

REPORT PREPARED FOR:

SUSTAINABLE FOREST ACTION COALITION

Summer 2016 SFAC Survey Results and
Estimated Economic Effects of USFS
Activities in Select Communities

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Prepared by the Center for Economic Development at
California State University, Chico

WWW.CEDCAL.COM; (530)898-4598

EXECUTIVE SUMMARY

Survey Results

Researchers from the Center for Economic Development at California State University, Chico collected 318 survey responses from small business owners and operators within sixteen communities near the Plumas, Tahoe, El Dorado, and Stanislaus National Forests over the summer of 2016.

The majority of survey participants agreed that business conditions and employment opportunities have changed from twenty years ago to today. Overall, participants' perceived that business conditions today are worse than business conditions were twenty years ago. When asked about overall business conditions, fifty-eight percent of participants stated business conditions twenty years ago were "good" or "very good" while only 26 percent of participants felt the same way about current conditions today. In addition, 38 percent of participants stated business conditions today are "poor" or "very poor" while only thirteen percent of participants stated conditions twenty years ago were "poor" or "very poor".

Furthermore, similar perceptions about employment opportunities were identified from participants. Forty-three percent of participants stated that employment opportunities were "very good" or "good" while only twelve percent of participants reported the same perceptions of employment opportunities today. Likewise, only nineteen percent of participants reported that opportunities twenty years ago were "very poor" or "poor". Compared to today's conditions, "poor" and "very poor" accounted for 42 percent more participants (61 percent).

A common narrative from federal land management agencies over the past 20 years has been that expanded recreational opportunities and associated visitor-driven spending would help offset declines in logging and other traditional economic activities on federal lands. In an effort to compare changes in business conditions and employment opportunities, the survey also asked participants how recreational opportunities have changed over the same time period. Thirty-nine percent stated that recreational opportunities decreased over the time period, while only thirty-three percent stated that the opportunities increased. Twenty-eight percent of participants felt that the recreational opportunities have stayed the same. These results would seem to call into question the common narrative regarding expanded recreational opportunities making up for traditional economic activities in these communities.

The overall survey results show trends in business perceptions throughout the four forest regions; however, in order to better understand how varying levels of economic diversity affected responses to questions about business conditions, employment opportunities, and recreational opportunities, the survey responses were analyzed by three designated community types: forest-focused communities, forest-peripheral communities, and regional gateway communities (see page ten for definitions).

Economic Effects

The objective of the estimated economic effects study is to accurately exhibit the direct impact of the existence of the FS in each forest area and community. Although we are sure of the fact that the FS effects the various communities in this report in an assortment of ways, refining the data to reveal a more precise and measurable effect can provide more insight to exactly how each community is influenced by the presence (or absence) of the FS. Analyzing these effects will allow us to look into exactly how each of the diverse communities are directly, and indirectly, influenced by the FS.

Within the survey, two non-invasive questions were asked to participants which allowed the CED to estimate the total revenue, by sector, in each of the four forest areas (within each of the four forests) and three forest communities (defined by influence of the FS in that area) that can be directly tied to the Forest Service. By entering the total revenue into a custom input-output (I-O) model, an accurate estimation of total employment was revealed for each forest area and forest community. These values convey the overall economic impact of the Forest Service.

Of the three types of communities, the Regional Gateway Communities accounted for the highest impact on employment, tied directly and indirectly to the FS, at 13 percent. Regional Gateway Communities were followed by Forest-Peripheral Communities and Forest-Focused Communities, accounting for nine and four percent, respectively. The average direct impact of employment due to the presence of the FS among all of the community types came out to approximately ten percent.

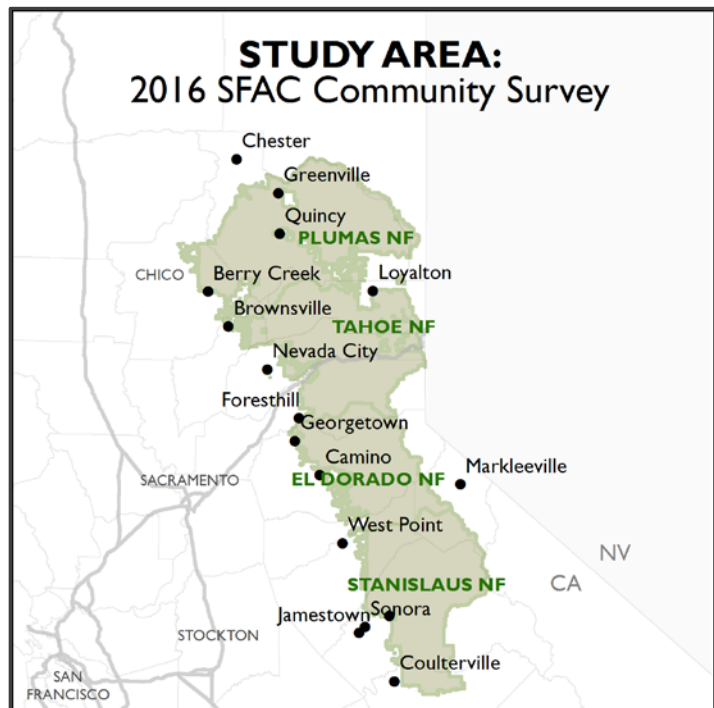
Analyzing the results by forest area, the Plumas forest area accounted for the highest impact on employment, tied directly and indirectly to the FS, at 17 percent. The Plumas forest area was followed by El Dorado, Tahoe and Stanislaus forest areas, accounting for ten, six, and four percent, respectively. The average direct impact of employment due to the presence of the FS among all of the community types came out to approximately six percent.

By looking at the total employment due to the presence of an industry (the FS) in a certain area, an accurate estimation can be formed showing how that industry (the FS) effects the economy on the whole. In this study, which took a cautious and conservative approach in each step arriving at the percentage employment due to the FS, revealed that the FS contributes to approximately 6-10 ten to the total economy in the areas surveyed in this study.

INTRODUCTION AND SURVEY METHODS

Introduction

This report summarizes results from the 2016 SFAC Forest Communities Survey, conducted between April and August 2016 by the Center for Economic Development. The survey targets business owners and operators within Northern California communities in an effort to better understand changes in local economic conditions, and perceptions about US Forest Service and other federal land agencies' activities in the area. This report presents responses to questions about local business conditions, employment opportunities, and recreational opportunities in three ways: first, it reports all results in aggregate. Second, results are broken out by each of the four National Forests that represent the study area: Plumas, Tahoe, El Dorado, and Stanislaus. Third, survey responses are broken out by the type of community surveyed: forest-focused communities, forest-peripheral communities, and regional gateway communities. Finally, in the last section of this report, survey responses are used to estimate the employment effects of US Forest Service spending and activities in the communities surveyed.



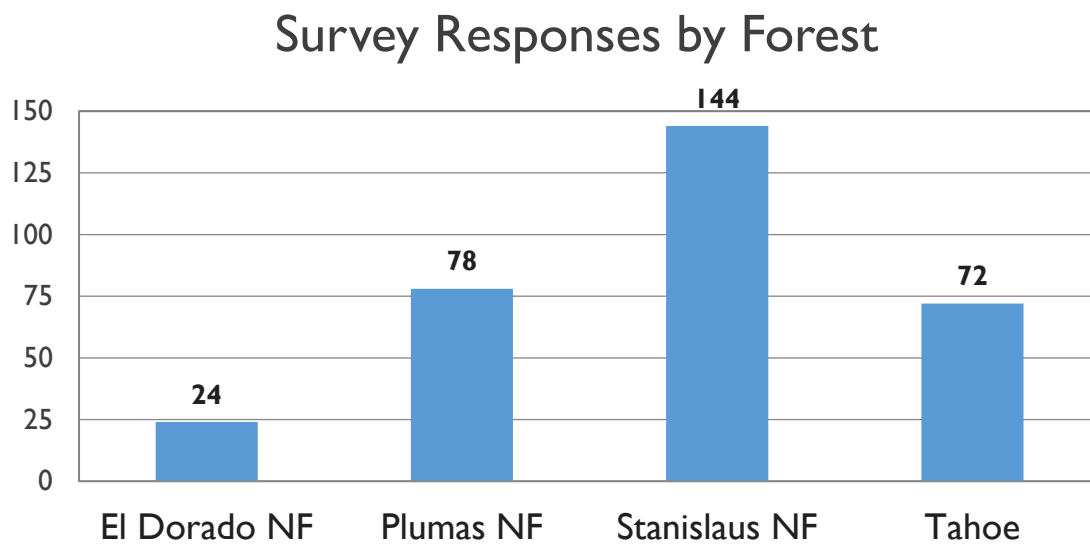
Survey Methods

The 2016 SFAC Forest Communities Survey was drafted by Bill Wickman (Spokesman, SFAC), Michael Suplita (Associate Director of Research, CED), and Ryan Miller (Project Manager, CED) during March of 2016. Survey questions aimed at obtaining a comprehensive sense of changing business and employment conditions, and possible relationships with US Forest Service or other federal land management policy. Most questions were multiple choice, but there were several questions where open-ended responses were accepted. A copy of the survey in its entirety, as well as a summary of the open-ended responses, are included as appendices to this report.

To administer the survey, CED staff obtained a list of potentially operational community businesses in by utilizing the Dunn and Bradstreet (D&B) business database. CED staff then contacted individual business owners by phone, either conducting the surveys over the phone, or directing business owners to an

online version of the survey to complete at their own pace. Out of a total universe of 5,786 potential businesses in these communities, CED collected surveys from a total of 318 businesses, an apparent response rate of 5.5 percent. It is worth noting that the data obtained from Dunn and Bradstreet is an over-estimate of all currently operating businesses, as the database is often updated with new business information but very rarely culled for business closures. For this reason, we are presenting response rates as 'conservative response rate estimates'. A summary of survey responses by National Forest, as well as by community, follows below:

Figure I.1: Survey Responses by Forest



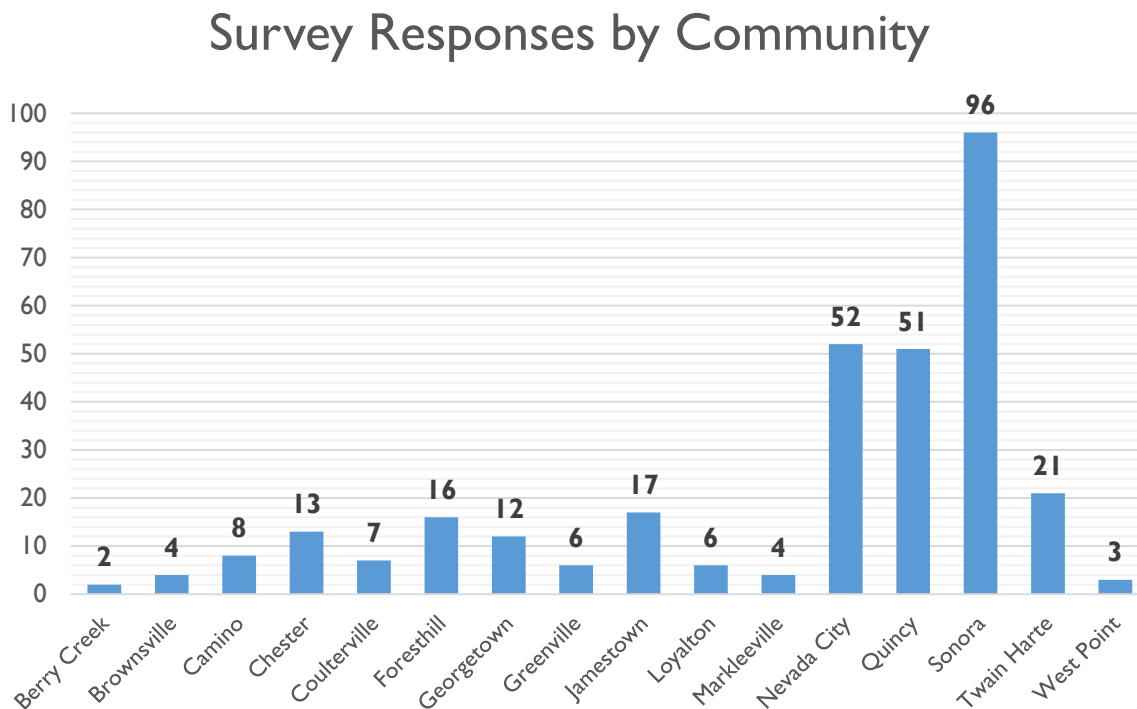
The above column chart graphically illustrates the number of responses received, categorized by the National Forest surrounding each community. El Dorado National forest had the lowest number of responses, with 24. We received 72 responses from the Tahoe National Forest, followed by Plumas National Forest with 78. We received the most responses from the Stanislaus National Forest, with 144.

Figure 1.2: Conservative Response Rate Estimate by Forest

| National Forest | Total Number of Businesses | Total Number Surveys Completed by Forest | Conservative Response Rate Estimate |
|-----------------|----------------------------|------------------------------------------|-------------------------------------|
| El Dorado | 337 | 24 | 7.12% |
| Plumas | 952 | 78 | 8.19% |
| Stanislaus | 2225 | 144 | 6.47% |
| Tahoe | 2272 | 72 | 3.17% |
| Totals | 5786 | 318 | 5.50% |

Figure 1.2, above, lists the estimated total number of businesses, the number of responses and the estimated conservative response rate, all separated by National Forest. We received the highest response rate from the Plumas National Forest with 8.19 percent. Next was the El Dorado National Forest in which we received a 7.12% response rate, followed by the Stanislaus National Forest with a 6.47% response rate. The lowest estimated response rate was that from the Tahoe National forest with 3.17 percent. In total we received 318 survey responses, with estimated response rate of 5.50 percent.

Figure 1.3: Survey Rate by Community



Shown above is a column chart that further breaks down survey responses, separating them into

community cohorts. The greatest number of responses was obtained in Sonora, with 96 responses, followed by Nevada City, with 52 responses. The fewest number of surveys came from West Point with 3 survey responses and Berry Creek with 2 survey responses. The average number of survey responses per community was 19.88.

Figure 1.4: Conservative Response Rate Estimate by Community

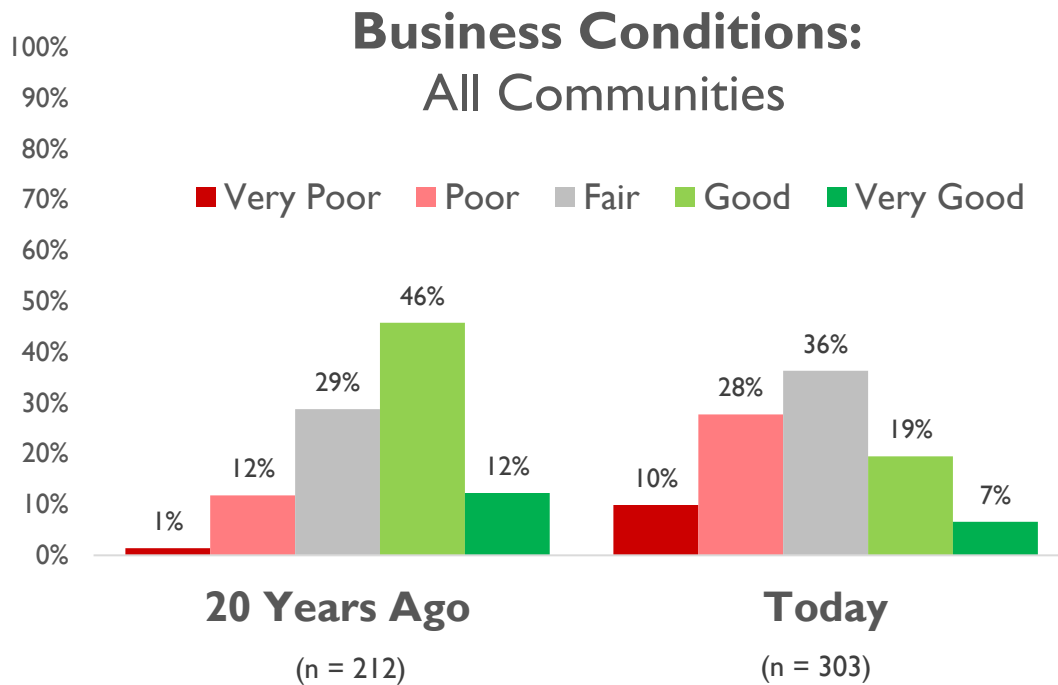
| Community Name | Total Number of Businesses | Total Number of Surveys | Conservative Response Rate Estimate |
|-----------------------|-----------------------------------|--------------------------------|--------------------------------------------|
| Berry Creek | 8 | 2 | 25.00% |
| Jamestown | 282 | 17 | 6.03% |
| Brownsville | 47 | 4 | 8.51% |
| Chester | 158 | 13 | 8.23% |
| Camino | 244 | 8 | 3.28% |
| Coulterville | 91 | 7 | 7.69% |
| Foresthill | 293 | 16 | 5.46% |
| Georgetown | 166 | 13 | 7.83% |
| Greenville | 62 | 6 | 9.68% |
| Loyalton | 45 | 6 | 13.33% |
| Markleeville | 60 | 4 | 6.67% |
| Nevada City | 1604 | 51 | 3.18% |
| Quincy | 454 | 51 | 11.23% |
| Sonora | 2015 | 95 | 4.71% |
| Twain Harte | 221 | 22 | 9.95% |
| West Point | 36 | 3 | 8.33% |
| Totals | 5786 | 318 | 5.50% |

The list above shows the percentage of estimated conservative response rates received from each community. Berry Creek had the highest estimated response rate with 25% followed by Loyalton with 13.33%. The lowest estimated response rates were from Camino with 3.28%, trailed by Nevada City with 3.18%.

Overall Survey Results

Current/Past Business Conditions (all communities)

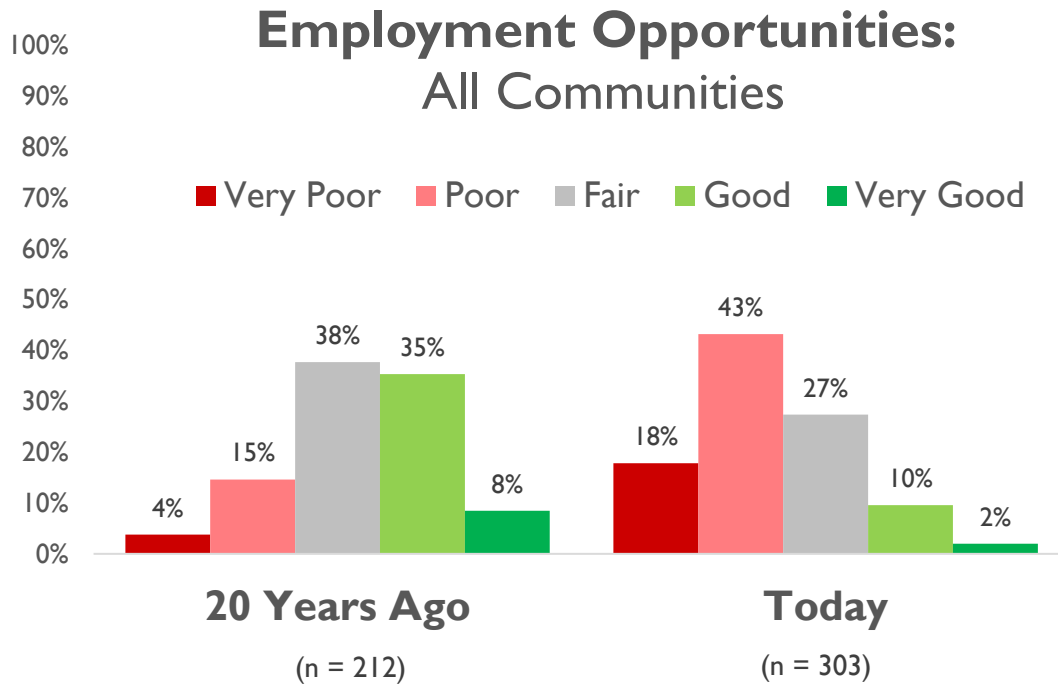
Figure I.5: Current & Past Business Conditions



Survey participants were asked to characterize current business conditions, and if applicable, business conditions from twenty years ago. As illustrated above, 58 percent of participants characterized business conditions from twenty years prior as “good” or “very good”. When asked about current business conditions, only 26 percent of participants characterized them as “good” or “very good”. In addition, only 13 percent of participants characterized business conditions twenty years ago as “poor” or “very poor”, while 38 percent of participants characterized business conditions similarly today.

Current/Past Employment Opportunities (all communities)

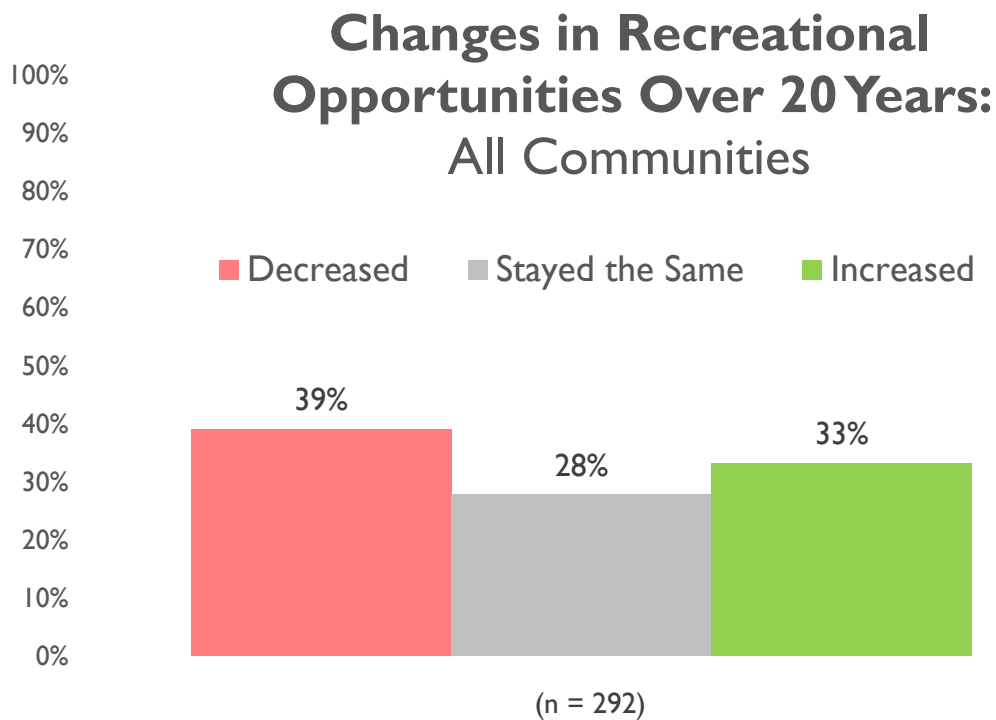
Figure I.6: Current & Past Employment Conditions



Survey participants were asked to characterize current employment opportunities, and if applicable, employment conditions from twenty years ago. As illustrated above, 43 percent of participants characterized employment conditions from twenty years prior as “good” or “very good”. When asked about current employment conditions, only 12 percent of these participants characterized them as “good” or “very good”. Nineteen percent of participants stated that employment opportunities were “very poor” or “poor” twenty years ago compared to 61 percent classifying employment conditions as “very poor” or “poor”.

Change in Recreational Opportunities (all communities)

Figure I.7: Changes in Recreational Opportunities Over 20 Years



Survey participants were asked how they felt Forest Service policies and practices have affected recreational opportunities around their communities. Thirty-nine percent of survey participants reported that recreational opportunities over the past 10-20 years have decreased. Thirty-three percent of survey participants reported that recreational opportunities increased. While twenty-eight percent of participants stated recreational opportunities have stayed the same.

Breakdown of Survey Results by Community Type

The following section presents a breakdown of survey responses across three distinct community types. These three community types were designated by the project team in an effort to better understand how varying levels of economic diversity affected responses to questions about business conditions, employment opportunities, and recreational opportunities. See the following page for a map of each community coded by community type.

Forest-Focused Communities:

Berry Creek, Challenge/Brownsville, Loyaltown, Markleeville, West Point

Forest-focused communities are smaller, often geographically isolated communities where activities on forest lands are a major component of the local economy. Many of these communities are located far from major transportation routes (Brownsville, Berry Creek, West Point), and some are known for their reputation as lumber towns (Greenville, West Point).

Forest-Peripheral Communities:

Chester, Quincy, Foresthill, Camino, Coulterville

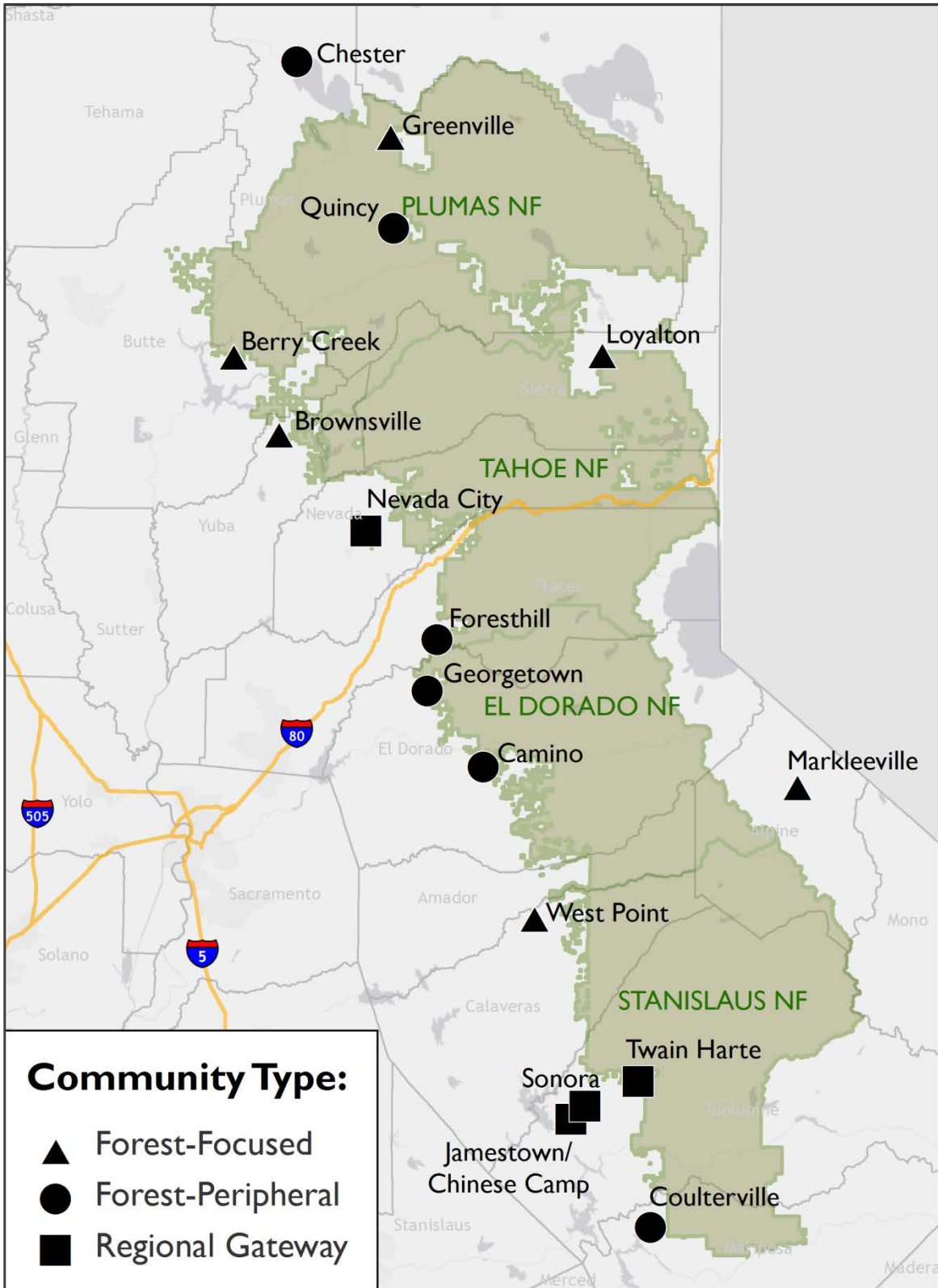
Forest-peripheral communities are small to medium sized communities where activities on forest lands are a sizeable component of the local economy, but where other economic activities may play a larger role in the community. These communities are often located along major transportation routes to outdoor destinations (Camino, Coulterville), are centers of local government and education (Quincy), focus on tourism and recreation (Chester), or are close enough to larger metropolitan job markets in the Central Valley to function as mountain bedroom communities (Camino, Foresthill, Georgetown)

Regional Gateway Communities:

Nevada City, Jamestown/Chinese Camp, Sonora, Twain Harte

Regional gateway communities are medium to large sized communities where activities on forest lands do not represent a sizeable component of the local economy owing to the numerous other economic activities taking place in these communities. They often lie outside of National Forest boundaries but along major transportation routes into the National Forests, making them staging areas for recreational activities within and beyond forest lands. These communities also commonly function as regional centers for commerce, education, and healthcare for the foothill and mountain areas beyond them.

Figure I.8: Map of Surveyed Communities by Community Type

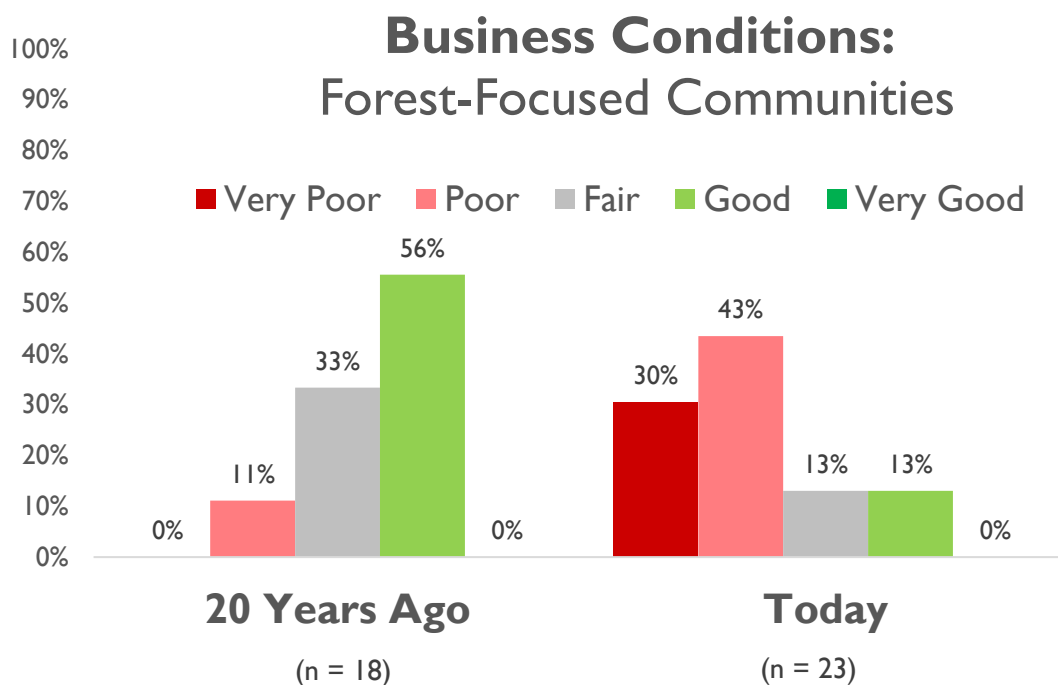


Current/Past Business Conditions (by Community Type)

The following section contains responses to the same question about past and present business conditions described in Figures 1.5, but with responses broken out by the community types (regional gateway communities, forest-peripheral communities, and forest-focused communities) defined on the previous page.

Forest-Focused Communities:

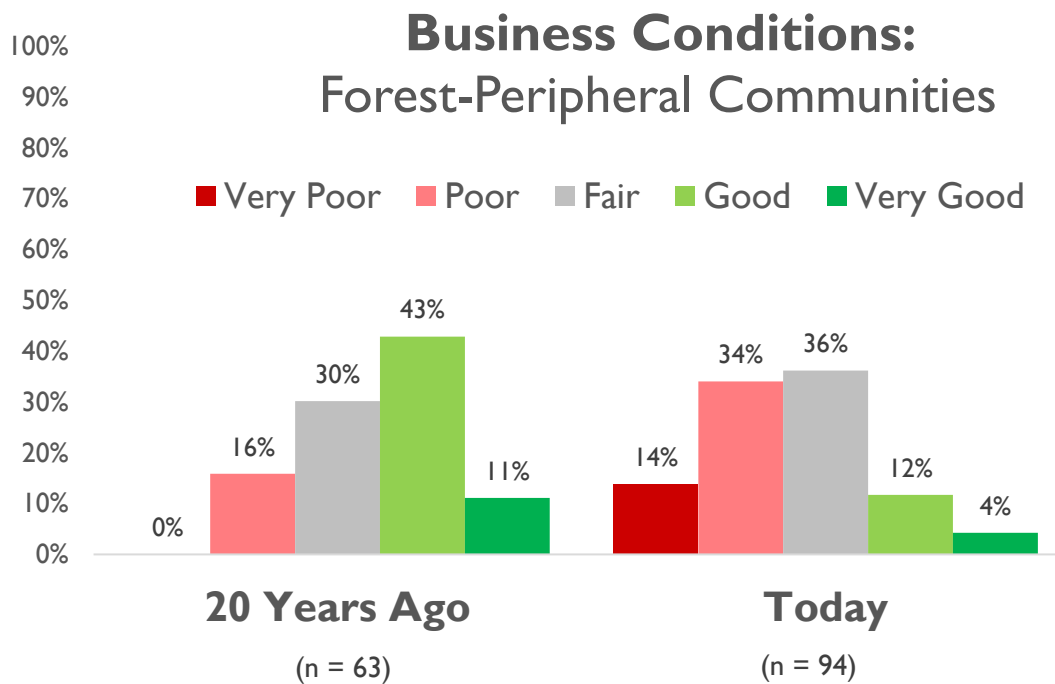
Figure 1.9: Current & Past Business Conditions in Forest-Focused Communities



Survey participants were asked to characterize current business conditions, and if applicable, business conditions from twenty years ago. As illustrated above, 56 percent of participants located in isolated forest-dependent communities characterized business conditions from twenty years prior as “good” while only 13 percent of participants stated that business conditions today were “good”. Conversely, when asked about current business conditions, 73 percent of participants from these forest-dependent communities characterized current business conditions as “poor” or “very poor” compared to the participants perceptions of business conditions twenty years ago with only 11 percent stating conditions were “poor”.

Forest-Peripheral Communities:

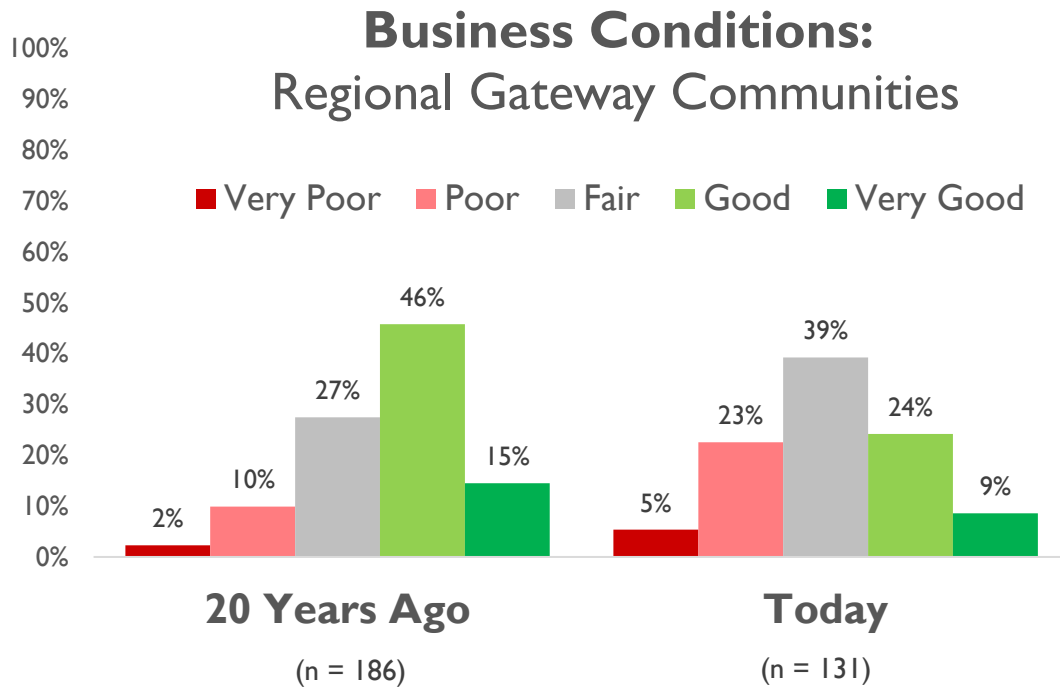
Figure I.10: Current & Past Business Conditions in Forest-Peripheral Communities



Survey participants were asked to characterize current business conditions, and if applicable, business conditions from twenty years ago. As illustrated above, 54 percent of participants located in peripheral forest-dependent communities characterized business conditions from twenty years prior as “good” or “very good”. When asked about current business conditions only 16 percent of these participants characterized them as “good” or “very good”. Likewise, only 16 percent of participations stated business conditions were “very poor” or “poor” twenty years ago while 48 percent of respondents stated conditions today were “very poor” or “poor”.

Regional Gateway Communities:

Figure I.11: Current & Past Business Conditions in Regional Gateway Communities



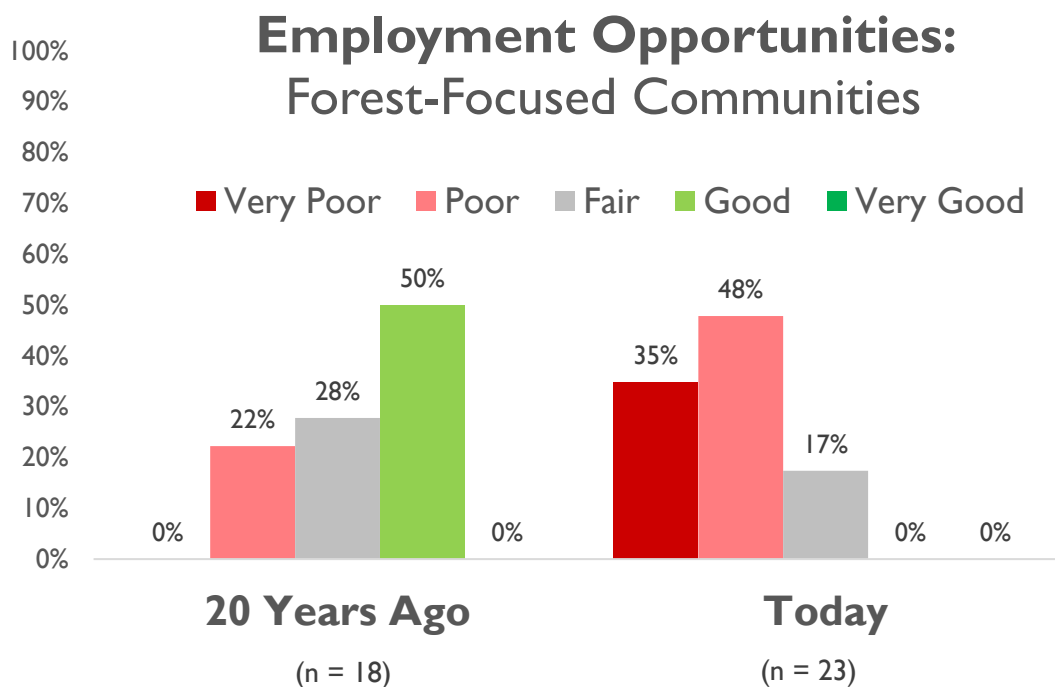
Survey participants were asked to characterize current business conditions, and if applicable, business conditions from twenty years ago. As illustrated above, 61 percent of participants located in regional gateway communities characterized business conditions from twenty years prior as “good” or “very good”. When asked about current business conditions, 33 percent of these participants characterized them as “good” or “very good”. Twelve percent of participants stated that business conditions twenty years ago were “poor” or “very poor” while 28 percent of participants stated that business conditions today were “poor” or “very poor”.

Current/Past Employment Opportunities (by Community Type)

The following section contains responses to the same question about past and present employment opportunities described in Figures I.6, but with responses broken out by the community types (regional gateway communities, forest-peripheral communities, and forest-focused communities) defined on the previous page.

Forest-Focused Communities:

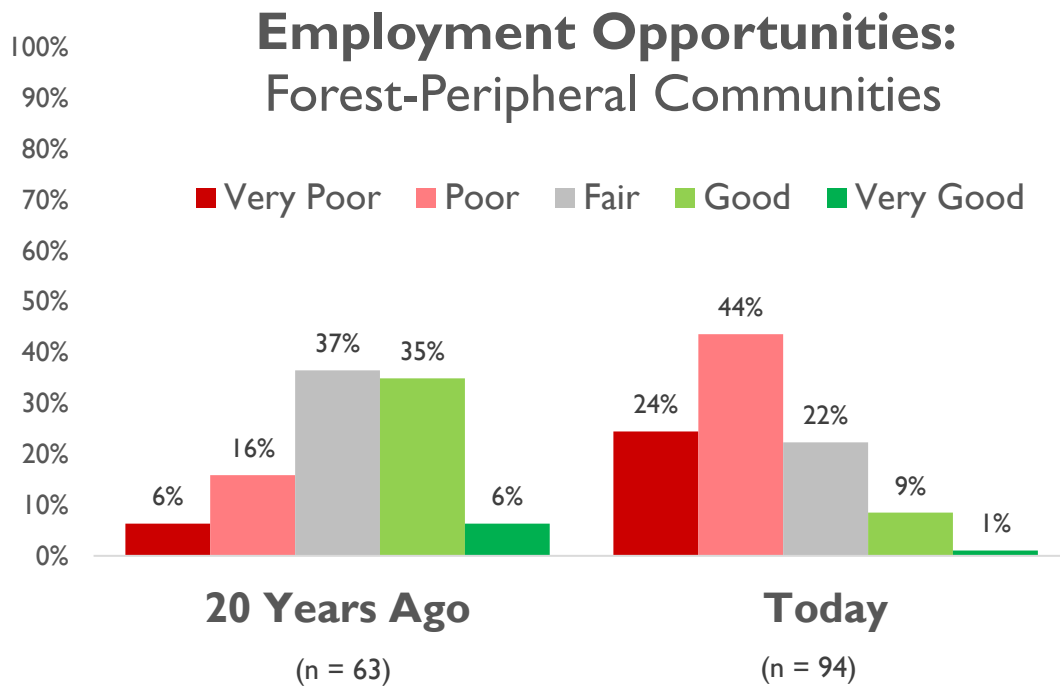
Figure I.12: Current & Past Employment Conditions in Forest-Focused Communities



Survey participants were asked to characterize current employment conditions, and if applicable, employment conditions from twenty years ago. As illustrated above, 50 percent of participants located in isolated forest-dependent communities characterized employment conditions from twenty years prior as “good”. Compared to participants’ perceptions of employment opportunities today, zero respondents stated employment opportunities were “good” or “very good” today. While 85 percent of participants characterized employment conditions today as “poor” or “very poor”, and only 22 percent of participants stated they were “poor” twenty years ago.

Forest-Peripheral Communities:

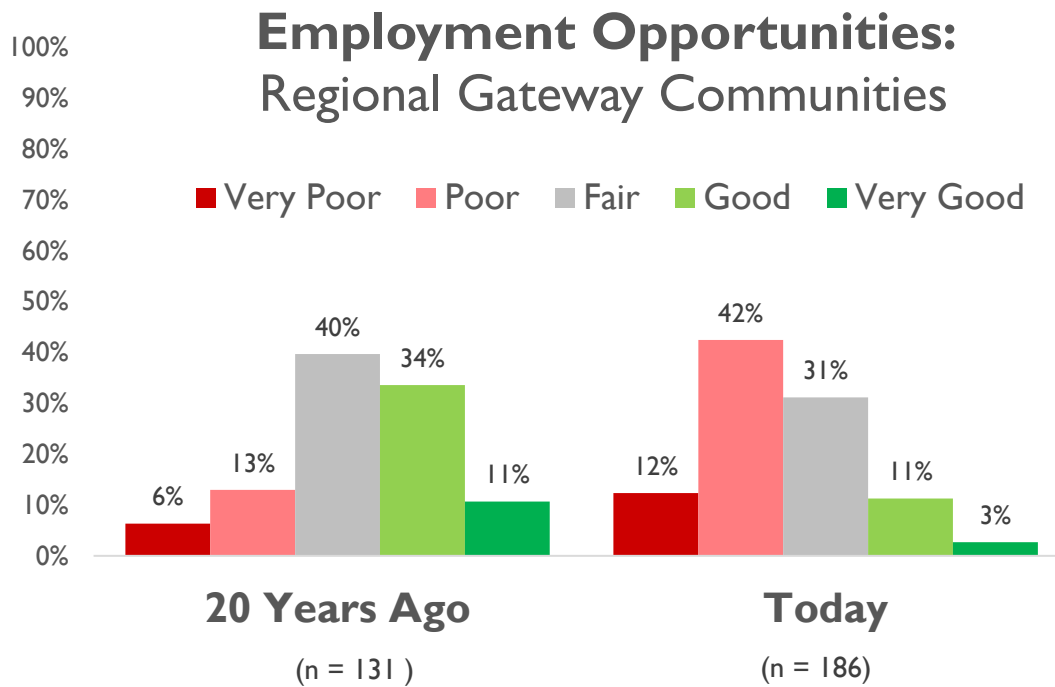
Figure I.13: Current & Past Employment Conditions in Forest-Peripheral Communities



Survey participants were asked to characterize current employment conditions, and if applicable, employment conditions from twenty years ago. As illustrated above, only 22 percent of participants located in peripheral forest-dependent communities characterized employment conditions from twenty years prior as “poor” or “very poor”. Conversely, when asked about current employment conditions, 68 percent of these participants characterized them as “poor” or “very poor”. In addition, only ten percent of participants stated employment conditions were “good” or “very good” today while 41 percent said they were “good” or “very good” twenty years ago.

Regional Gateway Communities:

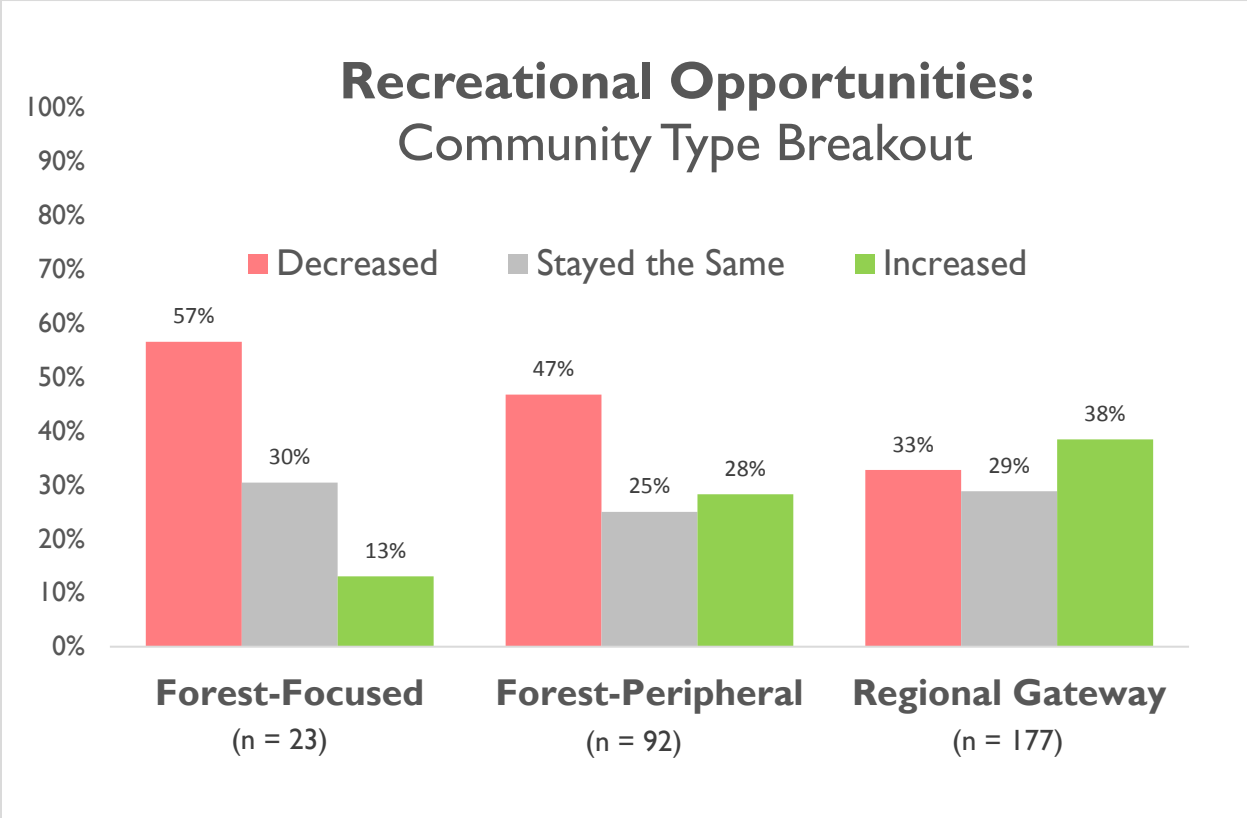
Figure I.13: Current & Past Employment Conditions in Regional Gateway Communities



Survey participants were asked to characterize current employment conditions, and if applicable, employment conditions from twenty years ago. As illustrated above, 45 percent of participants located in regional gateway communities characterized employment conditions from twenty years prior as “good” or “very good”. When asked about current employment conditions, only 14 percent of these participants characterized them as “good” or “very good”. Nineteen percent of participants stated these conditions were “poor” or “very poor” twenty years ago, while this number increased when asked about current conditions today with 54 percent participants stating conditions today were “poor” or “very poor”

Changes in Recreational Opportunities

Figure I.14: Changes in Recreational Opportunities by Community Type



Survey participants were asked to compare current recreational opportunities compared to how opportunities were twenty years ago and characterize whether they have increased, decreased or stayed the same. Results highlight a distinct difference in attitudes toward expanded recreational opportunities between forest-focused and regional gateway communities.

As illustrated above, 57 percent of participants in forest-focused communities stated that recreational opportunities have declined from twenty years ago to today, and 13 percent of participants stated they increased over this time period. Participants' perceptions in forest-peripheral communities were slightly better with 47 percent of participants stating recreational opportunities have declined and 28 percent of participants stating these opportunities have increased. The participants in the regional gateway communities had the most positive perceptions of recreational opportunities of the three types of communities with 33 percent of respondents stating these opportunities have declined and 38 percent stating they had increased.

ESTIMATED ECONOMIC EFFECTS

Summary

The objective of the estimated economic effects study in this report is to accurately exhibit the direct impact the existence of the FS has in each forest area and community. Although we are sure of the fact that the FS effects the various communities in this report in an assortment of ways, refining the data to reveal a more precise and measurable effect can provide more insight to exactly how each community is influenced by the presence (or absence) of the FS. By exploring these estimated economic effects through direct impacts in total sales through data extracted in the survey, then converting the total sales data to employment estimates in each community, we can acquire a better understanding of the true value of the FS. Analyzing these effects will allow us to look into exactly how each of the diverse communities are directly, and indirectly, influenced by the FS.

Method

Question 15 of the SFAC Survey asked respondents: “In your best estimation, what percentage of your business’ sales or revenue is directly tied to the presence of nearby U.S. Forest Service lands or activities?” Question 16 of the survey asked: “in your best estimation, what percentage of your business’ sales or revenue is directly tied to visitors who are in your community due to the presence of nearby U.S. Forest Service lands of activities?” These two non-invasive questions allowed the CED to estimate the total revenue, by sector, in each of the four forest areas (within each of the four forests) and three forest communities (defined by influence of the FS in that area) that can be directly tied to the Forest Service. By entering the total revenue into a custom input-output (I-O) model, an accurate estimation of total employment was revealed for each forest area and forest community. These values convey the overall economic impact of the Forest Service. The extended process is outlined here:

Step 1: Create a sub-regional revenue per employee estimate for each forest

Utilizing the Dunn and Bradstreet (D&B) Business Database, CED was able to aggregate D&B’s employee and revenue estimates for each industry sector in the counties affected by each individual forest area or community type (example; Butte and Plumas counties, representing Plumas NF, or Tuolumne and Nevada counties representing the Regional Gateway Communities). County level data was utilized to calculate the revenue per employee number, rather than community level data, to normalize potential D&B estimation errors arising from a smaller sample size. Also, due to data limitations, CED removed all business “headquarters” in favor of “single locations” or “branches” due to revenue over estimations in the data for “headquarters.” Lastly, to normalize the data even further CED only calculated revenue per employee numbers using the middle 50th percentile businesses. Numerous outliers were discovered in the raw D&B data so both the bottom and top 25 percent of businesses, sorted by revenue per employee, were used to calculate the forest wide average.

Step 2: Estimate revenue for each sector within each forest and community

Next, CED aggregated the employment numbers for all of the businesses in each of the four forests areas and three community types. Both definitions, forest area and community type, were defined by their respective zip. *Example*; Greenville’s zip code, Quincy’s zip code, Chester’s zip code, and Berry Creek’s zip code, representing Plumas NF or Jamestown’s zip code, Twain Harte’s zip code, Sonora’s zip code and Nevada City’s zip code, representing Regional Gateway Communities.

Table 2.1: Community Type by Zip Code (refer to Figure 1.8 for map)

| Community Type | Forest Area | County Location | Town | Zip Code |
|-------------------------------|-------------|-----------------|--------------|----------|
| Forest-Peripheral Communities | El Dorado | El Dorado | Georgetown | 95634 |
| | El Dorado | El Dorado | Camino | 95709 |
| | Plumas | Plumas | Quincy | 95971 |
| | Plumas | Plumas | Chester | 96020 |
| | Stanislaus | Mariposa | Coulterville | 95311 |
| | Tahoe | Placer | Foresthill | 95631 |
| Regional Gateway Communities | Stanislaus | Tuolumne | Jamestown | 95327 |
| | Stanislaus | Tuolumne | Sonora | 95370 |
| | Stanislaus | Tuolumne | Twain Harte | 95383 |
| | Tahoe | Nevada | Nevada City | 95959 |
| Forest-Focused Communities | El Dorado | Alpine | Markleeville | 96120 |
| | El Dorado | Calaveras | West Point | 95255 |
| | Plumas | Plumas | Greenville | 95947 |
| | Plumas | Butte | Berry Creek | 95916 |
| | Tahoe | Sierra | Loyalton | 96118 |
| | Tahoe | Yuba | Brownsville | 95919 |

Next, the data was aggregated by each industry sector and the revenue per employee ratio extracted in Step 1 was then sorted by industry and multiplied by the sum of employees in each NF’s respective four zip codes. *Example*; if the average revenue per employee in NAICS 113, in Butte and Plumas Counties, was \$50,000/employee and the total number of employees in Greenville, Quincy, Chester, and Berry Creek in NAICS 113 was 5, then the total estimated revenue for the four forest dependent communities in NAICS 113 would be \$250,000. By multiplying the revenue per employee data from the D&B county data to the D&B zip code data, a more concise estimate of total direct sales was calculated for each industry surveyed.

Step 3: Combine survey results with revenue estimates

The next step was to aggregate the survey responses by sector, by both forest area and community type. To complete this step, each survey was assigned to a NAICS code, and the average response to

both questions 15 and 16 were calculated in a pivot table, by either forest area or community type. Next, the average percentages were applied to the estimated revenue calculated in step 2. The resulting industry output dollar values were determined to be the direct impacts on each of the four forest areas and three forest communities and were then used as inputs for the IMPLAN model. *Example*; if Plumas NF NAICS 113 had total estimated revenue of \$250,000 and the average response to question 15 indicated that 20 percent of area sales in the sector were directly tied to forest service lands and activities (FS spending, spending by employees of the FS, spending by contractors of the FS, etc.) and 5 percent of sales were due to visitors in the area because of FS lands or activities (tourists) than it was estimated that \$50,000 of industry output is due to FS activities and \$12,500 was due to visitor spending. By combining these two numbers (direct sales due to the presence of the FS and indirect sales related to the visitations due to the presence of the FS), the total impact of the FS in these forest areas and community types were revealed.

Step 4: IMPLAN

In order to determine the economic impact on the counties within each forest, inputs were entered into their appropriate sector of the IMPLAN model (MIG 2014). IMPLAN is an input-output model (I-O) that separates the economy into industrial sectors, classifying each according to the primary product or service it provides. The transaction matrix is the model that estimates impacts. The transaction matrix contains the purchases and sales that occur among the various sectors. The column entries are the purchases made by a particular sector from all other sectors included in the model. The row elements are the industry destinations of the sector's sales. The model permits assessment of the total impact of an initial change in expenditures.

The total impact is the sum of the direct, indirect, and induced impacts. The indirect impacts are the result of purchases (by the sectors directly affected) from local industries supplying inputs. The induced effects are due to the spending of additional income earned through the enhanced business activity generated by the direct impacts. The model estimates business revenue, labor income, and employment changes for the study region as a result of spending pattern changes or changes in labor income. For the purpose of this study, we took a conservative approach and looked specifically at the direct impact rather than the total impact which includes the indirect and induced effects.

CED completed seven distinct IMPLAN runs. A model was created for each of the four forests, defining the forest area and community type as a set of multiple counties¹ within the model. Likewise, a model was also created for each of the three community types. The sum of direct FS spending and FS visitor spending was used to reveal the total estimate of employment the presence of the FS directly impacts.

Results

Table 2.2: Direct Impact of Employment by Community Type

¹ List of counties shown in Table 2.1

| Community Type | FS Employment Direct Impact | Total Employees | Percentage of Employment due to FS |
|--------------------------------------|----------------------------------------|----------------------------|-----------------------------------------------|
| Regional Gateway Communities | 1,779 | 14,232 | 13% |
| Forest-Peripheral Communities | 563 | 6,130 | 9% |
| Forest-Focused Communities | 125 | 3,382 | 4% |

Table 2.3: Direct Impact on Employment by Forest Area

| Forest Area | FS Employment Direct Impact | Total Employees | Percentage of Employment due to FS |
|--------------------|----------------------------------------|----------------------------|-----------------------------------------------|
| Plumas | 525 | 3,063 | 17% |
| El Dorado | 171 | 1,762 | 10% |
| Tahoe | 405 | 6,986 | 6% |
| Stanislaus | 420 | 11,933 | 4% |

Table 2.2, shown above, reveals percentage of employment due to the FS in the three different community types. The direct impact of employment due to the presence of the FS, as calculated by IMPLAN, was divided by the total employees defined by the community type, by zip code, to arrive at this percentage. Out of the three communities, the Regional Gateway Communities accounted for the highest impact on employment, tied directly and indirectly to the FS, at 13 percent. Regional Gateway Communities were followed by Forest-Peripheral Communities and Forest-Focused Communities, accounting for nine and four percent, respectively. The average direct impact of employment due to the presence of the FS among all of the community types came out to approximately ten percent.

Table 2.3, shown above, reveals the percentage of employment due to the FS in the four different forest areas. The direct impact of employment due to the presence of the FS, as estimated by IMPLAN, was divided by the total employees defined by the forest area, by zip code to arrive at this percentage. Out of the four areas, the Plumas forest area accounted for the highest impact on employment, tied directly and indirectly to the FS, at 17 percent. The Plumas forest area was followed by El Dorado, Tahoe and Stanislaus forest areas, accounting for ten, six, and four percent, respectively. The average direct impact of employment due to the presence of the FS among all of the community types came out to approximately six percent.

When comparing Table 2.2 to Table 2.3, you may notice that the sum of the total employee data matches in both of the tables but the sum of the employment impact does not. The sum of the total employees is the same in both of the tables, seeing that zip code data was used to calculate this total. The sum of employment impact is different in that, although the sales data by industry was the same, the designation of the data (either community type or forest area) caused differences. This is due multiplier effect when put into the I-O model, the data was sorted differently before going into the model, so

those differences in direct impact of employment are simply due to the I-O model's method in measuring multiplier effects for each industry.

The percentage employment due to the FS is an economic effect identifier, ultimately revealing the total impact the FS has on a certain area. By looking at the total employment due to the presence of an industry (the FS) in a certain area, an accurate estimation can be formed showing how that industry (the FS) effects the economy on the whole. In this study, in which took a cautious and conservative approach in each step arriving at the percentage employment due to the FS, revealed that the FS contributes to approximately 6-10% (based on the difference between forest area and community type) to the total economy in the areas surveyed in this study.

APPENDIX A

This appendix contains the written comments to the survey results, included word for word.

What are your biggest concerns [regarding your community]?

Impossible to build--fees are not affordable. ; Lack of industry. Marijuana growth regulations (pot growers contribute to the community) ; Need of small industry - hardly anything here ; water rate hikes & pot farmers ; surviving ; making ends meet ; wildland fire ; tourist do not come up = less mooney ; pg&e thermal curtain, mill closing down, school close if it went to charter school ; bringing families for local business & more population ; Congressional funding ; Local economy ; declining revenue and opportunity growth ; Community that is now growing, it is getting smaller ; Economic situation of town, it's dying ; Worker compensation and liability claims ; globalization, cutbacks on federal timber scale ; Finding qualified help, staying on top of california's regulations water / air quality ; survival ; Forest health, forst fires ; The timber market ; regulation of forest and management of forest ; trying to stay busy depending on mills ; Getting paid ; was the timber industrt ; employment ; Traffic ; Fire areas, taken out a of trees, damages from potential burning. ; Maintain balance between company culture & revenue. Expenses and costs and keeping a profit ; Finding qualified staff. ; People are getting tired of not able to find a decent job, everything is so high now, retirement and social security is low. ; Elections ; Road Closures ; Gun Laws ; Taxes, fees, permits ; Economic well-being, residents are poor with limited resources and income ; Fire arm regulations ; Finding people to work for that don't drive you crazy. ; The economy and taxes ; Government corruption ; Local government, board of supervisors don't have a long term plan. Land developers putting in low income housing. Great population for retired people ; Hish levels of drug addiction -- people leading dull unproductive lives ; Whole country has gone to hell in a hand basket--In california, restrictions/rules/regulations/cost of doing business ; Legalization of marijuana, clients will drive property value up and increase no. of buyers. ; Shrinking businesses ; Local economy is suffering ; 100's and 100's of dead trees. ; Not many opportunities, Gates are closed, People get cabins and the gates are closed ; Fire ; Good Community--Good town. ; I don't have many, Keeping up with clients. Unless there was a tax overhaul, [personally] Business relm - is the struggle for business volume and the constant threat of forestfire ; It would be nice to have local businesses like coffee shops, antique stores, boutiques, or more visitors. The community is huge at fundraising, there is so much to do here. ; The logging community, when they shutdown the mill, they sent the logs to lincoln and other places. Driving economic force for many employees. BLM isn't ran properly, they're overpaid. Cal Fire screws things up. There is no reprecussions for something bad. ; The town is in the middle of nowhere. But it is a growing area. ; Economic Stability for existing businesses, sustainability of the local economy. ; Not a lot of jobs, people are looking. ; No concerns, laidback town. Do your thing. ; None! Happily Retired! Retired here on purpose ; More jobs jobs for young people, so they don't have to leave. ; Too many rules, government not able to help provide a living ; The Future of the community ; Theres's a big fire going ; People that work in the service industry, such as plumbers, can't find reliable help/workers. They bring in help from out of state/area to get workers. ; It's such a struggle for small business to get going, there is a lack of opportunities, government intrusion, management of the forest, lawsuits on trovel managemnt, / snow mobiles ; Community is on a decline, travel to routine shopping (Quincy) and long travel for appliancces and clothes (chico or reno). ; I don't know ; At our age, not a lot. I would like to see towns like quincy/chester to get industry. We're filled with environmentalists, they want to shut everything down. The forest service is a joke, they have guns to keep us off their roads, they closed all access roads. "There are no god damn owls here, and we can't log. " Now there are mountain lions, wolves. They can't kill mountain lions, and they have no known enemy. ; It depends on good economics in all forms. Financial problems, keeping doors open ; Population ; Enviromental concerns, rules and regulations to follow. We're a small town "mom and pop" still the same rules as a gas station on i-5 ; Losing local business ; Sustainability of a business,

finding quality help, impact of schools for declining enrollment, USFS outbidding of job to internal contractor, rather than outside job. USFS went against their word and used land of loyalton to provide contract work. ; Employment opportunitiees able to see grow the county puts up barriers for people to start up businesses ; No Jobs or Work, The USFS beurocracy is impossible to deal with - negative view of community. They cannot do their job, they're not thinning/fuel reduction ; I take work as I want it. It's not my bread and butter, people come to me . It's my choice. ; Business owners + ranching enterprises ; People generally don't have income/money ; Hard to find technical skills + good backgrounds ; How our county officials affect our growth and it seems they don't want it to grow ; None really, crime and theft ; Country is going to hell with the Donald V. Hilary election. The dollar isnt worth anything. Gold and silver isnt worth much we're just a small niche community. ; Adhereing to city plans, saving as much land as possible. The CEO is member of land trust, so we're all into land conservation ; We're losing a lot of people due to the Sheriff. He's running people out of town. ; We're an A+ on BBB., we've made it. We had to do a personal bankrupcy, instead of hurting the business. ; Over building. "Ive got mine" mentality, while shutting the gate behind. The trends of a big city into a small town. ; Tourism during slow season. ; High rents, It's expensive to live up here ; Taxes / Property Tax, tough to find good employees ; Living around here, there are not a lot of concerns. Fire Severity zone, head scratching with schools? Schools have a decreased enrollment, more retired folks with less students. ; Crime, we have a rash of crime going on right now ; Attracting new businesses, the counsil is useless they say things but nothing happens ; Lack of qualified applicants ; Fire, clean water, attractiveness to a person ; Community is focused on marijuana cultivation ; A lot of small businesses don't affiliate with big corporations, Most people go up to auburn to buy shit. ; Getting good employees and keeping them ; when a recession hits, ; Funding, we're a non profit ; Economics of the time ; Internet infrastructure ; Laws and regulations ; No concerns, as long as tourist keep coming ; Inability to attract a wide variety of businesses to area ; Having businesses coming in, paying bills, finding good employees. ; Proper exposure for young generation for proper job and helping them find good jobs. ; Some People arent buying snacks anymore ; Multi national corporations ; housing ; Marijuana grow, terrorism ; Cannabis Industry ; Sustained growth ; Keeping our sense of community ; Lack of internet connectivity ; State + Local rules and regulations ; Declining membership interestes ; Where we are selling timber and who is going to log it ; My entire house / business burning down. Local regualtion ; Continuing and maintaining touring / restricting / opening more hotel operations ; No concerns ; Being able to comply with state and federal regulations ; Going under, not enough local business happening, a lot of internet businesses Local economies are poor ; Customer Service, cometicive pricing, returning customers ; Changes in regulations ; Market saturation, in general Im worried about political environment that's not conducive to business ; No concerns ; Work for young people, affordable housing, restricting laws on marijuana ; Keeping people coming here ; We have a large homeless population, and there are bans on citizens growing marijuana, it helps businesses. ; If you're busy now, will you be busy later? ; We're finding the residents and businesses are leaving. ; Lack of employment opportunities ; Lack of housing, the ponderosas are dying. Fire is a big concern ; People are illegaly camping, and starting fires. - its ongoing. State parks cant get anything done ; Presidential elections ; A lot of marijuana in this town, it's taking over. It's hard to find able young wworkers ; Lack of local economy ; Infrastructure ; Tax burden, population ; Fire danger ; If someone doesn't have water. And governmental control over personal wells. ; hiring in a small town. ; Not enough electricity ; No concerns ; expenses of having a business, prices are increasing ; Sales tax ; Drought causing issues with trees/ land ; No money available for construction (roads, bridges, etc) ; Economy/ drought ; Legislation forcing residents to remove trees; residents cannot afford it ; expanding/ finding more clients in a small town ; longevity, population of the community is declining ; need an influx of new people with families; population is declining ; insurance benefits are changing; ; current politicians ; inconsistency with demand; low population ; attitudes toward government; current politicians ; lack of trained people in the workforce ; environmental issues: fire, drought, weather ; reaching out/ expanding to other communities; population is too small ; selling a luxuray good/ service ; state regulations; ; lack of

business in general ; making more money/ getting more business ; rising minimum wage ; not sure ; the government does things with little knowledge of what the real world is like,,many elected people have no business experience but a college degree as an attorney or ???? ; not enough infrastructure projects ; infrastructure ; employment pool, not enough qualified people ; government regulations ; not enough qualified people in workforce ; not enough child care centers for community workforce that works at odd hours ; politicians making poor decisions ; aging demographic ; no opportunities for good paying jobs for our young people ; making a living and providing jobs for our community ; decreased population; decreasing income for customers ; change in demographics; retiring population who lives in area is dying out and being replaced by the younger generation who typically leaves area. ; government regulations ; Taxes, fees, permits ; high homelessness rate ; not a lot of opportunity for young people to return to the area/ live full time ; new construction the city is difficult because city planning tries to keep things historical ; inflow of tourists ; poor decisions made in local community ; costs of owning/running a business ; increase in costs every year ; nothing in particular ; electricity and other costs rising ; nothing in particular ; recovering from recession/ area was hit hard ; Finding qualified help, staying on top of california's regulations water / air quality ; overall economy ; recession, the trickle down effect ; lack of economic growth ; trying to make a living ; state mandates such as minimum wage increases ; attracting outside tourism; town is too small to sustain itself ; staying in business ; economy; people cannot afford basic rent ; keeping up with customers; can't find good / qualified help ; growth is unstable ; getting people to shop locally ; government involvement ; maintaining steady work ; keeping people shopping local ; getting business in general ; infrastructure; hard to create/build new businesses ; population is dwindling ; availability of parts needed for the business ; price increases passed on to consumers ; not as much tourism ; major impacts from the federal and state governments on business ; population is unstable/ declining ; lack of new tourism ; losing local shoppers ; hard for local businesses to stay open ; long term viability of community/ businesses in community ; downtown will crumble/ not be able to stand up to poor business conditions ; small town; not too many people coming in ; not too worried right now ; losing population base; families are leaving ; lack of customers ; economy; decrease in tourism; lack of jobs ; upcoming job opportunities ; lack of leadership/ direction in plumas county board of supervisors; inability of Forest Service to deal with natural resources affects community ; lack of jobs ; businesses closing down in the community ; bussinesses in community are closing ; community is drying up; young people aren't coming in/ staying ; Commercial/Businesses are closing and not being replaced. there are many vacant/empty commercial buildings ; jobs, people can't consume/ buy houses without good paying jobs ; businesses closing down in community; families leaving area in search of jobs take kids out which can harm schools and community in general ; I'm nearing retirement so getting the younger generationto take over businesses/ start new businesses ; commercial (and residential) real estate prices are too high; not enough tourism to support economy; no money for city improvements ; beauracracy;state mandates and new government regulations; hard to find qualified employees ; getting more people to come into town/ to the camp ; getting people to come in ; keeping families in the area; such a small population that when families leave other parts of the community start to crumble ; limited service options ; Whether or not I will continue to have enough business to survive. Making a long term investment on employees is a very risky thing right now. ; no economic growth/revenue ; government, insurance, banks ; health of other businesses in community; if other businesses in Quincy start to close/ fail, I lose my customers ; people moving away ; not sure ; not too sure; not getting paid by customers ; finding good employees ; finding qualified employees ; people aren't shopping local ; keeping busy/ keeping clients ; not sure ; lack of qualified people ; not sure ; finding good employees ; lack of money; not enough customers ; no big concerns ; planned growth ; economic growth ; drugs are negatively impacting community ; finding decent employees ; not enough business ; poor economic growth ; amount of regulations ; low income population ; wages/ the area is hard to live in unless you are self employees ; still feeling the effects of the recession ; finding qualified employees ; economic uncertainty ; hard to find good employees ; keeping out large corporations (i.e. dollar general) ; economic development; housing for young people ; housing; no new housing is being built ; not sure ; not sure,

doing really well right now personally ; about to retire so my only concern is that there is no hope for this community in the future ; not sure, business is good right now ; younger people are leaving ; not sure, business is good right now ; type of jobs that are available (limited) ; regulations, government intervention; timber industry leaving the country ; not sure, day care is always needed ; county needs to embrace tourism more, it is likely the future of our economy ; business is good for us because we take it anywhere; trees are dying which affects local residents ; economic growth and development is hindered ; trying to find good help ; economic climate ; regulations; ; not sure ; population within the school system is dwindling ; restrictions, taxes, regulations ; not sure ; not sure, I trust and rely on my customer base ; county doesn't enforce environmental rules as much as they should ; will my business survive? ; no local business (in my field) ; government; regulations; taxes; too much government spending ; non-profit, doesn't depend on the same things the rest of the community/ businesses do ; motorcycle shops don't get a lot of business ; paying employees/ businesses struggling to make ends meet; businesses are over-stretched/ under-staffed ; staffing; compliance issues with regulations; insurance issues; stability of market and effects of upcoming election ;

MPOSITION OF LOCAL LEGISLATION THAT WOULD STIFLE BUSINESS OPPORTUNITIES IN THE AREA...PASSIONS FOR OTHER INTERESTS RATHER THAN THE SMALL BUSINESS VENUE. ; increasing regulations and costs of doing business (permits); finding good employees ; finding qualified employees ; not sure, we stay pretty busy ; new growth ; n/a ; too many regulations ; not enough appraisers in community to meet demand/ turn around time is long/ affects homeowners negatively ; losing business/ tourists; need more tourism ; finding good employees/ poor work ethic ; regulations added onto corporations; taxes; costs increasing ; forest is overgrown which is dangerous and if a fire happens it will totally destroy the economy; tourism in the community is lacking ; ; ; water rate hikes & pot farmers ; surviving ; making ends meet ; wildland fire ; tourist do not come up = less money ; PG&E thermal curtain, mill closing down, school close if it went to charter school ; bringing families for local business & more population ; Congressional funding ; Local economy ; declining revenue and opportunity growth ; Community that is now growing, it is getting smaller ; Economic situation of town, it's dying ; Worker compensation and liability claims ; globalization, cutbacks on federal timber scale ; Finding qualified help, staying on top of California's regulations water / air quality ; survival ; Forest health, forest fires ; The timber market ; regulation of forest and management of forest ; trying to stay busy depending on mills ; Getting paid ; was the timber industry ; employment ; Traffic ; Fire areas, taken out a of trees, damages from potential burning. ; Maintain balance between company culture & revenue. Expenses and costs and keeping a profit ; Finding qualified staff. ; People are getting tired of not able to find a decent job, everything is so high now, retirement and social security is low. ; Elections ; Road Closures ; Gun Laws ; Taxes, fees, permits ; Economic well-being, residents are poor with limited resources and income ; Fire arm regulations ; Finding people to work for that don't drive you crazy. ; The economy and taxes ; Government corruption ; Local government, board of supervisors don't have a long term plan. Land developers putting in low income housing. Great population for retired people ; High levels of drug addiction -- people leading dull unproductive lives ; Whole country has gone to hell in a hand basket--In california, restrictions/rules/regulations/cost of doing business ; Legalization of marijuana, clients will drive property value up and increase no. of buyers. ; Shrinking businesses ; Local economy is suffering ; 100's and 100's of dead trees. ; Not many opportunities, Gates are closed, People get cabins and the gates are closed ; Fire ; Good Community--Good town. ; I don't have many, Keeping up with clients. Unless there was a tax overhaul, [personally] Business realm - is the struggle for business volume and the constant threat of forestfire ; It would be nice to have local businesses like coffee shops, antique stores, boutiques, or more visitors. The community is huge at fundraising, there is so much to do here. ; The logging community, when they shutdown the mill, they sent the logs to Lincoln and other places. Driving economic force for many employees. BLM isn't ran properly, they're overpaid. Cal Fire screws things up. There is no repercussions for something bad. ; The town is in the middle of nowhere. But it is a growing area. ; Economic Stability for existing businesses, sustainability of the local economy. ; Not a lot of jobs, people are looking. ; No concerns, laidback town. Do your thing. ; None! Happily

Retired! Retired here on purpose ; More jobs jobs for young people, so they don't have to leave. ; Too many rules, government not able to help provide a living ; The Future of the community ; There's a big fire going ; People that work in the service industry, such as plumbers, can't find reliable help/workers. They bring in help from out of state/area to get workers. ; It's such a struggle for small business to get going, there is a lack of opportunities, government intrusion, management of the forest, lawsuits on travel management, / snow mobiles ; Community is on a decline, travel to routine shopping (Quincy) and long travel for appliances and clothes (Chico or Reno). ; I don't know ; At our age, not a lot. I would like to see towns like Quincy/Chester to get industry. We're filled with environmentalists, they want to shut everything down. The forest service is a joke, they have guns to keep us off their roads, they closed all access roads. 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residents and businesses are leaving. ; Lack of employment opportunities ; Lack of housing, the ponderosas are dying. Fire is a big concern ; People are illegally camping, and starting fires. - its ongoing. State parks cant get anything done ; Presidential elections ; A lot of marijuana in this town, it's taking over. It's hard to find able young workers ; Lack of local economy ; Infrastructure ; Tax burden, population ; Fire danger ; If someone doesn't have water. And governmental control over personal wells. ; hiring in a small town. ; Not enough electricity ; No concerns ; expenses of having a business, prices are increasing ; Sales tax ; Drought causing issues with trees/ land ; No money available for construction (roads, bridges, etc) ; Economy/ drought ; Legislation forcing residents to remove trees; residents cannot afford it ; expanding/ finding more clients in a small town ; longevity, population of the community is declining ; need an influx of new people with families; population is declining ; insurance benefits are changing; ; current politicians ; inconsistency with demand; low population ; attitudes toward government; current politicians ; lack of trained people in the workforce ; environmental issues: fire, drought, weather ; reaching out/ expanding to other communities; population is too small ; selling a luxury good/ service ; state regulations; ; lack of business in general ; making more money/ getting more business ; rising minimum wage ; not sure ; the government does things with little knowledge of what the real world is like,,many elected people have no business experience but a college degree as an attorney or ??? ; not enough infrastructure projects ; infrastructure ; employment pool, not enough qualified people ; government regulations ; not enough qualified people in workforce ; not enough child care centers for community workforce that works at odd hours ; politicians making poor decisions ; aging demographic ; no opportunities for good paying jobs for our young people ; making a living and providing jobs for our community ; decreased population; decreasing income for customers ; change in demographics; retiring population who lives in area is dying out and being replaced by the younger generation who typically leaves area. ; government regulations ; Taxes, fees, permits ; high homelessness rate ; not a lot of opportunity for young people to return to the area/ live full time ; new construction the city is difficult because city planning tries to keep things historical ; inflow of tourists ; poor decisions made in local community ; costs of owning/running a business ; increase in costs every year ; nothing in particular ; electricity and other costs rising ; nothing in particular ; recovering from recession/ area was hit hard ; Finding qualified help, staying on top of California's regulations water / air quality ; overall economy ; recession, the trickle down effect ; lack of economic growth ; trying to make a living ; state mandates such as minimum wage increases ; attracting outside tourism; town is too small to sustain itself ; staying in business ; economy; people cannot afford basic rent ; keeping up with customers; can't find good / qualified help ; growth is unstable ; getting people to shop locally ; government involvement ; maintaining steady work ; keeping people shopping local ; getting business in general ; infrastructure; hard to create/build new businesses ; population is dwindling ; availability of parts needed for the business ; price increases passed on to consumers ; not as much tourism ; major impacts from the federal and state governments on business ; population is unstable/ declining ; lack of new tourism ; losing local shoppers ; hard for local businesses to stay open ; long term viability of community/ businesses in community ; downtown will crumble/ not be able to stand up to poor business conditions ; small town; not too many people coming in ; not too worried right now ; losing population base; families are leaving ; lack of customers ; economy; decrease in tourism; lack of jobs ; upcoming job opportunities ; lack of leadership/ direction in Plumas county board of supervisors; inability of Forest Service to deal with natural resources affects community ; lack of jobs ; businesses closing down in the community ; businesses in community are closing ; community is drying up; young people aren't coming in/ staying ; Commercial/Businesses are closing and not being replaced. there are many vacant/empty commercial buildings ; jobs, people can't consume/ buy houses without good paying jobs ; businesses closing down in community; families leaving area in search of jobs take kids out which can harm schools and community in general ; I'm nearing retirement so getting the younger generations to take over businesses/ start new businesses ; commercial (and residential) real estate prices are too high; not enough tourism to support economy; no money for city improvements ; beauracracy; state mandates and new government regulations; hard to find qualified employees ; getting more people to come into town/ to the camp ;

getting people to come in ; keeping families in the area; such a small population that when families leave other parts of the community start to crumble ; limited service options ; Whether or not I will continue to have enough business to survive. Making a long term investment on employees is a very risky thing right now. ; no economic growth/revenue ; government, insurance, banks ; health of other businesses in community; if other businesses in Quincy start to close/ fail, I lose my customers ; people moving away ; not sure ; not too sure; not getting paid by customers ; finding good employees ; finding qualified employees ; people aren't shopping local ; keeping busy/ keeping clients ; not sure ; lack of qualified people ; not sure ; finding good employees ; lack of money; not enough customers ; no big concerns ; planned growth ; economic growth ; drugs are negatively impacting community ; finding decent employees ; not enough business ; poor economic growth ; amount of regulations ; low income population ; wages/ the area is hard to live in unless you are self employees ; still feeling the effects of the recession ; finding qualified employees ; economic uncertainty ; hard to find good employees ; keeping out large corporations (i.e. dollar general) ; economic development; housing for young people ; housing; no new housing is being built ; not sure ; not sure, doing really well right now personally ; about to retire so my only concern is that there is no hope for this community in the future ; not sure, business is good right now ; younger people are leaving ; not sure, business is good right now ; type of jobs that are available (limited) ; regulations, government intervention; timber industry leaving the country ; not sure, day care is always needed ; county needs to embrace tourism more, it is likely the future of our economy ; business is good for us because we take it anywhere; trees are dying which affects local residents ; economic growth and development is hindered ; trying to find good help ; economic climate ; regulations; ; not sure ; population within the school system is dwindling ; restrictions, taxes, regulations ; not sure ; not sure, I trust and rely on my customer base ; county doesn't enforce environmental rules as much as they should ; will my business survive? ; no local business (in my field) ; government; regulations; taxes; too much government spending ; non-profit, doesn't depend on the same things the rest of the community/ business

What are your cause for concerns?

A lot of taxes, insurance, paying out to employ people In small community ; A lot of people are retired - they live up here because the cost of housing is low. ; age of population, not enough critical mass ; Air quality ; all levels of government; people out of the area have a lot of say in what goes on in the county ; anti- government political atmosphere ; appraisal businesses have left area/ gone ; as a bankruptcy attorney, banks are treating customers better so there is less business in the bankruptcy business ; as a manufacturer, a lot of companies have switched to over-seas production ; Baby boomers, millennials, cremation ; bark beetle, drought ; Bark beetle, prevents people from coming ; Because it's a small town in the hills. We're off the map. ; Because of the beetles that killed the trees ; Because we're a rural town, there's not a lot of opportunity or room for growth...we need balance ; bureaucracy/ government ; business closures; downtown is losing its luster ; business slows down outside of summer months ; businesses are closing/ leaving ; California thinks they are their own country ; careless people ; certain companies bidding jobs, cutting rates ; change in automotive market; people keep buying new cars rather than repairing old ones ; Changes in demographics, drug traders may lead to a decrease in tourism, losing workers to drug trade ; Changes in regulation requirements--law and environmental sector. ; city planning department ; climate change, global conditions, drought, trees dying; Tuolumne utility district/ local government won't allow new building ; closing down of the national forest. Better way of handling forest better on management ; Commercial Businesses paying an Increase on Taxes, versus some guy with computer that doesn't pay high taxes ; community government needs to focus on growth ; concerned about community, rising crime, theft of water ; country wide ignorance when it comes to forest health ; County and small pop's ; county building department is too strict on "preserving historical value"; don't allow enough new building ; Crimes of opportunity ; current government and

changes in regulations; environmentalists fight to keep any logging/ recreation out of forest and it hurts the economy ; Current politicians ; current political atmosphere ; current political atmosphere and inequality ; current political conditions ; current political conditions; minimum wage and overtime increases ; current politicians; current legislation ; Cuts from government funding, (b/c non-profit) we have gov't fund us, and families have to pay us/ ; Decline in population, a lot of retirees. ; Desired are, renters are able to post high rents. ; Drought in itself ; Drought/beetle ; dying trees creates more jobs but hurts residents ; economic state ; economic state ; economic state; other businesses aren't doing what the customers want and so they don't get the optimal level of business. ; economic state; poor leadership in local government and state/ federal government ; Economic downturn ; Economic uncertainty, severe lack of interest and effort on behalf of local politicians ; economic uncertainty; uncertainty in federal land management ; economy ; economy ; economy ; economy and marketing ; economy does not allow for as many luxury items/services ; economy in general ; economy in general ; economy in general; instability in government ; economy is cyclical and can't predict the future of economy/ business ; economy/ recession ; economy; when customers income decreases, their demand for luxury items decreases ; educated people leave area to find better jobs ; election year stress; economy in general ; everybody stops building homes, people spend less money, projects aren't started ; Expensive, hard to find services. There are different expectations for homeowners and USFS and BLM. They don't follow the same rules that cause safety issues/fire. ; Factories use certain power (3 phase), we can't expand and we're relocating to Nevada. ; families are leaving because of lack of opportunities ; Federal Government going to contractors ; federal policy hasn't helped ; few job opportunities ; financial resources for county, county officials ; fire conditions/ consumers need to spend money to cut down trees ; Fluxuatin and how people react to business income ; Forestry closing things down, direct impact of not taking care of the land ; Forrest neglected, not maintained, way overgrown ; Funds arnt out there, limited resources ; getting more visitors from Reno area ; government in general ; government in general ; government in general ; government isn't using common sense/ doesn't understand small business ; government regulations ; government regulations; forest service has a large budget but cannot use it to maintain the forest because they have to pay the firefighters and so most of their budget goes to fighting fires rather than preventing them ; government; economy; Forest ?service needs to implement/ focus more on fuel prevention ; government; good people leave to start their own work or leave area ; gov't regulations + taxes ; growth is too much; drought ; GROWTH OF LOCAL GOVERNMENT, UPGRADING OF CAPITAL ASSETS AND ACQUISITION OF LARGER GOVT FACILITIES. ; hard for parents to work when kids can't be taken care of ; hard to go outside of community to find new clients ; Having reliable high speed internet ; He doesn't care about community / tourists. ; High cost of utilities / taxes, not a lot of resources ; Housing is very limited or expensive. Marijuana grow are huge to our economy, they buy a lot of supplies and like to eat out. It really helps our local businesses. ; How businesses are affected by ; I happen to be a gov't reporter, and regulations are in constant fluctuation, which is not conducive to long term planning ; I hate paying the sales tax on stuff for jobs ; I think there isn't an emphasis or encouragement to bring businesses here. They want clean hi-tech, but not a lot of people are qualified for that ; Ignorance ; I'm a realtor, and it's impacting the industry here. Not enough rentals or available houses for sale. Homeless situation, no way to manage the beetle or the drought. Fire has insurability issues ; In California, Gov't is taking more, writing legislation, and is making it difficult for my business and other businesses ; increases in wages that have to be paid to employees ; increasing bills and need for safety ; Industry. People don't come up during winter. ; insurance companies/ employers don't support dental as much as before ; internet shopping ; internet shopping/ people leave area and don't shop locally; small isolated community ; internet shopping/ people leave area and don't shop locally; small isolated community ; internet shopping, people leaving area to shop bulk ; Inviting attractions and having them be affordable ; It's not always easy, if you have to rob peter, pay Paul. People sometimes have to choose to pay their energy bill rather than pay us. ; kids are involved in tech ; lack of (high paying) jobs ; Lack of affordable housing, hard to attract or grow businesses ; Lack of education. There is more money to be made by getting

pregnant rather than working ; lack of employment opportunity ; lack of employment opportunities and housing ; lack of employments , small businesses apply for bankruptcy ; lack of foresight by our community leaders ; lack of good jobs ; Lack of industry, highway cant get on map. Closed trail. Loss of business income. Businesses shut down. Poorly managed land management companies ; Lack of infrastructure from state ; lack of job opportunities ; lack of jobs ; lack of jobs ; lack of jobs ; lack of jobs and promotion opportunities; government doesn't make an effort to encourage/ help small business ; lack of jobs/ schools are not funded as well as they used to be ; Lack of participation from local residents, lack of support. There are good people here, majority live in Todd's Valley which is 3 miles west-- but they support Auburn's economy in stead of forest hill. There is a disconnect of communication b/w Forest Service and community. It depends on the ranger, sadly, and their willingness to help. We're surrounded by forest, but we're not a destination, but a travel thru spot. But b/c of the disconnect, rangers will close trails indiscriminately, and come up with random rules as to explain their actions. Tom McClintock and Forest Service are seen as Elitist and claim the forest as their own, not the communities that live their. There is lack of proper management, we've had a devastating fire every year. They put up gates without need, so people go to the next town. We have issues of consistency. There is a lot of community support, and we're ll willing to help fix the trails, but they wont allow us due to "insurance " or "liabilities" ; less attractive than other places ; limited amount of good paying jobs in community ; limited people, finding qualified workers ; local government is not environmentally concerned; S Forest service has a lot of room for improvement; needs to clear forest prior to fires ; local government needs to assist ; local, state, federal government ; Location ; location ; location ; Logging business decline in saw mills, local economy was dependent on it ; loss of the sawmills, construction, and increased regulation of timber industry ; minimum wage increases ; More people leaving, less people coming ; Multifold, there is one mill owner in the state and they own a lot of land. We're impacted by fire, and there are limited places to buy timber ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; n/a ; Natural progression of time, regulations to keep big businesses out of Nevada City ; new bypass means that people aren't coming through the town ; next generation of employees aren't good/ reliable; people leaving area ; niche field; young people don't stay/ come to the area ; niche market/ hard to find parts anywhere ; no concerns for local economy ; no enough job opportunities ; no increase in wages/ high paying jobs in 20 years; no big corporations ; no local growth attention-- takes forever to get things done. ; no money in community to upgrade old structures ; no new construction projects makes people leave the area to find better work ; no one to employ and no money ; no opportunities; younger people leaving in search of jobs ; no tourism board; local government isn't pushing tourism ; not a good market for motorcycles; internet shopping ; not able to pay qualified people enough ; not enough good/ high paying jobs, young people leave area to find better work ; not enough higher income jobs in the county ; not enough rental housing available ; Not enough retail jobs or industry ; not sure ; not sure ; not sure ; nothing controllable, mostly just weather ; Obama ; Obamacare ; our government and their regulations ; Our little town is dying. Its primarily used for recreation. People come and make a mess and leave. They don't patronize that much. ; over regulation, government in general ; over-bearing regulation ; People aren't building, no body has any money ; People can't live up to those regulations. We bake cookies here and health inspector came in and told us to put nutrition labels and it's little things like that. ; people don't shop locally so retail isn't a viable career path; few opportunities for young people in the area outside of retail ; people don't shop locally; higher prices; people not making high enough incomes ; people don't stay long enough with the company ; people don't want to work; government ; people either don't come to the area to begin with or leave to find better/ more opportunities ; people leave area ; people leave community in search of better job opportunities ; people leave town to bulk shop/ shop online ; people leaving area to find jobs ; people leaving area to find jobs/ better schools for children; weather; internet sales pull local business away ; people not buying local; rise in food prices; internet shopping ; people to want to stay here. No enough economy for people to stay ; pine bark beetle, huge impact from drought ; police are tough on visitors, discourages return visits ; policy ; political environment/ economy ; Politicians ; politics ; poor

decision makers ; poor economic development director/ poor local government ; poor economic state/ growth; lack of jobs ; Poor fire management, resource management price of fees, lengthy process time. Litigation b/w the people and gov't ; poor job opportunities ; Poorly manage resources lack of long term goals. ; population dec. not attractive ; Predatory nature of multinational corporations. ; prices of product ; Progress of the world. A lot of box store and we cant keep up with pricing ; purchasing on the internet and shopping out of the area ; recent drought has impacted recreation ; Regulations - zero growth area "You can build whatever you want, but the cost of permits and regulations make it impossible to do anything." There are no restaurants, clubs, bars, or anything. Some people like it, no street lights." ; regulations and economy in general ; regulations and not a lot of opportunities ; regulations in current government ; regulations on business- expensive to hire people, what is the forest service doing with dead trees ; remote/rural community ; restrict firearms, less business ; retired population is dying ; retirement community but not many new people are moving in ; retirement community/ people come as weekend visitors/ vacation homes but don't want to work in the area ; rural community ; rural community, less funding ; rural community, people leave the town to shop in bulk; internet shopping ; rural community/ lack of opportunity ; rural location ; seasonal fluctuations; weather ; Septic regulations--Costs 50,000 to get new septic system. Owners of buildings would rather shut down, than to pay to upgrade buildings. Most buildings are empty because of regulations. ; several of our businesses we vendored shut down ; small community ; small community, but it seems to be growing ; small pop' ; small town community ; small town, closest highway is 20 miles, trying to get people up here. ; small town, few opportunities ; small town/ lack of jobs and education ; small town; poverty level ; some changes in business, some chain companies are coming, changes in services and changes in flavor of our town. ; some flux in seasons ; Some of the homelessness come from other parts of the country and there are not enough enforcements it's a combo b/w blm and usfs and state parks not wanting to work together homeless people are scaring off the tourists. ; Some times it's a pain to deal with all the rules you have to follow ; Sopa Wheller (SP?) logging company is about to close USFS cut back employment ; stagnant population ; State government, local government ; State mandates health insurance policies. Beurocrats. Fire Dept making environmental policies. More taxation in construction, increasing fees that builders have to pay first, then the home owner has to pay. ; state/ federal government ; sub-prime loans still affecting economy; economic state in general ; Taxes continue to rise and rise, taking more and doing less. Permits and fees are doubling ; taxes/ regulations ; The economy was very weak ; the quality of government ideas and people ; The world we live in. I'm so close to the end of the road, I look at it differently. ; Theft is from out of towners, we're a small city, and that's just not what we do around here ; There is crime from the homeless, and govt wants to shut down the pot grows ; There is no gold standard, not since Nixon. We're not the best in education, pensions, healthcare, massive debts we will never pay off. I know a few people, myself included, who've loaded up on guns, food water and supplies, and we're worried for a revolution. there is a sickening disparity of wealth of income. ; They seem to hinder certain plans they don't make it easy. And makes it difficult to do anything ; They think there's too mch regulation ; Those are the priorities ; timber management, bark beetle, drought ; too many businesses leaving/ going out of business; no new people coming in ; Too many politicians--not enough cooks ; Too much regulation ; tourist ; uncertain how it's dealt with, real estate development, how we zone marijuana growing for community ; Unemployment rates, better business move to other countries. ; US Forest Service not properly managed. ; very niche occupation, hasn't found anyone qualified to help ; Weather ; weather can affect if people come out to the lake ; weather, fires, other environmental factors beyond human control ; weather/ winter season; economic condition ; we're a camp, income keeps us going ; We're a small historical town, and people don't want it to change but it has to. ; we're a small town a lot of younge people are retired. Jobs are hard to come by ; We're not regulated ; works comp has gone up from 5 to 100 to 6 to 100 ; worse because of current government and regulations ; You cant get fire insurance, lack of rental units. Prices. ; Young people are forced to leave b/c of the lack of community resources and jobs. The younger people here [in Greenville] work for the county or the forest service ; young people in the area leave in search of

better work ; younger generation doesn't want to work/ doesn't want to stay in the area ; younger generation is leaving area in search of work ; Younger people aren't interested in trail riding, we're ageing out ; ; ; Air quality ; all levels of government; people out of the area have a lot of say in what goes on in the county ; anti- government political atmosphere ; appraisal businesses have left area/ gone ; as a bankruptcy attorney, banks are treating customers better so there is less business in the bankruptcy business ; as a manufacturer, a lot of companies have switched to over-seas production ; Baby boomers, millennials, cremation ; bark beetle, drought ; Bark beetle, prevents people from coming ; Because it's a small town in the hills. We're off the map. ; Because of the beetles that killed the trees ; Because we're a rural town, there's not a lot of opportunity or room for growth...we need balance ; bureaucracy/ government ; business closures; downtown is losing its luster ; business slows down outside of summer months ; businesses are closing/ leaving ; California thinks they are their own country ; careless people ; certain companies bidding jobs, cutting rates ; change in automotive market; people keep buying new cars rather than repairing old ones ; Changes in demographics, drug traders may lead to a decrease in tourism, losing workers to drug trade ; Changes in regulation requirements--law and environmental sector. ; city planning department ; climate change, global conditions, drought, trees dying; tuolumne utility district/ local government won't allow new building ; closing down of the national forest. Better way of handling forest better on management ; Commercial Businesses paying an Increase on Taxes, versus some guy with computer that doesn't pay high taxes ; community government needs to focus on growth ; concerned about community, rising crime, theft of water ; country wide ignorance when it comes to forest health ; County and small pop'n ; county building department is too strict on "preserving historical value"; don't allow enough new building ; Crimes of opportunity ; current government and changes in regulations; environmentalists fight to keep any logging/ recreation out of forest and it hurts the economy ; Current politicians ; current political atmosphere ; current political atmosphere and inequality ; current political conditions ; current political conditions; minimum wage and overtime increases ; current politicians; current legislation ; Cuts from government funding, (b/c non-profit) we have gov't fund us, and families have to pay us/ ; Decline in population, a lot of retirees. ; Desired are, renters are able to post high rents. ; Drought in itself ; Drought/beetle ; dying trees creates more jobs but hurts residents ; economic state ; economic state ; economic state; other businesses aren't doing what the customers want and so they don't get the optimal level of business. ; economic state; poor leadership in local government and state/ federal government ; Economic downturn ; Economic uncertainty, severe lack of interest and effort on behalf of local politicians ; economic uncertainty; uncertainty in federal land management ; economy ; economy ; economy ; economy and marketing ; economy does not allow for as many luxury items/services ; economy in general ; economy in general ; economy in general; instability in government ; economy is cyclical and can't predict the future of economy/ business ; economy/ recession ; economy; when customers income decreases, their demand for luxury items decreases ; educated people leave area to find better jobs ; election year stress; economy in general ; everybody stops building homes, people spend less money, projects aren't started ; Expensive, hard to find services. 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work or leave area ; gov't regulations + taxes ; growth is too much; drought ; GROWTH OF LOCAL GOVERNMENT, UPGRADING OF CAPITAL ASSETS AND ACQUISITION OF LARGER GOVT FACILITIES. ; hard for parents to work when kids can't be taken care of ; hard to go outside of community to find new clients ; Having reliable high speed internet ; He doesn't care about community / tourists. ; High cost of utilities / taxes, not a lot of resources ; Housing is very limited or expensive. Marijuana grow are huge to our economy, they buy a lot of supplies and like to eat out. It really helps our local businesses. ; How businesses are affected by ; I happen to be a gov't reporter, and regulations are in constant fluctuation, which is not conducive to long term planning ; I hate paying the sales tax on stuff for jobs ; I think there isn't an emphasis or encouragement to bring businesses here. 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local growth attention-- takes forever to get things done. ; no money in community to upgrade old structures ; no new construction projects makes people leave the area to find better work ; no one to employ and no money ; no opportunities; young people leaving in search of jobs ; no tourism board; local government isn't pushing tourism ; not a good market for motorcycles; internet shopping ; not able to pay qualified people enough ; not enough good/ high paying jobs, young people leave area to find better work ; not enough higher income jobs in the county ; not enough rental housing available ; Not enough retail jobs or industry ; not sure ; not sure ; not sure ; nothing controllable, mostly just weather ; Obama ; Obamacare ; our government and their regulations ; Our little town is dying. Its primarily used for recreation. People come and make a mess and leave. 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There are no restaurants, clubs, bars, or anything. Some people like it, no street lights." ; regulations and economy in general ; regulations and not a lot of opportunities ; regulations in current government ; regulations on business- expensive to hire people, what is the forest service doing with dead trees ; remote/rural community ; restrict firearms, less business ; retired population is dying ; retirement community but not many new people are moving in ; retirement community/ people come as weekend visitors/ vacation homes but don't want to work in the area ; rural community ; rural community, less funding ; rural community, people leave the town to shop in bulk; internet shopping ; rural community/ lack of opportunity ; rural location ; seasonal fluctuations; weather ; Septic regulations--Costs 50,000 to get new septic system. Owners of buildings would rather shut down, than to pay to upgrade buildings. 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Fire Dept making environmental policies. More taxation in construction, increasing fees that builders have to pay first, then the home owner has to pay. ; state/ federal government

APPENDIX B

The following pages contain the print version of the Summer 2016 SFAC Survey. An online version of the survey was also available to respondents; questions were presented in the same order and manner as appear in the print version.

Part 1: General Questions

1. In what community is your business located? _____
2. What is your primary line of business? _____
3. In what year was your business established? _____
4. How many people does your business employ?
 - a. 0 (owner operated)
 - b. 1 – 4
 - c. 5 – 9
 - d. 10 – 19
 - e. 20 – 29
 - f. 30 – 49
 - g. 50 or more
5. Which of the following best describes your business' primary customer base?
 - a. Local residents
 - b. Seasonal / short-term visitors or tourists
 - c. Business to business
 - d. Other _____
6. What portion of the year does your business operate?
 - a. Year-round
 - b. 7-11 months
 - c. 3-6 months
 - d. Less than 3 months
7. How would you characterize current **business conditions** in your community?
 - a. Very poor
 - b. Poor
 - c. Fair
 - d. Good
 - e. Very good
8. How would you characterize current **employment opportunities** in your community?
 - a. Very poor
 - b. Poor
 - c. Fair
 - d. Good
 - e. Very good
9. Did you do business in or reside in the same community -around twenty years ago?
 - a. Yes (answer Questions 10-11)
 - b. No (skip to Question 12)

10. Around twenty years ago, **business conditions** in your community were:
- a. Very poor
 - b. Poor
 - c. Fair
 - d. Good
 - e. Very Good
11. Twenty years ago, **employment opportunities** in your community were _____ than they are today:
- a. Very Poor
 - b. Poor
 - c. Fair
 - d. Good
 - e. Very Good

12. What are your biggest concerns as a business owner or operator in your community?

13. What do you see as causing these concerns?

PROCEED TO PART 2A FOR MOST BUSINESS.

PROCEED TO PART 2B IF THE BUSINESS IS IN TIMBER, BIOMASS, GRAZING, WATER, MINING, ENERGY, OR ANOTHER EXTRACTIVE ACTIVITY.

Part 2A: Questions for Local Businesses Indirectly Affected by USFS Policy

14. In your experience, how important is the presence of nearby US Forest Service lands or activities to the overall economy in your community?
- a. Very important
 - b. Somewhat important
 - c. Not important
15. In your best estimation, what percentage of your business' sales or revenue is directly tied to the presence of nearby US Forest Service lands or activities? _____%
16. In your best estimation, what percentage of your business' sales or revenue is directly tied to **visitors** who are in your community due to the presence of nearby US Forest Service lands or activities? _____%

17. How have Forest Service policies affected recreational opportunities around your community?
(If asked - these policies include but are not limited to timber policies and fire suppression strategies)

Over the past 10-20 years, recreational opportunities have _____

- a. Significantly Increased
 - b. Increased
 - c. Stayed the same
 - d. Decreased
 - e. Significantly Decreased
18. In your experience, how are the policies and practices of the US Forest Service influencing **business conditions** in your community?
- a. Improving
 - b. Not influencing
 - c. Harming
19. In your experience, how are the policies and practices of the US Forest Service influencing **employment opportunities** in your community?
- a. Improving
 - b. Not influencing
 - c. Harming
20. Has your business ever worked directly with the Forest Service or other federal land management agencies?
- a. Yes (skip to Part 3)
 - b. No (DONE)

Part 2B: Questions for Commodity Producing / Extractive Businesses

21. In your experience, how important is the presence of nearby US Forest Service lands or activities to the overall economy in your community?
- a. Very important
 - b. Somewhat important
 - c. Not important
22. What is your primary line of business? _____
23. In your best estimation, what percentage of your business' sales or revenue is directly tied to the presence of nearby US Forest Service lands or activities? _____%

24. Which of the following products does your business include?
- a. Timber
 - b. Biomass
 - c. Grazing
 - d. Water
 - e. Minerals/Mining
 - f. Energy
 - g. Other _____
25. In your opinion, how well has the Forest Service been managing natural resources?
- a. Very poor
 - b. Poor
 - c. Fair
 - d. Good
 - e. Very good
26. In your experience, the policies and practices of the US Forest Service _____
business conditions in your community:
- d. Significantly improve
 - e. Improve
 - f. Do not influence
 - g. Hinder
 - h. Significantly hinder
27. In your experience, the policies and practices of the US Forest Service _____
employment opportunities in your community:
- d. Significantly improve
 - e. Improve
 - f. Do not influence
 - g. Hinder
 - h. Significantly hinder
28. Has your business ever worked directly with the Forest Service or other federal land management agencies?
- a. Yes (skip to Part 3)
 - b. No (DONE)

PROCEED TO PART 3 ONLY IF RESPONDENT ANSWERS "YES" TO QUESTION 28. OTHERWISE, THE SURVEY IS COMPLETE. THANK THE PARTICIPANT FOR HIS OR HER TIME.

Part 3: Questions for Forestry Business who have Worked With the USFS

29. How successful was your relationship with the federal land manager?

30. Has your working or contractual work with the Forest Service been maintained or reduced over the last twenty years?

30b. In your opinion, what have been the changes and why?

31. Were there any challenges that arose while working for this federal land manager?
