

# EAGLE COUNTY REGIONAL HOUSING NEEDS ANALYSIS

Data Summary and Initial Findings  
November 2024

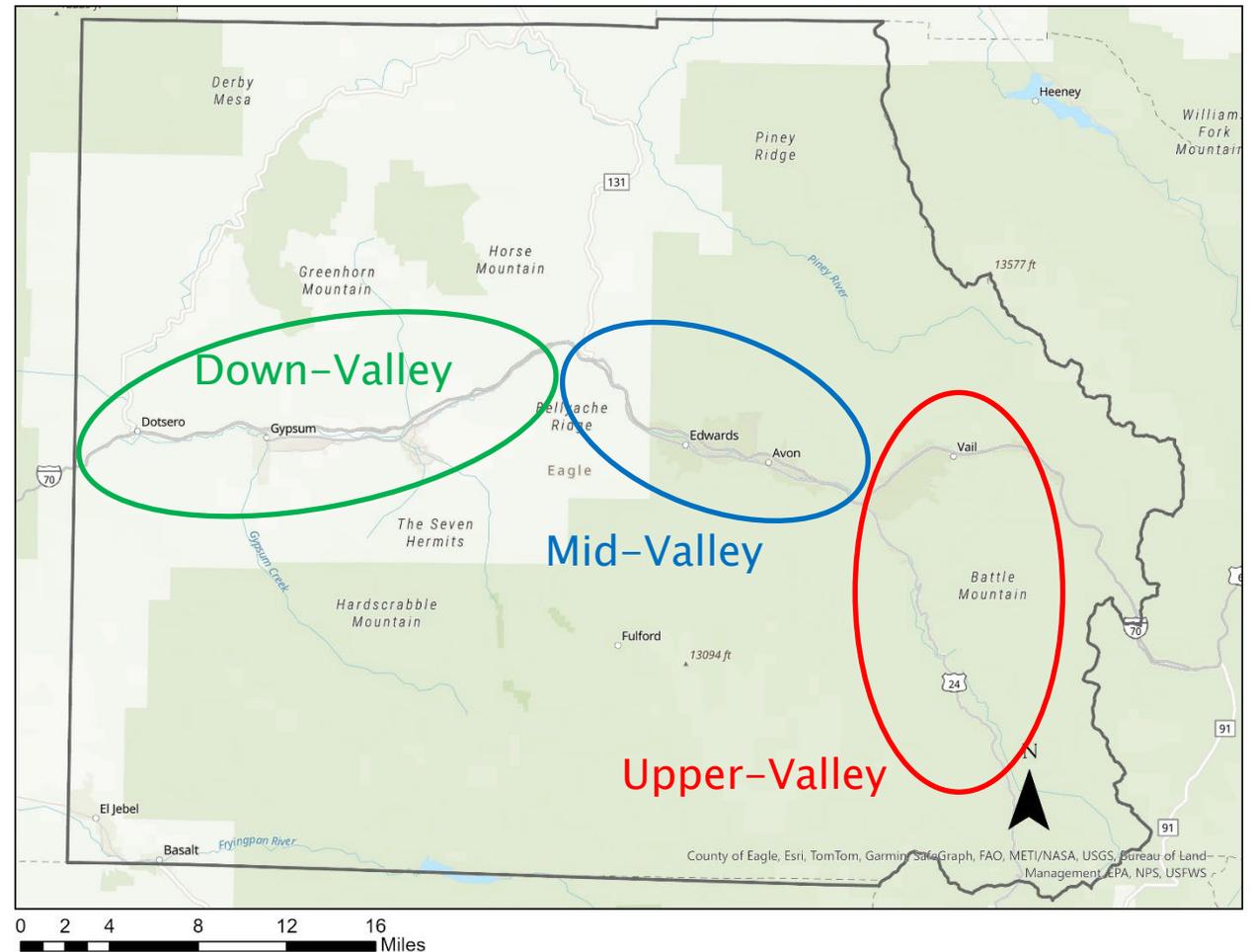


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*The Economics of Land Use*

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# STUDY AREA AND SUBAREAS

- Much of this data is analyzed by jurisdiction and by sub-region within the Eagle River Valley
- Upper Valley: Vail, Minturn, Red Cliff
- Mid-Valley: Avon, Edwards, Beaver Creek (when data available)
- Down-Valley: Eagle, Gypsum, Dotsero (when data available)



# DIVERSE POPULATION AND HOUSING CHARACTERISTICS

Area	Characteristics
Vail	Few family households, with smaller household size, older residents, predominantly white, mostly owners, many second homes/vacation rentals
Minturn	Stable population and housing units, fewer young residents, high household income, mostly owners
Red Cliff	Stable population and housing units, lower household income, older residents, mostly owners, few second homes/vacation rentals
Avon	Half renters, half owners, large increase in housing prices, high growth in housing units, large population of working-age adults
Edwards	Mostly owners, large increase in housing prices, demographics representative of Eagle County overall
Eagle	Many family households with larger household size, young residents, mostly owners, few second homes/vacation rentals
Gypsum	Many family household with larger household size, majority Hispanic/Latino residents, more young residents, high growth in housing units, mostly owners, few second homes/vacation rentals

# DEMOGRAPHIC AND EMPLOYMENT TRENDS

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# POPULATION

- Eagle County grew slowly between 2010 and 2022, adding 3,200 new residents (0.5% average annual growth)
- Most population growth occurred down-valley in Eagle and Gypsum
- Unincorporated areas, including Edwards, also grew

Eagle County Population, 2010-2022

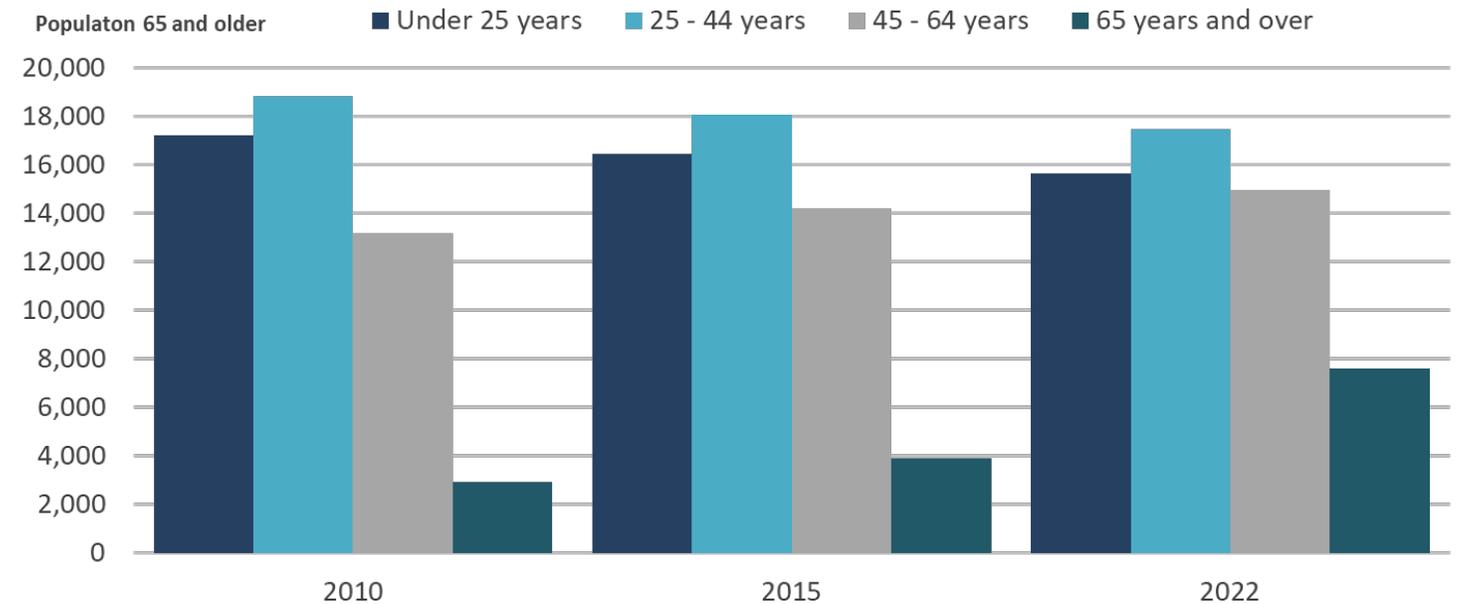
Description	2010	2015	2022	2010-2022		
				Total	Ann. #	Ann. %
Vail	5,285	5,113	4,804	-481	-40	-0.8%
Minturn	1,027	1,007	1,025	-2	0	0.0%
Red Cliff	266	237	254	-12	-1	-0.4%
Avon	6,422	5,972	5,978	-444	-37	-0.6%
Eagle	6,483	6,847	7,488	1,005	84	1.2%
Gypsum	6,472	6,961	7,927	1,455	121	1.7%
Basalt (part)	2,917	2,674	2,909	-8	-1	0.0%
<u>Unincorp. Area</u>	<u>23,185</u>	<u>23,970</u>	<u>24,906</u>	<u>1,721</u>	<u>143</u>	<u>0.6%</u>
<b>Eagle County Total</b>	<b>52,057</b>	<b>52,781</b>	<b>55,291</b>	<b>3,234</b>	<b>270</b>	<b>0.5%</b>

Source: Colorado State Demographer's Office, Economic & Planning Systems

# POPULATION BY AGE

- Eagle County's population over 65 has increased since 2010, both in absolute numbers and as the share of the population
- The share of the population 65 and older increased from 6% in 2010 to 14% in 2022

Eagle County Age Distribution, 2010-2022

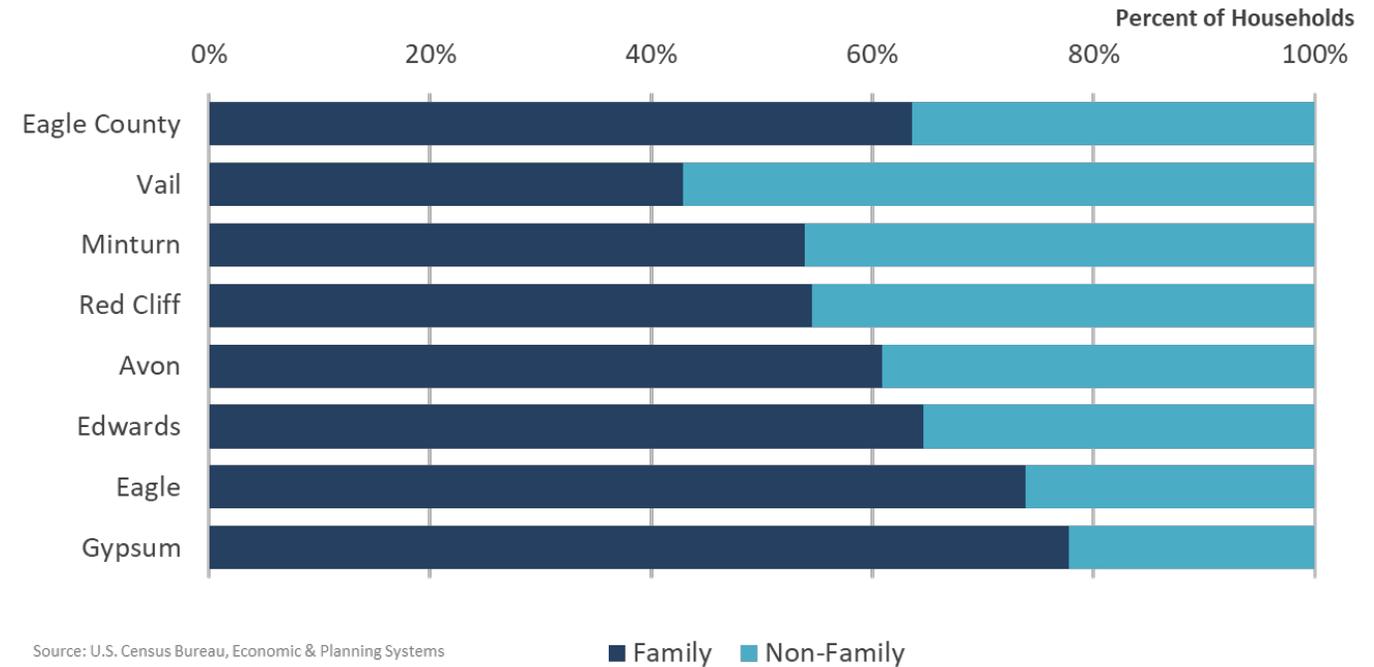


Source: U.S. Census Bureau, Economic & Planning Systems

# HOUSEHOLD TYPE

- There are more family households down-valley
- Down-valley communities also have lower median age and higher household size, all indications of more families and children living in these communities

Eagle County Household Type by Location, 2022



# HOUSING UNITS

- Avon, Eagle, and Gypsum accounted for 74% of all housing units added in Eagle County between 2010–2022.
- Housing growth continued up-valley despite losing residents, an indication that these new units are second homes and vacation rentals.

Eagle County Housing Units, 2010-2022

Description	2010	2015	2022	2010-2022		
				Total	Ann. #	Ann. %
Vail	6,974	7,138	7,331	357	30	0.4%
Minturn	523	532	566	43	4	0.7%
Red Cliff	118	126	139	21	2	1.4%
Avon	3,483	3,519	4,175	692	58	1.5%
Eagle	2,456	2,503	2,796	340	28	1.1%
Gypsum	2,207	2,322	3,177	970	81	3.1%
Basalt (part)	1,318	1,320	1,593	275	23	1.6%
<u>Unincorp. Area</u>	<u>13,731</u>	<u>13,903</u>	<u>14,556</u>	<u>825</u>	<u>69</u>	<u>0.5%</u>
<b>Eagle County Total</b>	<b>30,810</b>	<b>31,363</b>	<b>34,333</b>	<b>3,523</b>	<b>294</b>	<b>0.9%</b>

Source: Colorado State Demographer's Office, Economic & Planning Systems

*Note: SDO housing numbers for 2022 are nearly 1,300 units higher than ACS 5-year estimates; these numbers are based on the decennial Census and updated annually with local data*

# OCCUPIED HOUSING UNITS

- 61% of housing units in Eagle County were occupied full-time
- Occupancy patterns vary throughout the valley
  - Nearly all housing units down-valley are occupied full-time by households
  - Only one-third of housing units in Vail are occupied, indicating many second homes or vacation rentals

Eagle County Occupied Housing Units as Percent of Total, 2010-2022

Description	2010	2015	2022
<b>Eagle County</b>	<b>61%</b>	<b>57%</b>	<b>61%</b>
Vail	36%	33%	33%
Minturn	80%	73%	69%
Red Cliff	83%	75%	81%
Avon	64%	55%	56%
Edwards	69%	60%	71%
Eagle	90%	85%	94%
Gypsum	91%	93%	93%

Source: U.S. Census Bureau, Economic & Planning Systems

# HOUSEHOLD INCOME

- Median household income in Eagle County was just under \$100,000 in 2022
- Household income varies substantially by size
- Median income for 1-person households is less than half of median income for 2-person households
- Incomes for 2- and 3-person households have grown much more than 1-person households since 2015

Eagle County Median Household Income, 2010-2022

Description	2010	2015	2022	2010-2015			2015-2022		
				Total	Ann. #	Ann. %	Total	Ann. #	Ann. %
<b>All Households</b>	<b>\$71,337</b>	<b>\$72,214</b>	<b>\$98,887</b>	<b>\$877</b>	<b>\$175</b>	<b>0.2%</b>	<b>\$26,673</b>	<b>\$3,810</b>	<b>4.6%</b>
1-Person Households	40,359	42,829	43,167	2,470	494	1.2%	338	48	0.1%
2-Person Households	79,620	86,626	119,105	7,006	1,401	1.7%	32,479	4,640	4.7%
3-Person Households	86,076	80,982	129,646	-5,094	-1,019	-1.2%	48,664	6,952	7.0%
4-Person Households	82,391	91,779	103,708	9,388	1,878	2.2%	11,929	1,704	1.8%

Source: U.S. Census Bureau, Economic & Planning Systems

# HOUSEHOLD INCOME BY SOURCE

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- Wages have declined as a share of personal income in Eagle County, from 61% to 53%. Income from investments has increased from 32% to 41%.
- This indicates that new residents may not be working in the county (or not relying on employment for their income).

Eagle County Household Income by Source 2010-2022

Description	2010	2015	2022
Wage & Salary	61%	57%	53%
Investment Income	32%	37%	41%
<u>Transfer Receipts</u>	<u>7%</u>	<u>6%</u>	<u>6%</u>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Note: Dollars are not inflation-adjusted

Source: Bureau of Economic Analysis; Economic & Planning Systems

# EMPLOYMENT

- Overall employment is made up of 70% wage and salary jobs (this table) and 30% proprietors
- Eagle County had 34,000 jobs in 2022, growth of 6,500 jobs since 2010 (24% job growth)
- The Health Care and Social Assistance and Administrative and Waste (including property management) sectors grew the most from 2010 to 2022
- Employment in largest industries grew slower than overall employment, but jobs remain stable
- Just over half of Eagle County employees commute from another county

Eagle County Job Growth, 2010 – 2022

Description	2010	2022	2010-2022 Total Growth	Percent of Total Job Growth
<b>Industry</b>				
Accommodation and Food Services	6,676	7,272	596	9.1%
Retail Trade	2,994	3,507	513	7.8%
Construction	2,666	3,464	798	12.2%
Arts, Entertainment, and Recreation	3,434	3,419	-15	-0.2%
Health Care and Social Assistance	1,856	3,394	1,538	23.4%
Administrative and Waste Services	1,354	2,909	1,555	23.7%
Real Estate and Rental and Leasing	1,360	1,674	314	4.8%
Public Administration	1,413	1,585	172	2.6%
Educational Services	1,279	1,522	243	3.7%
Professional and Technical Services	1,032	1,462	430	6.6%
Other	3,397	3,814	417	6.4%
<b>Eagle County Total</b>	<b>27,461</b>	<b>34,022</b>	<b>6,561</b>	<b>100%</b>

Source: Colorado Department of Labor and Employment, Economic & Planning Systems

# OCCUPATIONS AND WAGES

- Overall median wage in Eagle County for all occupations was \$52,900
- The largest occupations in Eagle County are food and beverage serving, construction trades, and retail sales
- Six of the top ten occupations have median wages below \$50,000/year

Eagle County Top Occupations and Wages, 2024

Description	Employment	Entry Level	Median	Experienced
Food and Beverage Serving Workers	3,010	\$31,700	\$37,000	\$50,600
Construction Trades Workers	2,446	\$42,500	\$56,900	\$68,400
Retail Sales Workers	2,265	\$33,800	\$40,700	\$48,600
Building Cleaning and Pest Control Workers	1,655	\$34,200	\$41,000	\$47,100
Cooks and Food Preparation Workers	1,584	\$34,500	\$40,500	\$48,100
Business Operations Specialists	1,514	\$48,400	\$76,400	\$101,400
Information and Record Clerks	1,456	\$36,400	\$44,200	\$52,500
Healthcare Diagnosing or Treating Practitioners	1,211	\$82,700	\$112,800	\$187,100
Other Management Occupations	1,167	\$72,700	\$112,500	\$145,600
Grounds Maintenance Workers	1,104	\$39,400	\$49,300	\$54,400
<b>Top Ten Occupations (Average)</b>	<b>17,413</b>	<b>\$37,357</b>	<b>\$48,100</b>	<b>\$59,529</b>

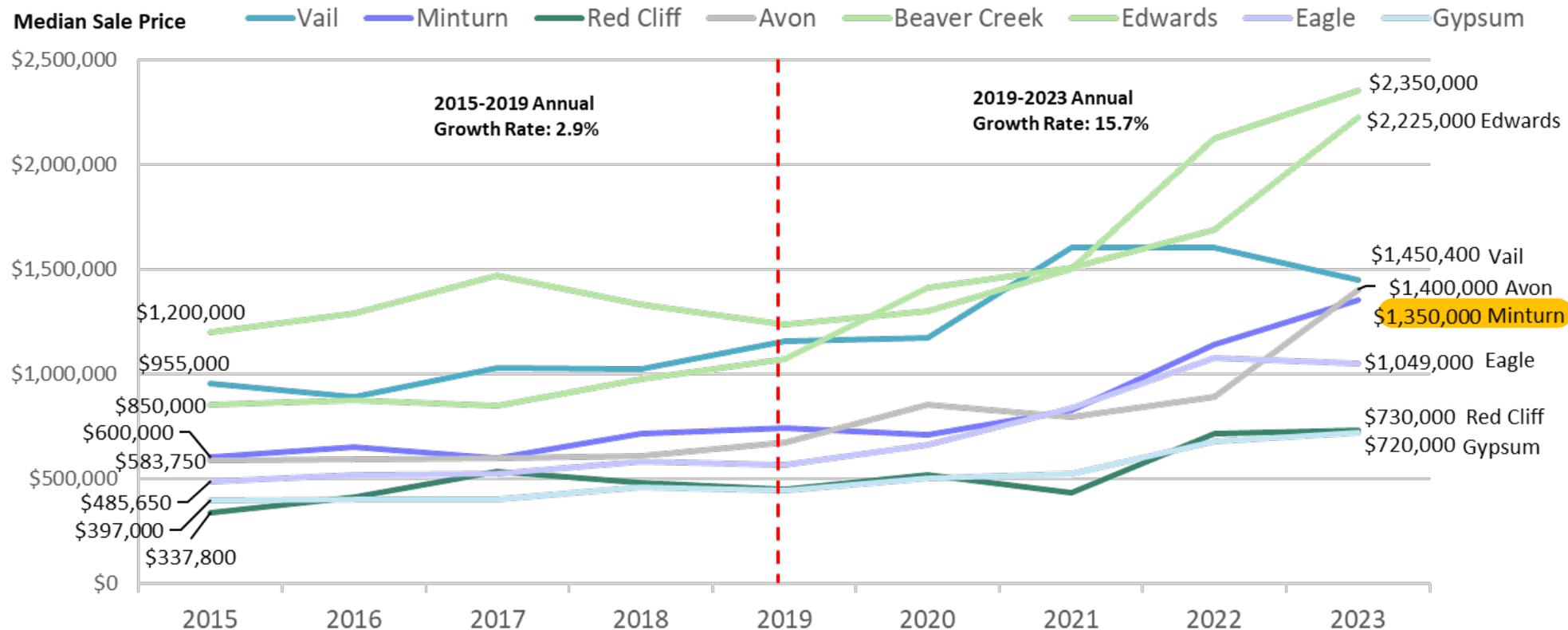
Source: JobsEQ, Economic & Planning Systems

# HOUSING MARKET TRENDS

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# MEDIAN SALE PRICE BY LOCATION

- Prices have increased rapidly county-wide, especially since 2019.
  - Price increases were largest in the mid-valley
- Median sale price countywide has been over \$1 million since 2021, and has more than doubled since 2015
- Only 2 communities (Red Cliff and Gypsum) have a median sale price below \$1 million



Eagle County Median Sale Price by Location, 2015-2023

Source: MLS, Economic & Planning Systems

Note: Analysis excludes mobile homes, ranches, and highest and lowest 5% of sales. Deed-restricted homes are included.

# MEDIAN SALE PRICE BY TYPE

- Housing costs vary by the type of home being sold
- Median prices have nearly or more than doubled for all home types since 2015
- In 2023, the median sale price for all home types was over \$1 million – condos crossed that threshold in 2023, townhouses in 2022

Eagle County Median Sale Price by Type, 2015-2023

Description	2015	2019	2023	2015-2019			2019-2023		
				Total	Ann. #	Ann. %	Total	Ann. #	Ann. %
Condominium	\$664,500	\$665,000	\$1,200,000	\$500	125	0%	\$535,000	133,750	16%
Duplex	\$748,500	\$985,000	\$1,750,000	\$236,500	59,125	7%	\$765,000	191,250	15%
Single Family Residence	\$685,000	\$862,900	\$1,312,500	\$177,900	44,475	6%	\$449,600	112,400	11%
Townhouse	\$500,000	\$616,750	\$1,325,065	\$116,750	29,188	5%	\$708,315	177,079	21%

Source: MLS, Economic & Planning Systems

Note: Analysis excludes mobile homes, ranches, and highest and lowest 5% of sales. Deed-restricted homes are included.

# RENTAL MARKET OVERVIEW

- Rent data is challenging to get – utilize Census, community survey, online listings, and landlord/property manager interviews. Locals often use informal sources like Facebook or word of mouth to find rentals
- Census data is consistent with survey data – average rent of \$1,924 and median rent of \$1,800 in Eagle County
  - May reflect differences in rent for people current in a home compared to people currently looking to rent
- Interviews and focus group feedback note that per-bedroom rent is between \$1,500 and \$2,000; rent for a couch can be \$800–\$1,000

Eagle County Median Rent by Location, 2010-2022

Description	2010	2015	2022	2010-2015			2015-2022		
				Total	Ann. #	Ann. %	Total	Ann. #	Ann. %
<b>Eagle County</b>	<b>\$1,225</b>	<b>\$1,272</b>	<b>\$1,868</b>	<b>\$47</b>	<b>\$9</b>	<b>0.8%</b>	<b>596</b>	<b>85</b>	<b>5.6%</b>
Vail	1,266	1,249	1,625	-17	-3	-0.3%	376	54	3.8%
Minturn	1,259	1,148	2,181	-111	-22	-1.8%	1,033	148	9.6%
Red Cliff	1,297	1,550	1,800	253	51	3.6%	250	36	2.2%
Avon	1,231	1,122	1,731	-109	-22	-1.8%	609	87	6.4%
Edwards	1,346	1,343	1,870	-3	-1	0.0%	527	75	4.8%
Eagle	1,058	1,478	1,612	420	84	6.9%	134	19	1.2%
Gypsum	1,229	1,201	1,741	-28	-6	-0.5%	540	77	5.4%

Source: U.S. Census Bureau, Economic & Planning Systems

# AFFORDABILITY ANALYSIS

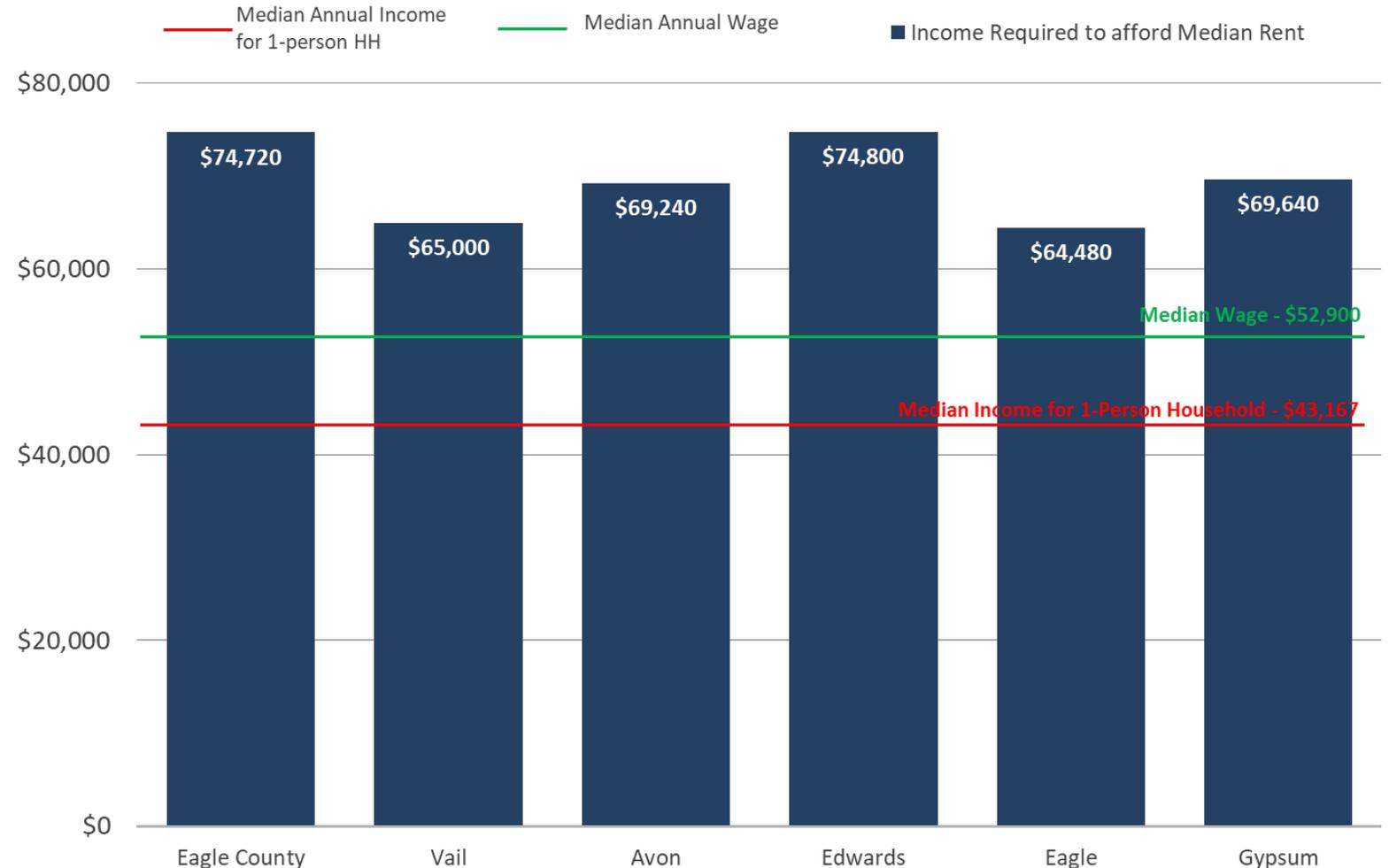
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# RENTAL AFFORDABILITY

There is no community in the County where a single-wage earner or 1-person household earning median income can afford the median rent.

This data indicates that it is challenging to live affordably in Eagle County as a 1-person household. Many people will double up (or more) out of necessity

Eagle County Income Needed by Location, 2022



Source: U.S. Census Bureau, Economic & Planning Systems

# OWNERSHIP AFFORDABILITY

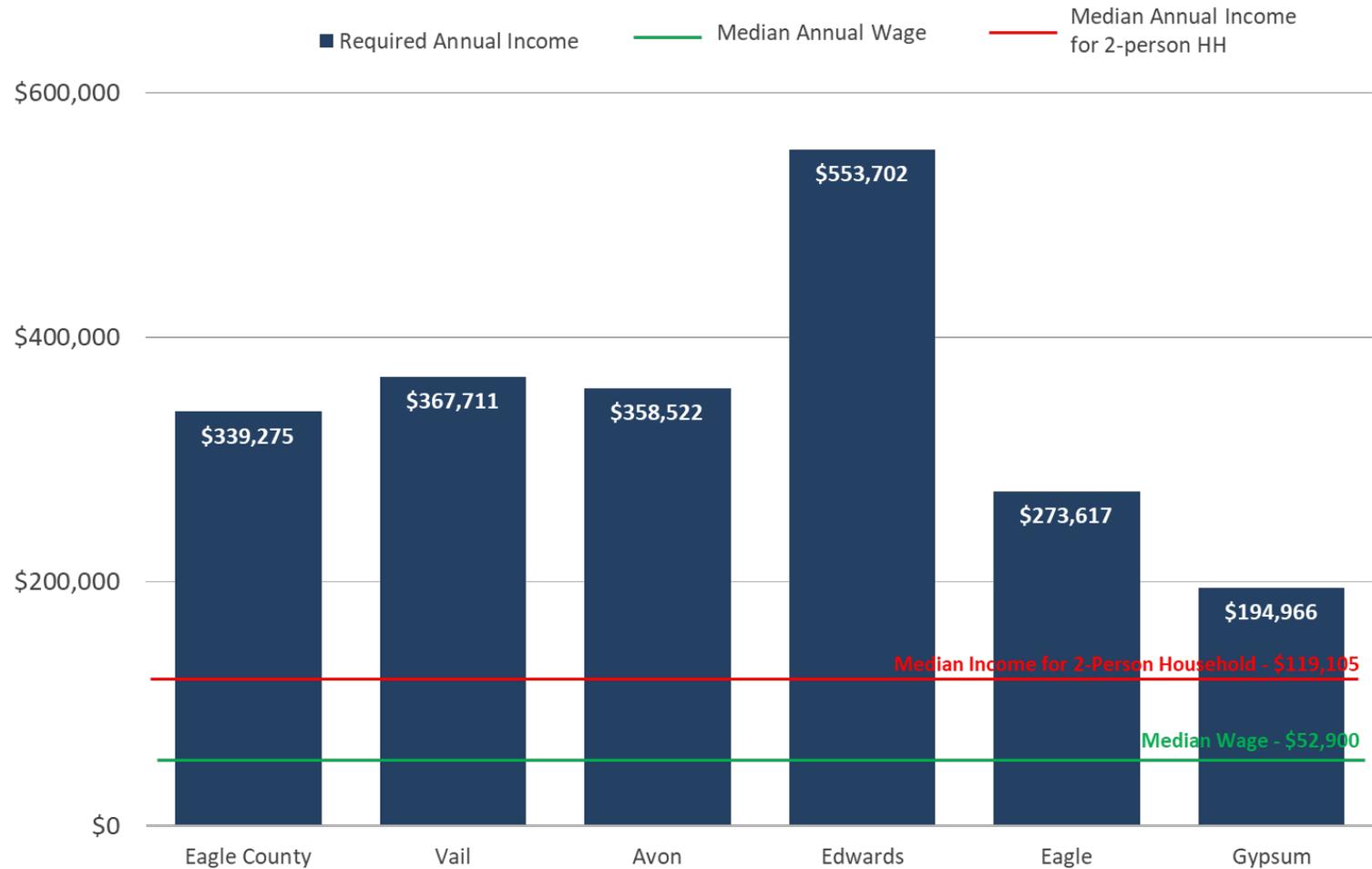
A 2-person household earning Eagle County median income cannot afford the median-priced home in any community.

- Only 24 homes were sold in 2023 that were affordable for a 2-person household earning 100% AMI

The affordability gap is even larger when measured by wages. A household would need 6.4 median-wage jobs to afford a median home in Eagle County.

Even when “high-value” areas are excluded, required incomes are still 2–3 times higher than area median income for a 2-person household.

Eagle County Income Required to Purchase by Location, 2023



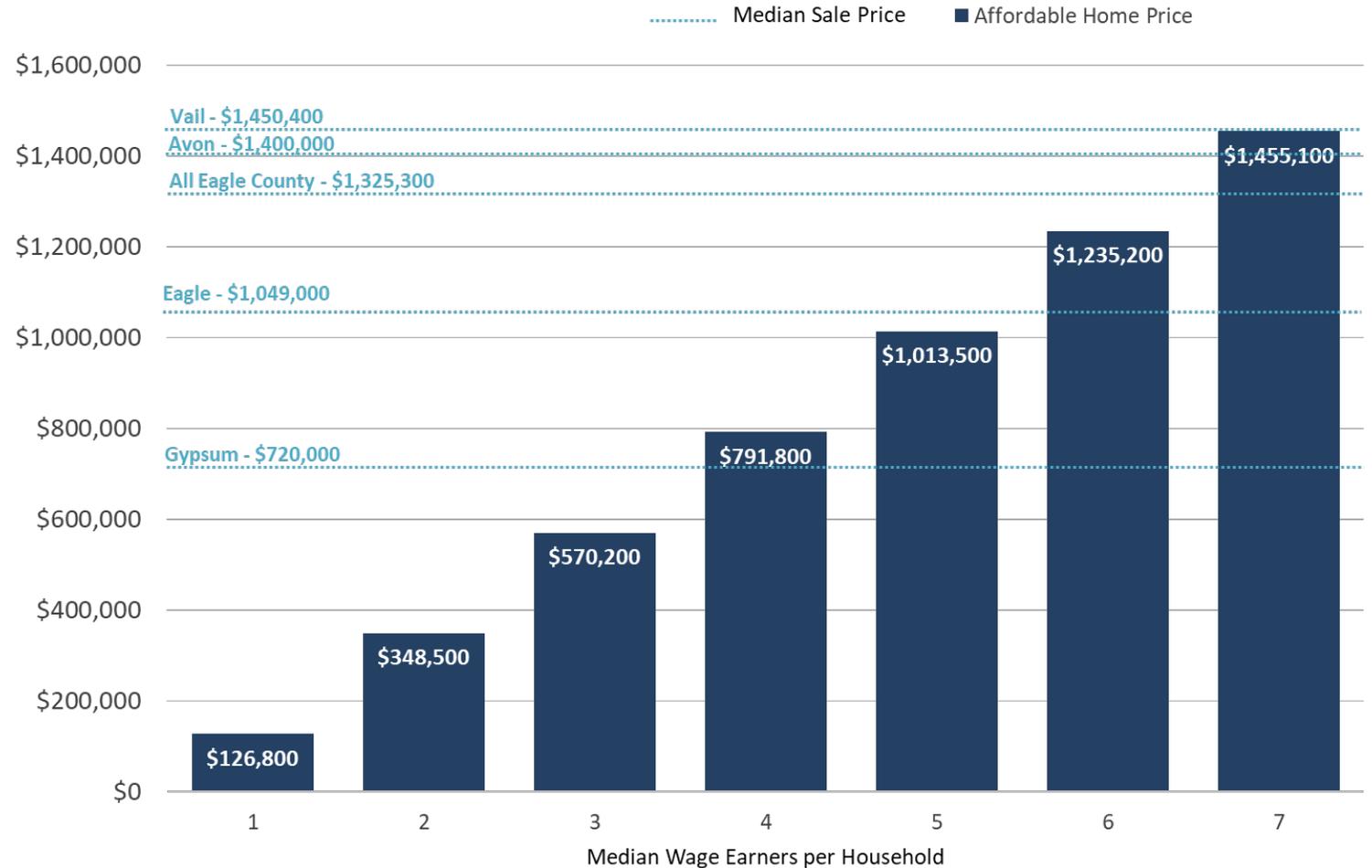
Source: MLS, U.S. Census Bureau, Economic & Planning Systems

# OWNERSHIP AFFORDABILITY – WAGES

To afford the median priced home in Eagle County, a household needs an income equivalent to 6.4 full-time jobs paying median wage of \$52,900/year.

As a result, homeowners may take on roommates or work extra jobs to afford a home.

Eagle County Affordability Gap by Wages and Location, 2023



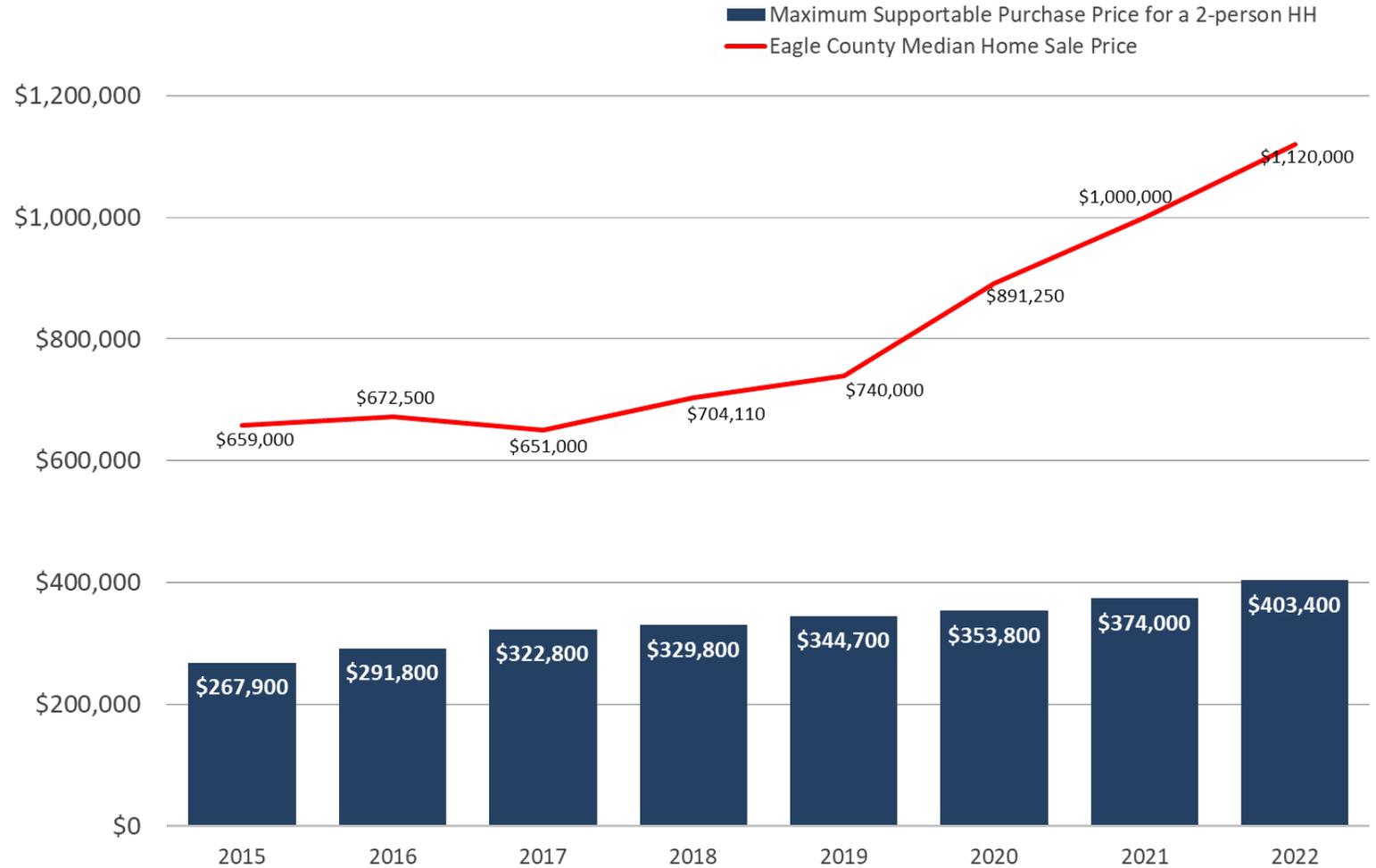
Source: MLS, JobsEQ, Economic & Planning Systems

# OWNERSHIP AFFORDABILITY OVER TIME

In 2015, the gap between what a 2-person household earning 100% AMI could afford and the median purchase price was approximately \$450,000.

In 2020 that gap was about \$636,000, and by 2022 had grown to over \$700,000.

Eagle County Affordability Gap, 2015-2022



Source: MLS, U.S. Census Bureau, Economic & Planning Systems

# OUTREACH OVERVIEW

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- A key part of this process is community and stakeholder outreach
- Survey
  - In late winter and spring 2024, a community survey (for residents and employees) was conducted to better understand housing conditions and needs in Eagle County
  - Over 2,700 responses were collected
  - Survey data was largely consistent with other data points collected
  - An employer survey was also conducted, with 183 responses
- Interviews
  - EPS conducted seven interviews with local stakeholders in the real estate, rental and insurance markets
- Focus Groups
  - Focus groups – Community focus groups were held October 22–24 and 29–30, with additional follow-up interviews as needed

# SECURITY OF HOUSING SITUATION

- Many survey respondents expressed feelings of insecurity in their housing situation
- This was especially high for those living in employer-provided housing, young renters, and those living with roommates

Security of housing situation		Overall	Key Population Segments									
			Young renters	Live with roommates	Live in employer-provided housing	Live in deed-restricted housing	Hispanic/Latino	Older adults (aged 55+)	Families with children	Families with young children	Other family HHS with children	All other
How secure do you feel in your current housing situation, in terms of your ability to stay in your home (and not be forced to move)	Very secure	48%	16%	27%	14%	39%	25%	68%	46%	43%	32%	50%
	Somewhat secure	29%	43%	30%	41%	40%	36%	20%	33%	35%	33%	28%
	Somewhat insecure	11%	21%	19%	18%	9%	17%	6%	10%	11%	17%	11%
	Very insecure	9%	15%	15%	22%	8%	14%	4%	8%	7%	8%	9%
	Don't know / not sure	3%	5%	8%	2%	3%	7%	1%	2%	2%	7%	1%
	Other:	1%	1%	1%	2%	0%	1%	1%	1%	1%	3%	2%
<b>TOTAL</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
	n =	2,709	329	292	119	298	575	797	715	434	106	532

18 Sep 24

Source: RRC Associates

Data weighted by housing tenure, householder age, householder Hispanic origin, and household size within zip; and by zip; per 2018-22 ACS

Cells 5+ PPT greater than the overall are **GREEN** filled | Cells 5 PPT or less than the overall are **RED** filled

# EASE OF FINDING HOUSING

- Young renters, those living with roommates, and Hispanic/Latino households have struggled to find affordable housing that met their needs

Ease of finding housing		Overall	Key Population Segments									
			Young renters	Live with roommates	Live in employer-provided housing	Live in deed-restricted housing	Hispanic/Latino	Older adults (aged 55+)	Families with children	Families with young children	Other family HHS with children	All other
When you last moved within the Eagle River Valley or surrounding region, how hard was it to find housing that met your needs and that you could afford?	Not difficult	20%	4%	9%	13%	12%	12%	37%	15%	10%	13%	21%
	Moderately difficult	31%	21%	29%	28%	25%	24%	37%	32%	31%	28%	31%
	Very difficult	43%	63%	50%	41%	59%	56%	24%	49%	53%	42%	43%
	I have yet to find such housing	5%	12%	13%	19%	3%	9%	2%	4%	5%	17%	6%
<b>TOTAL</b>			100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
n =		2,661	331	290	117	298	567	767	712	432	104	522

18 Sep 24

Source: RRC Associates

Data weighted by housing tenure, householder age, householder Hispanic origin, and household size within zip; and by zip; per 2018-22 ACS

Cells 5+ PPT greater than the overall are **GREEN** filled | Cells 5 PPT or less than the overall are **RED** filled

# HOUSING COSTS AS A PERCENTAGE OF INCOME

- Hispanic/Latino households are severely cost burdened
- Employer-provided housing may be more affordable but also comes with more insecurity

		Key Population Segments										
		Overall	Young renters	Live with roommates	Live in employer-provided housing	Live in deed-restricted housing	Hispanic/Latino	Older adults (aged 55+)	Families with children	Families with young children	Other family HHs with children	All other
Ratio of selected housing costs (rent/mortgage, HOA fees and utilities) to household income	0%	6%	8%	14%	17%	4%	9%	4%	3%	3%	14%	7%
	0.1 - 9.9%	17%	7%	11%	10%	8%	5%	30%	11%	9%	4%	11%
	10 - 19.9%	22%	15%	22%	20%	19%	13%	21%	24%	24%	15%	27%
	20 - 29.9%	23%	28%	18%	19%	26%	16%	19%	22%	23%	19%	29%
	30 - 39.9%	13%	19%	17%	19%	17%	13%	9%	14%	15%	7%	13%
	40 - 49.9%	7%	7%	5%	3%	7%	13%	7%	10%	9%	8%	6%
	50 - 99.9%	9%	11%	10%	5%	13%	20%	7%	11%	11%	19%	6%
	100%+	3%	5%	3%	5%	6%	10%	3%	4%	4%	13%	1%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Median</b>	<b>21.9%</b>	<b>26.3%</b>	<b>21.6%</b>	<b>21.3%</b>	<b>27.1%</b>	<b>34.7%</b>	<b>16.7%</b>	<b>25.2%</b>	<b>25.7%</b>	<b>27.1%</b>	<b>21.5%</b>	
<b>n =</b>	<b>2,013</b>	<b>271</b>	<b>187</b>	<b>92</b>	<b>225</b>	<b>367</b>	<b>687</b>	<b>549</b>	<b>328</b>	<b>72</b>	<b>340</b>	

18 Sep 24

Source: RRC Associates

Data weighted by housing tenure, householder age, householder Hispanic origin, and household size within zip; and by zip; per 2018-22 ACS

Cells 5+ PPT greater than the overall are **GREEN** filled | Cells 5 PPT or less than the overall are **RED** filled

# EMPLOYER SURVEY: CHALLENGES IN FINDING & RETAINING EMPLOYEES

- Half of employers had difficulty filling jobs in the past year, leading to operational challenges
- Around 70% of employers identified housing as a barrier to finding employees

		OVERALL	Physical location(s) of business:			Total peak season workers (maximum of winter and summer!)				
			Upper Valley (Vail, Minturn, Red Cliff, Hwy 24)	Mid Valley (Eagle-Vail, Avon, BC, Edwards, Wolcott)	Lower Valley (Eagle, Gypsum, Dotsero)	1 - 4 workers	5 - 9 workers	10 - 24 workers	25 - 49 workers	50+ workers
To what extent has your ability to find and retain qualified employees changed over the past five years (since 2019)?	Declined / gotten harder	73%	78%	74%	75%	44%	75%	87%	77%	89%
	Stayed about the same	16%	18%	12%	18%	25%	17%	13%	12%	11%
	Improved / gotten easier	3%	4%	5%		3%	6%		12%	
	Don't know / not applicable	8%		9%	7%	28%	3%			
<b>TOTAL</b>		100%	100%	100%	100%	100%	100%	100%	100%	100%
	n =	178	49	82	71	36	36	46	26	27
What are the primary challenges you face in recruiting and retaining employees, if any?	Lack of affordable housing	73%	86%	74%	72%	44%	72%	83%	77%	93%
	Lack of available housing	59%	67%	56%	59%	33%	47%	65%	65%	96%
	No/few applicants	36%	37%	37%	37%	22%	42%	39%	27%	48%
	Unskilled applicants	32%	35%	35%	37%	22%	36%	28%	31%	52%
	Work ethic/dedication problems	27%	27%	23%	31%	17%	28%	33%	31%	26%
	Lack of childcare	20%	24%	27%	21%	8%	17%	24%	12%	44%
	Low wages	20%	22%	22%	23%	8%	25%	20%	12%	41%
	Transportation / long commutes	14%	20%	10%	21%	8%	14%	13%	15%	26%
	None - no challenges in recruiting/retaining employees	9%	6%	7%	8%	28%			12%	4%
	Drug/substance abuse	8%	10%	6%	8%	8%	3%	7%	19%	11%
	Other	6%	4%	6%	8%	3%	6%	7%		15%
	Lack of year-round positions	5%	10%	2%	7%	6%		4%	8%	7%
	Seasonality of community activity	3%	6%	1%	1%		6%	4%	4%	
<b>TOTAL</b>		312%	355%	307%	334%	208%	294%	326%	312%	463%
	n =	177	49	81	71	36	36	46	26	27

# WHAT'S NEXT?

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- Gaps and needs analysis is ongoing
- Determine strategies
  - Evaluate opportunities (e.g. changes to land use codes, funding, land), and work with jurisdictions to recommend strategies, policies, and actions to address housing needs
- Finalize data/report
- Will be back at councils in January/February

# QUESTIONS AND DISCUSSION

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# DISCUSSION

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- Were there any surprises for you in the data? If so, why?
- How do you see your community's role in housing vis a vis other communities and the county?
- What are the relationships between the communities in Eagle County, in terms of economy, workforce, and housing?
  - I.e. How does the location of jobs vs. workforce relate to housing?
- What are some unique opportunities the county has for a regional approach to housing?
- What types of housing do you think your community is best suited to create? Who would that appeal to?
- Do you see your community partnering with other jurisdictions on things like development projects, funding strategies, etc.?