

Comprehensive Economic Development Strategy

Concho Valley Economic Development District

2017 Update

Table of Contents

Executive Summary.....	2
Concho Valley Economic Development District	3
Historical Overview	4
Regional Overview	6
Past Economic Development	9
Trends and Factors	9
Natural Resources & Environmental Issues.....	10
Land Use	11
Prime or Unique Farmland	12
Ecologically Sensitive Areas.....	13
Floodplains and Wetlands	13
Public Services.....	14
Housing.....	14
Resiliency Strategy.....	14
Regional Service Organizations	15
Water and Waste Water Systems	15
Solid Waste & Recycling	18
Transportation	21
Historic Buildings and Archaeological Resources	22
Population.....	24
Demographics and Trends.....	24
Education and Training.....	25
Labor Force	26
Area Economy	27
Recent Trends.....	28
SWOT Analysis, Vision-Priorities, & Action-Strategies	28
Coke County	28
Concho County	30
Crockett County.....	31

Irion County 32

Kimble County 33

Mason County 35

McCulloch County 37

Menard County..... 38

Reagan County..... 39

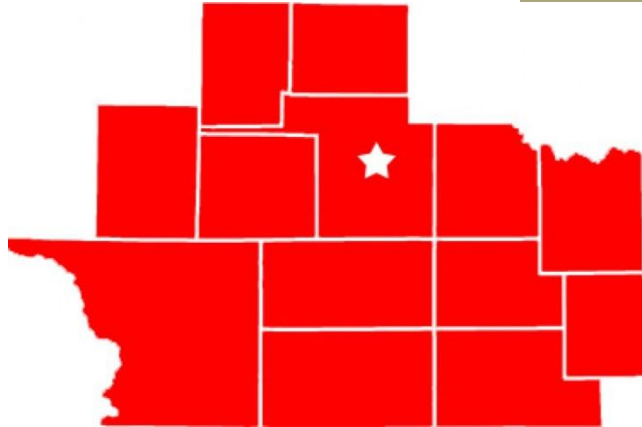
Schleicher County..... 40

Sterling County 42

Sutton County..... 43

Tom Green County 44

Evaluation46



Executive Summary

Concho Valley Economic Development District

The Concho Valley Council of Governments has been designated by the Economic Development Administration (EDA) to serve as the Concho Valley's Economic Development District (CVEDD) and has served in that role for twenty-three years. As a requirement of this designation, CVEDD was to initially prepare and subsequently update a Comprehensive Economic Development Strategy (CEDS) every five years. The CEDS is a planning document funded by the EDA that serves as a regional strategy to establish economic goals, address challenges facing their respective region, and guide development priorities. A five year update requirement ensures that each district maintains an up-to-date regional strategy. CVEDD is staffed and administered under contract with the Concho Valley Council of Governments. Present staff members of the district are: John Austin Stokes - Executive Director, Albert Rodriguez - Regional Services Director and Katy Matschek – Regional Services Coordinator. CVEDD is a Texas nonprofit corporation and is operated under direction of the Board of Directors who meet every two months and represent a broad spectrum of perspectives including county government, local financial institutions and business development organizations. The CEDS document is a product of regional stakeholder input, aimed at

CEDS is a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region. It is a key component in establishing and maintaining a robust economic ecosystem by helping to build regional capacity (through hard and soft infrastructure) that contributes to individual, firm, and community success.

developing the economic capacity, prosperity and resiliency of the region’s communities.

The district serves the thirteen counties of: Coke, Concho, Crockett, Irion, Kimble, Mason, McCulloch, Menard, Reagan, Schleicher, Sterling, Sutton, and Tom Green. The City of San Angelo, located in Tom Green County, is the region’s largest urban area with the Census estimating a population of over 100,000 in 2015. The region coincides with the Service Delivery Area 10, as designated by the Governor, for which the Concho Valley Council of Governments was created in 1967. The Council of Governments was assigned responsibility for consolidation and elimination of duplication of effort in providing services to the region. In such a rural and sparsely populated region as the Concho Valley, collaboration among governments and institutions is essential to providing necessary services to citizens in an efficient manner. The CEDS is not intended as a mandate but rather a tool to improve the economic condition and resiliency of the region through coordination and collaboration of existing institutions.

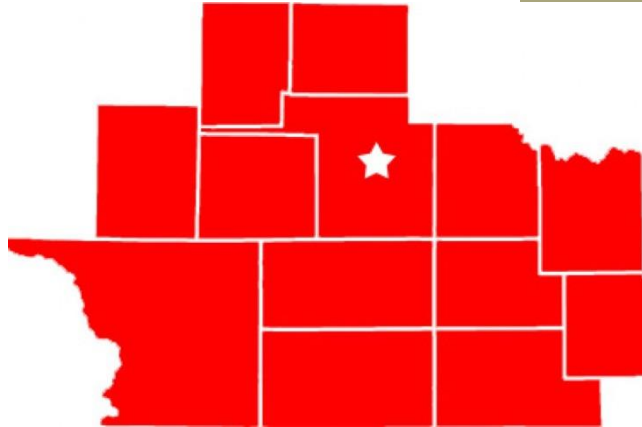
The planning process for the CEDS began with an examination and evaluation of its economic condition in order to make recommendations for programs and strategies for economic development. City and County officials were consulted, economic development meetings were held and the plan was drafted. The Comprehensive Economic Development Strategy was reviewed, modified and accepted by cities, counties, chambers of commerce, and economic development corporations of the district. Periodic review of the CEDS by member counties for concurrence of goals will continue to provide direction for the Board in developing strategies and goals through a locally controlled process.

The following document describes the Concho Valley Development District's Economic Development Plan (EDP) with the following major goals:

- To enhance job opportunities within the district, especially for the low income, unemployed and underemployed.
- To strengthen and diversify the business, industrial, and agricultural sectors of the district's economy.
- To improve the quality of life within the district

Historical Overview

The Concho Valley takes its name from the Concho River, Concho meaning “shell” in Spanish, due to the abundance of freshwater mussels in the river. The district has had a roller-coaster history of economic development from the mid-1800s to current times. The land was settled by rugged pioneers who developed the area into agricultural production. Row crops, primarily cotton and grain, have been grown in the northern portion of the district and farm animals have been the main cash animals in the central and southern portions, cattle, goats, and sheep being the main products. The Concho Valley is a leading center for goats, sheep, wool and other related products. There has been limited growth in the area. The lack of a diversified economy



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and the region's dependence on the petroleum and agribusiness sectors had left the counties and cities in the area in a "sustaining" mode in an effort to endure hard economic difficulties. However, recent advances in the petroleum industry have reflected well in those areas of the region with a significant interest in that industry, primarily the western and southwestern counties. However, the area does not have alternative jobs available for these citizens who are trained for specific occupations. The northern and western portions of the district have also had to deal with changes in governmental crop programs and continued droughts. The southern and eastern portions of the region have been dealing with the drought and the drop in prices for wool and mohair. In spite of these difficulties, there have been some advances in the economic condition of the area. For example, the City of San Angelo has replaced some of the jobs lost with the closing of two local manufacturing firms with the placement of two service operations. Economic diversification has occurred in cities like Eden who has located a detention center in their area. Additionally, McCulloch County and the City of Brady are marketing products from special sand found in the county, as well as manufacturing trailers and computer cable. Finally, the economic pressure in the area has resulted in a resilient regional community that has begun to understand that their individual well-being is dependent on the collective well-being of the region. This, along with education and training facilities such as the Angelo State University, the West Texas Training Center and Howard College will better equip the region to face the economic development concerns that it faces in the 21st century.

Goals, objectives and implementation plans for the district recognize the strengths and weaknesses. The district must address the needs of: streets, water systems, waste water systems, landfilling, recycling, medical networking, transportation, education, production of products related to local raw materials, development of diversification of local economies for economic resilience, and providing financing for expansion and start-up businesses.

CVEDD will continue to work with the with their partners in region including Angelo State University - Small Business Development Center, San Angelo Chamber of Commerce, City of San Angelo Development Corporation, the Lower Colorado River Authority, the Colorado River Municipal Water District, American Electric Power, Verizon Telephone, local chambers of commerce, and local economic development organizations to provide a coordinated effort to develop a vital economy in the entire district. The cities and counties of the district are interested in growth. They support efforts of the district and participants in the enhancement and promotion of the area for potential and expanding industries and the quality of life for citizens. The Concho Valley Economic Development District, Inc. serves the **LAND OF PROMISE**. The promise is that the district provides opportunities for growth in an environment which encourages family living and community involvement.

Regional Overview

CVEDD is comprised of 13 counties with approximately 16,324 square miles. The geography of the district ranges from the rolling arid Permian basin oil fields in the northwest to the hill country in the southeast. The soil ranges from sandy loam in the west to clay with numerous rock outcrops in the east. The climate is temperate with annual rainfall average from eighteen (18) to twenty-five (25) inches. Annual temperatures range from an average of 33 degrees for the low in January to a high of 95 degrees in July. There is an average of 227 growing days in the district. Coke, Crockett, Irion, Reagan, Schleicher, Sterling, Sutton and Tom Green Counties are the largest oil and gas producing lands of the district. These counties have not diversified their economies during the past due to the growth found in this one industry. The remaining counties (Concho, Kimble, McCulloch, Mason, and Menard) have relied on an agricultural economy. The agricultural land use in this region is predominately for ranching of cattle, sheep and goats. Portions of land in Coke, Concho, McCulloch, and Tom Green Counties also produce cotton and grain crops. Portions of McCulloch and Mason counties also yield marketable sands, gravel, and marble. The reduction in federal incentives for agricultural products has caused the district to look at its natural resources. Land use plans are becoming more important. The petroleum industry has left pollution problems which will need to be addressed before meaningful economic development will take place. This is also true of returning the land to agricultural uses.

Sparsely populated, most of the district is rural area with the 2010 Census indicating an overall regional population of 154,192 citizens. Approximately 71% of the regional population resides in Tom Green County, equaling 110,224 people and resulting in approximately 72.4 persons per square mile. The City of San Angelo in Tom Green is the only urban area in the district. The remaining 43,968 citizens are spread among the other twelve counties. Sterling County has the least populous county with only a total of 1,143 residents, 1.2 persons per square mile. Population growth overall has been constant for the district, but several of the rural counties have experienced population decline (Table 1). Population density in the district is concentrated in Tom Green County and the remaining counties have a density of 1.2 to 7.8 persons per square mile (Table 1). Net migration has shown a shift of population from rural to urban areas (Table 2). Tom Green County is the only county to show a steady in-migration over the past three decades.

The district contains fifteen incorporated cities: Big Lake located in Reagan County, Brady in McCulloch County, Bronte in Coke County, Eden in Concho County, Eldorado in Schleicher County, Junction in Kimble County, Mason in Mason County, Melvin in McCulloch County, Menard in Menard County, Mertzon in Irion County, Paint Rock in Concho County, Robert Lee in Coke County, San Angelo in Tom Green County, Sonora in Sutton County, and Sterling City in Sterling County. There are numerous inhabited places in the district with populations of less than 10 to more than 5,000. Crockett is the only county with no incorporated city. The cities

and the road structures are shown in Figure 8. Nine of the fifteen incorporated cities have planning and zoning commissions with zoning ordinances. Six of the cities also have an industrial plan. These communities have seen the need of zoning and planning for future growth.

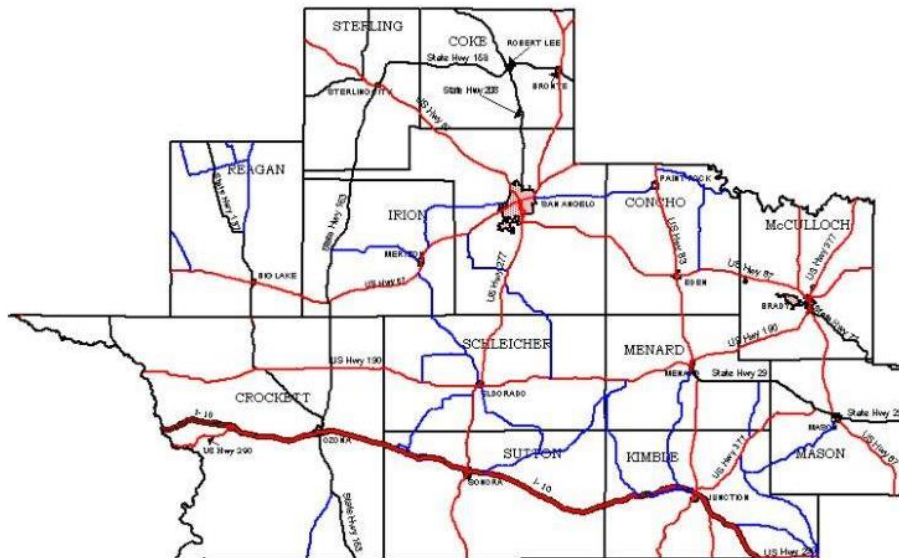
The region is served with a road system of approximately 15,000 miles. Interstate 10 traverses the three counties in the southern part of the region. This links the region with San Antonio and Houston to the south and east and with El Paso to the west. Every city and county is served with state and U.S. highways that provide access in both east-west and north-south directions. The main highway weakness is a north-south connector for the region. However this will be addressed with both the Texas Trunk System and the Ports-to-Plains Trade Corridor which traverses through the center of the Concho Valley region. The Ports-to-Plains Trade Corridor route

CONCHO VALLEY ECONOMIC DEVELOPMENT DISTRICT

was

CITIES AND HIGHWAYS

FIGURE 8



adopted in 2000 and aligns with US Highway 277 through San Angelo. North of San Angelo the route follows U.S. Highway 87 into Sterling City where it splits to both Big Spring and Midland. San Angelo is the largest city in Texas without an Interstate Highway. Major traffic corridors in San Angelo have been slow in developing. Completion of the Houston-Harte Expressway through San Angelo in 2004 has brought recent activity on a portion of the central city area.

The majority of the 15,000 miles of public roads in the area are two lanes. With the large expanse of sparsely populated country, industrial development will depend upon the construction of better transportation systems. This development has already begun with the recent boom in the oil industry, necessitating the upgrade of major connector roads in the area. The previously mentioned U.S. Highway 87 from Big Spring to San Angelo was recently

upgraded from a two lane highway to a four lane. In spite of these upgrades, tourism is still hampered by the lack of major connectors. Hunting, camping, fishing, and other outdoor recreational activities are popular with guests to the area but it has been difficult to attract tourists, overnight lodging establishments and other necessities of this trade due to lack of major access arteries.

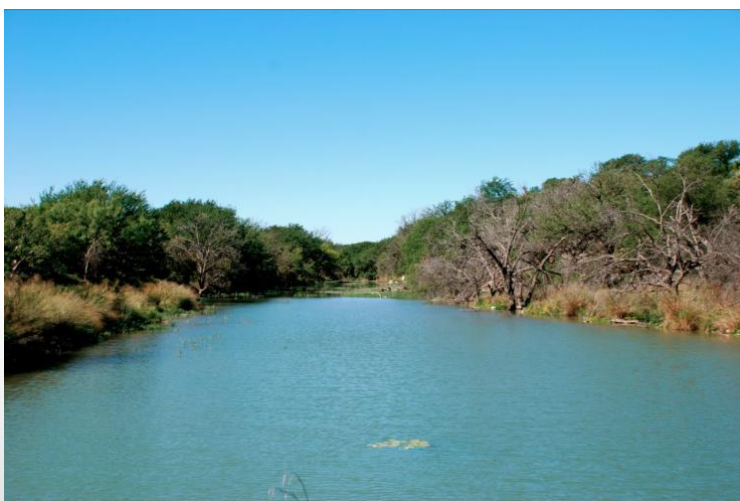
The district’s fifteen cities contain infrastructure systems which have been in existence for a number of years. Streets, water systems, waste water systems, public buildings, and fire protection equipment need updating and enhancing to meet regulations and the demands of growth. Most of the local governments have applied for the Texas Community Development Program for funding for infrastructure from year to year. These funds have provided assistance on a number of programs, but needs exceed the funding available. The U. S. Department of Agriculture through its Rural Development program has assisted in these needs for some of the rural areas. Serious needs continue to exist with assistance critical for economic growth.



SAN ANGELO’S FAMOUS FIBERGLASS SHEEP

Other necessary social services such as medical facilities are critical to the remote rural areas, as they are to larger population centers. However, due to lower population density there are a very limited number of physicians in the rural areas. This problem is addressed through the clinics, nurses, and physician’s assistants in the district. A better system of networking among these providers throughout the counties is needed.

The counties of the district have problems with the communication systems for law enforcement and emergency services. Advances have been made in this area and inter-communication has improved however, updating is needed to serve future needs.



RIVER IN TOM GREEN COUNTY

The region boasts many assets that contribute to an excellent quality of life for its citizens. The region’s climate and availability of health services within the populated areas of the region attract many retirees. The ample hunting and fishing facilities bring many sportsmen to the

area during those seasons. The geography of the district includes the dry and arid expanse in the west and the central Texas Hill Country in the east. The growing season is exceptionally long due to the warm climate.

Past Economic Development

Trends and Factors

The rural portion of the district has seen a dramatic change over the past decade. The two major parts of the economy were petroleum and agriculture. The petroleum industry permeated the economy of the western states as it provided income and high paying jobs. The main economy in the remainder of the district was agriculture. Beginning in the 1980s, petroleum prices and state and federal policies deteriorated to the point that production dropped and jobs were lost. The recent upturn in the petroleum industry has begun to turn this around, however its full effect will be a while in maturing. This was followed with the decline of agricultural prices and subsidies as well as a six year drought. The result was less money in the local economy, and a loss of jobs resulting in rural communities experiencing an out-migration of youth and skilled citizens, as no replacement jobs were available. More recently beginning in 2010, the energy sector experienced another boom cycle which brought well-paying jobs to the state and many people to fill them to the Concho Valley. This helped the economy and brought an influx of business to the area, but the oil prices began dropping again in 2015 and bottomed out in 2016, significantly slowing down the oil industry. However, current indicators show that the oil industry is poised for a comeback which could potentially bring more jobs back to the area.

Tom Green County has experienced the same problem but has been successful in adding new industries for diversification. As a result of jobs added to the workforce, there has been a less dramatic out-migration of youth in this county (Table 2). Tom Green has the added benefit of Goodfellow Air Force Base, which has become a substantial part of the San Angelo's economy as the city's largest employer with approximately 5,500 military and civilian employees. The base is home to the historic 17th Training Wing and serves as a major training installation of Air Force personnel as well as joint-service training installation in the same skills for Army, Navy and Marine Corps personnel.

Diversification has been very slow and difficult for small communities. Menard County has seen a truffle farm and a recent addition of a wine grape farm. McCulloch County has seen new industries involved in mining special sand and a new manufacturer of computer cables. White Wing, a local canvas and leather goods manufacturing company with military contracts in Eden has recently flourished, providing local jobs. Additionally, Curtis Field Airport in Brady has been expanding its employment opportunities and is continuing to diversify.

The Concho Valley has some rural cities which have a portion of the sales tax designated for economic development. The cities are utilizing the economic development sales tax in a variety of ways to augment and expand their economic development strategies. The cities have made good use of the sales tax to attract new industry and to save jobs at others. The main problem is the small amount of funds available in these areas. Local funding for housing, infrastructure, and development is limited. The financial community is helpful toward growth, but is limited in the amount of funds which can be committed. Additional funding is needed for growth and retention of existing business.

Natural Resources & Environmental Issues

The district is distinguished by many natural resources. These include climate, beauty of the area, petroleum products, cotton, grain, cedar, deer, goats, sheep, cattle, sand, granite, old forts, a cavern, and others. The beauty of the area and the climate has enticed many citizens to become part of the area after retirement. The quality of life provides an excellent place for year round sports, hiking, fishing, hunting, etc. These same resources encourage families and businesses to look to the area as a place to live and raise a family.

Petroleum products have long been important to the economy of the district. There are some oil and gas reserves in the western half of the district, plus selected areas in every county. Cotton and wool are grown and harvested in the area. The district is the most prolific producer of wool in the United States. These fibers are processed to various degrees in the district. Cotton ginning is the first step in processing, but the cotton must then leave the district for manufacturing into end-products. Wool is scoured in the district. Other fiber is marketed in the district after production in other areas of the state and around the world.

Cedar or spruce grows naturally over much of our area. Industry in Kimble County processes the fiber to produce the oil. This is used in many products. A new use for the remaining pulp has assisted in development of a recycling plant for plastics. The use of the recycled plastic and cedar pulp produces a lumber product which is being marketed nationwide. The entire area abounds in wild deer. This brings a large contingent of hunters into the area each autumn. The economy is enhanced with this industry. Ranchers and farmers lease lands for hunting; motels and restaurants house and feed them; gas stations, feed stores, and grocery stores provide supplies, and other merchants sell merchandise to visiting hunters and their families. Another associated, and increasing, activity is tourism throughout the region. The natural resources of The Caverns at Sonora and the early Indian paintings on rocks near Paint Rock attract many tourists. Other attractions include old forts in Coke, Crockett, Mason, Menard, and Tom Green Counties. Finally, some of the counties are venturing out into nature tourism such as bird watching and wildlife photography.

Ranching provides other resources in the area. Sheep, goats, and cattle provide a strong portion of the local economy. Goats produce leather, wool and meat; cattle produce meat and leather; and sheep produce wool, leather products, and manure which are composted into a final product in Menard. Many of these products are processed in the district.

Mining of sand, granite, and other natural resources provides a major influx into the local economy, especially in the eastern portion of the district. The CVEDD has numerous natural resources which become obvious as new industry develops. The dry, clean air provides an ideal setting for manufacturers in the San Angelo area.

Land Use

The district ranges in geography from the arid rolling prairie of the Permian Basin in the west, to the rocky hills of the Hill Country in the east. McCulloch County in the Northeastern corner of the district is the geographic center of the State of Texas. Soils range from clays to solid limestone and granite outcropping. The area is historically ranch land with crop lands included in the northern half of Concho and McCulloch Counties, the northeastern portion of Tom Green County, and the eastern portion of Coke County. Other crop land is found in scattered portions of the remaining counties.



PICTOGRAPHS NEAR PAINT ROCK

Soil, rock formations, and levelness of the terrain contribute to the ability of the land to provide a crop base and for location of industrial sites. The geography of the area varies from rolling lands to the west with hills and broken areas in the east. Coke, McCulloch, Mason, Menard, Kimble, Sutton, Schleicher, and Tom Green Counties contain some areas of hills and valleys which are too steep for economic development. Oil and gas production has been evident in all counties of the region but, primarily in the central and western portions. Coke, Crockett, Irion, Reagan, Schleicher, and Sutton Counties have relied on this industry for a large portion of their tax base.

Another previous use found to have an impact on regional land use is landfilling of solid waste. The Texas Commission on Environmental Quality and the U.S. Environmental Protection Agency regulate the use of land where waste is buried. Table 3 is an updated and comprehensive closed landfill inventory has been developed by the Concho Valley Council of Governments

which includes all land used for solid waste disposal. There is no Superfund or state designated sites in the region. No sites have been identified with hazardous or toxic substances present.

Prime or Unique Farmland

There is very little unique farmland in the thirteen county area. Notable exceptions are the truffle farms and a new area being developed for wine grapes in Menard County, east of the



City of Menard. There are small areas of unique farmland for pecan orchards but these are so small and scattered that designation is a problem. There is, however, a great amount of prime farmland acreage. The following list gives an estimation of prime farmland in each county:

Coke County - There are 128,860 acres of prime farmland in the county plus 58,860 acres which are prime farmland when irrigated.

Concho County - There are 201,968 acres of prime farmland, and 10,690 acres which are prime when not frequently flooded, and 9,710 acres which are prime farmland when irrigated.

Crockett County - There is no prime farmland in the county.

Irion County - There are 190,210 acres of prime farmland in the county plus 29,360 acres which are prime farmland when irrigated.

Kimble County - There are 95,136 acres of prime farmland plus 7,933 acres which are prime farmland when irrigated.

Mason County - The County has a large amount of prime farmland. The soil survey is not complete by the Soil Conservation Service and acreage has not been determined.

McCulloch County - There are 170,337 acres of prime farmland with 33,731 acres which are prime farmland if irrigated.

Menard County - There are 51,309 acres of prime farmland and 27,692 acres which are prime farmland when irrigated.

Reagan County - There are 421,910 acres of the county which are prime farmland if the land is irrigated.

Schleicher County - There are 167,050 acres of prime farmland.

Sterling County - There are 227,080 acres of prime farmland plus 7,350 acres which are prime farmland when irrigated.

Sutton County - There are 96,400 acres of prime farmland.

Tom Green County - There are 307,523 acres of prime farmland plus 42,490 acres which are prime farmland if irrigated.

Ecologically Sensitive Areas

There are no identified conservation areas or unique habitats listed in the area, but, there are ecologically sensitive areas at the headwaters of drainage systems where springs flow. The counties of Concho, Crockett, Irion, Kimble, Mason, Menard, Schleicher, and Tom Green all have springs which flow into the headwaters of waterways.

A critical habitat has been identified by U.S. Fish and Wildlife Agency to include portions of Concho, McCulloch, and Eastern Tom Green Counties along the Concho and Colorado Rivers. The endangered species identified with this critical habitat is the Concho Water Snake (*Nerodia harteri paucimaculata*). The Concho Water Snake is endemic to Texas, meaning it lives nowhere else in the world. It has one of the smallest distributions of any North American snake. There are no other critical habitats identified in the thirteen county region.

Floodplains and Wetlands

Floodplains generally follow waterways throughout the region. Cities affected with major floodplain areas are: Brady, Bronte, Junction, Mason, Menard, Robert Lee, and San Angelo. Floodplain maps indicate low lying areas of these counties are within the 100 year floodplain area. The area designated as having a greater danger of flooding than every 100 years is clear of dwellings in the majority of the area. Recent history has not recorded major flood damage. Cities attempt to control changes in elevation, due to construction, which will impact the floodplain. Wetlands are found in the eastern and northern portions of the region. These wetlands are only visible during seasons when abnormal amounts of rainfall occur. There are limited wetland regions in Coke, Concho, Mason, McCulloch, and Sterling Counties. These are scattered throughout designated portions of the region, in low lying areas. As the normal rainfall in the area is less than 25 inches in the east and 18 inches in the west, occurrences of these wetlands are rare.

Most of the wetland areas are ranch land with sparse population. The areas in Coke County include the City of Bronte and the City of Robert Lee and in Mason County the City of Mason is included. The remainder of the Concho Valley Economic Development District, Inc. is free from wetland areas except along waterways. In Tom Green County there is a large portion of the area surrounding Lake Nasworthy which has become designated as wetlands.

Public Services

Housing

Housing is a problem in many of our counties. Concho County have had a need for moderately priced homes for the past few years due to the development of detention centers and Sterling County due to influx of personnel from the Wind Energy segment. The oil and gas industry's recent upturn has also strained the housing availability in counties like Tom Green, Reagan, Irion and Sterling and 'man camps' have been erected in these counties to help alleviate the pressure. The industry has suffered a recent decline; however it is expected to recover. Housing also is needed in all of the remaining counties due to lack of homes that meet basic standards. Many vacant homes throughout the area are in need of major repairs or replacement. San Angelo and Tom Green County is experiencing an expansion in the amount of multiple resident housing. Most of this housing is targeted at the retired or those approaching retirement. Some of these units provide assisted living.

Some of the cities and counties are beginning to address housing needs through several actions. Cities such as Melvin are passing new ordinances concerning substandard housing. Cities throughout the district are involved with code enforcement to assure safe adequate housing.

Housing is a need that must be addressed for the future growth in the district and in some cases may be the single most pressing need that is inhibiting growth.

Resiliency Strategy

An objective for the region is to assess current economic planning efforts and support the development of more tactical and efficient resiliency strategies for the counties. Recognizing gaps and holes in these strategies will help determine the vulnerabilities that the region may have and aid in the planning for future events such as changing conditions or economic downturn.

Due to natural resources being one of the distinguishing characteristics of the region, many counties may be dependent on these resources for their economic well-being. One thing the region can do to help prevent economic disruption in the event that something happens to these natural resources, like the price of oil dropping causing employers to move elsewhere, is diversify the industries on which the region relies on. By not being over-dependent on single industries and helping support emerging ones, the region can help prevent this economic disruption.

The counties in the region also have Emergency Management and Hazard Mitigation plans in place in the case of a disaster. They provide training in the event of these disasters and some, like Tom Green, are also prepared for large scale incidents.

Regional Service Organizations

Several service organizations located in San Angelo serve the surrounding region as part of their service area and promote economic resiliency through social service. Common service areas and associated alliances provide the region a strong advantage in supporting the economic development of stakeholders in the region.

Concho Valley Community Action Agency (CVCAA) serves most of the CVEDD's region, with the exception of Mason. Offering utility assistance, weatherization and free tax assistance, their mission is to fight poverty in local communities through public and private partnerships.

Workforce Solutions of the Concho Valley (WFS) serves all CVEDD's counties. Their mission is to assist businesses, individuals and families with employment, training, childcare needs and other resources. WFS is certified by the Texas Workforce Commission and undergoes a certification review every 3 years. Their core service programs include: access to unemployment benefits, apprenticeship, dislocated workers and youth, post-secondary career and technology training, SNAP, TANF/Choices, Veterans Employment and Training, Workforce Innovation Opportunity Act and more.

United Way of the Concho Valley serves all 13 counties in the Concho Valley. Their mission is to increase the organized capacity of people to care for one another by funding programs that support education, health and income assistance programs.

ASU's Small Business Development Center (SBDC) and the Rural Business Program were developed in 1990 to provide business advising and training services to ten counties in the Concho Valley area. ASU-SBDC has assisted thousands of area small businesses with free and confidential advising and training to better manage businesses and help create new business. SBDC also has a dedicated rural business development specialist who travels to those rural counties in a monthly "circuit ride" to provide advising and training services.

Water and Waste Water Systems

Coke County - The Cities of Bronte and Robert Lee have been upgrading their treatment and distribution facilities for the past several years. Both cities have been on a program to expand service to citizens. Adequate service and pressure are available for fire protection in both cities. Service improvements are enhanced through help from the Texas Community Development Program. The City of Bronte received a TCDP grant to replace the line from Oak Creek Lake to the city. The old line was of eight inch cast iron pipe that had deteriorated through time. The City of Robert Lee received a TCDP award to upgrade their water treatment plant that deteriorated to the point of being cited by the TCEQ.

Concho County - The Cities of Eden and Paint Rock are continually working to provide adequate water and sewer service. Paint Rock citizens use septic tanks. The City of Eden provides sewer

service for its citizens which has recently been updated. The waters of the area contain nitrogen and radium in amounts that exceed standards. A recent project, funded through grants from Texas Water Development Board's (TWDB) Economically Distressed Areas Program (EDAP), is meeting several needs. First, Eden piloted a program to remove radionuclides from its drinking supply in order to be complaint with TCEQ. The funding also helped Eden drill a third well, treatment plant and cooling tower. Fire protection needs in and around the City of Paint Rock are handled by tank trucks. Trucks must transport water to fires. The City of Eden's system provides approximately double the present requirement, which includes fire protection needs. Eden was awarded a TCDP grant to replace existing water lines, loop the water system, place valves and provide fire hydrants for fire protection.

Crockett County - The county has worked with Texas Community Development Program funding to provide water and sewer in all of the inhabited areas. The Crockett County WCID #1 provides service to most of the citizens in the Ozona area. Colonia areas are included in this system. The latest enhancements to the water system should provide adequate supply and pressure for residential, commercial, and fire protection needs in the Ozona area. Additionally, Crockett County recently received a TCDP grant award to upgrade the sewer system which had major problems such as homes becoming flooded with raw sewage due to the lines becoming plugged.

Irion County - The City of Mertzon provides local water from municipal wells. Adequate pressure and volume are available for firefighting in the city due to recent increases in above ground storage capacity. The previous storage tank was in numerous violations from the TCEQ. Along with the storage tank, the City also completed line work with valves for increased



efficiency. Additionally, the City has acquired TCDP funds to provide new wells to provide adequate water supply through the recent drought conditions. Irion County was also successful in receiving a TCDP grant to provide an improved water system to the community of Barnhart.

Kimble County - The City of Junction provides water from the Llano River. The plant is capable of producing 2 million gallons per day. Current requirements are at 1.9 million gallons per day. The city must address increased capacity needs in the near future. Economic growth is limited due to this problem. Current use of water for firefighting requires curtailment of other uses. Improvements in above ground storage capacity

are now in progress. Sewer capacity is adequate for moderate growth with only 20% loading on a plant capacity of 300,000 G.P.D. Additionally, the city received a TCDP grant to upgrade the sewer system.

McCulloch County - The City of Brady provides water from municipal wells and from the Brady reservoir. Plant capacity is presently at 7 million G.P.D. with a peak load of 4 million G.P.D. Projects have provided greater pressure for citizen's use and fire control with the addition of a standpipe in the north portion of the City and a ground storage unit in the eastern portion of the City. Additionally, water lines in existence for 70 years have been replaced to provide for better distribution. Fire control needs are adequately met with this enhanced system. Sewer service is available for approximately double the present load. The City of Melvin provides water service from municipal wells. Daily capacity is 110,000 G.P.D. Service lines will not support high pressure fire needs. Deficiencies in the system had been cited by the Texas Commission on Environmental Quality and a project correcting the distribution deficiencies was completed. Tank trucks are still required to haul water to a fire scene. Septic tanks are used in the City of Melvin, as no waste water system is in place. The waste water problems of septic tanks must be addressed in the near future. Finally, McCulloch County has also secured TCDP funds to 12,400 linear feet of water distribution lines to the community of Rochelle.

Mason County - The City of Mason provides water from municipal wells with loading at approximately 80% of capacity. Sewer service is provided with more than 50% capacity available. Renovations of both systems are continuing to provide adequate service and capacity. The most recent upgrade has been to the sewer system with new pipe lines and the addition of a new filtration unit. Pressure and capacity are available for fire protection within the city.

Menard County - The City of Menard provides water from municipal wells with a capacity of 8 million G.P.D. Peak loads have been 610,000 G.P.D., or approximately 7.6% of capacity. The sewer plant has a capacity of 170,000 G.P.D. with about 60% utilization. TCDP grants have provided the construction of a hydro pneumatic tank, new PVC water lines, new SDR sewer lines, and more service connections and manholes. Adequate water pressure and capacity are available for fire protection needs.

Reagan County - The City of Big Lake provides water with a capacity of 3 million G.P.D. available from municipal wells. Approximate peak loads are 1.5 million G.P.D. This provides adequate supply for all needs, including fire protection. There was a problem with the lack of pressure in some portions of the system. However, the City has recently completed work on an above ground storage upgrade. Sewer capacity of 600,000 G.P.D. is presently loaded at approximately 50%. There are continuing needs of maintenance of the system which is aging.

Schleicher County - The City of Eldorado provides a capacity of more than two million gallons of water per day from municipal wells. Present peak load is 1.25 million G.P.D. The City has been

successful in acquiring funds from the TCDP to provide storage and distribution improvements. Adequate pressure and capacity is available for daily usage and fire protection in the city. Updated sewer treatment capacity of 385,000 G.P.D. is in the finishing stages with approximately a 35% load. Constant updating and expansion of both systems are required in order to provide adequate service. The city has recently put up a new water tower as part of these updates.

Sterling County - The City of Sterling City provides water from municipal wells. Present capacity of 500,000 G.P.D. is approximately 40% loaded. The city has recently completed piping and drilling as well as a booster station and water main looping to provide better water service. The old wells were not meeting needs for citizens and fire protection. New capacity is adequate for this use. The city provides sewer service with excess capacity at 95,000 G.P.D.

Sutton County - The City of Sonora provides water from 5 municipal wells with a daily capacity of 4 million gallons. A peak load of 1.5 million G.P.D. is being experienced. The City was recently awarded a TCDP grant for a new 400,000 gallon storage tank to provide water service to the city. Good capacity and pressure are available for citizens and fire protection. The sewer plant is rated at 1.5 million G.P.D. with a loading of approximately 60%.

Tom Green County - The City of San Angelo provides water with a capacity of 76 million G.P.D. from five lakes and a well field. Peak loading is currently about 40 million G.P.D., or approximately 53%. Adequate capacity and pressure assure good fire protection to local citizens. The sewer plant has a 16.3 million G.P.D. capacity with a 9 million G.P.D. load. This provides adequate service for present and planned growth. Additionally, Tom Green County was awarded a TCDP grant for water system improvements in the community of Christoval.

Solid Waste & Recycling

The following update will provide county by county specifics of service. All landfills in the area are either Type I or Type IV facilities for municipal solid waste. All except the City of San Angelo facility are permitted as "Arid Exempt" (AE) landfills. All sites are in compliance, but meeting operating requirements under RCRA rules, known as Subtitle D and TCEQ 30TAC330 regulations, are making the costs skyrocket. Table 4 shows the landfills in the district and their different types.

Coke County - A type IV-AE landfill is provided by the City of Robert Lee. This facility is permitted to accept yard trimmings, brush, and construction debris. The City of Bronte contracts with BFI to provide collection service and disposal in Taylor County. The City of Robert Lee contracts with Trashaway Services for collection with disposal in Tom Green County. Both services have been satisfactory to citizens and businesses in the area. Coke County provides used oil and used oil filter collection in both cities. The City of Robert Lee provides mulching of clean wood waste at its Type IV landfill. The mulch is then available for private and public use on gardens and flower beds. Drop-off collection sites were constructed in 1996 for

recyclable materials in the City of Robert Lee. A site is located at the post office and another on the north side of the school. Both sites provide collection of paper and corrugated cardboard.

Concho County - The City of Eden closed their landfill in 1993 and contracted with BFI for waste collection and disposal in Taylor County. The City of Paint Rock has recently closed their landfill due to lack of capacity. They are contracting with Trashaway Services for a Citizens' Collection Station. This provides a place for citizens to take waste to be transported to Tom Green County for disposal. The City of Eden provides used oil collection adjacent to the city hall.

Crockett County - The County contracts with Waste Management for collection and disposal service. The waste is hauled to Ector County for disposal. Yard and construction waste are being composted locally with coordination by the Crockett County WCID #1. The county provides used oil and used oil filter collection at a site in Ozona. Waste Management provides a drop-off collection center for recyclables at the same site. The county has expressed an interest in developing landfill capacities closer to residents.

Irion County - The County operates a Type 1AE landfill located approximately 0.6 mile west of Barnhart. Citizens may contract with either RSC or Trashaway Services to collect and dispose of waste. RSC disposes of waste in the county landfill while Trashaway disposes of their waste in Tom Green County. The county provides used oil and oil filter collection in the City of Mertz on and the community of Barnhart.

Kimble County - The City of Junction provides a Type 4AE landfill for their citizens. This facility accepts yard trimmings and construction/demolition waste. The remainder of the waste in the city is collected by Trashaway Services for disposal in Tom Green County. A drop-off location is available for those who do not have collection service. The City of Junction provides used oil and oil filter collection at the city maintenance facilities.

Mason County - The City of Mason operates a Type 1AE landfill and provides collection service in the city. The city also has one of the best developed recycling programs in a rural area. They collect: used oil; used oil filters; clear glass; brown glass; corrugated cardboard; aluminum cans; steel cans; newspapers and plastic. A building, baler, fork lift, and truck are dedicated to the processing of recyclables.

McCulloch County - The City of Brady operates a Type 1AE and 4AE landfill and provides collection service in the city. The City of Melvin provides a citizen's collection station and transports their waste to the Brady landfill for disposal. The City of Brady has a drop-off recycling center for used oil, oil filters, corrugated cardboard, clear glass, brown glass, newspaper, aluminum cans, and steel cans. An oil filter crusher enhances this program. McCulloch County has instituted an office paper recycling program which encompasses the city, county, hospital, schools and some private firms. Cooperation with the City of Mason has begun and is expected to expand the recycling program. Yard trimmings are mulched at the landfill.

Menard County - The City of Menard has a Type 4AE landfill for yard trimmings and construction debris. They also have a transfer station situated at this facility. Waste Management provides collection for the city with disposal in Bexar County. The city provides a used oil and oil filter collection center. During 1996 they began expansion of recyclables collection with the addition of a recyclable material collection trailer. This allows them to have several locations for collection, including special events. Waste Management will transport and market collected recyclable materials.

Reagan County - The City of Big Lake provides a Type 1AE landfill for the citizens. The TCEQ recently permitted a new facility and the City of Big Lake is looking to import waste from the local area. The city has a collection center for used oil and used oil filters. An oil filter crusher is available to enhance the program. The city added a wood chipper in 2017 to provide mulch from clean wood waste. Clean up service for yard trimmings is available twice a year in alleyways and yard trimmings may be chipped at the landfill at all times. This has significantly reduced waste going into the landfill. The school system, Reagan County, and the City of Big Lake are cooperating in a recycling program to educate children and the general public. They will put collection into practice at the school, county park, and at other scheduled places through use of the city's recycling collection trailer.

Schleicher County - The City of Eldorado provides collection with disposal at its Type 1AE and Type 4AE landfills. The TCEQ recently permitted a new landfill for the City of Eldorado. Several recycling opportunities are available. The City recently completed an expansion and upgrade of their recycling center and will begin operation of the newly expanded facility to provide a comprehensive recycling program for the citizens. Additionally, the city, county, and school system own a mobile recyclable material collection trailer which is used to collect aluminum cans, steel cans, clear glass, and brown glass at the city hall and at special events.

Sterling County - The county provides a Type 1AE landfill for its citizens. Persons dispose of their own waste or may contract for collection with a private hauler. Drop-off collection of used oil and used oil filters is available at the landfill entrance. A mobile recyclable material trailer is also used to provide collection of recyclable materials and transportation to markets.

Sutton County - The City of Sonora closed its Type 1AE landfill and has contracted to have its waste collected and transported to the City of San Angelo's landfill. The City is looking at reopening the landfill as a Type IV-AE so that it may collect yard trimmings and construction debris.

Tom Green County - The City of San Angelo provides a Type I landfill in which citizens may deliver items at no charge once a month with a copy of their most recent municipal services statement. They contract for operation and collection with Republic Services. Tom Green County provides transfer stations at Christoval, Grape Creek, and Wall. The Citizen's Collection Center is operated by a group of volunteers who call themselves "San Angelo Friends of the

Environment” (S.A.F.E.). Collection began in early 1995 at a drop-off location which is open Tuesday-Saturday 9am – 4pm. Materials collected at the site are: batteries, white goods, corrugated paper, newspaper, office paper, magazines, cereal boxes, glass, aluminum cans, steel cans, various types of plastics, and most electronics with a small fee. A back yard compost demonstration site is also provided at the center. The Center continues to expand and continues to add more items accepted for recycling.

Transportation

The Concho Valley Economic Development District is well situated for easy access to major cities throughout the State of Texas and the Southwestern portion of the United States. The district is approximately at the midpoint between Houston and El Paso in the portion of the state referred to as West Central Texas (Figure 7). McCulloch County, located in the northeastern part of the district, has been designated geographically as the center of Texas. Access in the region is served by nine (9) U.S. highways and six (6) Texas highways. Interstate 10, an east to west highway, directly serves the Concho Valley, intersecting the municipalities of: Junction located in Kimble County, Sonora in Sutton County and Ozona in Crockett County. The region is lacking a north-south interstate; however there is recent development in the federal Ports-to-Plains alliance, a multi-modal trade corridor from Colorado through Oklahoma and Texas to Mexico facilitated by highways rail and air. Within our region, this corridor serves as a reliever route for the Texas Trunk

System and Ports-to-Plains corridors for both San Angelo and Tom Green County. The corridor traverses through Sterling, Coke, Tom Green, Schleicher and Sutton counties and there are efforts being made to facilitate this access with a north-south interstate in the region. Texas Department of Transportation (TxDot) has conducted several studies on increasing highway access in the region within recent years. Upgrade and expansion of highways within the corridor will provide the region with additional access to more extensive economic markets.

Other major roadways in the region are US83 which provides direct north-south access through Concho, Menard, and Kimble Counties; US67 which provides a connection through Tom Green,

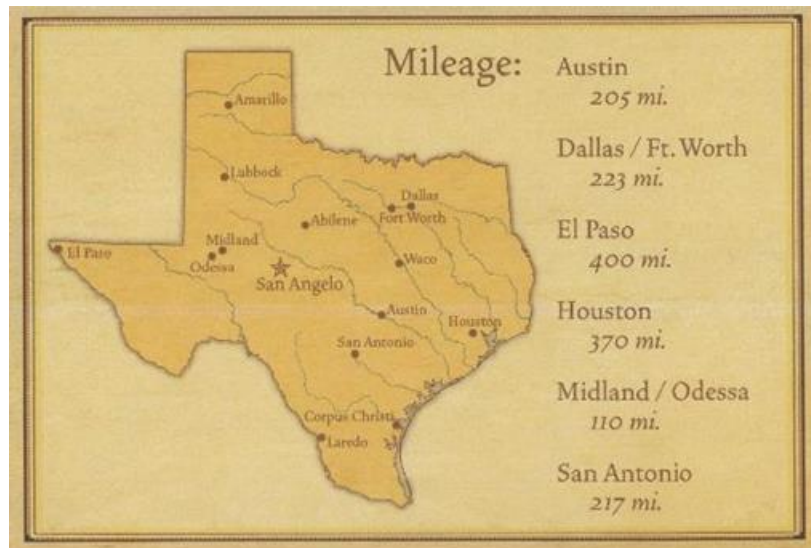


FIGURE 7 MILEAGE TO MAJOR CITIES

Other major roadways in the region are US83 which provides direct north-south access through Concho, Menard, and Kimble Counties; US67 which provides a connection through Tom Green,

Irion, and Reagan Counties; and US277 which provides service through Coke, Tom Green, Schleicher, and Sutton Counties (Figure 8). There are other US, State and farm-to-market roads throughout the area. Interstate 10, which runs through Sutton County, is the only interstate in the district. The Texas Trunk System has identified many of the above mentioned highways for upgrading to four lane divided service. This improvement will provide easy access to the panhandle and to San Antonio when completed. The Forts-to-Ports Alliance is also trying to upgrade highway access in the region in order to provide easy access for the large swath of land between I-10 and I-20. The Congressionally designated I-14 could feed into both I-10 and I-20, greatly increasing the accessibility of the Concho Valley.

The only commercial airport in the district is Mathis Field at San Angelo, which has recently begun undergoing renovations and is expected to be completed soon. Mathis Field has three crossing runways and three passenger gates. American Eagle, the single service provider, has five flights daily from San Angelo to Dallas-Ft. Worth. Most of the communities have small airports for local use.

Rail service is available in McCulloch, Tom Green, Irion, and Reagan Counties. Texas Pacifico services Reagan, Irion and Tom Green counties. OmniTRAX recently acquired the short-line railroad servicing Brady in McCulloch County from Heart of Texas Railroad and it is now being operated as Central Texas & Colorado River Railway.

There are only short stretches of navigable waters in the CVEDD.

The Concho Valley Transit District is the primary public transportation provider throughout the Concho Valley. Their fixed-route service is limited to within San Angelo, but they provide on-demand and para-transit services throughout the region. CVTD is located at the multi-modal facility in downtown San Angelo. Some of the outer-laying counties are served by other transportation providers, such as Mason County, which utilizes Hill Country Transit District the HOP. Concho Coaches is also located in the multi-modal facility and provides Greyhound connection to Midland and Abilene. They also provide service to and from the Midland/Odessa Airport. San Angelo has limited taxi service providers and auto rental companies; however there has been recent growth in this area. Due to the demand for accessible transportation, local errand/concierge companies have begun to fill this void by offering transportation as an aspect of their services.

Historic Buildings and Archaeological Resources

The area contains many archaeological resources and historic buildings. Each county contains historic buildings of interest and all but one of the thirteen counties has Courthouses which were built in the early 1900s with architectural attractions. **The City of San Angelo** has a historical district in the center of town which offers many buildings including the Cactus Hotel and the Texas Theater. Many of these structures have been or are being restored with

encouragement from the city. Additionally, there are several early forts in the area which have visitor appeal. The City of San Angelo is proud of Fort Concho which has many restored buildings open for visitors. Special activities are conducted each year to acquaint people with the history of the area. Some of the buildings are used as museums. A plaza area was recently constructed to connect an amphitheater, historic parts of the business district, the Concho River, and Fort Concho. An 18-hole miniature golf course was recently opened along the Concho River downtown in a recreational area called The Bosque. It will eventually include an adjacent concession stand and an assortment of play items such as kayaks and paddleboats. A renovation and expansion project has also begun on the City's Auditorium, slated to be completed in 2017.

Many buildings in the **City of Sonora** have been restored and the city is inviting to tourists. A unique attraction to Sutton County is The Caverns of Sonora, internationally recognized as one of the most beautiful show caves on the planet. The Caverns are located 15 miles southwest of Sonora and also serve as a halfway point between San Antonio and Big Bend National Park. RV Park and tent campgrounds are available on the ranch complete with water and electricity.

The **City of Menard** has restored historic downtown buildings and provided them for new businesses. The project has been very well accepted and continues to expand. This is enhanced with the "Ditch Walk", a four block walk along a water way through historic buildings. Murals have been restored at the old Mission Theater, and Fort McKavett in Menard County has some restored structures and is a popular tourist stop. Menard also has the Presidio San Luis de Amarillas, where ruins may be viewed.

The **City of Mason** has many restored buildings in a historical square surrounding the courthouse. Businesses are using these buildings in an attractive setting. A historic tour visits buildings in the city and the county. Activities are in progress to restore the Odeon Theater where the film "Old Yeller" premiered, with the intention of establishing it as a Performing Arts Center. The film is based on a book written by a native of Mason County.

The **City of Junction** has many historic buildings which are being used by businesses and restored to their usefulness. Kimble County also operates a historical museum

Crockett County has retained its historic beauty in restoration and remodeling of the courthouse and other downtown structures. The county operates a museum that showcases the development and growth of Ozona.

Irion County has an abandoned courthouse in Sherwood which brings back memories of the early settlers to the area. This structure is sadly neglected and needs major repair. Today, it operates as a community center.

Reagan County has an abandoned courthouse at Stiles which has been proposed as a museum. The facility must have major repair.

Fort Chadbourne in **Coke County** has not been rebuilt but provides a look at history through the remains of structures.

McCulloch County has ruins which may be viewed at Camp San Saba.

For visitors in the **Concho County** area, pictographs are painted on the rock bluffs along the Colorado River near the City of Paint Rock by Indians who inhabited the area centuries ago.

Schleicher County has a historic woolen mill which offers an opportunity to see production of wool cloth using equipment and methods which have been in existence since 1940.

Population

Demographics and Trends

The Concho Valley Economic Development District comprises thirteen counties spread over approximately 16,287 square miles of West-central Texas. It is predominantly a sparsely populated rural area with San Angelo being the only city with a population of more than 6,000 (Table 5). The population of the counties from 1980 and county municipalities is shown in Table 5. This chart indicates a steady growth district wide over the past four decades; however all of the counties except Tom Green and Concho have shown periods of decline. Tom Green and Concho are the only counties that have sustained growth. This growth was not uniform however, some counties lost population while others grew substantially. It is interesting to note that the greatest growth occurred in the counties that diversified their economies. Both Coke and Concho counties were successful in placing detention centers in their counties; it is believed that this has a direct relationship with the growth that both counties experienced.

The district's population has a median age of approximately 41.4 years (Table 6). In the San Angelo Metropolitan Statistical Area, the net migration accounted for a third of the growth during the 1980s with the balance due to a natural increase (Table 5).

Population density in the district is sparse, except in Tom Green and McCulloch Counties. Tom Green County has the highest density with 72.4 persons per square mile. McCulloch County follows with 7.8 persons per square mile. The remaining counties have from 1.2 to 4.2 persons per square mile (Table 1). Low densities present significant challenges to development of the district.

Population is heavily distributed toward Tom Green County, with 70.2 percent of the 2000 population, and 71.5 percent of the 2010 population residing in Tom Green County (Tables 1 and 5.) Sterling, Irion and Menard Counties, the least populous counties, together represent just a little over three percent of the district population. McCulloch County contains approximately 5.4 percent of the district population and is the next most populated county after Tom Green.

The educational attainment of citizens age 25 or older in the district is shown on Table 7. An average of 32.04 percent of individuals in the region have attained their high school diploma with 12.3 percent having a bachelor's degree or more. The highest percentage attaining at least a high school education is in Irion County and the lowest percentage is in Sutton County followed closely by Sterling County.

The median family income in the district ranged from \$34,464 in Menard County to \$65,948 in Reagan County (Table 8). Per capita income grew from an average of \$21,901 in 1999 to \$24,395 in 2014. This compares to \$26,513 for the State of Texas in 2014. In 2014 the per capita income level ranged from \$19,762 in Sterling County to \$30,444 in Irion County (Table 9). The average percentage of persons below the poverty level in this region was 15.7 percent in 2010. This compares with a state average of 17.2 percent in the same year (Table 10). This indicates the low wages and number of citizens who are unemployed or underemployed.

The racial composition of the district in 2010 was 89 percent Anglo, 1.29 percent Black, 40.6 percent of Hispanic ethnicity, and 11.02 percent other races and ethnicities (Table 11). The percent of individuals of Hispanic ethnicity ranged from a low of 20.1 percent in Coke County to 67.4 percent in Reagan County. In the last CEDS update, Crockett and Sutton Counties were the only counties with a majority of its citizens of Hispanic origin; however, Concho and Reagan have caught up and now have a majority of citizens of Hispanic ethnicity as well. The increase in the percentage of Hispanic citizens has been constant throughout the past three decades.

Education and Training

The educational opportunities in most of the counties of the CVEDD are associated with the public school system. Twenty-four independent school districts serve the district with exceptional educational facilities. Each county has at least one district and many rural districts are involved in providing education close to student's places of residence.

The region has several education institutions, primarily extensions of larger university systems. Angelo State University, a member of the Texas Tech University System, delivers undergraduate and graduate programs in the liberal arts, sciences and professional disciplines. Serving more than 9,500 students, ASU offers more than 100 majors and concentrations spread across 41 undergraduate programs, 23 master's degree programs and one doctoral program. Angelo State is an NCAA Division II and Lone Star Conference member with highly competitive men's and women's teams in 13 sports.

Howard College offers career technical/workforce and academic courses for certificates and associate degrees, continuing education, remedial and compensatory education to its taxing district of Howard County and the twelve other counties in its service area, 9 of which are in the Concho Valley. A recently established West Texas Training Center will be providing greatly needed specialized training. Prior to the opening of the West Texas Training Center, few technical and vocational schools were available in the district. Both Angelo State University and

Howard College provide nursing courses, and Howard College provides beautician training. H & R Block has a school to train accounting personnel in basic bookkeeping skills and secretarial skills. Aladdin Beauty College offers cosmetology courses. Central Texas College in Brady offers associates degrees designed to allow for the transfer to the bachelor degree requirements at most four-year public colleges and universities. Kimble County has a branch of Texas Tech University which provides graduate level training for art instructors (in the summer). Other technical training is done in surrounding areas such as Abilene, Kerrville, Midland, Odessa, San Antonio, Snyder, and Sweetwater.

The need to travel for specialized employment training will be greatly diminished with the new West Texas Training Center. The impact of the West Texas Training Center will be enormous as many of the unemployed have specialized or no training. Many are from farms, ranches, and other agricultural backgrounds and have few offices, industrial or general business skills. We have a need for welders in one portion of the district with a high number of petroleum industry workers in another who seek alternate employment. Prior to the West Texas Training Center, the only training in the district for many of these occupations was on-the-job.

Labor Force

The labor force has grown considerably during the past several decennial census counts. In 1990 there were 60,556 persons in the labor force in our region which has grown to approximately 76,448 persons in the civilian labor force currently (Table 12). The trend indicates a steady growth. There are approximately 55.5 percent of all the citizens in the region in the workforce. This percentage ranges from 775 persons in Sterling County to 53,585 persons in Tom Green County. In 2010 there were 44.5 percent of the citizens of the district not in the workforce. Since 2010, the unemployment has decreased overall, with a slight increase in 2015. Seven out of the thirteen counties saw an increase in the labor force from 1990 through 2010 (Table 12). In the age group of 20 to 64 year olds, approximately 78.4 percent of the males and 62.6 percent of the females are employed in the region's labor force, while the unemployment rate for males is approximately 93 percent of that of females (Table 13). It is widely assumed that the unemployed also include a larger number of females who have not registered as seeking jobs. If this could be documented, we would have a larger unemployment rate and a larger percentage of unemployed females.

The Civilian Labor Force Unemployment Rates have declined over the past decade. With a small recent increase, the rate has declined from 7.4 in January 2010, to 4.6 in March 2016 (Table 14). It is felt that the district has a number of citizens who have dropped out of the labor force. These people work part time and do not register with the Texas Workforce Commission when they are unemployed. This calls for a creative plan to train citizens and bring them back into gainful employment.

The Concho Valley has a significant population of migrant seasonal farm workers. Statistics indicate that most of these workers do not register with regional agencies. The Texas Workforce Commission has developed an outreach program to attempt to document these workers and their impact on the district. A portion of this program is dedicated to the development employment opportunities as alternatives to the migrant and seasonal jobs. This is to provide employment on a regular basis to these workers.

Many employment opportunities are available to industry and unemployed citizens. There is access to Howard College and Angelo State University in San Angelo. Job Training Partnership Act programs are available throughout the district. The Job Training Partnership Act is a federal program which directs funds to eligible individuals due to economic disadvantages and serious employment barriers. This program also serves those who are unemployed due to economic or technological change or industrial restructuring. The Texas Workforce Commission provides Job Search Seminars throughout the district. There are jobs available in San Angelo for many of the rural unemployed who are willing to relocate. The Texas Department of Human Services identifies clients with employment potential and refers them to the Texas Workforce Commission for support services. This service also identifies families from the Aid to Families with Dependent Children group. The Texas Workforce Commission also receives referrals from the Food Stamp Employment and Training Program.

Area Economy

The number of workers in specific occupations has shifted over the past decade. The oil and communications industries have drastically declined in the district. This has caused a major shift from these segments into trades and services.

Major employers in the district include:

Tom Green County: Goodfellow Air Force Base, Shannon Health System, San Angelo ISD, Angelo State University, City of San Angelo, San Angelo State Supported Living Center, San Angelo Community Medical Center, SITEL, Inc

Kimble County: Kimble County Hospital, Leisure Nursing Home, Cedar Fiber Co, PAKS, A.E.R.T., Inc., Ad-Venturous, and METCO.

McCulloch County: Brady ISD (210), Loadcraft Industries (200), Walmart (165), Carmeuse Industrial Sands (150).

Sterling County: Florida Power & Light (FPLE), Airtricity, Mission-Edison, Cielo. When FPLE completes phase 8 or 9 this will be one of the largest wind farms in the world and possibly the largest.

Recent Trends

Employment has seen a decline in management and high tech jobs. The reduction in staff of Verizon, petroleum production companies, and others has reduced these occupational opportunities. The jobs to replace these have been somewhat plentiful, but, at lower skill levels. The transition has often required skills training to prepare the labor force for the jobs. The largest increases in employment have come from telemarketing, wind energy and medical related jobs. All of these require specific training.

Business trends have been toward diversification. The large complex of GTE operations is gone from the district. SITEL, Inc. has opened a new operation employing 1,100 in telemarketing. McCulloch County has gained three firms. Two of them are making an end product from the sand in eastern McCulloch County. The other firm, SSI-The Shop, Inc., produces computer related cables. These are deviations from the old standard for industry in the district, but, business as usual is not holding strength throughout the state.

Construction in the district has been confined mostly to 3 areas. One is the sand companies of McCulloch County, the second being Sterling Wind Energy in Sterling County and the last being in the City of San Angelo. Fueled by surging oil field activity there has been a hotel boom in San Angelo recently. As of late January 2014 there were approximately 2,000 hotel rooms available.

SWOT Analysis

Responding to the economic, labor force and demographic trends requires an organizational framework that categorizes such factors and contributes to an overall analysis. The Concho Valley Economic Development District has many strengths which to build on, as well as some weaknesses that must be addressed in an effort to fully attain the region’s potential. The Concho Valley Economic Development District is committed to enhancing and improving the Concho Valley region by mitigating, improving or eliminating the shortcomings of the region in its entirety, however the SWOT analyses of the region will be discussed by individual county.

Coke County

STRENGTHS:

Recreational Opportunities

- Hunting, fishing, golf
- Black powder competitions
- Historic Fort Chadbourne
- Motor-cross tournaments
- Horseback trail rides

WEAKNESSES:

- Lack of industrial land/buildings available
 - Lack of coordination and advertising of local events to attract outside parties.
-

- Baseball tournaments
- Rodeos

Excellent Quality of Life

- Low crime rates
- Park and picnic opportunities
- Adequate medical service
- Excellent school systems

Progressive Business Potential

- Internet sites (Robert Lee and Coke County)
- Close proximity to higher/technical educational opportunities
- Economic Development Sales Tax
- Printed promotional material
- Highway access (SH 158, SH 208 and SH 277)
- Natural resources (mesquite and cedar trees)

- Infrastructure improvements needed (street and road repair, water quality in Robert Lee).
- Unemployed workers lack training to fit job opportunities.
- The appearance of the communities need to be planned and needs continued improvements

VISON – PRIORITIES

1. Water Improvements: Both Bronte and Robert Lee
2. Develop a funding plan for upgrading existing streets in both Bronte and Robert Lee.
3. Develop funding for additional housing in Bronte.
4. Promote cooperation between the both cities and the county to promote the area and enhance beautification efforts and education opportunities.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Determine private land available for industrial uses.
2. Work with Howard College and Angelo State University in San Angelo to develop continuing education classes and specific skills training in Coke County.
3. Work with the Concho Valley Economic Development District to develop plans to enhance the entrances to the cities and the county.
4. Determine private land available for industrial uses.
5. Work with Howard College and Angelo State University in San Angelo to develop continuing education classes and specific skills training in Coke County.
6. Work with the Concho Valley Economic Development District to develop plans to enhance the entrances to the cities and the county.
7. Develop plans to apply for grants to enhance housing and promote the first-time home owners programs of the Concho Valley Housing Finance Corporation.

-
8. Develop a plan to solicit expansion of local businesses.
Develop plans to upgrade streets and roads throughout the county
-

Concho County

STRENGTHS:

WEAKNESSES:

Recreational Opportunities

- Hunting, fishing, golf
- Lake O.H. Ivie
- New playground facilities at Pfluger Park
- Roy Burnes Civic Center at Pfluger Park
- Ray Dockery Arena holds ropings, AJRA rodeo, Spring Stampede and Bull Ride
- Green Apple Concert Series
- Garden of Eden

- Shortage of housing for rental or purchase.
- Limited economic diversity, reliance on agriculture
- Street deterioration.
- Lack of tourist attractions, lack of recreational facilities.
- Both cities need improvements in appearance.
- Lack of on-site vocational training.

Excellent Quality of Life

- Low crime rate
- Excellent school systems
- Patriotic, Christian communities
- Concho County Hospital newly renovated, pharmacy and wellness center
- Frontera Clinic
- Excellent library system
- Clean, pollution-free environment
- New EMS/Fire facilities and equipment
- Museum (since 2002)
- Updated water treatment facility
- Updated sewer system

Progressive Business Potential

- Internet site
 - Industrial Park
 - Excellent highway access (US 83 and US 87)
 - City of Eden has an Economic Development Sales Tax
 - Strong Financial Institution support
 - Available regional workforce
 - Enthusiastic community leaders
 - Façade improvements
-

VISION – PRIORITIES

1. Increase available rental properties and affordable housing.
2. Market Tourism.
3. Upgrade the water supply and sewer systems.
4. Develop industrial park.
5. Upgrade streets.
6. Provide continuing education/technical training skills.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Research and pursue Parks and Wildlife grants for parks and recreational facilities.
2. Work with Howard College and Angelo State University and the Concho Valley Workforce to provide continuing education and skills training in the county.
3. Research and pursue grant and low interest loan opportunities that could enhance the housing stock available.
4. Work with the Regional Economic Development District on the possibilities for assistance in beautifying the entrances and other places in the county.
5. Research and pursue grant opportunities to help upgrade existing streets and roads.

Crockett County

STRENGTHS:

Recreational Opportunities:

- Hunting, golf, fishing, baseball
- Convention Center
- Cinco de Mayo celebrations
- Pioneer Heritage Days
- Christmas Lighting
- Deerfest
- Davy Crockett Festival
- Art and Crafts Fair
- Airport
- Escondido Draw Recreational Park

WEAKNESSES:

- Lack of available housing
- Remoteness from large cities for shopping and medical attention.
- No rail or commercial air service.
- Lack of skilled workforce.
- Lack of economic diversification.
- Reliance on the petroleum industry.
- Lack of essential services
- Landlocked

Excellent Quality of Life

- Dry, warm climate
- Affordable living conditions
- Historic areas

Progressive Business Potential

- Natural resources (natural gas)
- Low property taxes
- Plentiful electricity and water

VISION – PRIORITIES

1. Housing is the first priority for Crockett County.
2. Develop a diversified economy.
3. Skills training.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Work with landowners to educate them about community and economic diversification.
2. Work with the Texas Department of Housing & Community Affairs and the Concho Valley Housing Finance Corporation to develop programs to address housing needs.
3. Work with economic development assistance organizations to assist in diversification.
4. Work with employers and the Concho Valley Economic Development District, Inc. to provide needed skills training in the district and in Crockett County. The school system may be able to provide facilities for skills training.
5. Work with local land owners to educate them about present and future economic opportunities.

Irion County

STRENGTHS:	WEAKNESSES:
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Recreation Opportunities

- Hunting, fishing
- Hunter’s Appreciation Dinner
- Youth Livestock Show

- Lack of infrastructure for water and sewer services in the communities of Barnhart and Sherwood
- Lack of entertainment opportunities,

- Christmas at Sherwood
- Salsa Festival
- Fall Festivals
- Monthly Community Meetings
- Ranch Rodeo

- especially for teens.
- Paved streets and curbs throughout the County.
 - Limited housing capabilities.
 - Appearance of the communities.

Excellent Quality of Life

- Dry, warm climate
- Excellent school system
- Low crime rate
- Excellent volunteer Fire/EMS capabilities
- Quiet
- Friendly people
- Beautiful landscape
- Churches

Progressive Business Potential

- Low tax rate
- Close proximity to San Angelo (shopping, regional airport, healthcare)
- Infrastructure able to support expansion
- No competition for business
- Excellent transportation access (US 67, SH 163, FM 853, FM 915, FM 2469, Texas-Pacifico Rail System)

VISION – PRIORITIES

1. Infrastructure improvements (water, sewer, streets, and curbs).
2. Community appearances.
3. Continue upgrading Telecommunications.
4. Promotional materials
5. Development of new industries.
6. Housing availability.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Start a local program of curbing and paving streets. Actively seek grants and private funds to assist local government finance these programs.
2. Start volunteer programs to assist and encourage land owners to clean and groom their communities.

3. Create promotional materials and an Internet listing.
4. Encourage the use of existing programs and financing mechanisms to encourage new business and construction of homes.
5. Actively seek grants and private funds to improve the infrastructure within the communities of Irion County.

Kimble County

STRENGTHS:

Recreational Opportunities

- Hunting, golfing, swimming, hiking, fishing, canoeing/kayaking
- Camping on the Llano River
- Bird watching
- Rodeo activities
- City parks
- Local museums
- Roller skating at Rollerama Junction
- South Llano State Park – 2,630 acres
- Photo Safari

Quality of Life

- Excellent public schools
- Houses of Worship representing many denominations
- Kimble Hospital, a Medicare designated critical access hospital, with focus on primary care
- Medical clinic
- Local pharmacy
- Pleasant climate with an annual average temperature of 64.7 degrees & 24 inches of rain
- Low crime rate
- Emergency management services

Progressive Business Potential

- Excellent highway access (I-10, US 83, US 290, US 377)
- No restrictive zoning requirements
- Low tax environment with minimal regulatory and other governmental requirements
- Economic development corporation assistance for businesses
- Kimble county airport, a 5,000 ft. paved and

WEAKNESSES:

- Need for City water supply system upgrades.
- Housing Shortage
- Lack of Skilled Workforce
- Shortage of Skills-based Training
- Little Use of the Internet to Market and Sell Products
- Lack of County-wide Collaborative Community Effort to Establish County Goals

lighted runway

- Texas Tech University 400 acre campus Field - Research Station with state and international - participation (distance learning, classroom instruction, seminars)
- Internet service providers available
- Available cellular telephone access
- Cable and satellite television services available

VISION – PRIORITIES

1. Water Supply Upgrades within the City of Junction
2. Encourage Expansion of the Housing Inventory
3. Provide Skills-based Training and “Distance Learning” to obtain Associate Degree
4. Promote Web-based Marketing by Local Businesses
5. Participatory Approach to Community Decision Making and Information Sharing

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Modifications to the City water supply are being addressed.
2. Housing challenges to be given proper priority.
3. Currently working with the Concho Valley Workforce Development Board to bring their skill-based training in Junction. The training will be marketed to the unemployed and employed workforce.
4. Community effort already exists to facilitate earning an Associate Degree (a.k.a., a Junior College Degree) or technical certification while living in the City of Junction or Kimble County.
5. Research availability of different types of marketing products to ensure “outside of the County dollars” provide tax base wealth to Junction and Kimble County.
6. Schedule quarterly countywide meetings to encourage direct community participation in the decision making.

Mason County

STRENGTHS:

Recreational Opportunities

- Hunting, golf, fishing
- Photography
- Bird watching
- Topaz and Quartz hunting

WEAKNESSES:

- Need more retail establishments
- More rental housing needs to be added
- The water supply may not be adequate for some industrial or manufacturing purposes.

- River recreation

Excellent Quality of Life

- Low crime rate
- Excellent school system
- Friendly people
- Ideal climate and terrain

Progressive Business Potential

- Zone restrictions and building code enforcement to assure compatible and attractive community
- Promotional material
- Room for expansion
- Financing opportunities

- A portion of the county has flooding problems.
- The county needs local job skills training
- The county needs to have more use of online courses at the post high school level.
- A small but influential portion of the county does not want to change.
- The agricultural community needs training in diversification and marketing

VISION – PRIORITIES

1. Assist local business to expand and create opportunities for new business to locate.
2. Expand electrical, water and sewer capabilities.
3. Expand the permanent and temporary housing market.
4. Create more interest in the Mason County home page.
5. Create a positive attitude of citizens toward economic growth and the growth of businesses.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Bring in new business and entice local businesses to expand.
2. Research and pursue grants for expanding/upgrading the electrical, water and sewer capabilities.
3. Research and pursue grants for housing needs.
4. Work with area educational facilities, in Mason and the general area, to create continuing, or vocational, classes for the community.
5. Research better use of on-line capabilities.
6. Public education needs to be addressed to provide a positive attitude to development of industries in Mason County.
7. Research the creation of maps and flood prevention techniques.

McCulloch County

STRENGTHS:

Recreational Opportunities

- Hunting, swimming, fishing, golf
- Rodeo
- Excellent museum
- World Championship Goat Cook-Off

Excellent quality of life

- Low crime rate
- 3 parks
- Excellent medical facilities
- New High School

Progressive business potential

- Economic development sales tax
- Industrial Park
- Buildings/Property available
- Enterprise Zone
- Access to four US Highways
- \$9.4 million water treatment plant
- Comprehensive Community Development Plan
- Tax abatements
- Resources (oil, natural gas, gravel, stone)
- High speed internet
- Municipal Airport (4,000 ft. runway)

WEAKNESSES:

- Housing needs to be developed.
- Street paving in Melvin.
- Lack of a trained labor force.
- Lack of Higher/Technical education.
- No public transportation.
- Lack of recreational facilities.
- Need improvements in water and sewer systems in both cities.
- Need to demolish old/abandoned buildings.

VISION – PRIORITIES

1. Survey businesses for training required.
2. Create stable, custom base for business.
3. Secure financing for street repair.
4. Acquire land and infrastructure for Junior College.
5. Expand public transportation.
6. Route L.T.L. to one primary freight carrier.
7. Create Enterprise zones, tax abatements, develop industrial park with financing package.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Texas Workforce Training.
2. Secure employment levels for stability, increase population.
3. Grants for Junior College or satellite for larger college.
4. Expand fleet transportation.
5. Support new business/expansion (tax abatements).

Menard County

STRENGTHS:

Recreational Opportunities

- Hunting, fishing, golf
- San Saba River
- Guided Kayak adventures
- Presidio de San Saba
- Fort Mckavett State Historic Site
- Tourism
- RV parks

Excellent Quality of Life

- Low crime rate
- Active civic organizations
- Ample clean water supply
- Businessmen’s Club
- Chamber of Commerce
- Excellent restaurants
- Excellent school system
- Presido Restoration Society
- Garden Club
- Business Women’s Club
- EMS and Fire Department

Progressive Business Potential

- Economic Development Sales Tax
- Excellent highway access
- Local financing for industries
- Airport
- Available industrial property
- No zoning to impair new industries
- Flood prevention plan

WEAKNESSES:

- Beautification of downtown area.
- Removal of vacant rundown houses and cars throughout the county.
- Lack of sufficient housing for additional residents.
- Lack of adequate mid/low income housing
- Vacant buildings in the downtown area need to be renovated and leased or sold to businesses.
- Lack of jobs for young adults.
- Low tax base.
- Reliance on agriculture.

VISION – PRIORITIES

1. Improve water and wastewater capacity within the City of Menard.
2. Renovate downtown area.

3. Renovate housing in the City of Menard.
4. Encourage post-graduate training in Menard County.
5. Expand tourism.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Develop plans for city water and waste water upgrades to provide capacity for growth. These plans should include plans for financing the projects.
2. Beautification of the downtown area should be planned for budgeting and/or grant applications.
3. City ordinances and financial assistance for removal of substandard housing and abandoned vehicles.
4. Develop plans for skills training and academic instruction for local citizens. Work with colleges and universities in the area for possible solutions.
5. Work with other governmental agencies to develop programs which will encourage construction and upgrade housing for low-income citizens.
6. Advertise for small businesses to locate or relocate to the area.
7. Diversify agriculture by enhancing tourism, commercializing the river, increase hunting potential, or any other means to increase tax base and influx of outside dollars.

Reagan County

STRENGTHS :

Recreational Opportunities

- Hunting, golf, swimming, fishing, tennis, walking track
- Community Center
- Wild Game Dinner
- State & National Sheep & Cattle Dog Trails
- Historical Santa Rita and Texon
- Rodeo
- Bluegrass Festival
- 150 RV Spaces
- Hickman Museum

Excellent Quality of Life

- Pleasant community
- Low crime
- rate churches

WEAKNESSES :

- Streets in need of repair.
- Large amounts of substandard structures within the City of Big Lake.
- Lack of quality housing.
- Limited training of workforce (most trained in mechanical and technical fields).
- Drainage problems in portions of the City of Big Lake.
- Weak gas pressure under peak demands.
- Lack of Retail businesses.

- Excellent schools
- Medical/EMS service
- New Hospital and Care Center

Progressive Business Potential

- Land available for development
- Underground water for development (brine water)
- Good highway access (US 67, SH 137)
- Rail service
- Large amount of well-trained welders and mechanical technicians
- Economic Development Corporation

VISION – PRIORITIES

1. Upgrade streets and roads
2. Eliminate substandard structures.
3. Encourage expansion of housing inventory.
4. Training of potential workers with targeted industries in mind.
5. Increase gas pressure.
6. Waste Water Treatment plant
7. Infrastructure to the Industrial Park

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Continue to develop plans to renovate streets and drainage concerns.
2. Substandard structures to be addressed by zoning ordinances.
3. Initiate housing programs to address adequate housing.
4. Workforce Training
5. Seek funding assistance in providing better gas pressure.

Schleicher County

STRENGTHS:

Recreational Opportunities

- Hunting
- Airport
- Rodeo
- Upgraded park and golf course

WEAKNESSES:

- There is no public property or buildings available for industrial development.
- There are no continuing education classes in the county.
- There is no economic specialist to

-New pool facilities

Excellent Quality of Life

- Low crime rate
- Ideal climate and terrain
- New hospital
- Excellent EMT services
- Upgraded streets
- Good school system

Progressive Business Potential

- Local financing opportunities
- 21 miles to I-10
- Close to higher education
- Good highway access (US 190, US 277)

concentrate on Schleicher County.

- Water and sewer capabilities must be addressed for new industry.
- The city does not have an economic development sales tax.
- There is no active Chamber of Commerce.

VISION – PRIORITIES

1. Upgrade streets and roads.
2. Expand water supply within Schleicher County.
3. Increase wastewater capacity within the City of Eldorado.
4. Bring continuing education classes to Schleicher County.
5. Promote economic growth (economic development sales tax).

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Research and pursue grant opportunities to expand the water and sewer systems of the City of Eldorado.
2. Work with Howard College and other providers of higher education to determine the possibility of education classes in the county.
3. Research the possibility of an economic development sales tax to support an economic development specialist.
4. Continue work on upgrading county roads.

Sterling County

STRENGTHS:

Recreational Opportunities

- Hunting, tennis, golf
- Stock show
- Annual Hunter Appreciation Dinner

Excellent Quality of Life

- Low crime rate
- Excellent schools – new facility
- Clean environment
- Fitness center
- Medical clinic
- EMS services
- Friendly people
- Rehabilitation Center
- Historical Senior Center
- Meals on Wheels

Progressive Business Potential

- Internet home page
- Close proximity to higher education
- No zoning restrictions
- Good highway access (US 87, SH 158, SH 163) 43 miles to I-20
- Business access to high density traffic on Hwy 87 (5,300 vehicles per day)
- Economic development sales tax
- Grants for new and existing businesses
- Local financing opportunities
- Good employment opportunities
- Thriving wind energy industry

WEAKNESSES:

- The county needs affordable housing.
- The county has no industrial commercial property or buildings available.
- The county needs promotional materials to highlight the county’s strengths.
- Streets in Sterling City need to be upgraded.
- The county has a limited work force.

VISION – PRIORITIES

1. Look at ways to provide affordable housing for the city and county.
2. Upgrade streets and roads.
3. Create promotional material for the county and specifically the tourist attraction connected with hunting.
4. Identify land that is available for industrial expansion.
5. Lure industries to Sterling County by using the close proximity to San Angelo and Interstate 20.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Research and pursue grant opportunities that could help upgrade existing streets and roads.
2. Work with the Concho Valley Economic Development District, Inc. for promotion and economic development work.
3. Use private land for industrial expansion.
4. Promote the work force available with commuters from San Angelo and Big Spring.

Sutton County

STRENGTHS:

Recreational Opportunities

- Caverns of Sonora
- Golf, hunting, swimming
- Old Train Depot
- Arts and Theatre
- Nature Tourism
- Old Jail Museum
- Community Celebrations
- Airport
- Ice House Museum

Excellent Quality of Life

- Excellent medical facilities
- Excellent water quality
- Excellent school system
- Churches
- Great climate
- Low crime rate
- Family and neighborhood friendly city
- Main Street activity
- Cultural activities

Progressive Business Potential

- Highway access (I-10 and US 277)
- Active chamber of Commerce
- Adequate utility delivery

WEAKNESSES:

- Lack of affordable housing
- No rail service
- No commercial air service
- Needs skills training for unemployed/underemployed
- Limited workforce
- Limited property available (both rental and permanent)
- Isolated from major cities
- Limited telecommunications service
- No four lane north and south highway

- Enterprise zones
- Economic Development Sales Tax
- SBA programs
- Active Development Corporation
- Industrial park incentives
- Progressive local government
- SmartJobs training
- Local financing
- Close proximity to higher education

VISION – PRIORITIES

1. Need to promote affordable housing
2. Promote industry.
3. Improve infrastructure (water storage).
4. Educate labor force (focused training).
5. Retain and expand local business.
6. Recruit/Entice prospective employers.
7. Assist in initiating housing development.
8. Develop tourism model.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Work with developers to enhance housing.
2. Select industry that utilizes current talents and competes on levels of existing jobs.
3. Plan for infrastructure improvements.
4. Work with high school, chamber, and universities to develop and offer community site based educational offering to enhance service and industrial skills.
5. Promote current businesses to expand offering assistance and guidance on available aid and potential help.
6. Promote local community to prospective employers via the Sonora Industrial Development Corporation, Chamber of Commerce and local governments.
7. Work with local landowners to establish nature and wildlife tourism destinations.

Tom Green County

STRENGTHS:	WEAKNESSES:
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Recreational Opportunities:

- Fort Concho
- Fishing, golf, hunting, nature tourism
- 3 lakes
- Concho River

- Completion of San Angelo Regional Business and Industrial Center.
- Continuing need to maintain infrastructure (water treatment plant, distribution lines, etc..)

- ASU Planetarium
- Bird watching
- Paseo de Santa Angela
- State Park
- Historical city center

Excellent Quality of Life

- Excellent local schools, parochial schools
- Angelo State University, Howard College
- Clean climate
- Fine Art Museum
- Low vehicular traffic
- Superior in regional medical service: Community and Shannon Medical Centers

Progressive Business Potential

- West Texas Training Center
- Good water/city infrastructure
- Key link in Ports-to-Plains Corridor
- Goodfellow Air Force Base
- Strategically located with excellent highway access (US 87, US 67, US 277, SH 208)
- Plentiful workforce
- City/County cooperation
- Railroad service
- Enterprise zones
- Strong economic programs

- Provision of adequate water and sewer service in the rural populated areas.
- Provision of adequate firefighting equipment and services in rural areas.
- Provision of recycling and waste management in rural areas.
- Competition for high tech and upper income jobs.
- Development of the Concho River for commercial purposes.
- Limited competitive air service.
- Insufficient recreational facilities.
- Decrease in manufacturing/industrial jobs.
- Improved environment for entrepreneurship.
- Rise in crime rate.

VISION – PRIORITIES

1. Completion of Regional Industrial Park.
2. Improve and expand City of San Angelo infrastructure (water, sewer, streets, bridge, drainage).
3. Construction of new recreational facilities.
4. Develop an environment for entrepreneurship.
5. Water and sewer service for rural areas.
6. Fire protection for rural areas.
7. Recycling and waste management in rural areas.
8. Develop Concho River Corridor.
9. Improve air transportation service and infrastructure.

ACTION – STRATEGIES

The Concho Valley Economic Development District will work on accomplishing the previously listed priorities in an effective and efficient manner. The strategies towards mitigating shortcomings and enhancing strengths are as follows.

1. Work with the Concho Valley Economic Development District in seeking and obtaining funding. Possible use of Economic Development Sales Tax funds.

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2. Actively seek alternate funding sources to improve and expand city's infrastructure. Continue budgeting and preparing for future needs.
 3. Actively seek alternate funding sources to improve and expand the available recreational facilities. Continue budgeting and preparing for future needs.
 4. Encourage entrepreneurship through the establishment of a technology incubator.
 5. Actively seek funding sources to aid in the improvement and expansion of rural water and sewer service throughout the county.
 6. Encourage local training of volunteer firemen to decrease cost of acquiring adequate training. Continue to seek funding sources to upgrade and expand equipment and facilities.
 7. Actively seek out those illegally dumping municipal solid waste. Ensure adequate recycling and waste management opportunities exist for the rural residents of the county.
 8. Encourage private/commercial development of Concho River Corridor through incentives.
 9. Improve air transportation service and infrastructure by actively seeking out and promoting the regional airport service.
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EVALUATION

The Concho Valley Economic Development District and its member governments will strive to implement each of the priorities listed. However, it is understood and expected that not all of the priorities will be implemented at the same time. While precedence will be given to the higher the priority, it is also understood that occasions may arise that lend itself toward accomplishing a lower level priority. Consequently, the CVEDD will strive toward completing any of the priorities listed regardless of ranking.

Therefore, the evaluation will be as follows. The CEDS Strategy Committee will revisit the strengths, weaknesses and action plan once every two years. The emphasis will be to evaluate the progress made on the items listed. This will also provide an opportunity to amend the list as items are completed or as additional needs are identified.

The Economic Development Administration requires a complete CEDS be conducted every five years. The CVEDD and its member governments will adhere to this schedule.

Table 1
Population Distribution and Density

County	Population	Percent region population 2006	Percent region population 2010	Persons per square mile	Percent Rural	Percent Urban
Sterling	1,143	.93	.74	1.2	100	0
Coke	3,320	2.75	2.15	3.6	100	0
Reagan	3,367	2.12	2.18	2.9	100	0
Irion	1,599	1.21	1.03	1.5	100	0
Tom Green	110,224	69.92	71.48	72.4	15.43	84.57
Concho	4,087	2.62	2.65	4.2	100	0
McCulloch	8,283	5.56	5.37	7.8	35.33	64.67
Crockett	3,719	2.75	2.41	1.3	100	0
Schleicher	3,461	1.93	2.24	2.6	100	0
Menard	2,242	1.59	1.45	2.5	100	0
Sutton	4,128	2.85	2.67	2.8	100	0
Kimble	4,607	3.17	2.98	3.7	100	0
Mason	4,012	2.66	2.6	4.3	100	0

Table 2
Population Change Components

County	Total pop. Change	Natural increase	Vital events			Net migration	
			Births	Deaths	Total	International	Domestic
Coke	-81	-124	144	268	57	0	57
Concho	-6	-37	123	160	30	104	-74
Crockett	-9	103	280	177	-93	10	-103
Irion	-45	24	88	64	-68	0	-68
Kimble	-219	-69	206	275	-149	5	-154
McCulloch	58	-100	491	591	167	0	167
Mason	20	-39	194	233	65	58	7
Menard	-78	-63	102	165	7	10	-3
Reagan	425	235	348	113	190	17	173
Schleicher	-250	81	199	118	-343	2	-345
Sterling	209	2	81	79	203	1	202
Sutton	-215	116	277	161	-341	-2	-339
Tom Green	7,881	2,927	8,117	5,190	5,029	1,099	3,930

Source: Estimates of the Components of Resident Population Change: April 1, 2010 to July 1, 2015. U.S. Census Bureau, Population Division

Table 3
Closed Landfill Inventory

County	Site Number	Owner/Operator	Current Status
Concho	449	City of Eden	Undeveloped pasture land
Concho	899	Concho County	Undeveloped pasture land
Concho	1146	Concho County	Undeveloped pasture land
Concho	1198	Concho County	Undeveloped pasture land
Crockett	587	Crockett County	Undeveloped pasture land
Crockett	U845	Crockett County	Undeveloped pasture land
Irion	500	Irion County/University of Texas	Undeveloped pasture land/open hole
Irion	1270	-	-
Irion	1054	City of Mertzon	Undeveloped pasture land
Kimble	886	City of Junction	Undeveloped pasture land
Mason	195	-	-
Mason	U397	Mason County	Undeveloped pasture land
Mason	U399	City of Mason	Private recycling operation and undeveloped pasture land
McCulloch	156	City of Melvin	Undeveloped pasture land
McCulloch	392	City of Brady	Undeveloped pasture land
McCulloch	860	McCulloch County	Undeveloped pasture land
McCulloch	1732	-	-
McCulloch	U408	City of Melvin	Undeveloped pasture land
McCulloch	U409	-	-
McCulloch	U410	-	-
McCulloch	U1580	McCulloch County	Old caliche pit, undeveloped pasture land
McCulloch	U1581	McCulloch County	Undeveloped pasture land, traces of auto body parts
McCulloch	U1589	Texaco Travel Center	Disturbed area on southwest corner of truck travel center
McCulloch	U2258	Jay Chatham	Undeveloped pasture land

Menard	43	City of Menard	closed
Menard	1404	-	-
Menard	U430	-	-
Reagan	86	-	-
Reagan	U573	-	-
Reagan	U574	City of Big Lake	Undeveloped pasture land
Schleicher	349	-	-
Schleicher	2264	-	-
Schleicher	U608		
Sterling	666	Sterling County	Closed
Sterling	1325	-	-
Sterling	U627	-	-
Sutton	658	City of Sonora	Stock pens, commercial warehouse, undeveloped pasture land
Sutton	1750	-	-
Sutton	U629	City of Sonora	Commercial self-storage unit and undeveloped pasture land
Tom Green	921	Tom Green County	Undeveloped pasture land
Tom Green	1106	Texas Dept. of Mental Health and Mental Retardation	Undeveloped pasture land
Tom Green	1363	Dick Cobb	Stock pens and undeveloped pasture land
Tom Green	1439	Goodfellow Air Force Base	Undeveloped pasture land
Tom Green	1501	Goodfellow Air Force Base	Undeveloped pasture land
Tom Green	2196	Goodyear Proving Grounds	Undeveloped pasture lands
Tom Green	U655	Private	Cultivated agricultural field
Tom Green	U657	Elmer Edgington	Residential area
Tom Green	U659	City of Miles	Undeveloped pasture land
Tom Green	U1717	City of San Angelo	Undeveloped land bordered by commercial development
Tom Green	U2253	Ross Carley	Undeveloped land
Tom Green	U2254	-	-
Tom Green	U2255	Olin Stewart	Runion Rd and limited

			unorganized residential development
Tom Green	U2256	Amado Huerta/Huerta Construction	Undeveloped pasture land
Tom Green	U2257	Gary Viss	Undeveloped pasture land

Table 4
Concho Valley Council of Governments

COG	Permit	Site Name	County	Type	2015 Tons	Rem Yds	Rate	Rem Tons	Rem Yrs
10	1270	Barnhart Landfill	Irion	1AE	758	27,846	350	4,873	1
10	26B	City of Junction Landfill	Kimble	4AE	2,700	599,108	1000	299,554	202
10	195	City of Mason Landfill	Mason	1AE	2,359	73,284	1000	36,642	10
10	1732	City of Brady Landfill	McCulloch	1AE&4AE	9,852	2,259,747	900	1,016,886	58
10	1404	City of Menard Landfill	Menard	4AE	29	12,017	850	5,107	39
10	86B	City of Big Lake Landfill	Reagan	1AE	5,334	23,790	740	8,802	84
10	349	City of Eldorado Landfill	Schleicher	4AE	1,719	552,249	1500	414,187	196
10	2264	City of Eldorado Landfill	Schleicher	1AE	3,771	1,342,776	1500	1,007,082	77
10	79	San Angelo Landfill	Tom Green	1	205,628	4,181,210	1377	2,878,763	14

Source: Texas Commission on Environmental Quality, Municipal Solid Waste in Texas: A Year in Review, FY 2015 Data Summary and Analysis

Table 5
Population History

COUNTY/City	1980	1990	Growth rate	2000	Growth rate	2010	Growth rate
COKE	3,196	3,424	7.13	3,864	12.85	3,320	-14.07
Bronte	983	962	-2.14	1,076	11.85	999	-7.16
Robert Lee	1,202	1,276	6.16	1,171	-8.23	1,049	-10.41
CONCHO	2,915	3,044	4.43	3,966	30.29	4,087	3.05
Eden	1,294	1,567	21.10	2,561	63.43	2,766	8
Paint Rock	256	227	11.33	320	40.97	273	-14.69
CROCKETT	4,608	4,078	11.50	4,099	0.51	3,719	-9.27
IRION	1,386	1,629	17.53	1,771	8.72	1,599	-9.71
Mertzon	687	778	13.25	839	7.84	781	-6.91
KIMBLE	4,063	4,122	1.45	4,468	8.39	4,607	3.11
Junction	2,593	2,654	2.35	2,618	-1.36	2,574	-1.68
MASON	3,083	3,423	11.03	3,738	9.20	4,012	7.33
Mason	2,153	2,041	-5.20	2,134	4.56	2,114	-0.94
MCCULLOCH	8,735	8,778	0.49	8,205	-6.53	8,283	0.95
Brady	5,969	5,946	0.39	5,523	-7.11	5,528	0.09
Melvin	202	184	-8.91	155	-15.76	178	14.84
MENARD	2,346	2,252	-4.01	2,360	4.80	2,242	-5
Menard	1,697	1,606	-5.36	1,653	2.93	1,471	-11.01
REAGAN	4,135	4,514	9.17	3,326	-26.32	3,367	1.23
Big Lake	3,404	3,672	7.87	2,885	-21.43	2,936	1.77
SCHLEICHER	2,820	2,990	6.03	2,935	-1.84	3,461	17.92
Eldorado	2,061	2,019	2.04	1,951	-3.37	1,951	0
STERLING	1,206	1,438	19.24	1,393	-3.13	1,143	1.25
Sterling City	915	1,096	19.78	1,081	-1.37	888	-17.85
SUTTON	5,130	4,135	-19.40	4,077	-1.40	4,128	1.25
Sonora	3,856	2,751	-28.66	2,924	6.29	3,027	3.52

TOM GREEN	84,784	98,458	16.13	104,010	5.64	110,224	5.97
San Angelo	73,240	84,462	15.32	88,439	4.71	93,200	5.38
TOTAL	128,407	142,285		148,212		154,193	

Table 6
General Population Characteristics

COUNTY	MEDIAN AGE 2000	MEDIAN AGE 2006	MEDIAN AGE 2010	% POP. BELOW POVERTY	% MALE	% FEMALE
COKE	43.1	43.3	49.9	14.9%	49.0%	51.0%
CONCHO	35.0	36.0	41.6	26.5%	68.3%	31.7%
CROCKETT	31.9	37.2	38.5	13.7%	49.2%	50.8%
IRION	29.8	39.9	43.6	8.6%	50.5%	49.5%
KIMBLE	41.6	43.1	50.3	18.5%	49.5%	50.5%
McCULLOCH	36.9	40.4	43.6	18.9%	49.0%	51.0%
MASON	41.9	46.7	49.9	14.8%	49.3%	50.7%
MENARD	40.5	44.1	43.1	22.7%	50.5%	49.5%
REAGAN	25.6	32.4	32.5	11.2%	51.9%	48.1%
SCHLEICHER	32.4	38.8	35.2	13.6%	49.9%	50.1%
STERLING	30.0	37.9	37	11.8%	50.4%	49.6%
SUTTON	31.4	36.5	38.8	13.2%	49.2%	50.8%
TOM	30.4	33.8	33.7	15.6%	49.0%	51.0%
AVERAGE	34.7	39.24	41.4	17.65%	51.21%	48.79%

Table 7
Educational Profile

County	Population estimate	Less than 9th grade	9th - 12th, no diploma	High school diploma (or equivalency)	Associate's degree	Bachelor's degree or higher
Coke	2,425	5.5%	6.0%	35.1%	9.9%	12.9%
Concho	3,241	20.7%	13.5%	33.7%	2.1%	7.7%
Crockett	2,601	16.3%	15.3%	29.1%	6.4%	6.2%
Irion	1,105	8.1%	5.5%	39.4%	5.1%	9.4%
Kimble	3,477	7.3%	10.1%	36.5%	6.4%	12.2%
McCulloch	5,827	10.9%	10.5%	33.0%	4.2%	10.9%
Mason	3,069	9.2%	6.0%	32.5%	5.1%	17.0%
Menard	1,484	14.0%	10.7%	29.9%	2.2%	10.9%
Reagan	2,289	23.5%	16.0%	30.5%	0.7%	8.0%
Schleicher	1,892	15.1%	11.2%	28.5%	4.3%	15.3%
Sterling	898	14.4%	9.5%	28.8%	2.6%	19.6%
Sutton	2,569	17.2%	7.3%	28.1%	5.8%	15.0%
Tom Green	71,700	7.6%	9.4%	31.4%	7.2%	14.6%
Average	102,577	13.06%	10.08%	32.04%	4.77%	12.3%

*residents 25 and older, 2010-2014

*statistics from American Community Survey

Table 8
Household Income Characteristics

County	Median Household Income
Coke	\$42,498
Concho	\$39,945
Crockett	\$53,903
Irion	\$64,777
Kimble	\$37,488
Mason	\$45,340
McCulloch	\$39,900
Menard	\$34,464
Reagan	\$65,948
Schleicher	\$53,886
Sterling	\$62,759
Sutton	\$51,667
Tom Green	\$46,711

Source: State of the City 2017, San Angelo Standard Times

Table 9
Per Capita Income

County	1990	1999	2014	% of state average
Coke	\$10,220	\$19,839	\$28,741	108.40
Concho	\$8,126	\$18,818	\$20,503	77.33
Crockett	\$10,232	\$14,986	\$24,862	93.77
Irion	\$11,659	\$18,663	\$30,444	114.83
Kimble	\$11,372	\$17,618	\$27,544	103.89
Mason	\$8,847	\$18,891	\$27,512	103.77
McCulloch	\$8,575	\$17,443	\$21,654	81.67
Menard	\$9,318	\$15,948	\$20,055	75.64
Reagan	\$10,243	\$25,480	\$23,814	89.82
Schleicher	\$10,615	\$15,197	\$23,074	87.02
Sterling	\$12,698	\$15,845	\$19,762	74.53
Sutton	\$10,926	\$17,676	\$24,723	93.24
Tom Green	\$11,482	\$23,453	\$24,443	92.19
Average	\$10,332	\$21,901	\$24,395	92
State Average	\$15,075	\$26,834	\$26,513	100

Texas' average per capita income was \$26,513 in 2014.

County	Persons below Poverty level
Coke	14.9%
Concho	26.5%
Crockett	13.7%
Irion	8.6%
Kimble	18.5%
McCulloch	18.9%
Mason	14.8%
Menard	22.7%
Reagan	11.2%
Schleicher	13.6%
Sterling	11.8%
Sutton	13.2%
Tom Green	15.6%
Average	15.7%
State Average	17.2%

Table 11
Racial Composition of the Concho Valley

County	White	Black or African American	American Indian and Alaska Native	Asian	Native Hawaiian and other Pacific Islander	Some other race	*Hispanic or Latino Ethnicity
Coke	96.0%	0.8%	1.0%	0.1%	0.0%	2.3%	20.1%
Concho	90.2%	1.4%	0.7%	0.4%	0.0%	8.6%	54.8%
Crockett	75.1%	0.2%	0.0%	0.6%	0.0%	25.5%	63.4%
Irion	96.4%	2.2%	1.6%	0.0%	0.0%	3.5%	26.9%
Kimble	94.4%	0.1%	0.6%	0.0%	0.1%	5.6%	23.7%
McCulloch	92.3%	1.6%	5.0%	0.0%	0.0%	3.4%	30.6%
Mason	94.4%	0.0%	1.1%	3.2%	0.0%	2.2%	24.2%
Menard	97.1%	1.0%	6.3%	0.0%	0.0%	3.1%	37.3%
Reagan	69.7%	3.3%	0.3%	0.0%	0.1%	27.0%	67.4%
Schleicher	83.1%	0.3%	0.3%	0.5%	0.2%	16.5%	48.6%
Sterling	96.5%	0.2%	0.0%	0.0%	0.0%	3.2%	36.1%
Sutton	87.1%	0.8%	0.5%	0.2%	0.2%	11.6	57.9%
Tom Green	88.3%	4.9%	1.2%	1.7%	0.1%	6.4%	36.8%
Total Region Average	89.28	1.29	1.34	0.51	0.05	9.14	40.6%

*People of Hispanic or Latino ethnicity can be any race, numbers will not equal to 100%.

Table 12
Labor Force Trends

County	Labor Force 1990	% of persons in labor force	Labor Force 2000	% of persons in labor force	Labor Force 2010	% of persons in labor force
Coke	1,321	52.0%	1,425	52.0%	1,362	54.6%
Concho	1,229	55.9%	1,301	53.5%	1,304	31.9%
Crockett	1,907	59.2%	1,762	59.3%	2,118	64.7%
Irion	634	62.3%	742	60.6%	926	63.4%
Kimble	1,734	55.4%	1,950	61.0%	2,061	58.3%
Mason	1,601	54.5%	1,453	63.5%	2,375	59.8%
McCulloch	3,475	51.3%	3,351	60.3%	3,784	59.1%
Menard	895	49.0%	899	51.5%	1,065	53.8%
Reagan	1,672	61.4%	1,862	62.8%	2,518	64.4%
Schleicher	1,190	56.9%	1,184	56.2%	1,452	65.4%
Sterling	521	58.9%	622	62.0%	775	57.2%
Sutton	2,317	64.1%	1,957	63.7%	3,123	61.3%
Tom Green	42,060	65.0%	49,137	66.1%	53,585	59.5%
Total	60,556		67,645		76,448	
Average		57.4%		57.9%		55.5%

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.

Table 13
Gender in labor force

	males In labor force		Males employed	Males unemployed	females In labor force		Females employed	females unemployed
Coke	841	84.4%	81.6%	3.4%	859	68.7%	65.1%	5.3%
Concho	2,094	28.5%	26.9%	5.4%	690	63.6%	61.7%	3.0%
Crockett	1,062	95.0%	92.7%	2.5%	1,087	70.7%	63.5%	10.3%
Irion	454	91.2%	89.6%	1.7%	491	65.8%	58.9%	9.7%
Kimble	1,191	83.0%	75.9%	8.5%	1,247	69.5%	65.4%	5.9%
Mason	1,175	88.8%	80.1%	9.8%	972	67.3%	63.2%	6.1%
McCulloch	2,213	88.0%	83.1%	5.6%	2,314	62.0%	59.7%	3.7%
Menard	530	80.6%	74.7%	7.3%	514	72.4%	69.8%	3.5%
Reagan	1,049	90.4%	89.3%	1.2%	967	58.2%	57.4%	1.4%
Schleicher	829	86.0%	84.2%	2.1%	842	61.3%	61.3%	0.0%
Sterling	365	78.1%	78.1%	0.0%	386	61.7%	61.7%	0.0%
Sutton	1,078	91.3%	90.4%	1.0%	1,154	55.3%	54.3%	1.7%
Tom Green	33,166	82.2%	72.1%	4.6%	33,498	70.7%	72.1%	6.2%
Average		82.1%	78.4	4.1%		65.2%	62.6%	4.4%

*population 20-64 years

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

Table 14

Civilian Labor Force Unemployment Rates for the Concho Valley District

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
2016	4.4	4.5	4.6	-	-	-	-	-	-	-	-	-	4.5
2015	3.9	3.9	3.9	3.9	4.3	4.6	4.7	4.5	4.4	4.4	4.4	4.2	4.3
2014	4.5	4.5	4.3	3.6	4	4.2	4.3	4.1	3.8	3.6	3.5	3.2	4.0
2013	5.4	5.1	4.8	4.8	5	5.7	5.5	5.1	5	4.8	4.6	4.3	5.0
2012	5.7	5.4	5.1	4.9	5.1	5.7	5.7	5.3	4.9	4.8	4.7	4.7	5.2
2011	6.6	6.4	6.1	5.8	6.1	6.8	6.6	6.4	6.3	5.8	5.5	5.2	6.1
2010	7.4	7	6.9	6.5	6.3	6.8	6.8	6.5	6.4	6.3	6.5	6.2	6.6