



**Army Listening Session
Fort Leonard Wood
Sustainable Ozarks Region - Missouri**
– April 30, 2013

Welcome To Fort Leonard Wood

- ▶ Introduction
- ▶ Impact on region
- ▶ Quality of life
- ▶ Land use
- ▶ Transportation and infrastructure
- ▶ Community mission support
- ▶ Conclusion



Introduction & Overview



- ▶ Region is four counties neighboring FLW
- ▶ Population: about 160K
- ▶ Major cities: Rolla, Lebanon, St. Robert, Waynesville, Houston
- ▶ FLW is about 62,000 acres in Pulaski County
- ▶ I-44 ties region with Springfield and St Louis

Fort Leonard Wood - Economic Impact on Region & State

- ▶ The total economic output of Fort Leonard Wood's personnel spending was \$2.1 billion, of which, household earnings accounted for \$1.2 billion.
- ▶ The operation of Fort Leonard Wood supported approximately 36,400 direct and indirect jobs in the state of Missouri.
- ▶ Out-of-state visitors to Fort Leonard Wood spend an average of \$57.3 million annually in Missouri, which results in \$167.3 million in total economic output, \$38.6 million in household earnings, and supported approximately 1,500 jobs in the state.

Missouri's Military Infrastructure Report; KBS and the Missouri Hawthorn Foundation, 2013



Regional Economic Impact: Programmatic Environmental Assessment (PEA)

Impact by County

	Population	Employment	Sales (\$M)	Total Income (\$M)
Laclede	-1,265	-626	-22	-22
Phelps	-1,070	-530	-18	-18
Pulaski	-6,713	-3,324	-116	-117
Texas	-681	-337	-12	-12
Total	-9,729	-4,817	-168	-169

Notes:

1. Impact estimates do not include cutbacks by Other Services (which could be substantial).
2. Total impacts on state government have not been calculated.
3. Army 2020 PEA did not include Texas County. Estimate provided.
4. Army 2020 PEA contained incorrect census data for Pulaski County, which caused understatement of impact.

Cost of Living Comparison

Cost of Living Index	Overall
Fort Huachuca	103
US Average	100
Fort Jackson	95
Fort Gordon	91
Fort Lee	94
Fort Benning	94
Fort Leavenworth	90
Fort Leonard Wood	87
Fort Rucker	87
Fort Sill	86

The Cost of Living Index measures the relative costs of food, housing, utilities, transportation, healthcare, and optional expenses.

Source: Sperling's Best Places, accessed April 29, 2013



Fort Leonard Wood Area Schools

School District	Student Enrollment	% Military Impacted
Swedeborg	50	23%
Success	88	23%
Phelps R3	214	22%
Newburg	461	n/a
Crocker	566	n/a
Richland	623	14%
Plato	657	40%
Laquey	685	30%
Iberia	739	n/a
Licking	864	8%
Dixon	1026	18%
Rolla	4043	4%
Lebanon	4720	10%
Waynesville	5957	75%



Waynesville R-VI School District

6,000 students

75% military impacted

60% military dependents



Second largest employer in Pulaski County

778 employees

278 classified at average salary \$36,523

500 certified at average salary \$55,245

\$48.3 million annual payroll



An estimated 10% are veterans, military spouses or active duty

Waynesville R-VI School District – Facilities, Academic Rigor & Staff

- ▶ Academic excellence, high graduation rates
- ▶ New construction and facility updates in excess of \$100 million in last 10 years
- ▶ Ample room for growth and expansion
- ▶ \$5 million Elementary and Early Childhood Center addition
- ▶ Athletic facilities improvements



School Performance Comparisons by Military Installation Locations

Installation	State	School District	ACT 2011	Graduation Rate 2011
Bliss	Texas	Coronado	23.4	85.3%
Leonard Wood	Missouri	Waynesville SD	20.8	87.4%
Riley	Kansas	Geary County	20.6	72.5%
Bliss	Texas	Chapin	20.3	83.5%
Polk	Louisiana	Vernon Parish SD	20.2	80.7%
Hood	Texas	Copperas Cove ISD	19.8	86.6%
Hood	Texas	Killeen ISD	19.7	89.8%
Polk	Louisiana	Beauregard Parish SD	19.7	86.2%
Benning	Georgia	Muscogee County	19.0	84.0%
Carson	Colorado	Fountain ISD	18.9	81.5%
Stewart	Georgia	Liberty County SD	18.9	78.0%
Bliss	Texas	El Paso	17.6	84.5%
Bliss	Texas	Austin	17.4	70.6%
Bragg	North Carolina	Cumberland County	17.2	80.7%
Knox	Kentucky	Kentucky District (DODEA)	N/A	N/A
Campbell	Kentucky	Kentucky District (DODEA)	N/A	N/A
Lewis	Washington	Clover Park SD	N/A	69.8%
Drum	New York	Indian River Central	N/A	87.6%
Drum	New York	Carthage Central	N/A	77.9%

* 2011 data

Army 2020 Impact on Enrollment and Staffing Waynesville R-VI School District

- Projected loss of 3,700 K-12 students in region:
(57% - 73% attending Waynesville R-VI Schools)
- Decrease in K-12 student enrollment: 2,109 - 2,701
- Total decrease in teacher/staff positions: 272 - 350
- Total annual salary/benefits decrease: \$16 - 22 million

Range based upon various demographic assumptions

Higher Education – Colleges & Universities

- ▶ Six colleges and universities offer 72 degree programs through the Truman Education Center on post, with 11,000 enrolled
- ▶ In 2012, there were about 730 degrees earned; in 2011, there were 897 (6th largest degree granting institution in Missouri)
- ▶ Each year about 150 captains earn Master's Degrees from the Missouri University of Science and Technology (MS&T), primarily Engineer
- ▶ University of Missouri Technology Parks supporting entrepreneurs and small businesses; two university liaisons on Post; \$50 million in federal research expenditures
- ▶ Access to world class research universities: University of Missouri, Washington University, St. Louis University

Healthcare

- ▶ Region includes 4 hospital complexes and numerous outpatient clinics
 - ▶ General Leonard Wood Hospital
 - ▶ Harry S Truman VA Clinic-Waynesville
 - ▶ Mercy Hospital – Lebanon
 - ▶ Phelps County Regional – Rolla
 - ▶ Texas County Memorial - Houston
- ▶ Warrior Transition Unit



Housing

- ▶ Market stable last two years
- ▶ In last 12 months (4 counties)
 - ▶ Homes sold: 992
 - ▶ Av Market days: 119
 - ▶ Av Sell price: \$133K (average 1,750 sq. foot home)
 - ▶ For sale: 1,046
- ▶ New construction on-going
- ▶ Twice normal availability of rentals
- ▶ Distressed properties fewer than most markets



Key Issues-Supporting Missouri Military Families

- Missouri was one of the first 10 charter members of the Interstate Compact
- State programs and law:
 - ▶ Facilitates spouse transition through eligibility for Unemployment Compensation
 - ▶ Minimizes school disruption for military children during transition and deployment
 - ▶ Promotes enforcement of predatory lending regulations
 - ▶ Comported with DOD rules on disposition

2012 Key Quality of Life Issues, Supporting Military Service Members and Families,
Central Regional Environmental and Governmental Affairs area, Department of Defense

Key Issues-Supporting Missouri Military Families

- Pending state legislation, with passage likely:
 - ▶ Facilitating service members receiving licensure and academic credit for military education, training and experience
 - ▶ Improve absentee voting for military members and their families
 - ▶ Support development of veterans' treatment courts open to eligible veterans and service members throughout the state
 - ▶ Waive required waiting time to establish residence for separating service members to obtain in-state tuition rates

Missouri Military Preparedness and
Enhancement Commission Report, 2013

Fort Leonard Wood Community Covenants

- ▶ Army Community Covenants signed with 16 Missouri cities, businesses, universities and school districts and 3 with the State of Missouri
- ▶ Covenant Program fosters and sustains effective state and community partnerships
- ▶ Formal commitment of support by state and local communities to Soldiers and Families of the Army - Active, Guard and Reserve



Partnerships

Partnerships abound in support of Fort Leonard Wood

▶ County level

The Committee of 50
Supporting Warfighters,
their families, and
Fort Leonard Wood
for over 60 years

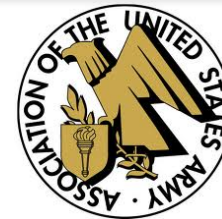


**FRIENDS
of the FORT**



**Phelps for
the Fort**

▶ Regional level



**“Best Chapter”
Award 2012**

▶ State level

**Missouri Military Preparedness
and Enhancement Commission
(MMPEC)**



Fort Leonard Wood Regional Partnerships

- ▶ Association of the U.S. Army Fort Leonard Wood Mid Missouri Chapter (AUSA)
 - ▶ The Mid Missouri FLW Chapter is the National “Best Chapter” for the year 2012
 - ▶ Over 2000 Individual Members and over 200 Corporate Members
 - ▶ Wounded Warrior Fund grant program...We have given over \$100,000 to Warriors and their families in times of crisis, typically responding in 24-48 hours
 - ▶ “Warriors In Town” program

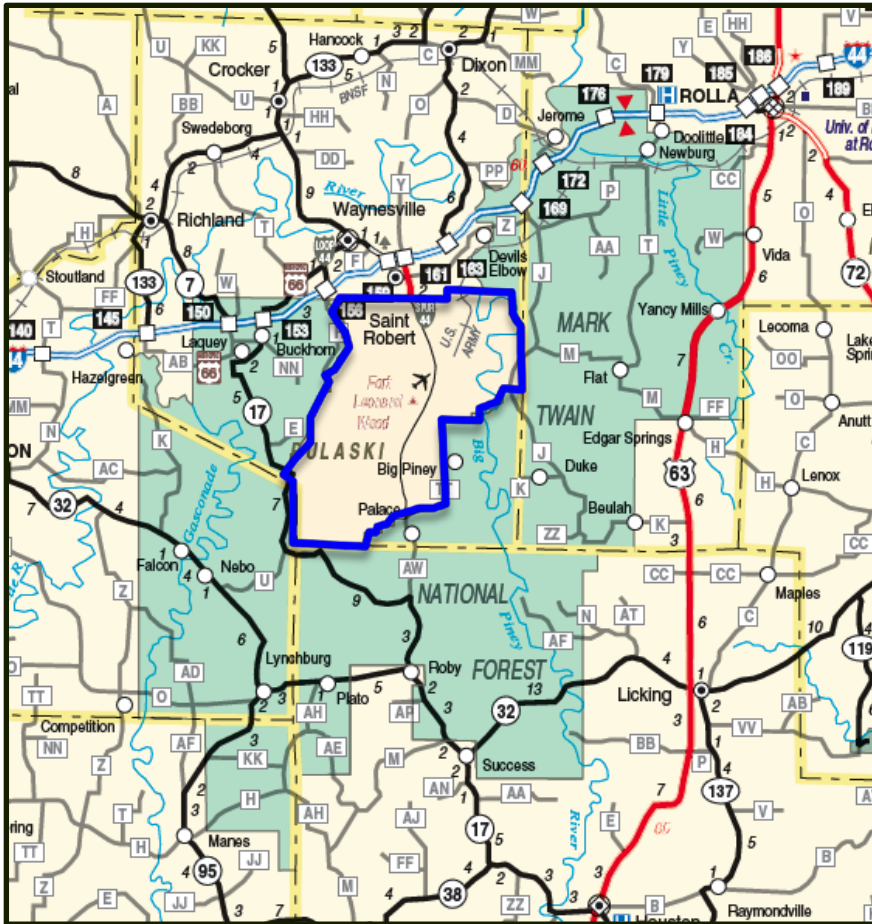


Recreation

- ▶ Lake, river and outdoor sports including fishing, canoeing, and golf at Lake of the Ozarks
- ▶ World famous Branson music theaters and theme parks
- ▶ Local shopping, festivals
- ▶ Professional sports including baseball (2), football (2) and hockey
- ▶ World class museums, theaters, symphonies, and performing arts venues



Land Use



- ▶ Joint Land Use Study (JLUS)
- ▶ 51 miles of boundary
- ▶ 43.9% of installation borders Mark Twain National Forest
- ▶ No encroachment issues
- ▶ Agreements and processes limit future issues
- ▶ FLW and communities are good neighbors

Transportation and Infrastructure - Air

- ▶ Joint-use airport on FLW, St Louis/Springfield airports nearby
- ▶ Scheduled commuter air flights from FLW to St. Louis
- ▶ Department of Transportation approval of \$6 million grant for taxiway at FLW-Forney Field airport



Forney Field, Fort Leonard Wood



Transportation and Infrastructure

- ▶ Good history of state support of transportation needs
- ▶ I-44 access to St Louis and Springfield, and beyond
- ▶ Rail head on post
- ▶ St Louis port and barge capability
- ▶ Full bus and shuttle transportation network in place
- ▶ Fiber optic network and 4G LTE cell service in place
- ▶ Scheduled improvements to major North-South corridor, U.S. Highway 63
- ▶ Missouri #8 in report on excellent roadways*



*Reason Foundation Survey 2012

Community Support for Fort Leonard Wood's Mission

- ▶ No encroachment issues and room to grow
- ▶ Community support for off-post motor transport driver training
- ▶ Unique water-based training at the Lake of the Ozarks Recreational Area (LORA)
- ▶ Large controlled airspace for air operations
- ▶ Cannon Range



Conclusions & Recommendations

The Fort Leonard Wood Region is a great place for the Army to maintain and expand its presence

- ✓ Low cost of living
- ✓ Access to quality healthcare
- ✓ No known environmental or land encroachment issues
- ✓ Good transportation infrastructure
- ✓ Excellent schools
- ✓ World class recreation opportunities
- ✓ Military friendly state and local governments
- ✓ Exceptionally supportive community partnerships
- ✓ Communities ready and able to embrace expanded or new training and operational missions

Conclusions & Recommendations

Proposed reductions would:

- ▶ have a severe socioeconomic impact on regional communities, businesses and supporting school districts
- ▶ devastate Pulaski County's economy
- ▶ seriously impact on the quality of life for remaining Soldiers and Families
- ▶ miss an opportunity to leverage Fort Leonard Wood's and the region's community capacity to support growth
- ▶ undervalue Fort Leonard Wood's capacity and value to the Army and DOD