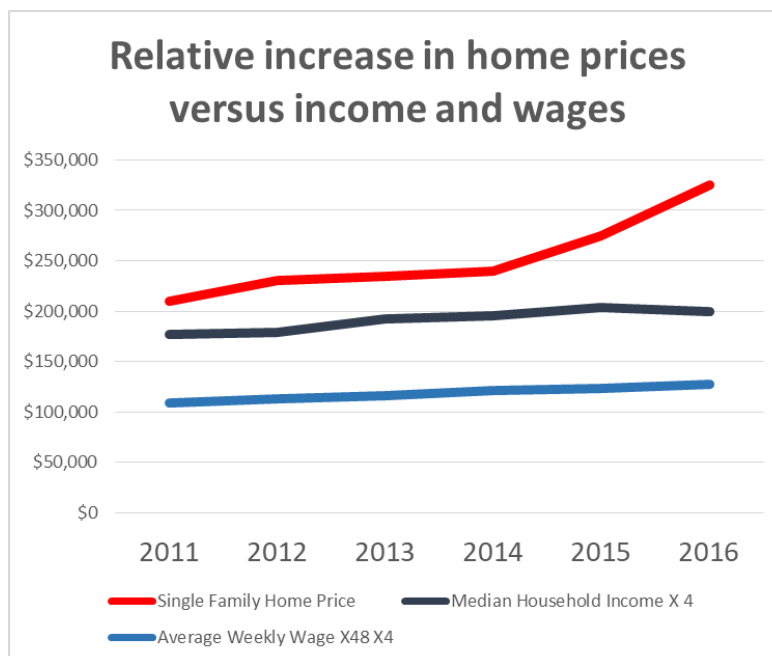
2 – Economy

Collaborative citizen-led efforts to revitalize historic downtown districts, develop recreational access, improve education, and advance health care have helped create a strong and resilient Chaffee County economy. The Colorado Office of Economic Development and International Trade recently studied the city of Salida as *a model of economic resilience.* Resilience is tied to natural resources and community. The State Demographer indicates that over 60% of local jobs are driven by tourism (36%) and retirees (25%) – both attracted to the county by a quality of life including outdoor recreation, scenic views and community. The next biggest job contributor is "regional services" including health care, education and transportation.

The predominance of tourism-related jobs creates a challenge where the largest occupations in Chaffee County are also relatively low-paying (see graph below based on data from the Colorado Office of Economic Development and International Trade).
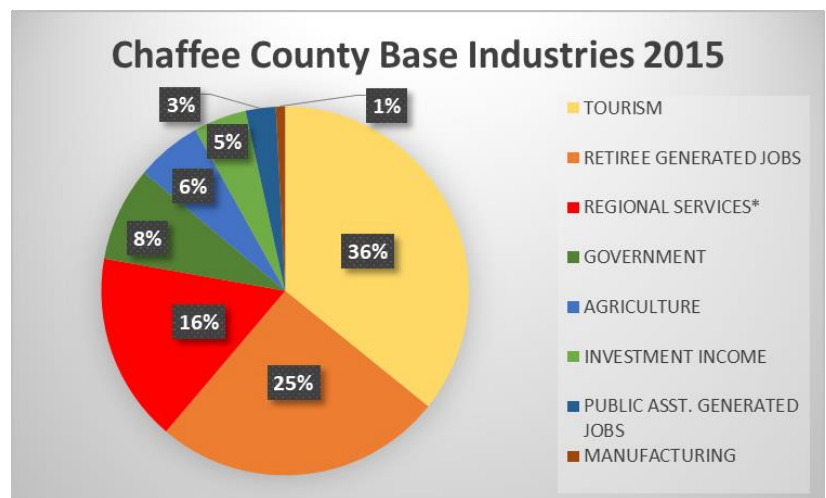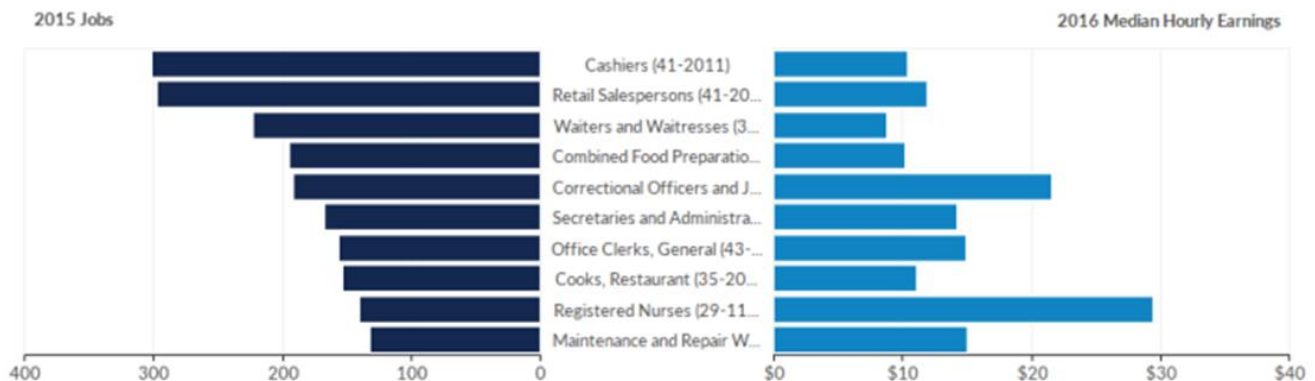
Measure #2A: Economic Diversity – GRADE A

Maintaining a diverse mix of base industries contributes to economic prosperity, median wage growth and resilience. Envision survey respondents indicated they would like to see the economy continuing to diversify, with a concern abou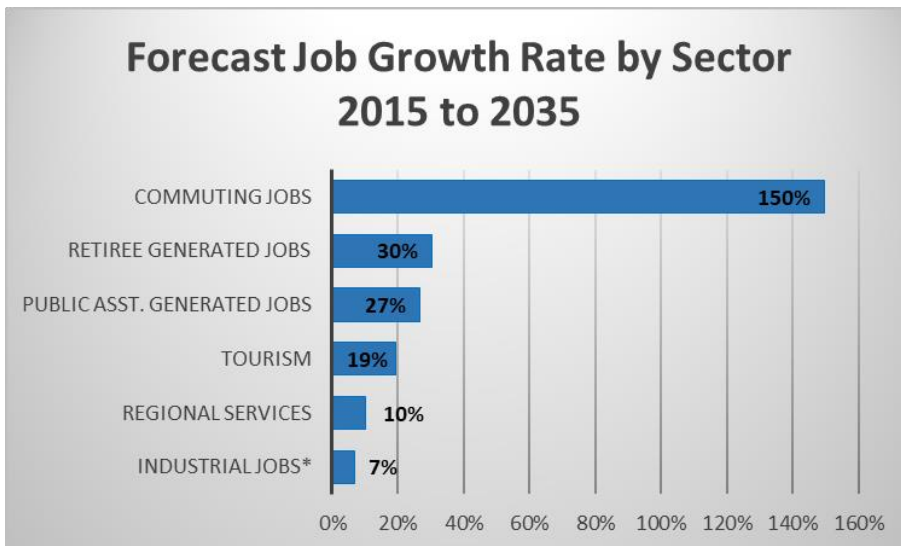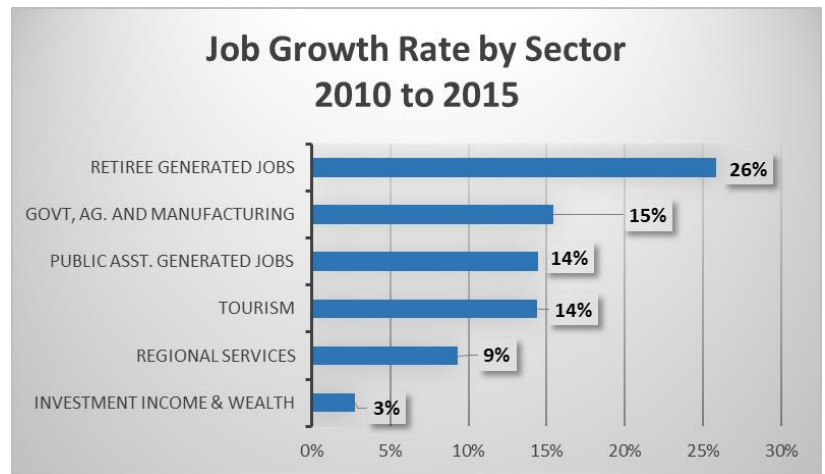t a future focus on tourism-related jobs, which tend to be lower paying and more susceptible to recession. We are using the rate of job growth by sector as the best measure.

According to information provided by the State Demographer, Chaffee County experienced 17% job growth from 2010 to 2015, or more than 3% per year. **Job growth rate by sector was very diverse, with double digit growth in almost all categories** (graph right).

The biggest increase was in retiree generated jobs, followed by "industrial" jobs involving government, agriculture and manufacturing. Regional services, which include health care, education and transportation also experienced nearly double-digit growth, adding many higher paying jobs.

Job Growth Rate by Sector 2010 to 2015

Sector	Growth
RETIREE GENERATED JOBS	26%
GOVT, AG. AND MANUFACTURING	15%
PUBLIC ASST. GENERATED JOBS	14%
TOURISM	14%
REGIONAL SERVICES	9%
INVESTMENT INCOME & WEALTH	3%

Forecast Job Growth Rate by Sector 2015 to 2035

Sector	Growth
COMMUTING JOBS	150%
RETIREE GENERATED JOBS	30%
PUBLIC ASST. GENERATED JOBS	27%
TOURISM	19%
REGIONAL SERVICES	10%
INDUSTRIAL JOBS*	7%

Looking to the future, the State Demographer also provides a forecast of future job growth (graph left). The forecasts indicate potential for rapid growth in jobs that are "location-neutral," where people live in Chaffee County and "commute" digitally to jobs that are located elsewhere. It also shows continued rapid growth in retiree generated jobs. However, industrial jobs (manufacturing, agriculture, government) are forecast for slower potential growth.

Measure #2B: Seasonal Employment – GRADE B

Chaffee County citizens indicated a desire for more year-around and "career" job opportunities, versus seasonal employment. The percentage of seasonal jobs was measured using quarterly employment data and comparing the quarter with the highest employment (July-Sept) with the quarter with lowest employment (Jan-Mar). "Seasonal" jobs increased from 9% of the total market in 2007 to 13% in 2016, or roughly 0.5% per year.
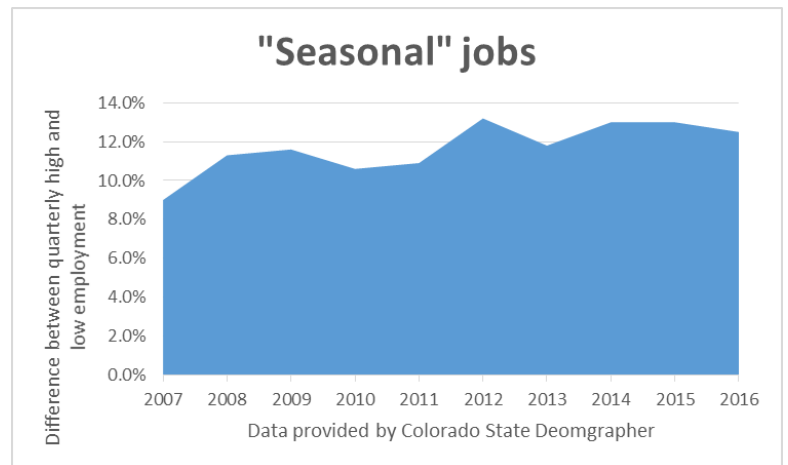
3 – Transportation
Measure #3A: Public Transportation – GRADE B

Transportation needs are rapidly increasing. Information from the Colorado Department of Transportation, indicates that average daily traffic counts for the intersection of state highways 285 and 24 at Johnson Village have increased 40% since 2012 (graph right). Transportation impacts community mobility, job creation, safety, security, economic opportunity and environmental quality. The Chaffee County Transportation Plan is 18 years old, while transportation infrastructure is one of the most expensive and longest time-line areas to plan for. Transportation in Chaffee County includes highways, airports, trails, the river corridor and telecommunications infrastructure that are used by freight vehicles, buses, cars, bikes and pedestrians.
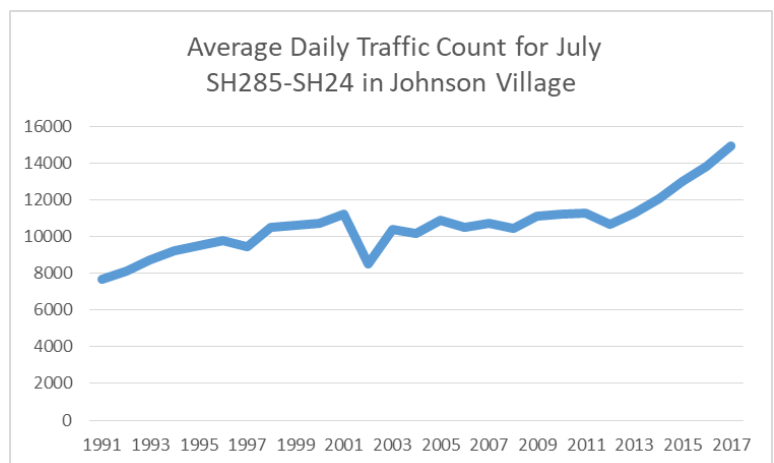
Transportation data was provided by the Chaffee County Transportation Advisory Board (TAB) who noted "very little transportation data is available." Available measures indicate the use of public transit is rapidly increasing (an "A") – although the TAB notes this could change rapidly without proper planning. However, we have not yet sourced data relevant to the issues expressed by *Envision Chaffee Survey* respondents – traffic, congestion and parking – making evaluation of this area incomplete.

Transportation also connects to housing, business and recreational access. Based on what data is available, public transit use has increased by 21% to 25% per year, a much faster pace than county population growth at 1% to 2% per year.

The Chaffee Shuttle, a local non-profit organization providing demand-response transportation for citizens across Chaffee County, has seen 400% growth in ridership since it began service in 2003. In 2017, the service provided 15,000 rides across the County (graph right). Riders are diverse; they include the elderly but over half of users are under 60.

Chaffee County Shuttle Ridership

Data from Connie Cole at Chaffee Shuttle
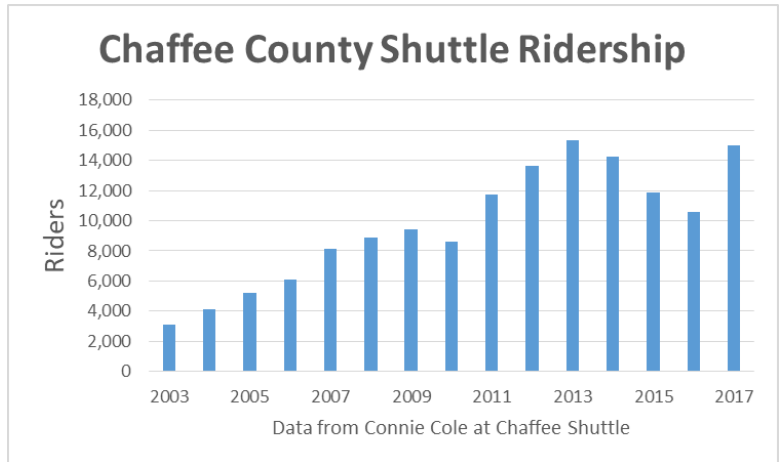
The Colorado Department of Transportation initiated intercity bus routes in 2010 to connect passengers to locations around the state and a daily service to the Denver International Airport. This service has also experienced strong and steady growth (graph below). A recent survey conducted through the Region 13 Tourism and Outdoor Recreation Sector Partnership found that 59% of Chaffee County visitors would consider visiting more often if there were expanded public transportation options and that 80% of residents would consider using a public transportation system to access activities or work.

Ridership Intercity Bus

Data from Connie Cole at Chaffee Shuttle
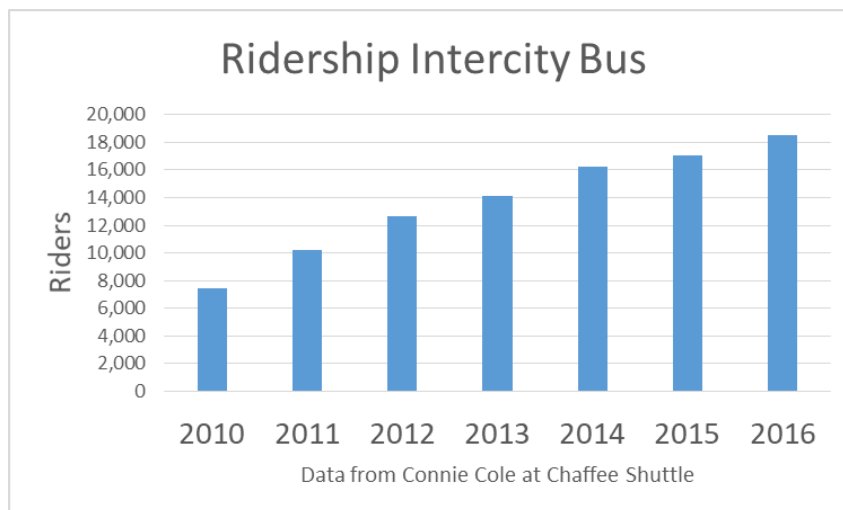
COMMUNITY VISION 3

Chaffee County is a friendly, supportive community where participation is encouraged and shared cultural elements connect us.

OVERALL GRADE

B

COMMUNITY LIVES LOCALLY

Second Homes.. **B**
Second home ownership increased from 6% in 2000 to 7% in 2014.

VRBO Growth .... **F**
Vacation Rental by Owner (VRBOs) increased 530% from 2014 to 2016.

Commuters.. **B**
Commuters increased from 11% to 35% from 2000 to 2014.

Average Age .... **C**
Median Chaffee County age is 48, versus 37 for Colorado.

LOCAL BUSINESS HEALTH

Chamber Member Growth .... **B**
Membership grew 15% percent between 2012 and 2017.
Over 85% of current business members are local.

CRIME RATE

Offenses .... **?**

VOLUNTEERISM

Non Profits and Volunteers .... **A**
Non-profit membership in Chambers stable from 2007 to 2012.
USFS and CPW volunteer hours stable.

How report card grades were determined: All measures were evaluated relative to the vision statement – not as a statement of overall value – as many of these metrics (like rising housing cost) can be beneficial for some citizens and detrimental to others. An "A" indicates a measure is improving relative to the vision; "B" indicates a decline of less than 1% per year; "C" denotes a decline of 1% to 1.5% per year; "D" indicates a decline of 1.5% to 5% per year; and "F" marks a decline greater than 5% per year.

Context

The 1,200 community members that participated in the *Envision Chaffee Survey* indicated that one of the things they value most about Chaffee County is the sense of community. Some defined this as "friendly" and a place where people care about and help one another. Others cited the importance of community participation in the diverse local non-profit organizations and as volunteers. Many noted the importance of having a community where people that work here also live here, and the majority of people with residences here spend time in the community. Still others noted low crime rates, traffic/ transportation, community heritage and quality schools as important indicators.

This is the most difficult of the vision statements to measure. Community working groups indicated the best measure for this area would be a community satisfaction survey. Unfortunately, this type of survey data is not currently available for Chaffee County. Data is also difficult to obtain in other cultural areas. However, we did find information about community members living locally, local business growth, crime rates, and non-profit organization growth. Based on these data, our current status is graded "B."

1 – Community Lives Locally

Many *Envision Chaffee Survey* respondents indicated that a community that lives locally is a critical element in sustaining our friendly community feel. We have attempted to measure this by looking at second home ownership, vacation rental by owner (VRBO), commuters and demographic shifts. The reader is also referred to the 2016 Chaffee County Housing Needs Assessment for additional discussion on these topics.

Measure #1A: Second Homes – GRADE B

Second home ownership in Chaffee County increased from 5.6% in 2000 to 7% in 2014, according to the 2016 Chaffee County Housing Needs Assessment Study (graph below). The change represents a 25% increase from a relatively low base.

Second Home Growth — Percentage of all Homes: 2000, 2010, 2014. Data from Chaffee County Housing Needs Assessment, 2016
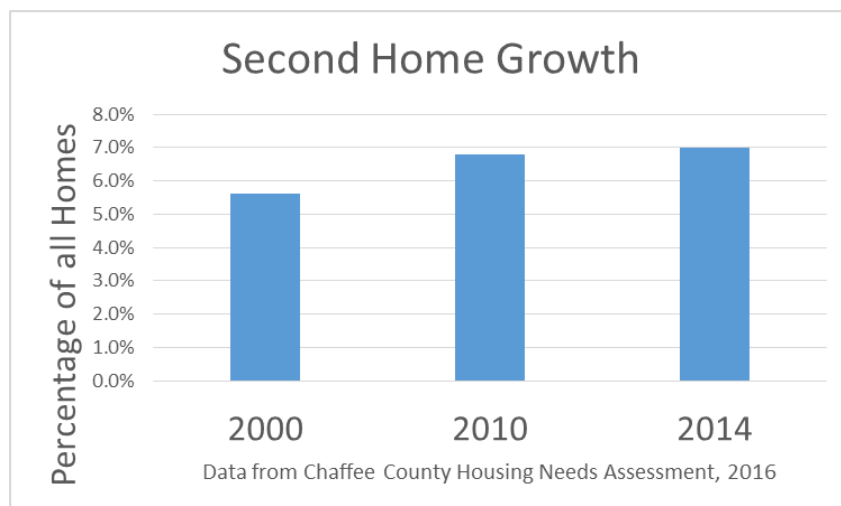
Measure #1B: VRBO Growth – GRADE F

The number of vacation rental by owner (VRBO) units in Chaffee County increased 103% from January 2015 to January 2018, from 151 to 307, according to information provided by the Chaffee County Assessor's Office (graph right). An increase occurred in all tax districts. The VRBO market can bring benefits to the larger economy through increased utilization of otherwise empty second homes. However, this sharp increase may also impact overall housing cost and the percentage of homes that are occupied by residents.
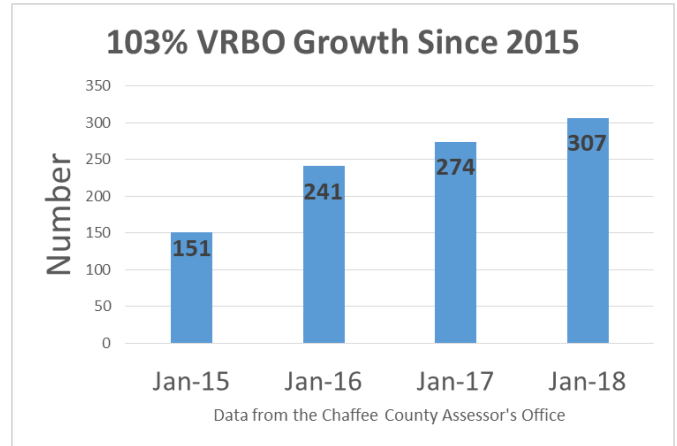
Measure #1C: Commuters – GRADE B

The percentage of people who both live and work in Chaffee County decreased from 89% in 2000 to 65% in 2014. However, 90% of this change is driven by an increase in people who work in Front Range counties (like Denver, El Paso and Douglas) as well as out of state, but live in Chaffee County. These workers are considering Chaffee County their residence (perhaps due to quality of life or lower relative housing costs), but commuting by car or by technology to jobs in relatively distant areas. The remainder of the change is due to an increase in the percentage of people commuting from immediately adjacent counties, which changed from 9% to 11% from 2000 to 2014. This population may be commuting further for a variety of reasons, including housing availability. This data deserves more attention to fully understand the trends. This measure was intended to indicate if people are being forced out of the community due to increasing housing costs and is rated a "B" due to the small increase in people commuting to adjacent counties.
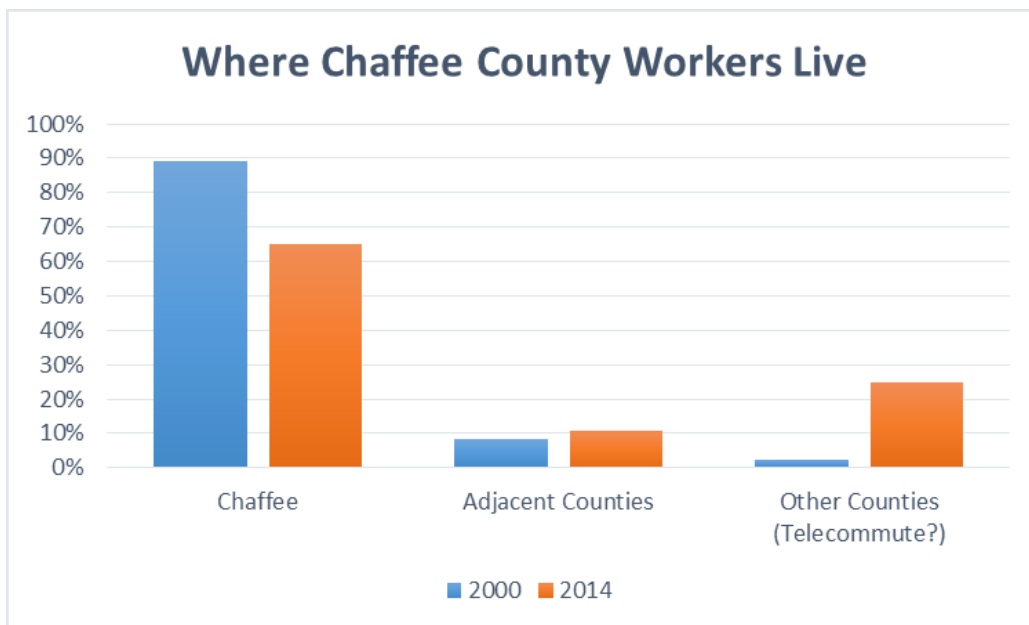
Measure #1D: Average Age – GRADE C

According to data from the State Demographer, Chaffee County was successfully attracting and retaining baby boomers between 2000 and 2014. This is important since, in 2015, 27% of the county's economy was driven by retirees. However, **attracting and retaining younger people (especially the 20-44 age range) has been less successful, and this population decreased 21% between 2000 and 2014.**

As a result, combined with the aging of the baby boomer generation, the median age of Chaffee county residents increased from 38 to 48 years from 1990 to 2014. This compares to a Colorado average age of 37. Looking

Chaffee County Age Distribution

Data from Chaffee County Housing Needs Assessment, 2016

forward, the State Demographer indicates Chaffee County population will grow 31% by 2030. The fastest growing segments of our population are forecast to be: 1) 70 to 79 year olds as baby boomers age; and 2) 20 to 50 year olds attracted to a growing labor market. The community and the economy will benefit if diverse age ranges can be attracted and retained, according to the State Demographer.
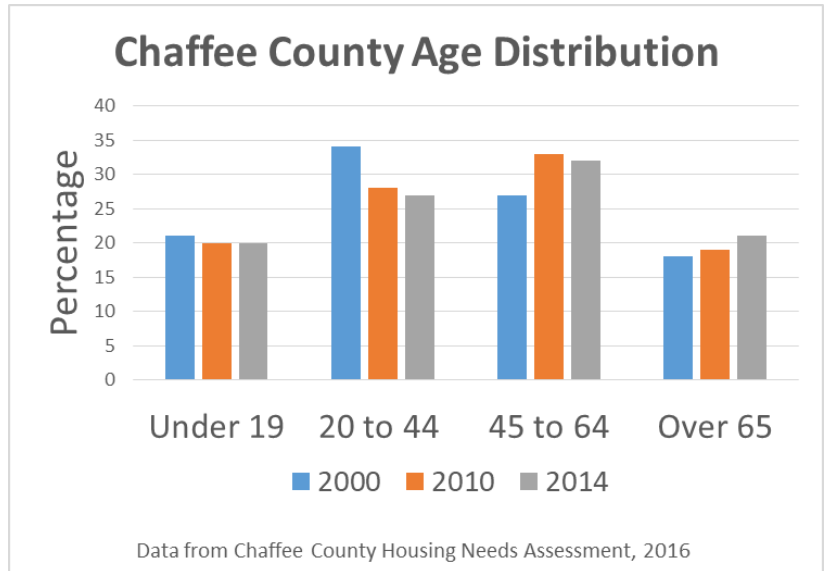
2 – Local Business Health
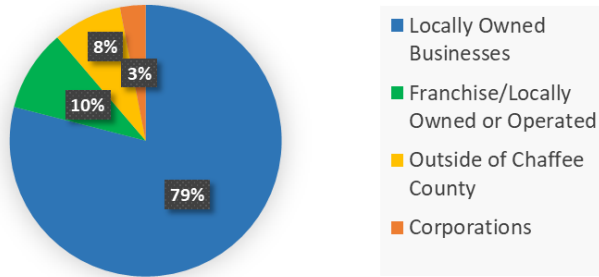## Measure #2A: Chamber Member Growth – GRADE B

We did not find trend data documenting the number of locally-owned businesses over time. Therefore, membership data from the Buena Vista and Salida Chambers of Commerce were used as a rough proxy. We recognize this is not a perfect approach.

Data provided by the Salida and Buena Vista Chambers of Commerce indicate that membership in both organizations grew roughly 15% percent between 2012 and 2017 – or a brisk 2.5% per year. In both organizations, 85-89% of current business members are locally owned, including franchises with local ownership (graphs on next page).

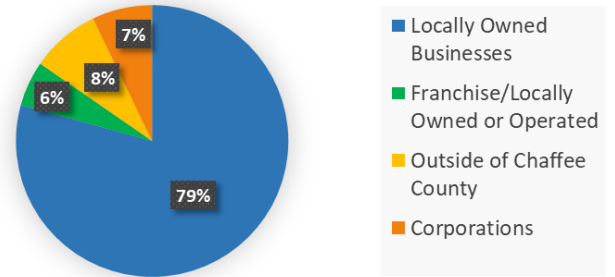Looking at the growth in business membership from 2012 to 2017, locally owned businesses and franchise membership comprised 36% of growth in Salida and 7% of growth in Buena Vista – suggesting local business is healthy and growing in numbers (graphs below). However, 56% to 93% of business member growth in Salida and Buena Vista, respectively, was from businesses based outside of Chaffee County and from national corporate businesses.
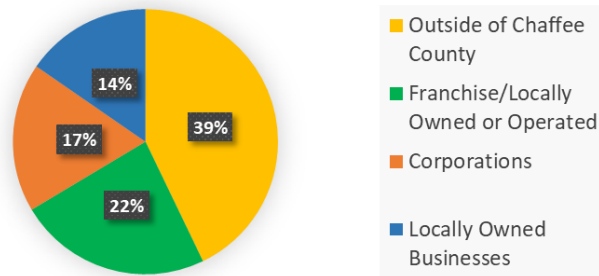
Salida Chamber Business Members 2017

- Locally Owned Businesses — 79%
- Franchise/Locally Owned or Operated — 10%
- Outside of Chaffee County — 8%
- Corporations — 3%

Buena Vista Chamber Business Members 2017

- Locally Owned Businesses — 79%
- Franchise/Locally Owned or Operated — 6%
- Outside of Chaffee County — 8%
- Corporations — 7%

Growth Rate of Salida Chamber Business Members 2012 to 2017

- Outside of Chaffee County — 39%
- Franchise/Locally Owned or Operated — 22%
- Corporations — 17%
- Locally Owned Businesses — 14%

Growth Rate of Buena Vista Business Members from 2012 to 2017

- Outside of Chaffee County — 70%
- Franchise/Locally Owned or Operated
- Corporations — 23%
- Locally Owned Businesses — 7%
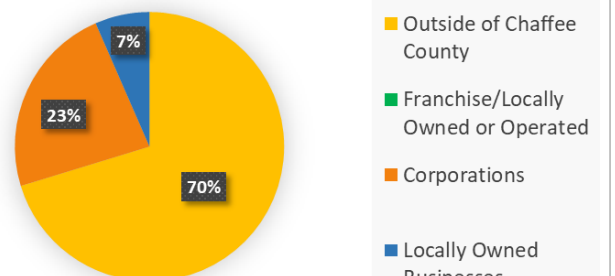
# 3 – Crime Rate
Measure #3A: Offenses – GRADE Pending

The community indicated that a measure of crime rate is another important metric. Envision volunteers have gathered this information and are currently working with local law enforcement agencies to ensure full understanding of this topic. This information will be made available to the appropriate Envision Chaffee County Action Team in January.

4 – Volunteerism
Measure #4A: Non Profits and Volunteers – GRADE A

Volunteer Hours - USFS and CPW

Data provided by USFS, CPW and GARNA
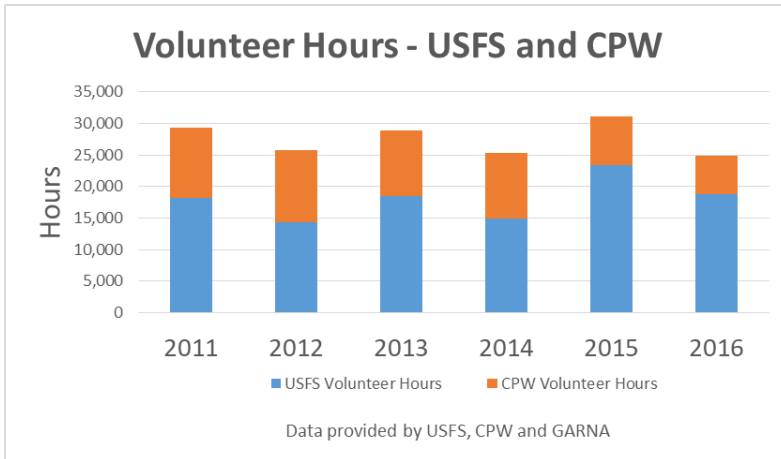
Available data and anecdotal information suggest volunteerism is a community strength. Data is available from the USFS, CPW and GARNA about the number of volunteer hours donated to support public lands and wildlife (graph left). This data shows a steady rate of volunteer hours, from 25,000 to 30,000 per year from 2011 to the present. This is about 16 man years donated per annum.

A collation of all non-profit organizations in Chaffee County and information about their membership and growth rates is not available at this time. However, information from the Buena Vista and Salida Chambers of Commerce about their non-profit members shows a steady number from 2012 to 2017.

Non-Profit Organization Membership	2012	2017
Buena Vista Chamber	71	67
Salida Chamber	36	41
Total	107	108

Chaffee county has a sustainable agricultural community, open rural landscapes and growth concentrated in and around towns.

OVERALL GRADE

C

SUSTAINABLE AGRICULTURAL COMMUNITY

Acres in Agriculture .... **C**
Land in agricultural production has decreased 30% since 1982.

Acres in Conservation Easement .... **B**
Land in easement increased 43% in the past 10 years.

RURAL LANDSCAPES AND GROWTH CONCENTRATED IN AND AROUND TOWNS

Population in Towns vs. County .... **D?***
Half of population growth since 2010 in the county versus towns.

Development in Towns vs. County .... **D?***
62% of single family dwelling units in county over the past 10 years.

Number of Rural Open Space Incentive Developments .... **D**
The number of ROSI developments declined from 21 between 2002 and 2008 to only 1 in the subsequent years.

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* These two measures have remained steady over the past 10 years, they are graded as a "D" because 30-40% of new growth has occurred outside a 3 mile buffer zones around the city limits

How report card grades were determined: <u>All measures were evaluated relative to the vision statement – not as a statement of overall value – as many of these metrics (like rising housing cost) can be beneficial for some citizens and detrimental to others</u>. An "A" indicates a measure is improving relative to the vision; "B" indicates a decline of less than 1% per year; "C" denotes a decline of 1% to 1.5% per year; "D" indicates a decline of 1.5% to 5% per year; and "F" marks a decline greater than 5% per year.

Context

An estimated 60% of Chaffee County's private lands are classified as *working agriculture* (according to USDA data). Based on the *Envision Chaffee Survey*, **97% of citizens said working lands contribute to Chaffee County's quality of life**. According to survey respondents, these lands (in order of importance):

1. Provide open space and views
2. Are part of our community and culture
3. Keep water rights local
4. Provide wildlife habitat
5. Provide local foods and
6. Contribute to jobs and our economy

Overall, this vision is graded as a "C." In Chaffee County, and across the West, the sustainability of local agriculture is under pressure and the acres of working lands are declining. More than half of population growth and building permits in the past decade have been focused in the unincorporated county versus in towns. In a recent Envision listening session, local ranchers identified multiple challenges to keeping their lands in production, including: conflicts with growing population; restrictions limiting ability to develop new revenue streams; water rights protections; and workforce limitations.

1 – Sustainable Agricultural Community
## Measure #1A: Acres in Agriculture – GRADE C

County-level USDA National Agriculture Statistics Service Survey Data indicate the acres of land in agricultural production in Chaffee County have decreased 30% since 1982 (graph below). This represents 33,000 acres or 26% of all private lands. The slight increase in acreage from 2002 to 2007 is due to USDA focus at that time toward adding small farms (any property with up to four horses or generating $1,000/year in agricultural income) into the survey data, according to Bill Meyer, Regional Director USDA.
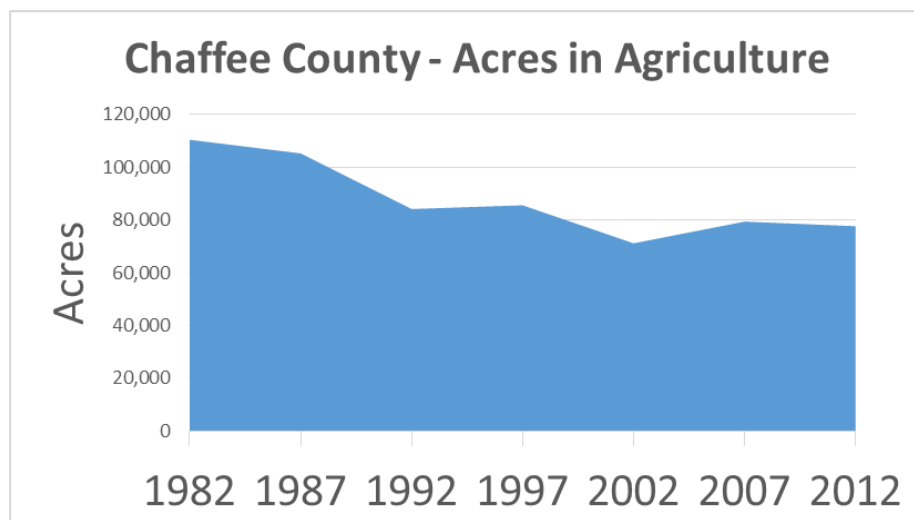
Measure #1B: Acres in Conservation Easement – GRADE B

A total of 5,829 acres in Chaffee County are currently in conservation easement. This number has been growing steadily, with a 43% increase in the last 10 years (graph below). The acreage represents 5% of all Chaffee County private lands, and 8% of working agricultural lands as defined by the USDA data. As a comparison, Gunnison County has easements covering 19% of all private lands, and 34% of working lands.
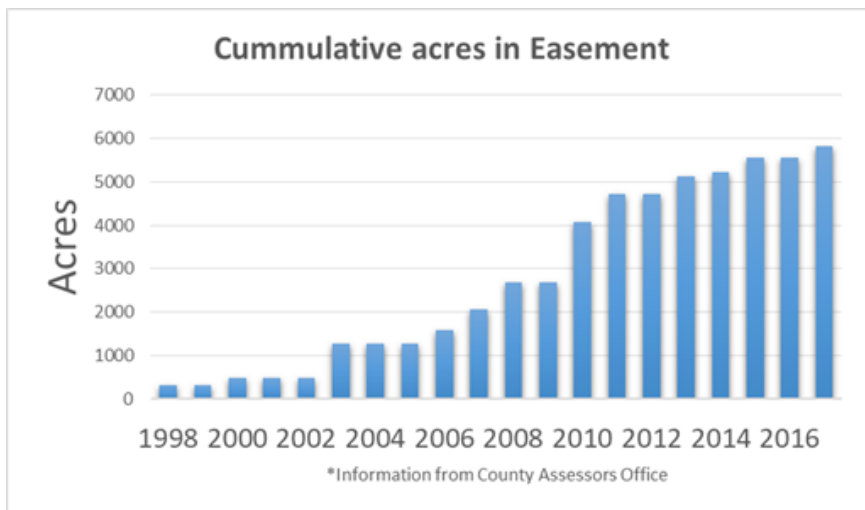
Conservation easements are one tool used to protect land and water for future generations while allowing owners to retain many private property rights, including living on and using their land, and selling or passing it on to heirs. An easement is a voluntary legal agreement between a landowner and a land trust permanently limiting some uses of the land in order to protect agreed conservation values, while providing land owners with tax benefits. An easement selectively targets only those rights necessary to protect specific conservation values, such as water quality or migration routes, and it is individually tailored to meet a landowner's needs. Because the land remains in private ownership, with the remainder of the rights intact, an easement property continues to provide economic benefits for the area in the form of jobs, economic activity, property taxes, as well as to preserve scenic views and wildlife.

## 2 – Rural Landscapes and Development Focused In and Around Towns
Measure #2A: Population and Development in Towns vs. County – Grade D?

This measure includes three components. The Community Vision states a desire for "development focused in and around towns." The best measure of this is Chaffee County Assessor's Office data showing acres subdivided within and beyond a 3 mile radius around current town limits. As a second measure, census data showing population growth in towns versus the unincorporated county is considered. Finally, data on building permits granted in towns versus in the county are given. It is noted that the two later measures could be misleading as growth in contiguous residential communities extending beyond city limits is counted negatively (included in the county numbers).

Taken together, the metrics indicate that at least 30% to 44% of development is occurring in areas well outside of buffer zones extending 3 miles beyond towns, therefore the grade is a "D" but with a "?" because it is not clear at this time what a target percentage may be.

Acres Subdivided – One hundred and sixty subdivisions have been created in Chaffee County since 1999, involving 9,570 acres (8% of all private lands). Of the acres divided, 30% are outside of a 3 mile buffer around towns, 14% is the Welden Creek division on the edge of the Poncha buffer zone, and the remaining 56% was inside the 3 mile buffer zone (graph below). With 30 to 44% of acers developed outside of the 3 mile limits, this metric suggests a "D" score.

Acres Subdivided Since 1999

- Inside 3 mile buffer around towns — 56%
- Outside 3 mile buffer arouond towns — 30%
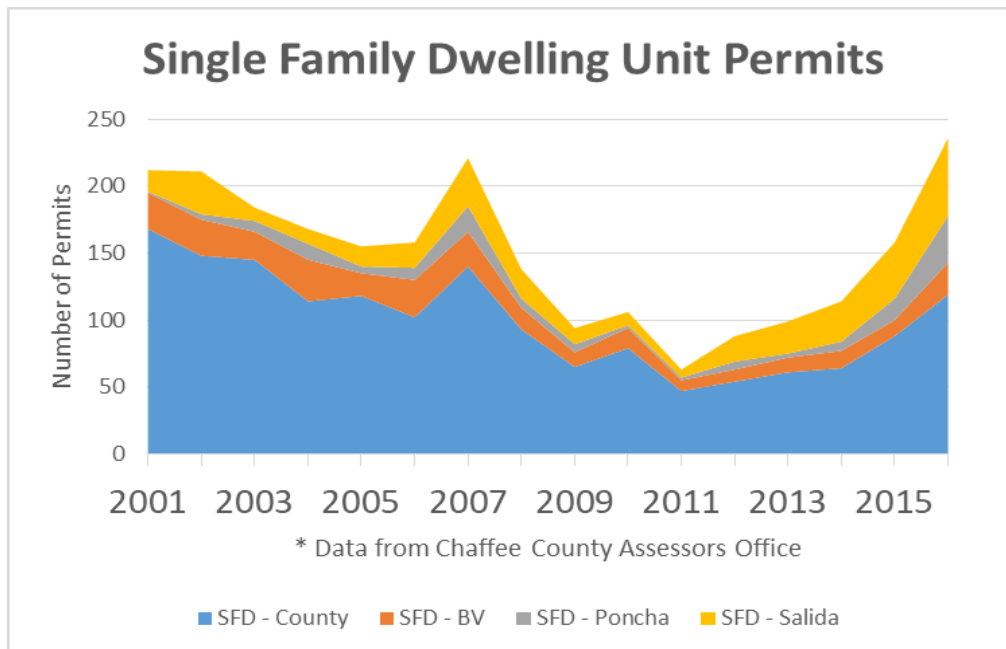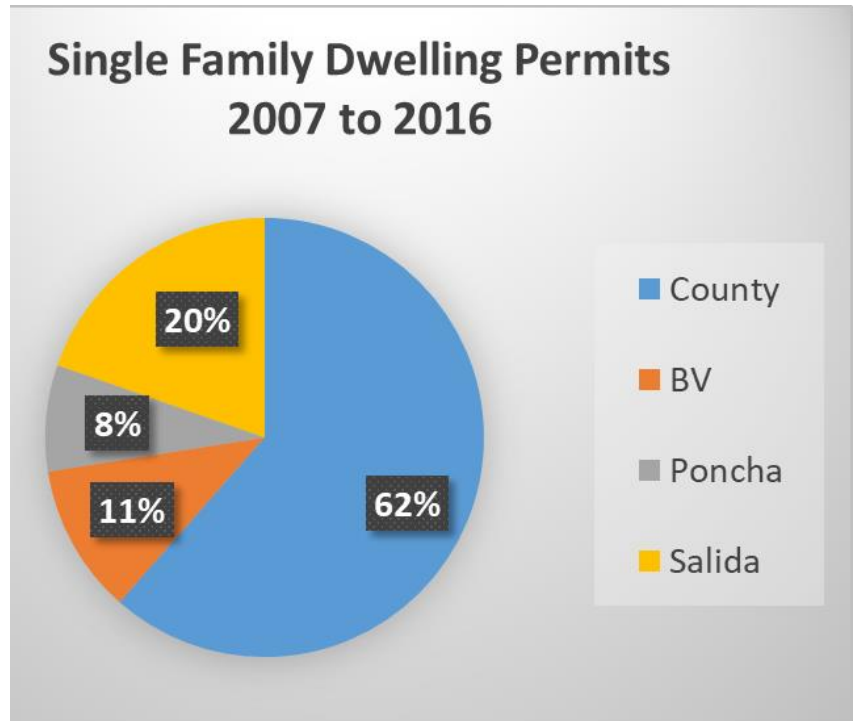- Weldon Creek (on Poncha Buffer) — 14%
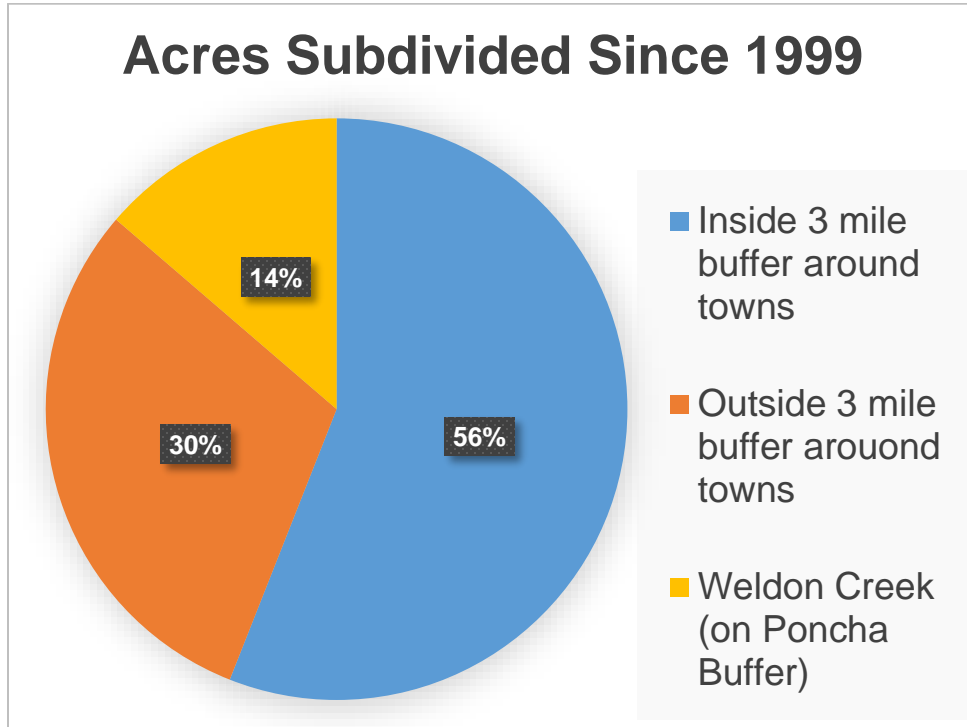
Population Growth – Currently, 51% of the population lives in the unincorporated county (graph right). Chaffee County population grew 7%, or 1,300 people, from 2010 to 2016. The majority of new population growth (47%) occurred in the unincorporated county, according to the State Demographer. Note that, in this data, the "unincorporated county" includes growth zones immediately adjacent to city limits.

Population distribution 2016

- Buena Vista — 15%
- Poncha Springs — 4%
- Salida — 30%
- Unincorp. Area — 51%
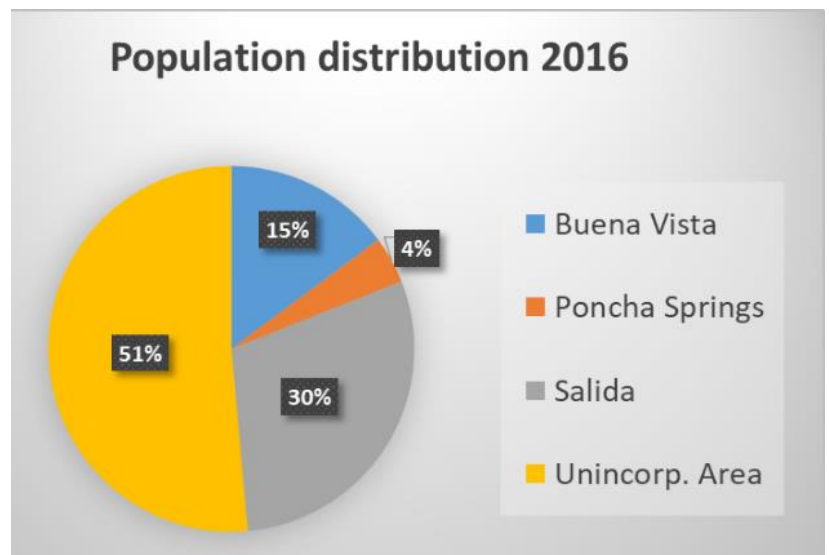
Building Permits – In 2016, more building permits and permits for new single family dwellings (236) were issued than any other year in Chaffee County history, according to information from the Assessor's Office. The graph below shows that permits for single family dwellings decreased greatly during the recession and have now fully recovered, with an increase of 270% since 2011.

Over the past 10 years, the majority of growth in single family dwelling units has been in the unincorporated county (62%). The majority of new commercial permits (58%) have also been granted in the unincorporated County. Again, note that in this data the "unincorporated county" includes growth zones immediately adjacent to city limits.

Single Family Dwelling Permits 2007 to 2016
- County – 62%
- BV – 11%
- Poncha – 8%
- Salida – 20%

Single Family Dwelling Unit Permits

* Data from Chaffee County Assessors Office

SFD - County   SFD - BV   SFD - Poncha   SFD - Salida

Measure #2A: Number of Rural Open Space Incentive Developments – GRADE D

A Rural Open Space Incentive (ROSI) subdivision is intended to encourage land and water conservation and preservation of open areas through clustering of residential subdivision parcels. Two-thirds of the total area is preserved in perpetuity for wildlife habitat, grazing land, critical or sensitive natural areas or similar uses. Four residential parcels are allowed for each 35 acres or one unit per 8.75 acres. The incentive for landowners is a shorter subdivision process, plus the applicant may be eligible for density bonuses.

Since 2002, a total of 22 ROSI developments have been approved, providing 193 lots and protecting 1,876 acres of open space. However, 95% of these were approved prior to 2008. Only one has been approved since that time.
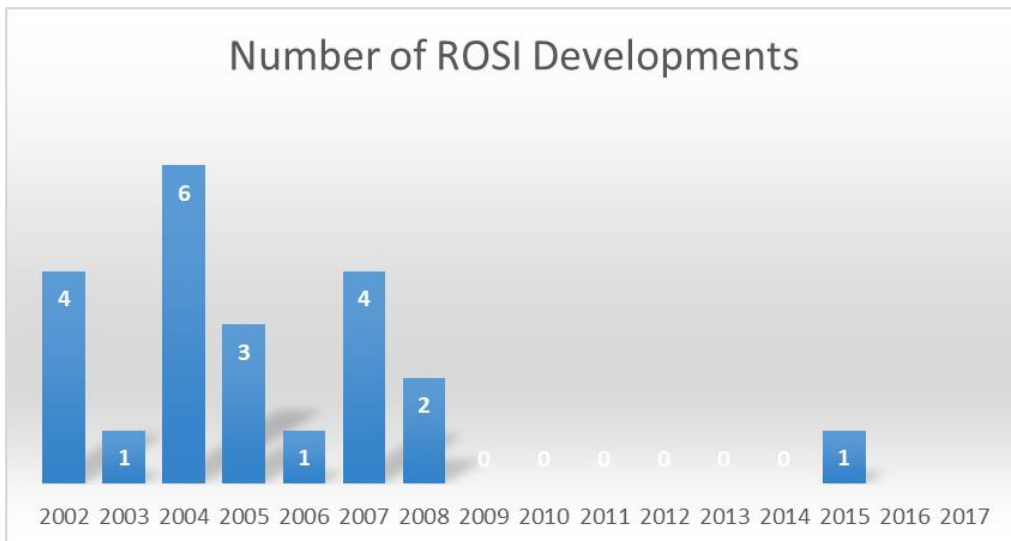
Water Rights Transferred – Grade Pending

The community indicated that a measure of water rights transferred from agricultural use to municipal use within and outside Chaffee County is another important metric. The Upper Arkansas Water Conservation District staff is compiling this data but, due to the holiday break, require additional time to assure that all of the data on this complicated topic are complete. This information will be made available to the appropriate Envision Chaffee County Action Team in January.

Conclusion

This first Envision Chaffee County Community Vision Report Card is an important step in measuring how the county is tracking compared to the vision that citizens have for the future. This first version is by no means perfect or complete, but it provides clear insights about our current strengths and areas where change is required to create the future the community desires.

In talking with many citizens and the staff of local agencies, government and non-profit organizations, one message was very clear. **The work of building the Chaffee County future that citizens want can only be successful through the collaborative efforts of energized, engaged and enabled people from all these groups working together.**

The grades in this first report card are a call to action for each of us – to engage, to develop new solutions, to work together to build a future based on common ground!

All data used in this report is available upon request to Envision Chaffee County – envision@centralcoloradoconservancy.org. Ideas to improve the measures and data presented in this first report card are also welcome at the same address.