

SECTION 2 - CHAPTER 6
THE MERAMEC REGION
ECONOMY

EMPLOYMENT

The top three economic sectors in the Meramec Region are education, health and social services (15,795 people at 21.7 percent), manufacturing (12,679 at 17.4 percent) and retail (8,782 at 12 percent.) There has been a major economic sector shift since 1960. Census data for 1960 shows that, although manufacturing was the top ranking sector—at 24.7 percent—agriculture was the second ranking sector, employing 18.3 percent of the employed persons. The service industry and retail were very close for the third ranking sector at 14.3 percent and 14.2 percent, respectively. In 1970, manufacturing remained at the top at 23.4 percent. Agriculture was replaced by the service industry as the second ranking employment sector at 22.2 percent. By 1980, the service industry had overtaken manufacturing as the top economic sector in the region with 25.7 percent of the employed persons. Manufacturing ranked second at 22.2 percent and retail third at 15.4 percent.

Employment in the service industry increased by 27.3 percent from 1980-1990; however, the largest component—education—increased by only five percent. This reflects two things, the de-emphasis on funding for education during the 1980s by both the state and national agencies and fewer school age children as the population in the region ages. Educational services sector, however, increased by some 50.6 percent from 1990-2000.

The median age in 1970 for the Meramec Region was 32.2 years; in 1980 32.6 years; in 1990, 35.1 years; and in 2000, 36.6 years. The state and national median age for 1970 was 29.4 years and 28.0 years, respectively. For 1980 it was 30.8 years and 30.3 years, respectively; in 1990 it was 33.5 years and 32.6 years, respectively; and in 2000 it was 36.1 years and 35.3 years, respectively. The health services component of the service industry for 1990 was 3,793; this was up from 2,632 in 1980. In 2000, health care and social assistance

was 8,434. An expansion of one hospital in the region was completed in the early 1980's that contributed to this increase as well as the expansion of several physician clinics. Table 6-1 indicates the various industries in which persons in the Meramec Region were employed in 1960 through 2000.

Manufacturing employed 7,500 in 1960 and 10,664 in 1990, an increase of approximately 42 percent in 30 years. In 2000, manufacturing employed 12,679, an increase of nearly 19 percent in 10 years. A concentrated effort has been made by several of our counties and communities to attract new manufacturing and industry and to assist existing industry to expand. The use of the EDA revolving loan fund and an active marketing campaign during the 1980s assisted in a 22.4 increase in manufacturing jobs between 1970 and 1980. Even though some plants closed, mainly the shoe and apparel industries, it is evident that the Meramec Region local governments are taking advantage of programs that are available to assist in increasing the employment in the manufacturing sector.

OCCUPATIONS

According to 2000 Census data, the largest category of occupations for the region is Management, Professional, and Related Occupations. Some 18,650 persons in the Meramec Region are employed in that category according to the 2000 census. In the 1970 census, the major employment category was equipment operators and laborers with 7,644 employed. This number fell dramatically to only 5,794 in the 1990 census, due to the closing and cut backs in the mining industry in the area. In the 1960s, the major employment category was transportation and material moving, with 7,819 employed. Table 6-2 classifies employed persons according to occupation.

LABOR FORCE AND AVAILABLE LABOR

Section 2—Chapter 2 provides information about the region's labor force. Some people do not seek unemployment benefits or employment services. Those that run out of unemployment benefits aren't tracked, and many in the region are underemployed or in a

job-seeking mode, if the right opportunity comes along. For example, when the Wal-Mart Distribution Center in St. James, Phelps County, sought applications in 2001 for 600 positions, with most starting at about \$11.50 an hour with benefits, over 15,000 applications were received. That number is almost five times the population of St. James.

EXISTING EMPLOYERS

The major public employers in the region include: Fort Leonard Wood, with 2,300 employed; Phelps county Regional Medical Center with 1,335 employed; and Missouri University of Science and Technology (University of Missouri—Rolla), with 1,000 employed. Public employees make up about 20 percent of the number of employed persons (16 years and older) in the region. Table 6-3 lists the major public employers in the region.

The largest private employer in the region is Wal-Mart Distribution Center in St. James, employing 1,175. Other major private employers include:

- Quaker Window 625 employees
- Von Hoffman Graphics 500 employees
- Aerofil Technologies 500 employees
- Boys and Girls Town of Missouri 450 employees
- Wal Mart Retail Stores 420 employees
- U.S. Food Service 417 employees

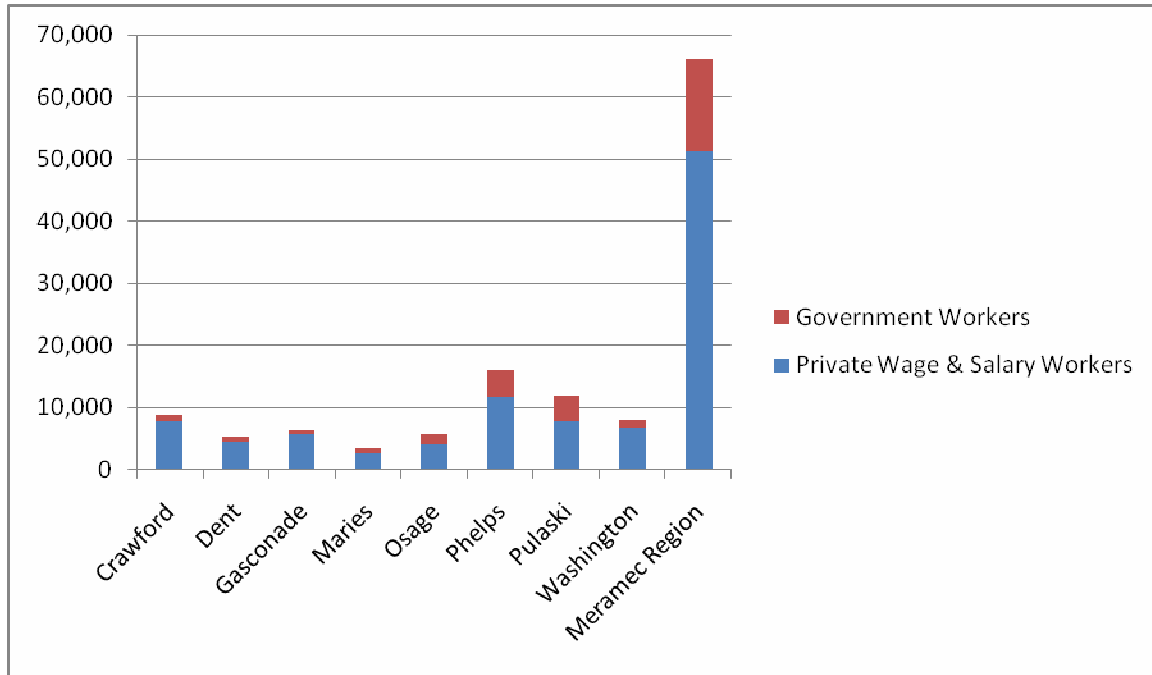
Table 6-4 lists the existing private employers in the Meramec Region with a labor force of 20 or more. This table also provides the NAICS codes and the primary product, as well as the number of employees. This information is from the Meramec Regional Planning Commission Fact Book that is updated on a regular basis with a survey of existing industry and business.

The information may be found on the Meramec Region's web site at

www.missourimeramecregion.org. Table 6-5 classifies workers in the region as of 2000.

Chart 6-1 below depicts the number of public and private employees in each county, and the region as a whole. Table 6-5 classifies workers in the region as of 2000.

Chart 6-1
Meramec Region
Class of Workers--2000



Source: 2000 Census of Population 1

AVAILABLE BUILDINGS/SITES

Table 6-6 lists the business/industrial sites located in the region and Table 6-7 lists available business and industrial buildings and sites as of June 2006, including a contact person. This information is updated on a regular basis and provided to the State of Missouri Department of Economic Development. Buildings/sites may also be found on the Missouri LocationOne web site found at www.locationone.com/locationone.

MAJOR ECONOMIC SECTORS

Service Industry

As shown in Table 6-1, educational, health and social services has become the most prominent industry of employed persons in 2000 in the Meramec Region. Some 15,795 people are employed in one of these areas. In Crawford, Gasconade, Maries, Osage and Washington counties, the service industry sector still takes a second place to manufacturing. However, service industry jobs dominate in Dent, Phelps and Pulaski counties. All counties but Phelps show more employed in health care and social assistance than in educational services.

Manufacturing

The second largest employment sector in the Meramec Region is manufacturing. Based on 2000 information, some 12,679 people are employed in manufacturing. Tables 6-8 through 6-11 list the manufacturers in each county, along with the type and longevity of the industry and the total number of jobs for each year from 1992-2008. (Data was not available for 2003 or 2007.)

Currently, the largest manufacturers in Crawford County are Industrial Wire Products in Sullivan with 150 employees and Paramount Cap in Bourbon with 400 employees. Dana Brake Parts saw a significant increase in jobs between 1998 and 2002, adding some 260 employees to its roster. Mar-Bal, Inc., a producer of electrical equipment, has added almost 50 jobs in the city of Cuba since 1992. Steelville Manufacturing Company added about 30 jobs in the last 10 years and Versa-Tags, a producer of pressure sensitive tags and labels in Cuba, added 40 jobs during the same period. Crawford County was greatly impacted when GenCorp Automotive Company went out of business in 1992, losing 170 jobs and by the loss of the Brown Shoe Company in 1995, with the loss of about 450 jobs. Also of significance is the loss (1998) of about 40 jobs in the city of Cuba at the BW Freeman Heel Company, although the company remained open. Paramount Cap in Bourbon lost 200 jobs in 2000, but has since gained them back. In 1997, Pea Ridge Iron Ore moved from Crawford County to

Washington County, but maintained its 100 jobs in that county. In December 2006, Brake Parks, Inc. in Cuba, closed its doors with a loss of 350 jobs.

In Dent County, the largest manufacturers are Doe Run Company in Boss, with 252 employees and Royal Oak Enterprise in Salem with 100 employees. Salem Wood Products follows closely behind with 96 jobs. Doe Run Company has seen a net gain of 122 jobs since 1994. Buick Mine Mill (a division of Doe Run Company) closed down in 2006, with a loss of 200 jobs. The county has experienced other major job losses over the past decade. In 1993 CanOak USA lost 368 of its 400 jobs. The company now employs 40. In 1998, Hagale Industries, an apparel company located in Salem that employed 325, began a decline and eventually closed, putting the final 100 employees out of work in 2002. Salem also lost All American Apparel, a producer of awards jackets, in 1997, losing another 31 jobs. Additionally, they lost Daisy Company in May 2006, with a loss of 30 jobs.

In Gasconade County, the largest manufacturers are Von Hoffman Graphics in Owensville with 500 employees and Jahabow Industries in Owensville with 145 employees. Von Hoffman Press grew from 258 employees in 1992 to 500 in 2002. Jahabow Industries in Owensville gained almost 100 employees from 1992-2002. However, recently, 50 employees were lost. Mid Missouri Graphics closed in 2002, bringing to an end some 80 jobs. BW Freeman Heel Company moved to Cuba in 1994, taking its 58 jobs. Pretium Packaging of Hermann, downsized from 130 to 100 over the past few years. AMF Playmaster Billiards and Games, located in Bland, had once employed 125 people. The company closed in May 2007, with a loss of about 60 jobs.

In Maries County, the largest manufacturing firm is Kingsford Products in Belle with 124 employees. Kingsford has maintained a steady 120-125 employees for the past 14 years, dipping only slightly to 110 in 2000-2001. In 1997, Top This, Inc.—a manufacturer of hats—closed, losing the remaining 21 jobs. The company had employed 50 in 1995-1996. Invacare (originally Huntco Healthcare) closed in 2001, putting 60 people out of work. In 2002, Missouri Thistle, Inc. moved to Owensville, taking 35 jobs with them.

Osage County is home to Quaker Window in Freeburg with 500 employees, and Diamond Feeds (Schell & Kampeter, Inc.) in Meta with 130 employees. Diamond Feeds has grown by a healthy 93 employees since 1992. Quaker Window has added some 200 employees since 1992. Royal Oak Enterprises (Meta) has lost 46 jobs since 2000. Another charcoal manufacturer—Patio Chef—closed its doors in Meta at the close of the decade. Some 40 jobs were lost.

In Phelps County, one of the largest manufacturers—Briggs and Stratton in Rolla—with 900 employees, closed in August 2006. Other major Phelps County employers include Brewer Science in Rolla with 260 employees, and Can-Tex in Rolla with 100 employees. Major employee gains since 1992 include Brewer Science with 210 additional employees and Can-Tex Industries with 45. Tacony Vacuum in St. James has added 11 new jobs since its 1998 beginning. Some 115 jobs were lost with the closing of California Manufacturing in St. James in 1997. With threats of moving USGS operations to Denver in the fall of 2006, 100 employees sought employment elsewhere or opted for early retirement. Wal Mart Distribution Center in St. James now employs 1,175.

In Pulaski County, the largest manufacturers are Lakeside Truss Company with 30 jobs and the Ad Tracker with 25 jobs.

In Washington County, the largest manufacturers are Purcell Tire and Rubber Company in Potosi with 135 employees and Reed Lumber Company with 55 employees. Purcell Tire has gained 11 employees since 1992. In 1996, Enhancements Sheltered Workshop opened in Potosi and now employs 33. Sure Seal, Inc. of Mineral Point had 73 employees in 2005, but has only one now. Company closures since 1992 include Red Wing Shoe (250 jobs lost) and Henschel Mfg. Co. (50 jobs lost).

Retail Trade

Some 8,782 citizens of the Meramec Region are employed in retail trade (Table 6-1). Retail trade is the third largest economic sector in all of the eight counties in the region, with the exception of Pulaski and Phelps, in which it is second, and Osage, in which it is fourth.

The number of retail establishments in 1997 and 2002, by category and sales are shown on Table 6-16. As of 2002, there were 735 establishments in the region, with total sales of over \$1.3 billion. Of these establishments, gasoline service stations and motor vehicle and parts dealers top the list with 132 each. Leading the sales list are motor vehicle and parts dealers with over \$297 million in sales. Table 6-17 compares the number of establishments and sales for 1987, 1992, 1997 and 2002. As indicated, while the number of retail establishments in the region has increased from 1987 to 2002 by about 4 percent, retail sales increased by 187.2 percent. Retail sales per establishment rose by 173.4 percent during that time frame period. The trend of a smaller increase in the number of establishments and higher retail sales is most likely due to the larger retailers moving into the area, and the consequent closing of many of the smaller retail establishments that could not compete.

OTHER ECONOMIC SECTORS

Wholesale

The number of wholesale establishments in the region has decreased from 159 to 131 from 1987 to 2002—a net decrease of about 17.6 percent. It is difficult to evaluate total sales figures, since a great deal of information is withheld to avoid disclosure of individual company records. However, it appears that sales did not follow suit, increasing from 1987 to 2002 by almost 30 percent. Table 6-18 lists wholesale establishments and sales by county and region for 1987, 1992, 1997 and 2002.

Agriculture

As discussed in Section 2, Chapter 3, the number of farms in the Meramec Region has decreased by about 229 (3.5 percent) from 1997 to 2002. Large farms—1,000 acres and over—increased by 23.4 percent in that same timeframe. It appears that small farms are being combined or added to larger farms. The average size of farms in the Meramec Region decreased by 8 acres between 1987 and 2002. Table 6-19 shows comparisons of the market value of agricultural products for the years 1987, 1992, 1997 and 2002. The market value in agricultural products sold, from 1997 to 2002, declined in Missouri by .7.2 percent, while

nationally it rose by 1.9 percent, and in the Meramec Region by .9 percent. All counties except Washington showed an increase in the market value of agricultural products sold from 1997-2002. Gasconade County led the rest of the counties with a 22.6 percent increase, followed by Phelps County that showed a 11.6 percent increase. Dent County had the highest average market value of agricultural products increase (8.6 percent) with Gasconade County second (6.5 percent). Details on the average per farm value may also be found in Table 6-19.

Forestry

The Ozarks region of Missouri is the focal point of several converging ranges of plant associations. Eastern hardwoods, southern pines and western prairies and the wildlife each supports, all reach the outward limits of their range in this area. As a result, various types of forest lands and animal habitats co-exist within a limited area. In 1989, of the 2,598,800 acres of land in the Meramec Region, some 1,764,000 acres were forest land. Of this forest land, 96 percent was considered commercial.

The economy of the region is partially dependent upon the resources of the forest land. According to the *Missouri Forest Industries 1990 – Directory of Primary Wood Processors*, developed by the Missouri Department of Conservation, there are 51 businesses dependent upon the timber resources in the Meramec Region, as shown in Table 6-20. These industries include sawmills, charcoal plants, stave mills, post peeling plants and treating plants. Dent County has the most industries tied to the timber business, 19, with Crawford County second with 12.

In addition, there are several small business and side businesses in the cordwood business that are not listed in the directory. For some of these small operators, the cordwood business is a substantial part of their annual income.

Mining

Mining has long been an important factor in the local economy in the Meramec Region, but the mining industry has been plagued with problems since the beginning. The location of mining areas presents problems in the removal of mining wastes, pollution of local water

supplies and the reduction in the market for mineral resources in the region. Table 6-21 lists the mining and quarry companies and their locations within the region.

The Doe Run Company, with corporate and sales headquarters located in suburban St. Louis, has mining and milling operations in the ore-rich Viburnum Trend. Lead smelting and refining are performed at the nation's largest lead smelting complex in Herculaneum, just outside the Meramec Region in Jefferson County. Recycling takes place at the most advanced, environmentally sound facility of its kind, located in Boss, in the Meramec Region. The EPA recognized Doe Run's Buick Resource Recycling Facility, a secondary smelter for significant decreases for production-related waste between 1994 and 1996. However, within the past few months, lead levels in Herculaneum have been found to be excessively high and a buyout of most homes is being discussed along with a clean-up effort.

ECONOMIC RELATIONSHIPS

The economy of the Meramec Region has shown a varied amount of growth during the last 10 years. The population growth from 1990-2000 in the region was 9.5 percent, compared to 8.6 percent growth for the state of Missouri. Population projections for 2005-2010 show that the population for the Meramec Region will increase at a slightly lower rate than for Missouri and at a slower rate than for the United States.

The poverty rate for the area was 17.4 percent in 1989—up 1.2 percent from 1979. The 1999 poverty rate for the region is 14.0 percent. This compared to the state rate of around 11.7 percent. The unemployment rate during 2001 for the region was 5.48 percent, compared to a state rate of 4.8 percent. Median family income in the region in 1989 was only 69.1 percent of the U.S. median income and 76.43 percent of the Missouri median income. In 1999, the median family income in the region was 76.2 percent of the U.S. median and 82.8 percent of the Missouri median.

Strategically located close to Fort Leonard Wood, St. Louis, Columbia and Springfield; dissected by Interstate 44; and home to the Missouri University of Science and Technology

(University of Missouri—Rolla,) Rolla Technical Center, Linn State Technical College, U.S. Geological Survey, the Missouri Geological Survey and the Phelps County Regional Medical Center the Meramec Region is poised to see future growth and diversity in the next several years. In the past, the region took hard hits in the mining and textile industries, but is now using its strengths in the service, manufacturing and retail sectors to overcome those losses. In 2001, the world’s largest company—Wal-Mart—located a hard-line distribution center in St. James in Phelps County. Including its transportation division, the company employs roughly 1,175 people.

Over half of those employed in the service sector are in health care or education. The major public employer in the region is Fort Leonard Wood with 2,300 employees and the largest private employer is Wal Mart Distribution Center with 1,175 employees. The region's two major private manufacturing employers are Von Hoffman Graphics in Owensville with 500 employees and Quaker Window with an estimated 625 employees.

With the exception of the city of Linn at 17.9 percent growth, the cities located along the I-44 corridor have seen the most growth during the past decade: Cuba (27.3 percent), Rolla (16.22 percent), St. James (13.8 percent), Bourbon (13.5 percent) and Sullivan (12.2 percent). Large companies are looking to locate close to large metropolitan areas along major highways—two strengths of the Meramec Region.

ECONOMIC PERFORMANCE FACTORS

State and Local Laws

Enterprise Zones – In 1982, the state legislature created tax-abatement zones called Enterprise Zones. There are currently five zones within the Meramec Region that offer real property tax abatement on improved properties to qualifying companies. The zones are used as an incentive for the growth of business and industry in low income, high unemployment areas. Figure 6-1 is a map showing the enterprise zones within the state and the region. In 2005, Missouri authorized the Enhanced Enterprise Zone Program that allows for the

establishment of zones based on unemployment and poverty. A local board determines the incentive package, which includes at least a 50 percent tax abatement on real property improvement and the state offers sellable, discretionary tax credits to qualifying industries. Currently, two zones exist in the Meramec Region—one in the Chamois area in Osage County and one in the Salem area in Dent County.

Financial Resources

Commercial banks in Missouri are the main lending institutions for businesses and industries. While savings and loans will provide financing for land and building, they rarely provide financing for equipment or working capital.

Data regarding lending institutions and their assets are listed in Table 6-22. Assets are listed as total assets for institutions and their branches, not individual branches. This data was compiled by a survey conducted by the Meramec Regional Planning Commission and included in the Fact Book that is updated on a regular basis.

Industry Financing & Business Assistance Resources

In addition to commercial sources for financing, business and industry have access to a variety of assistance programs. The following list indicates the organization and the type of assistance available.

Meramec Regional Planning Commission (MRPC) - A council of local governments—serving Crawford, Dent, Gasconade, Maries, Osage, Phelps, Pulaski and Washington counties and their respective 34 cities—provides a variety of assistance, including business loans, grants for public infrastructure to support business and industry, resource information, data and U.S. Census information as well as feasibility studies.

Meramec Regional Development Corporation – MRDC, a 501(c)3 affiliate organization to MRPC, administers the Small Business Administration 504 loans program and two revolving loan funds for MRPC. These loans can be used by new and expanding businesses and

industries. The funds are tied to job creation and can be used for fixed assets as well as working capital and inventory. A commission appointed board administers the program. MRPC staff prepares applications and takes care of the day to day administration of the program.

Missouri Department of Economic Development - The department offers financing, tax incentives, productivity enhancement programs and business support services to new and expanding businesses and industries. Meramec Region staff access these programs on a regular basis.

Economic Development Administration - A part of the Department of Commerce, this federal agency provides funding for local governments for public infrastructure to support new and expanding business and industry. Funds are also available for revolving loan funds administered locally or new and expanding businesses and industries.

Missouri Enterprise - This state innovation center provides technical assistance and assists industries in transferring technology from the University of Missouri - Rolla to solve an industry's problem.

Industrial Development Authorities - Most cities and counties in the Meramec Region have formed these not-for-profit corporations which can issue tax-exempt industrial bonds without public referendum. Fixed assets, including land, buildings and equipment, can be purchased with these bonds.

Municipal Bonds for Industrial Development - Both general obligation and revenue bonds can be used for industrial development in Missouri. Ad valorem tax advantages may be gained by using bonds issued by municipalities.

Central Ozarks Private Industry Council - This organization administers and operates the Job Training Partnership Funds for an eleven county area including the Meramec Region. The COPIC provides training and education opportunities for individuals who are unemployed or

under employed. The employer can receive up to 50 percent reimbursement for training of new employees.

USDA Rural Development - A part of the Department of Agriculture, this federal agency offers grants and loans to communities working with companies looking to locate or expand. Additionally, Rural Development offers direct loans and loan guarantees for business.

Electric Cooperatives -Economic Development is a team effort aimed at creating jobs and improving the well being of communities. Most electric cooperatives in the region play a role in economic development, and some have full time developers. Intercounty Electric has provided low-interest to no-interest loans for businesses

Delta Regional Authority-The Delta Regional Authority was formed in 1988 by the U.S. Congress to address poverty and low per capita income levels in the distressed communities in the Mississippi Delta. Four of the Meramec Region's counties are in the Delta Region— Crawford, Dent, Phelps and Washington.

GENERALIZED LAND USE

The Meramec Region is rural in nature with Rolla being the largest city with 16,367 in population. Only 10 of the 34 communities meet the Census Bureau's definition of urban—that being a population of 2,500 people. Many of the cities, even those with less than 2,500 in population, have planning and zoning. However, none of the counties have planning and zoning. This was an issue that surfaced in many of the county strategic meetings, held as a part of this CEDS development.

Land-Use Patterns

Urban Uses — According to the Census Bureau, an urban area is defined as a place having a population of at least 2,500 people. Using this definition, ten cities in the Meramec Region were classified as urban in 2000: Cuba, Hermann, Owensville, Potosi, Rolla, St. James, Salem, Sullivan, St. Robert and Waynesville. Developed land in these areas, as well as in the

other incorporated places includes residential, commercial, industrial, public and park land. Residential land is devoted primarily to single family dwellings while commercial land consists of retail activities and personal, professional and business services. Most commercial land use is limited to major roadways inside the city limits.

Unincorporated Areas — Within the unincorporated portion of the region, only scattered commercial uses are found along with the residential uses. Those industrial uses found in the unincorporated areas are primarily mining and forestry operations and utility substations. Park and recreation areas are found throughout the region. The Mark Twain National Forest is found in portions of Crawford, Dent, Phelps, Pulaski and Washington counties. State parks and wildlife areas are found in Crawford, Dent, Phelps and Washington counties.

Agricultural Uses — Much of the land in the Meramec Region's 5,133 square miles is devoted to agricultural uses. According to the *2002 Census of Agriculture*, the largest agricultural land use in the region is cropland. In 2002, almost 42 percent of the 1,448,285 acres of farmland in the region was used for growing crops. The total farmland acreage has increased by 186,307 acres (12.5 percent) since 1987. The total number of farms in the region also increased by almost 15 percent from 1987 to 2002. However, the average size of farms in acres decreased by 5 acres. Osage County holds the most farmland in the region with 314,788 acres. (See Table 6-23.)

TRANSPORTATION

Detailed information on the transportation system in the region is contained in Section 2-Chapter 4. The regional transportation system is vital to the area's economic growth and sustainability. Highways and railroads are used for transporting manufactured products and agricultural goods, accessing employment centers, and bringing travelers and tourists to the region. Aging highways and bridges prohibit growth in much of the region because access becomes limited to many communities. The Transportation Advisory Committee of the Meramec Region continues to work with the Missouri Department of Transportation to identify and prioritize transportation needs in the region.

OTHER ECONOMIC FACTORS

HOUSING

General

According to Table 6-24, in the Meramec Region, there are 78,513 total housing units with 66,974 occupied (according to 2000 Census data.) The average population per unit in the Meramec Region is 2.53 as compared to 2.48 for Missouri. Pulaski County has the highest per unit population with 2.68, followed by Washington and Osage with 2.64 and 2.61 persons per unit, respectively.

Occupancy

Of the 66,974 occupied units, 47,949 are owner occupied while 19,025 are renter occupied. These figures are shown in Table 6-24. There are more individuals living in owner occupied units, average of 2.57 for the region as compared to renter occupied units, average of 2.36 for the region. This follows the state trend of 2.59 for owner occupied and 2.2 for renter occupied.

The Meramec Region has 11,539 vacant housing units with 1,285 vacant units for sale. According to the 2000 U.S. Census, Pulaski County has the most vacant units for sale, 315 and Maries County had the fewest with 61.

In the 1980 U.S. Census there were 250 units in the region occupied by 8 or more persons; in the 1990 Census the figure 7 or more was used and this number increased to 465 in the Meramec Region.

Sale and Rent Price

The median sale price asked for a housing unit in the Meramec Region, according to the 2000 U.S. Census, was \$69,263 compared to the 1980 census figure of \$19,950. The state of Missouri median asking price per housing unit for the 2000 U.S. Census was \$89,900, up

from \$34,800 in 1980. While the Meramec Region shows an increase of approximately 247 percent in the median sale price, the state of Missouri shows 158 percent increase.

In 1980 the median asking price for rent for the Meramec Region was \$95. The 2000 U.S. Census shows the median rent at \$374—a 294 percent increase. In the state of Missouri, the median rent for 1980 was \$153 and the median for 2000 was \$484—a 216 percent increase. It is interesting to note however, that while rental rates increased approximately 294 percent, purchase costs increased approximately 247 percent. For those individuals able to purchase their housing units the cost increase was less than for those who rented.

Structural Characteristics

More homes were built in the Meramec Region between 1970 and 1979 than any other years. The same was true for the state as a whole. Roughly 53 percent of the homes in the region are 20+ years old. Rehab opportunities in the future will be important to sustain the housing stock. Multi-family units will also need rehabilitation—including many senior housing development projects financed by USDA Rural Development in the 1980s. From 1990 to 2000, 14,882 units were built in the region. 7,791 units were built in 1939 or earlier. The majority of housing units in the region, as in the state, are single unit structures that are separated from any other structure. The second largest category is mobile homes, with 12,537 units in the region. This is also the second largest category for the state of Missouri. Four counties have structures with 50 or more units—Dent, Phelps, Pulaski and Washington. In the area of multi-family housing, the most common size in the region and state is three to four units. Housing construction has declined in the region since 1970. There is very little affordable housing being built. A complete housing needs assessment has not been done for the region, however, individual studies and focus groups indicate a need for homes under \$100,000 in most counties. Structural characteristics of housing units in the Meramec Region are indicated in Table 6-25, 26 and 27. Data presented is from the 2000 U.S. Census of Population - Housing Characteristics.

COMMUNITY FACILITIES

Sewer and Water Systems

Progress continues in upgrades to community facilities across the region due to funding through the Community Development Block Grant program, administered by the Missouri Department of Economic Development. Several of our communities have received funding for water or sanitary sewer systems over the past 5 years including Caledonia, Mineral Point, Public Water District #4, Public Water District #3 and Public Water District #2 in Washington County, Argyle in Osage County, and Doolittle and Newburg in Phelps County. In addition, several of our communities have extended or improved their systems with the assistance of grant monies or bond issues or both. The Meramec Regional Planning Commission staff continue to work with communities to find a feasible method for providing a proper water system and a sanitary sewer system that meets health and environmental standards.

Health Care

Table 6-28 indicates the number of medical professionals practicing in the Meramec Region. These include 169 physicians, 44 dentists and 1,059 nurses. The information source is the Missouri Department of Health and Senior Services, March 2002. Table 6-29 lists each county and the health care facilities in that county. All of the Meramec counties, except for Maries and Osage, have a hospital or medical center. Phelps County has the most comprehensive medical facility with 232 licensed beds, the latest in technological equipment including a CAT Scanner and MRI, a stress center, extensive out-patient and emergency services. The hospital has recently completed a \$1 million dollar expansion to improve and expand its obstetrics, surgery, out-patient and emergency facilities. It also added a medical library with a computer network for literature searches for medical staff and a cardiac rehabilitation unit. In 2003, a \$3 million renovation of the Emergency Department was completed. Additionally, a 72,000 square-foot expansion was made for Radiation Oncology, Physical Rehabilitation, Cardiac Rehabilitation units and a new state-of-the-art Laboratory. In 2004, PCRMC announced plans for building a new Intensive Care Unit and Step-Down Unit and in 2005, plans to build a Medical Office Building on campus to house physician

offices and outpatient services. Also, PCRMC began working on a new 18-bed ICU and 36-bed Step-Down Unit

Table 6-30 lists the number of licensed nursing home and residential care facilities, the number of beds, type of care and population for each of the counties. Phelps County has the most with 12 facilities. Table 6-31 lists the county, each institution in the county, the type of care provided, annual occupancy and patient days.

Education

Table 6-33 provides data on the schools districts in the Meramec Region. Table 6-33 indicates the primary school districts for the Meramec Region, the number of schools, number of teachers, number of students and student/teacher ratio. The lowest ratio is 3.62 students per teacher in the R-III Swedeborg School. The highest per student ratio is 19.97 students per teacher in R-II in Owensville. In secondary schools, reported in Table 6-34, the lowest ratio is Osage County's R-I with 5 students per teacher, and the highest Rolla 31 in Phelps County with 16.64 students per teacher.

Table 6-35 lists the colleges, universities, vocational and technical schools in or near the region. There are six universities, six colleges, which includes a business college, and five vocational or technical schools. Drop-out rates and educational attainment are addressed in Section I-Chapter 1.

Public Safety

Each major community in the region has a staffed fire department, however most of them are volunteer departments. Dixon, Hermann, St. Robert, Potosi, Rolla, St. James, Sullivan, Waynesville and Salem have full-time fire department staff. All communities have access to library facilities. Tables 6-36 and 6-37 list the public facilities in the region. Table 6-39 provides the utility rates for each community in the region.

The Meramec Regional Emergency Planning Committee (MREPC)

One of the responsibilities given our counties is to ensure adequate emergency planning as it relates to hazardous materials for the protection of their citizens. Under a federal law, the Superfund Amendments and Reauthorization Act and similar state legislation, the creation of local emergency planning committees to address hazardous materials is required.

In the Meramec Region, the counties of Crawford, Dent, Gasconade, Maries, Phelps and Washington joined together in 1987 to form the Meramec Regional Emergency Planning Committee. Osage County joined in 1998. That committee has been active now for 15 years, working on the development and maintenance of a hazardous materials response plan for use by elected officials, first responders and emergency response personnel, and promoting hazmat training for emergency responders.

The hazmat plan, updated and distributed annually—includes all of the emergency response resources available in the region as well as a list of all of the hazardous materials stored in facilities around the region. This list of hazardous materials is generated through state Tier II reporting. Each year businesses and other entities with reportable quantities of hazardous materials must submit a report on what materials and what volumes they have on hand. By including this information in the hazmat plan and distributing it to emergency response agencies in the region, they are made aware of what they might have to deal with if called out to an emergency at that location.

In addition, the MREPC provides training opportunities for emergency responders in the region. That includes holding training sessions on a variety of hazmat topics and providing local grants to fire departments in the region for hazmat training.

Recreational and Cultural

Most of the communities in the Meramec Region offer recreational opportunities in the form of parks, trails, swimming pools, summer ball leagues, country clubs, libraries and golf courses as well as annual fairs, festivals and celebrations that often feature nationally known entertainers. The region has many other qualities which make it an ideal place to live and

work. Our region is unique in having thousands of acres of National Forest, state parks and abundant clean rivers which add to each community in diverse ways.

Hermann, in Gasconade County, is well known for its German heritage and its wineries as well as its Maifests and Octoberfests.

The many Meramec Region wineries offer tours and sampling of their products. A number of wineries are located in St. James and Hermann.

Many communities such as Rolla, Hermann, Owensville, Salem and Cuba, have theatre groups that produce plays throughout the year. The Missouri University of Science and Technology, with its Leach Theatre, hosts many quality plays, inspiring lectures and symphonies. The Meramec Music Theatre in Steelville offers a variety of entertainment. Arts Rolla! is an organization in the city of Rolla whose purpose is to foster, encourage and promote the arts and cultural activities in south-central Missouri; to provide a forum for the citizens of this area where local talents and artistic endeavors; and to develop an appreciation for the arts through education. Arts Rolla! sponsors various programs and events throughout the year.

Crawford County

Recreation Highlights of Crawford County:

Indian Hills Lake, Cuba; Meramec River; Huzzah River, Steelville; Courtois River; Mark Twain National Forest; Meramec Country Music Show, Steelville; Antique and Craft Shops, Bourbon, Cuba and Steelville; Onondaga Cave Park; W.K. Woods Wildlife Area; Huzzah Wildlife Area; Meramec State Park, Sullivan

Bourbon:

Public Swimming Pools:	0	Public Golf Courses:	0
Public Tennis Courts:	2	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0
Movie Theaters:	1 Indoor		

Nearest Public Access to a Lake or River: 5 miles

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Cuba:

Public Swimming Pools:	0	Public Golf Courses:	0
Public Tennis Courts:	1	Country Clubs:	1
Public Parks:	4	YMCA/YWCA:	0
Movie Theaters:	1 Indoor 1 Outdoor		

Nearest Public Access to a Lake or River: 4 miles

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Other Recreation Activities: Bowling Alley and Family Billiards

Steelville:

Public Swimming Pools:	1	Public Golf Courses:	1
Public Tennis Courts:	1	Country Clubs:	1
Public Parks:	2	YMCA/YWCA:	0

Nearest Public Access to a Lake or River: 3 miles

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Sullivan:

Public Swimming	1	Public Golf Courses:	0
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Pools:

Public Tennis Courts:	4	Country Clubs:	1
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Public Parks:	4	YMCA/YWCA:	0
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Movie Theaters:	1
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Nearest Public Access to a Lake or River: 2 miles

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Missouri Department of Conservation Lands in Crawford County:

Blue Springs Creek Conservation Area (857 acres); Campbell Bridge Access (10 acres); Crooked Creek Conservation Area (337 acres); Huzzah Conservation Area (6225 acres); Mint Spring Access (11 acres); Onyx Cave Conservation Area (35 acres); Richter Conservation Area (81 acres); Riverview Access (5 acres); Sappington Bridge Access (10 acres); Scotts Ford Access (34 acres); Woodson K. Woods Memorial Conservation Area (5660 acres)

DENT COUNTY

Recreation Highlights of Dent County:

Salem is the Gateway to the Ozark National Rivers; Current River; Montauk State Park and trout fishing; The Bonebrake Center for Nature and History; Dent County Museum; Mark Twain National Forest; Indian Trail Conservation Area; 100 Acre Wood Rally; the Dent County Fair Board hosts numerous events at The Commons, including county fairs, national

lumberjack competitions, demolition derby's and mud races, as well as the Dent County Saddle Club sponsoring horse shows, team penning, team roping, rodeos and other horse-related events.

Salem:

Public Swimming	1	Public Golf Courses:	0
Public Pools:			
Public Tennis Courts:	2	Country Clubs:	1
Public Parks:	5	YMCA/YWCA:	0
Movie Theaters:	0		

Nearest Public Access to a Lake or River: Lake - 2.5 miles, River - 30 miles.

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Other Recreation Sources: Indian Trail Archery Indoor Archery Range, Bowling Alley, Trout Fishing - 25 miles

Missouri Department of Conservation Lands in Dent County:

Cedar Grove Conservation Area (1,160 acres); R.F. Clement Memorial Forest and Wildlife Area (520 acres); Hyer Woods Natural Area (30 acres); Indian Trail Conservation Area (13,383 acres); Lenox Towersite (5 acres); Montauk Fish Hatchery (336 acres); Montauk Towersite (40 acres); Shawnee Mac Lakes Conservation Area (255 acres); Short Bend Access (85 acres); White River Trace Conservation Area (2,044 acres)

GASCONADE COUNTY

Recreation Highlights of Gasconade County:

Helds Island Access; Historic Sites; Lake of the Ozarks; Hermann Historic Museum; Peaceful Valley Estates, Owensville; Lost Valley Lake, Owensville; Lake Northwoods,

Public Parks: 3 YMCA/YWCA: 0

Movie Theaters: 0

Nearest Public Access to a Lake or River: Immediate

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Other Recreation Sources: Sand Volleyball

Morrison:

Public Swimming 0 Public Golf Courses: 0

Pools:

Public Tennis Courts: 1 Country Clubs: 0

Public Parks: 3 YMCA/YWCA: 0

Nearest Public Access to a Lake or River: 6 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Owensville:

Public Swimming 1 Public Golf Courses: 1

Pools:

Public Tennis Courts: 1 Country Clubs: 0

Public Parks: 4 YMCA/YWCA: 0

Movie Theaters: 0

Nearest Public Access to a Lake or River: 15 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Missouri Department of Conservation Lands in Gasconade County:

Canaan Conservation Area (1,435 acres); Fredericksburg Ferry Access (5 acres); Gasconade Park Access (2 acres); Hells Island Access (9 acres); Hermann Riverfront Park (2 acres); Mint Spring Access (11 acres); Mint Spring Conservation Area (42 acres); Tea Access (4 acres)

MARIES COUNTY

Recreation Highlights of Maries County:

Belle Chute Access; Spring Creek Gap State Forest; Gasconade River Access; The City of Vienna is the crossroads for Lake of the Ozarks; Maramec Springs Park is within a 40 minute drive

Belle:

Public Swimming	1	Public Golf Courses:	1
Pools:			
Public Tennis Courts:	2	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0
Movie Theaters:	0		

Nearest Public Access to a Lake or River: 8 miles

Activities allowed: Swimming, Fishing, Motorboating

Other Recreation Sources: Public Fishing Lake

Vienna

Public Swimming	0	Public Golf Courses:	0
Pools:			
Public Tennis Courts:	1	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0
Movie Theaters:	0		

Nearest Public Access to a Lake or River: 2 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Missouri Department of Conservation Lands in Maries County:

Bell Chute Access (6 acres); Clifty Creek Conservation Area (256 acres); Clifty Creek Natural Area (230 acres); Freeburg Towersite (13 acres); Paydown Access (4 acres); Rinquelin Trail Community Lake (286 acres); Spring Creek Gap Conservation Area (1,819 acres)

OSAGE COUNTY

Recreation Highlights of Osage County:

Painted Rocks State Forest; Osage River Access; Lewis & Clark Trail Stops

Linn:

Public Swimming	1	Public Golf Courses:	0
Pools:			
Public Tennis Courts:	1	Country Clubs:	1
Public Parks:	1	YMCA/YWCA:	0

Nearest Public Access to a Lake or River: 6 miles

Activities allowed: Fishing, Motorboating, Water Skiing

Meta:

Public Swimming	0	Public Golf Courses:	0
Pools:			
Public Tennis Courts:	1	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0

Nearest Public Access to a Lake or River: 20 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Other recreational activities: The Centre and Splash Zone

St. James:

Public Swimming	3	Public Golf Courses:	1
Public Tennis Courts:	2	Country Clubs:	1
Public Parks:	2	YMCA/YWCA:	0
Movie Theaters:	1		

Nearest Public Access to a Lake or River: 5 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Other Recreation Sources: Trout Fishing, 6 miles

Missouri Department of Conservation Lands in Phelps County:

Beaver Creek Conservation Area (157 acres); Jerome Access (10 acres); Little Prairie Community Lake (343 acres); Maramec Spring Fish Hatchery/Trout Park (1,379 acres); Pilot Knob Towersite (4 acres); Rosati Towersite (92 acres); Schuman Park Lake - Rolla (5 acres); Scioto Lake - The James Foundation (5 acres); Woodson K. Woods Memorial Conservation Area (5,660 acres)

PULASKI COUNTY

Recreation Highlights of Pulaski County:

Canoeing, Spelunking, Fishing, Ryder Cave, Roubidoux Creek, Gasconade River, Fort Leonard Wood

Dixon:

Public Swimming Pools:	0	Public Golf Courses:	2
Public Tennis Courts:	0	Country Clubs:	1
Public Parks:	2	YMCA/YWCA:	0

St. Robert:

Public Swimming Pools:	0	Public Golf Courses:	0
Public Tennis Courts:	0	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0

Waynesville:

Public Swimming Pools:	1	Public Golf Courses:	0
Public Tennis Courts:	0	Country Clubs:	0
Public Parks:	1	YMCA/YWCA:	0
Movie Theaters:	1		

Nearest Public Access to a Lake or River: 1 mile

Activities allowed: Bird Watching, Camping, Canoeing, Fishing, Hiking

Missouri Department of Conservation Lands in Pulaski County:

Dixon Towersite (48 acres); Fort Leonard Wood Towersite (66 acres); Gasconade Hills Conservation Area (370 acres); Mitschele Access; Riddle Bridge Access; Ross Access; Roubidoux Creek Conservation Area (179 acres); Ryden Cave Conservation Area (30 acres); Schlicht Springs Access; Laughlin/Roubdioux Parks (Waynesville)

WASHINGTON COUNTY

Recreation Highlights of Washington County:

Big River Access; Council Bluff River; Bootleg Park River; Canoeing; Berryman Camp and Trail National Forest; Buford Mountain; Hughes Mountain Natural Area

Caledonia:

Public Swimming	0	Public Golf Courses:	0
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Pools:

Public Tennis Courts:	0	Country Clubs:	0
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Public Parks:	1	YMCA/YWCA:	0
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Nearest Public Access to a Lake or River: 12 miles

Activities allowed: Swimming, Fishing, Motorboating, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Irondale:

Public Swimming	3	Public Golf Courses:	1
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Pools:

Public Tennis Courts:	2	Country Clubs:	0
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Public Parks:	2	YMCA/YWCA:	0
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Movie Theaters:	1 Indoor
	0 Outdoor

Nearest Public Access to a Lake or River: 1 mile

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Mineral Point:

Public Swimming Pools:	0	Public Golf Courses:	0
Public Tennis Courts:	0	Country Clubs:	0
Public Parks:	0	YMCA/YWCA:	0
Movie Theaters:	0		

Nearest Public Access to a Lake or River: 10 miles

Activities allowed: Fishing, Motorboating, Camping and Hiking/Fitness Trails

Potosi:

Public Swimming Pools:	0	Public Golf Courses:	1
Public Tennis Courts:	5	Country Clubs:	1
Public Parks:	6	YMCA's/YWCA's:	1
Movie Theaters:	0		

Nearest Public Access to a Lake or River: 10 miles

Activities allowed: Swimming, Fishing, Motorboating, Water Skiing, Canoeing/Tubing, Camping and Hiking/Fitness Trails

Missouri Department of Conservation Lands in Washington County:

Bismarck Lake Conservation Area (1,188 acres); Bootleg Access (303 acres); Buford Mountain Conservation Area (3,743 acres); Hughes Mountain Natural Area (462 acres); Kingston Access (58 acres); Little Indian Creek Conservation Area (3,939 acres); Pea Ridge Conservation Area (8,269 acres)

ENVIRONMENTAL ISSUES

Flood Plains

A flood plain includes the low lying areas along a river or stream that are subject to flooding. Due to the hydrogeology of the Meramec Region, as described in Chapter 4, all seven counties in the Meramec Region have at least a small portion of land located in a flood plain and eligible for the National Flood Insurance Program (NFIP). This program was enacted in 1968, and amended by the Flood Disaster Protection Act of 1973 and the National Flood Insurance Reform legislation of 1994. The NFIP standards are contained in Section 44 of the Code of Federal Regulations. Economic Development in flood plain areas can be expensive and structures must be designed to fit the terrain.

Air Quality

Air pollution comes from many different sources such as factories, power plants, dry cleaners, cars, buses, trucks and even windblown dust and wildfires. Air pollution can threaten the health of human beings, trees, lakes, crops, and animals, as well as damage the ozone layer and buildings. Air pollution also can cause haze, reducing visibility in national parks and wilderness areas. EPA protects human health and the environment through the regulatory process and voluntary programs such as Energy Star and Commuter Choice. Under the Clean Air Act, EPA sets limits on how much of a pollutant is allowed in the air anywhere in the United States. Sullivan, a member city of the Meramec Region, is also partially located in Franklin County. Franklin County is a part of the EDA non-attainment area, so designated because they fail to meet EPA's air quality standards.

Wetlands

The Meramec Region, as described in chapter 4 and previously in this chapter, is comprised of a multitude of waterways and the region is considered a part of the flood plain. In this respect, the wetlands have had a significant impact on the economic development of the area. Under federal law, every acre of wetlands disturbed during development must be replaced and by definition, most any piece of land in the Meramec Region would meet the definition

of wetlands. Such a situation makes development costly and to the point of prohibitive. Less restrictive regulations have been proposed.

Historic Preservation

The Meramec Region is steeped with cultural roots and many towns have undergone historical preservation projects. Such areas as Hermann, Cuba, Rolla and Steelville have worked to preserve their older buildings and many provide retail opportunities—especially to tourists and those looking for day trips. Gasconade County—with its rich German heritage, is notably more conscious of its heritage. Rolla is embarking upon a downtown development—and some businesses are renovating their older quarters—in an effort to attract more shoppers to downtown.

Osage County is also interested in focusing on its cultural heritage to attract visitors.

Hazardous Waste Contamination

Although the Meramec Region is not free from hazardous waste contamination, this is not a significant issue that affects the area's economic performance.

Brownfield Reuse

While grant dollars are available for Brownfield Reuse, only a few companies have expressed interest in using them. The region does not have many large sites that pose problems—most are abandoned gas stations and a few industries. Right now, there is plenty of prime industrial land in the region, and it is more cost effective and poses less liability to develop than those that are potentially contaminated.