

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2024



PREPARED FOR:

The Round Valley Indian Tribes

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EXECUTIVE SUMMARY

The Round Valley Indian Tribes (RVIT) are a confederation of federally recognized tribes with ancestral lands extending across Northern California. Tribal lands within the Reservation boundary total approximately 30,000 acres located primarily in Mendocino County. The Reservation consists of forest and rangeland that are used primarily for timber harvesting, carbon sequestration, and cattle grazing. The Reservation lands in the valley adjacent to the town of Covelo (population 1,394) contain housing, government offices, an office park, and a commercial area.

The Tribal Administration includes departments to manage natural resources, education, public safety, community infrastructure, social services, and historic preservation. In addition, the Tribes have established the Round Valley Indian Health Center and the Round Valley Indian Housing Authority as non-profit organizations providing health services and housing development. In recent years, the Tribes have established commercial enterprises including the Hidden Oaks Casino, the Golden Oaks Motel, and the Hidden Oaks Convenience Store and Fuel Stop. Combined, these tribal activities make the RVIT the largest employer in the valley.

Tribal enrollment in 2022 was 5,781, however, only 1,195 reside on the Reservation. Due to a shortage of housing and jobs in the valley, most tribal members live outside the valley and of those who remain, many live in overcrowded conditions with poverty level income. The remoteness of the valley from other economic centers, the numerous winery and casino businesses outside the valley and the lack of tourist accommodations within the valley all restrict local economic development opportunities. Limited infrastructure such as water and wastewater systems for housing, commerce and industry further reduces the incentive for businesses to move to the valley.

Round Valley is a scenic location adjacent to the Mendocino National Forest and the Eel River with abundant natural resources and excellent environmental quality. The Tribes are working to manage their natural resources under the challenge of climate change induced drought and wildfire. They have ongoing programs to expand the water and wastewater systems and build new housing.

The Tribes' vision statement recognizes the need to create a healthy, diverse economy that does not waste the Reservation's natural resources or sacrifice tribal culture. The goals of this CEDS are to create a community environment conducive to business development and to promote sustainable business ventures that bring economic prosperity with employment, income, and revenue.

The overriding priority for the CEDS is to establish an Economic Development Board to provide guidance, support, and promotion for tribally sponsored businesses. The Tribes have designated top priority economic development initiatives. Two of these are in the initial stages of implementation: an aggregate mining project and broadband deployment. The third is to establish a small laundromat.

Second priority initiatives include a small car wash, bulk/bottled water sales, a microgrid, and a tribal community center. The microgrid could provide the entire valley with a resilient electrical supply and situate the RVIT as an electric utility. The Reservation's large, underlying aquifer is a valuable resource that could support bulk or bottled water sales. Establishing broadband connectivity and businesses in the business park and commercial areas would create an economic synergy that would invite locals, outdoor recreationists, and tourists to visit the Round Valley Indian Reservation for goods and services.

PROFILE OF THE ROUND VALLEY INDIAN RESERVATION

The Round Valley Indian Tribes are a federally recognized tribe located primarily in the northeastern part of Mendocino County and partly in the southern part of Trinity County in Northern California approximately 180 miles north of San Francisco via Redwood Highway 101 and State Highway 162. The closest town is Covelo (population 1,394), located adjacent to the southern boundary of the Reservation.

The Reservation is located in the Northern Coastal Ranges within the Upper Eel River Basin. Round Valley is a relatively flat, oval-shaped valley at about 1,380 feet above mean sea level. The climate of Round Valley is classified as mild Mediterranean, which is characterized by cool, wet winters and hot, dry summers.

The tribes of the Round Valley Indian Reservation have a long history in the valley and adjacent areas of northern California that goes back thousands of years. Consequently, there are many significant traditional cultural properties located within the Reservation boundaries as well as adjacent areas.

The Round Valley Indian Reservation sits primarily on the ancestral land of the Yuki tribe. The Wailaki tribe also has ancestral lands within the northern boundary of the Reservation along the North Fork of the Eel River.

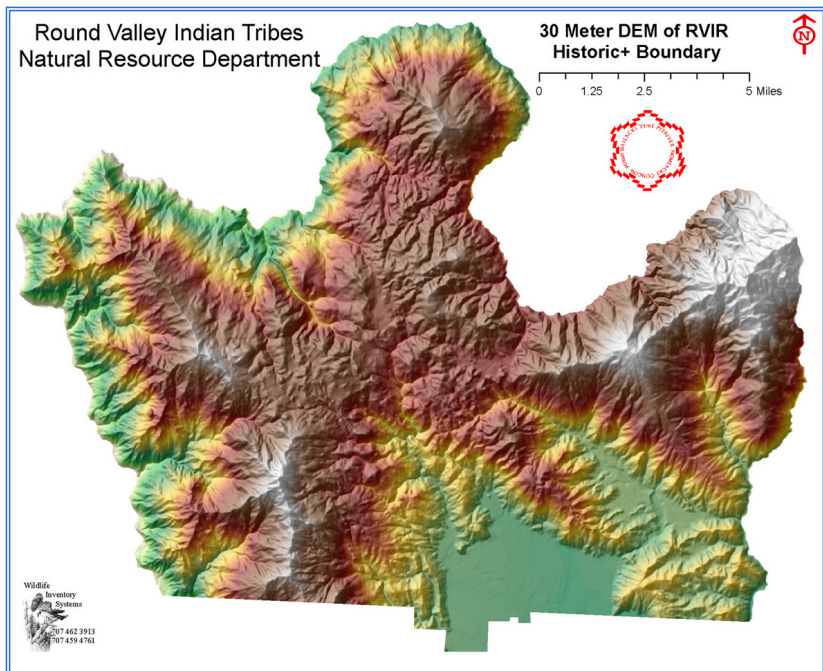


Figure 1: Topography of the Reservation

The Round Valley Indian Tribes are a confederation of federally recognized tribes with ancestral lands extending across Northern California. Tribal affiliations include six tribes:

- Yuki
- Wailaki
- Little Lake Pomo
- Nomlaki Wintun
- Concow Maidu
- Pit River Achomawi

The Reservation consists of numerous discontinuous parcels of land located in the valley, the adjacent mountains surrounding the valley and in various locations bordering the Eel River and the North Fork of the Eel River. Tribal lands total approximately 30,000 acres, the majority of which are tribal trust lands. Allotment parcels account for less than 6,000 acres of the total.

Most of the trust land of the Reservation is located in the hills in the north end of Round Valley that are well suited for grazing and timber production. Rangeland constitutes 60% of the Reservation. Although there are almost 10,000 acres of conifer forest, only 2,837 acres (12%) are considered available for commercial harvesting. There are also over 12,000 acres of woodland that provide firewood, posts and poles for the community. Forest and woodland areas often overlap lands designated as rangeland and open space.

The Reservation includes inaccessible lands totaling 16,382 acres, of which 3,687 are unreserved, productive timberland. The lands lack legal rights-of-way or road infrastructure that would allow for hauling timber. These two conditions currently preclude active timber management on these lands. (RVIT, 2023)

Cattle ranching is the primary agricultural activity conducted by tribal members. In addition, the Tribes maintain a small herd of buffalo. The Tribes manage twelve grazing units on tribal and allotted lands. The landscape consists of the steep mountain ranges north and west of Round Valley. The grazing units provide a mix of grassland and oak savannah on over 20,000 acres.

Approximately 400 acres of tribal trust land is used for homes. Suburban areas with lots of less than 1 acre provide most of the housing on the Reservation. Rural residential areas include homes on parcels of one or more acres (typically 1-10 acres).

There are 136 acres of land used for public purposes such as tribal offices, the healthcare center, water and wastewater treatment facilities, cemeteries, and the commercial area next to Hidden Oaks Park. The commercial area includes a fuel stop, convenience store, gift shop, and the Hidden Oaks Casino. In addition, the Tribes own the Golden Oaks Motel located in Covelo.

The Round Valley Indian Health Center (RVIHC) is a 501(c)(3) non-profit Corporation is the largest employer in the valley. The Round Valley Indian Housing Authority (RVIHA) is a tribally designated housing entity administering the Native American Housing and Self Determination Act (NAHASDA) Indian Housing Block Grant program.

The Round Valley Indian Reservation (population 1,752) is home to 1,195 tribal members representing approximately 21% of the total 2022 tribal enrollment of 5,781 members. Due to a shortage of housing and jobs in the valley, the majority of tribal members live outside the valley and of those who remain, many live in overcrowded conditions with poverty level income.

Under the terms of the Tribes' constitution, the tribal government consists of the Tribal Council as the legislative branch, the Tribal Administration as the executive branch and the Tribal Court as the judiciary branch. The Tribal Council President, Vice President, Treasurer and Secretary function as the executive branch along with a designated Tribal Administrator.

RVIT ECONOMIC DEVELOPMENT BACKGROUND

The decline of the timber industry, marked by the closing of the Louisiana Pacific lumber mill in 1991, combined with population growth on the Reservation and escalating unemployment and substandard housing conditions created major challenges for the tribal government. In addition, skilled tribal members tend to leave the valley seeking greater job opportunities elsewhere.

The remoteness of the valley from other economic centers, the numerous winery and casino businesses outside the valley and the lack of tourist accommodations within the valley all restrict local economic development opportunities. Limited infrastructure such as water and wastewater systems for housing, commerce and industry further reduces the incentive for businesses to move to the valley.

The tribal government, in an effort to provide basic services for tribal members, such as health and housing, has been able to create job opportunities for tribal members and others. The Round Valley Indian Health Center (RVIHC) was established as part of an Indian Health Service (IHS) demonstration pilot project in coordination with the California Rural Indian Health Board. The RVIHC opened for services in January 1968. In 1975, under the Indian Self-Determination and Education Assistance Act, the Round Valley Indian Tribes began to contract directly with IHS.

During this same time, the RVIHC became a state-licensed community health clinic. The RVIHC, as an organization, was incorporated through the State of California as a 501(c)(3) non-profit Corporation. The RVIHC is the largest employer in the valley and employs many tribal members.

The tribal government also employs many tribal members in administration and program management, and for stream restoration projects, wildlife inventories, reforestation, fuels management, and infrastructure. The Round Valley Indian Housing Authority (RVIHA), which was established in 1975, also employs tribal members for administrative and construction work. The RVIHA is a tribally designated housing entity (TDHE) administering the Native American Housing and Self Determination Act (NAHASDA) Indian Housing Block Grant program.

In 1993, after closure of the Louisiana Pacific sawmill, the Tribes conducted a community survey to identify community priorities for economic development. Businesses that would provide services to the tribal community had a high priority, including a gas station with a convenience store, and a recycling center. Community members also gave high priority to economic development that would provide employment opportunities as well as revenues to the Tribes. These included aggregate mining, tourist recreation and lodging, restaurants, and wood manufacturing. These priorities became the Overall Economic Development Plan (OEDP) of 1994.

In 1996, the Tribes developed a Community Action Plan that prioritized agricultural and wood products, information industries, recreation, and tourism-based businesses. Community priorities included community college and vocational education and a community resource center. In the interest of promoting economic development, the Tribes chartered the Round Valley Tribes Development Enterprise (RVTDE).

In the past, tribal councils have balked at establishing a corporation with finances separate from tribal finances. The RVTDE was an early attempt that was not ultimately achieved. Although the Council

received legal advice on forming different types of corporations, as well as options and benefits, no Council has authorized forming a corporation.

In 1998, a community assessment meeting was held with both Indian and non-Indian residents of Round Valley and a list of economic development priorities was developed that included agricultural and forest products and tourism. Community priorities included recreation, training, and education. Watershed restoration was also cited as a priority.

The Tribes commissioned a new OEDP prepared by John Palmquist. This plan recommended the activation of the RVTDE, continuation of timber sales and development of value-added forest products, development of the Hidden Oaks Park along with hiking and bicycle trails, consideration of a financial processing center, a water bottling plant, and aggregate mining. Acquisition of the Big Bend and McKay Ranches brought potential opportunities for tourism and resource-based enterprises (Palmquist, 1998).

During the development of the Tribes' 2010 CEDS, the Tribes' CEDS Committee met to assess and prioritize business initiatives for the CEDS. Once again, business services serving the Reservation community were high priorities. These included the fuel stop, convenience store, and gift shop that were successfully established. In addition, the Tribes constructed a small Class 2 casino and purchased the Golden Oaks Motel in Covelo.

THE REGIONAL ECONOMY OF MENDOCINO COUNTY

The economy of Mendocino County has historically centered around timber and agriculture. A recent study by Beacon Economics highlights the economic challenges that the county faces, notably depopulation through outmigration and aging (County of Mendocino Economic Development Analysis, 2021). The county's population is mostly low-skill and low-to-middle income. Residents who pursue higher education typically seek better paying jobs outside of the county. Timber manufacturing has continued to decline, further contributing to slow growth. Finally, the county's economy has also been negatively affected by wildfires, lack of affordable housing, and low rates of broadband connectivity (Mendocino County Economic Development Analysis, 2021).

Housing affordability is a notable issue in the County. The median price of single-family homes is higher than neighboring Humboldt and Lake counties, at \$415,000. Home buying is beyond the reach of most homebuyers, with the minimum qualifying income for purchasing a home about \$30,000 higher than the median household income. Housing construction has repeatedly stalled in Mendocino County since the 2008 financial crisis. If the lack of affordable housing continues, there is a likelihood that it will lead to more outmigration from the County.

The lack of fast and affordable broadband access also continues to be an issue in Mendocino County. The persistence of the "digital divide" presents a challenge, as opportunities for work and education are increasingly internet-based. There are multiple federal and state initiatives underway to increase broadband access in California that will benefit residents of Mendocino County, including Broadband for All, the Broadband Middle-Mile Initiative, the State Digital Equity Plan, and the Affordable Connectivity Program.

TIMBER HARVESTING AND WOOD PRODUCTS

Approximately 30 percent (32 million acres) of California’s land area is forested, about half of this (16 million acres) is timberland. Most timber harvesting occurs in northern California, with the top five timber-producing counties being Mendocino, Shasta, Siskiyou, Butte, and Plumas. According to a report by the USDA’s Forest Service, approximately 80 percent of timber harvested in 2016 was from private lands; 17 percent came from national forests and 3 percent came from public sources. (Marcille et al., 2020). In 2021, Mendocino was the top timber-producing county, producing 83,183 million board feet at a value of \$33.8 million. (California Department of Food and Agriculture, 2022).

Mendocino County’s economy has historically depended on the harvesting of timber, and the production of value-added wood products. For many years, logging and wood products manufacturing provided an excellent opportunity for high paying, blue collar jobs. In the past, these jobs were relatively well paid and did not require extensive education or formal training.

Commercial harvest on a large scale did not begin until the timber boom that followed the Second World War. In the early 1950s, due to post-war demand for lumber and higher saw timber prices, the BIA began an aggressive saw timber sale program lasting almost 25 years, on both allotments and the tribal timberlands. During this boom, the large timber that occupied most of the present-day commercial forest areas on the Reservation was almost completely logged out. The Louisiana Pacific lumber mill on the reservation was closed in 1991. (RVIT Forest Management Plan, 2006)

Wood products have declined as a component of Mendocino County’s economy since the 1970s. In the early 1970s, wood products comprised between 35 and 40 percent of all jobs in the county. By 1999, wood products comprised less than 10 percent of all jobs. Recent trends have shown declines in both production and financial value. Of the three dozen former sawmills in the County, only two were open as of 2016 (Marcille et al., 2020). The rate of timber harvest declines has slowed recently and could eventually reach a level of sustainability.

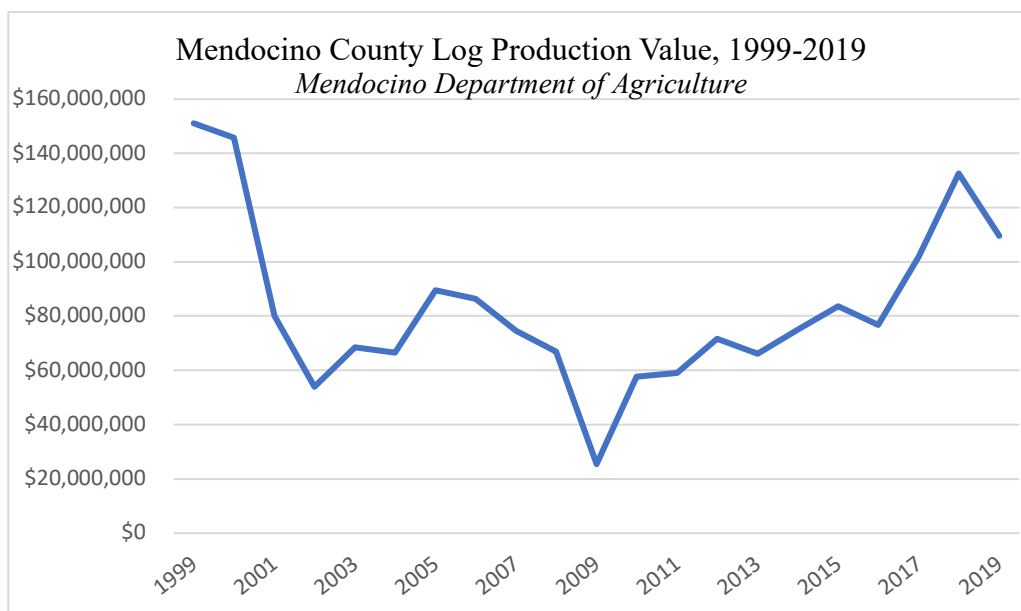


Figure 2: Mendocino Log Production Value

Round Valley Indian Reservation Timber Harvesting

The Reservation contains over 26,000 acres of generally mountainous forest land on scattered tribal and allotment parcels. There are several forest types on the Reservation, including densely forested mixed hardwood stands, conifer stands of Douglas-fir and white fir. The forests and woodlands have the potential, under proper management, to provide continuing benefits to Reservation residents, including income, employment, firewood, lumber, grazing, water, recreation, and spiritual satisfaction.

Commercial harvest on a large scale didn't begin on the Reservation until the timber boom that followed the Second World War. In the early 1950s, due to post war demand for lumber and higher saw timber prices, tribal members wishing to sell a large quantity of the saw timber inventory put pressure on the BIA to harvest Reservation timber. The BIA began an aggressive saw timber sale program lasting almost 25 years, on both allotments and the tribal timberlands. During this boom, the large timber that occupied most of the present-day commercial forest areas was almost completely logged out. (RVIT, 1989)

There are still a few patches of intact, unlogged primary "old growth" timber on manageable ground, as well as scattered clumps and trees of larger, older timber on steeper and less accessible slopes. Current tribal policy has reserved these stands from active timber management, although fire protection and vegetation management activities may occur in old growth reserves.

The trend of Reservation timber management in the last few decades has been toward more scientifically based, sustainable management of Reservation timber stands. Timber stands with commercial potential are typically managed to improve stand growth and vigor that, in turn, provides a dependable long-term supply of forest products.

The Tribes have worked to improve the growth and vigor of the second growth stands. Brush fields have been converted to conifer stands, pole size conifer stands have been thinned, and non-stocked commercial ground has been replanted with conifers. (RVIT, 2023)

Carbon Sequestration

The California Air Resources Board (CARB) manages and oversees the California Cap-and-Trade Program, established in 2006. CARB creates allowances, also called carbon credits, equal to the total amount of allowed emissions (the cap). One allowance or carbon credit equals one metric ton of CO₂ or its equivalent emissions under the 100-year global warming potential (GWP).

Every year, fewer carbon credits are created and the annual cap declines over time. Allowances have an increasing annual auction reserve or floor price. This, plus the decreasing annual credits, make a steady carbon price signal to stir action to cut emissions.

The Round Valley Tribes have set aside 5,550 forested acres for carbon offsets. Credit prices fluctuate and can be negotiated. Ten percent of the revenue from sales is set aside to manage the carbon project. To date, credit sales from the carbon project have generated over \$2,800,000 for the Tribes. Buyers include oil corporations such as British Petroleum, Shell, and Chevron.

The RVIT carbon project falls within the category of an Improved Forest Management (IFM) Project which assumes that, for the next 100 years, the tribal forests within the project area will be managed so that more carbon is sequestered by the trees in this area than is being released into the atmosphere. (RVIT, 2023)

AGRICULTURE

The agriculture industry consists of agricultural production (crops and livestock), specialized agriculture services, food processing, farm product storage and warehousing, and wholesale food distributors.

Crops and Livestock

Wine production and forest products are the largest components of the agriculture sector, contributing similar amounts of output in 2019. Livestock production was the third largest output.

Table 1: Value of Mendocino Agriculture 2019

Value of Mendocino Agriculture 2019	
Commodity	Value
Wine Grapes	\$ 114,432,271
Forest Products	\$ 109,582,368
Livestock Production	\$ 18,575,700
Pears	\$ 9,514,400
Commercial Fishing	\$ 6,752,019
Pasture	\$ 6,479,550
Rangeland	\$ 3,578,400
Nursery	\$ 1,750,000
Apples	\$ 476,800
Source: Mendocino County Department of Agriculture	

The total gross value for agricultural commodities produced in 2019 was \$271,619,209, which was a 15.3 percent decrease from 2018. The leading category was wine grapes, with a value of \$114,432,271. Timber was the second leading commodity, with a gross value of \$109,582,368, a decrease of 17.3 percent from 2018. Total agricultural production, excluding timber, had a value of \$162,036,841, which is a decrease of 13.9 percent from 2018.

Livestock and Pasture

Pasture for livestock production accounts for 47 percent of Mendocino County farmland in 2017, a decrease from 59.9 percent in 2012 (USDA Census of Agriculture). The county has 718,000 acres of pasture, grassland, and rangeland dedicated to livestock production, which had a value of over \$18.5 million in 2019. Cattle and calves provided the bulk of production at a value of over \$17 million. This was followed by sheep and lamb production at a value of \$417,000, and hog and pig production at \$79,000. Miscellaneous livestock production, which includes goats, pigeons, poultry, rabbits, turkeys, bison, and aquaculture, was valued at \$495,000 (Mendocino County Department of Agriculture, 2019).

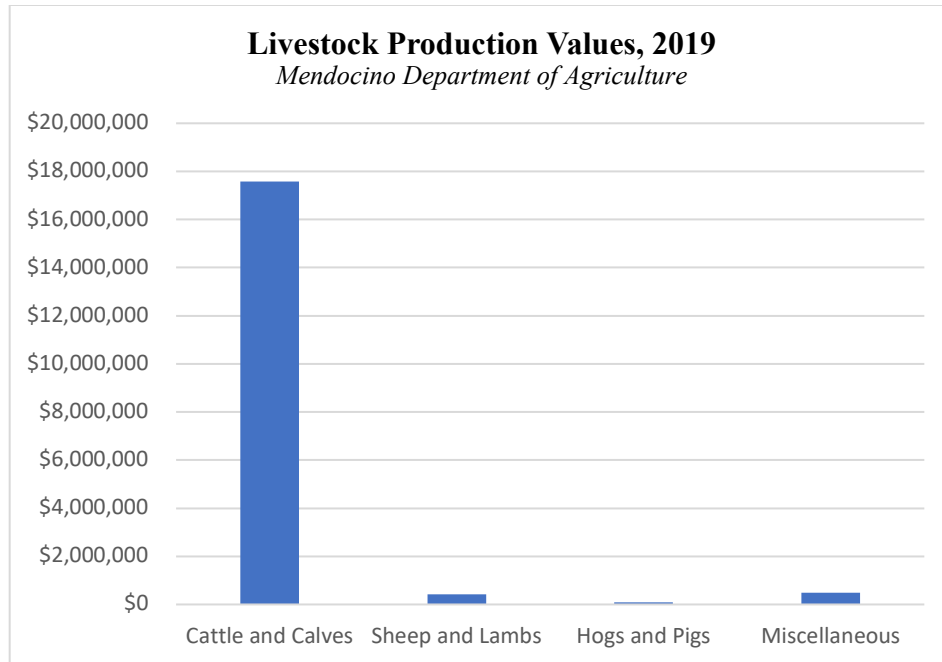


Figure 3: Livestock Production Values, 2019

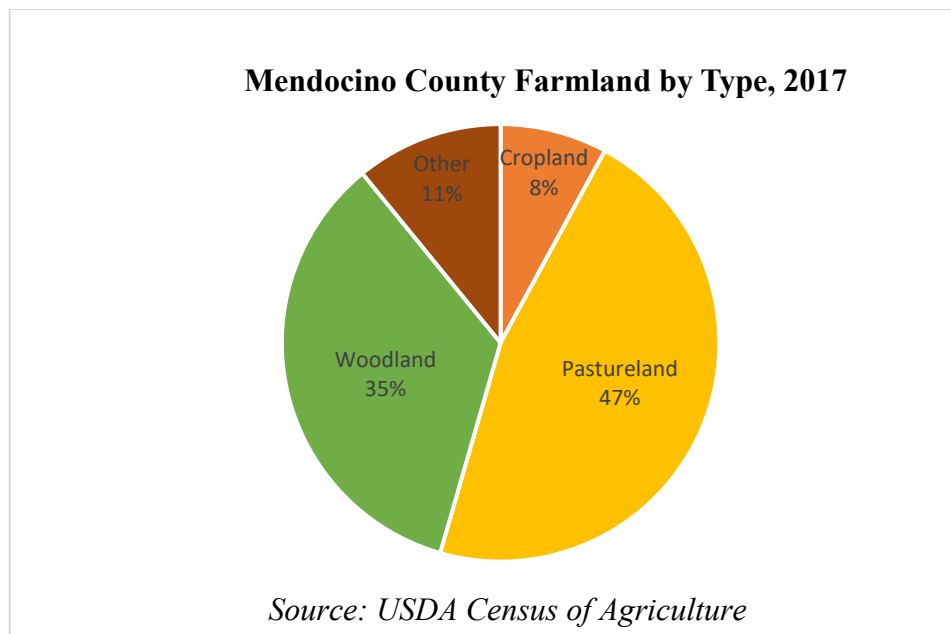


Figure 4: Mendocino County Farmland by Type, 2017

Mendocino County produced over \$1.5 million in livestock and poultry products in 2019, including wool, apiary, eggs, emus, cheese, manure, and ostriches. This value excludes milk production values, which are historically between \$3 and \$4 million. (Mendocino County Department of Agriculture, 2019).

Wine and Grape Production

Grape acreage continues to surpass all other agricultural crops combined. Although many of the grapes produced are turned into wine locally, a substantial portion is exported to other counties for production. Grape acreage has only grown from 16,400 in 2008 to 16,506 in 2019, a slight decrease from 16,733 in 2018. There is a general perception that enough grapes are now planted within the County and throughout California to meet demand for the foreseeable future. (Mendocino County Department of Agriculture, 2019).

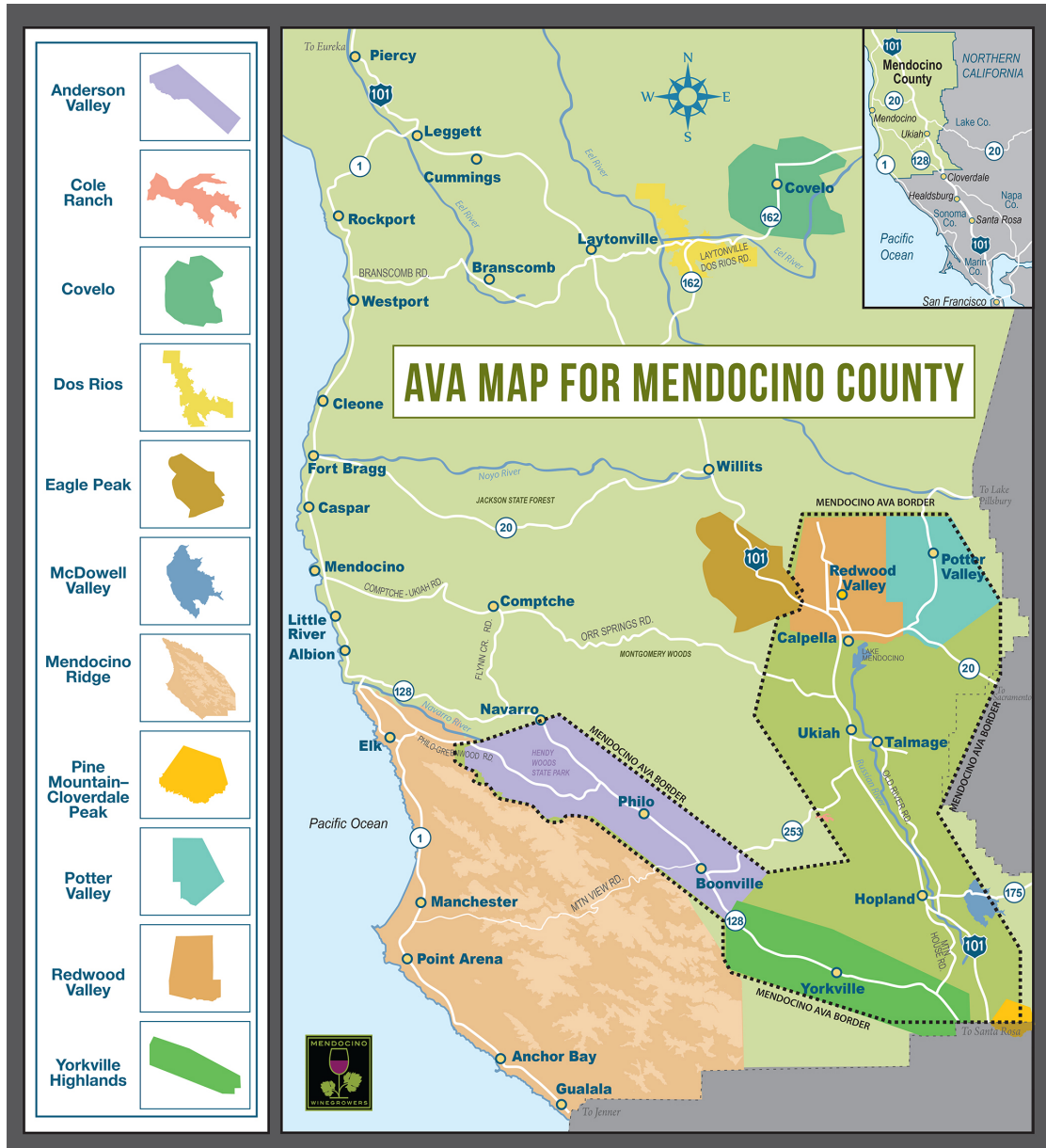


Figure 5: AVA Map for Mendocino County

Organic Food Production

California produces 36 percent of organic food products in the United States, and organic food sales continue to grow in the state and nationwide, with the state's sales totaling more than \$14 billion in 2021 (California Department of Food and Agriculture, 2022). Organic farming, including crops and livestock, is an expanding niche in Mendocino County. According to the USDA's 2017 Census of Agriculture, 10 percent of farms in Mendocino County are organic. Although this sector of the economy is still small, it typically produces a premium-priced product for consumers. Mendocino County had 26,442 acres of organic farmland as of 2019, a substantial increase from 7,799 acres in 2008. Most of this land (20,683 acres, 78%) is dedicated to pasture, forage, and grain production. Wine grape production accounts for 5,454 acres. The remaining organic farmland is used for fruit, nuts, and vegetables (Mendocino Department of Agriculture, 2019). Gross sales of organic products in Mendocino County, coming from 198 producers, totaled \$37,903,505 in 2021, a 30 percent decrease from the 2020 total of \$54,172,247 (California Department of Food and Agriculture, 2022).

There are at least two organic farms in Round Valley. Covelo Organic (founded 1989) is a ten-acre organic farm in northern Round Valley that supplies local supermarkets, Community Supported Agriculture (CSA) groups, restaurants, and farmers markets with vegetables, berries, fruit, and cut flowers. Live Power Community Farm (founded in 1977) is a solar- and horse-powered four-acre certified biodynamic farm located in Covelo.

Cannabis

Cannabis has been a significant economic force in California since 1996, when it became the first state to legalize cannabis for medicinal use. In 2016, California legalized cannabis for recreational use with the passage of Prop 64. There is not currently precise data available on cannabis production and sales in California because state law does not allow the Department of Cannabis Control to share this information. According to statistics from the California Department of Tax and Fee Administration, tax revenues in 2021 were likely in excess of \$5 billion.

Cannabis is cultivated throughout California, but the most prized crops come from Mendocino, Humboldt, and Trinity counties – the Emerald Triangle. Mendocino County has the third-largest cannabis cultivation industry in the state, with approximately 850 cultivation permits held by 670 growers, most of whom managed less than an acre of cultivation land or greenhouse space (California Department of Transportation, 2021). According to *Forbes*, Mendocino County received \$3.7 million in tax revenue in the fiscal year of 2018-2019 (Roberts 2021).

Although cannabis once seemed like a promising industry for small producers in communities such as Round Valley, the market has favored large-scale cannabis producers since legalization. The estimated startup capital for a large-scale grow operation is upwards of \$500,000. The substantial costs involved in setting up grow operations, combined with overproduction by large farms, heavy taxation, competition with illegal cannabis sales, and strict regulations on sales and transportation, has forced many legal small growers out of business. Out of the 10,000 growers operating at the time that Prop 64 was passed, only 2,000 growers remain (Ramos 2021).

A major challenge to the cannabis industry since legalization is the large black market. It is estimated that 75 percent of cannabis consumed in California comes from the illicit market (Lozano 2022). One study estimates that 16 million pounds of cannabis were diverted to California's black market in California or exported to other states (Mendocino County, 2021). The potential for big profits from illegal cannabis gardens has been linked to an upsurge of violence in cannabis country. According to

the *Courier Journal*, violence related to illegal grows has intensified in Covelo in recent years (Warren, 2021).

Illegal cannabis plantations in remote forests can also cause severe environmental damage. Growers in national forests have scarred the landscape by crudely terracing hillsides that erode under winter rain. They spill pesticides, fertilizer and diesel fuel used to power generators that run extensive drip-irrigation systems. They dam creeks for water sources, disfigure trees, and leave behind garbage, human waste, and litter.

COMMERCIAL FISHING

The commercial fishing industry (at Fort Bragg, Albion, Point Arena, and Gualala) is much smaller than in the past. Increased regulations and declining fish populations have contributed, as has competition from larger corporate and overseas operations. Future viability will in large part depend on levels established by regulators for maintaining a sustainable harvest. Party boats catering to tourists are becoming an increasing percentage of the local fishing fleet.



Although commercial fishing is limited, Noyo Harbor is the only commercial port between San Francisco and Eureka. This unincorporated nook surrounded by Fort Bragg is within the Noyo Harbor District. The harbor is a viable tourist destination in its own right, complete with party boats, restaurants, and a motel. The County's Coastal Plan prioritizes maintenance of the declining commercial fishing industry.

The commercial fish catch was valued at almost \$7 million in 2019. Over a ten-year period, the commercial fish catch value varied from almost \$8 million in 2010 to a high of over \$17 million in 2013, before steadily declining to the current value. Dungeness crab, sablefish, and salmon (chinook) provided the major value in commercial fish catch. (Mendocino County Department of Agriculture, 2019).

In 2008, the National Marine Fisheries Service (NMFS) closed commercial and recreational fishing for chinook salmon in the ocean off California and most of Oregon. The closure followed the recommendation of the Pacific Fishery Management Council after the catastrophic disappearance of California's fabled fall run of the pink fish popularly known as king salmon. This was the first total closure since commercial fishing started in the Bay Area in 1848. (U.S. Department of Commerce, 2010). At present, the NMFS mandates fishing seasons and catch limits that vary according to fishery and area. (U.S. Department of Commerce, 2021).

California's native salmon, steelhead, and trout are in a steep and drastic decline. The decline is being manifested by species listings, fishing closures, and continued litigation and controversy. The decline is being caused by a variety of factors, including climate change, drought, water mismanagement, habitat destruction and fragmentation, and loss of species integrity. According to a study by the University of California, Davis, and the nonprofit California Trout, 45 percent of California's salmon, steelhead, and trout will likely be extinct in the next 50 years. In the next 100 years, it is estimated that

74 percent will be extinct. The cost of the decline is reflected through the loss of important ecosystem functions, species extinctions, an eroded economic base, both commercial and recreational, and by the disappearance of iconic and culturally symbolic species. In 2023, the Pacific Fishery Management Council (PFMC) cancelled the recreational and commercial California ocean salmon fishery in all regions due to low stocks as a result of poor fish survival in 2022 (Pacific Fishery Management Council, 2023).

TOURISM

Tourism is a cyclical industry that is highly dependent on worldwide economic conditions. Nevertheless, there has been a general upward trend in the County for at least the past 30 years. After a period of decline and stagnation in 2010–2013 due to the economic downturn, the market began to grow again. By 2018, tourism spending had increased to \$482 million (EDFC, 2019). In 2019, this increased by 7.15% to \$484 million, resulting in \$46.2 million in state and local revenue (mendocinotourism.org, 2019).

According to Visit Mendocino County, the Mendocino County Tourism Commission’s marketing arm, the county generated an estimated \$433 million in tourism revenue in 2021. Lodging accounts for about \$148 million of this, with the hospitality sector including 750 hotels, inns, and rentals, of which 400 are hotels/motels (Ukiah Daily Journal).

Tourism industries such as lodging places, hotels and motels, camps and recreational vehicle parks, miscellaneous amusement, recreation services, and botanical and zoological gardens have high employment concentrations and are competitive industries. Tourism is a significant employment source for the County and generated 6,400 jobs in 2019, which dropped by 28.2 percent to 4,590 in 2020 before rising again by 9.9 percent to 5,020 in 2021 (Dean Runyan Associates, 2022). These changes were due in large part to pandemic-related closures.

Indian casinos are another growing visitor-serving service. There are currently three casinos along State Route 101, in or near Redwood Valley, Willits, and Laytonville. There are also casinos in Point Arena near the coast, and in Covelo in Round Valley. Although these casinos currently do not offer lodging, they provide a form of indoor entertainment that attracts tourists, bringing in additional revenues to nearby communities.

Mendocino County’s almost \$500 million tourism industry is dominated by coastal visitations. However, the inland communities along the State Route 101 corridor also serve an important niche in the County’s tourism economy. A substantial amount of State Route 101 traffic utilizes commercial services in Hopland, Ukiah, and Willits. These communities have not historically been visitor destinations and are challenged to attract the pass-through highway traffic.

Visitors have a variety of coastal lodging options including upscale bed and breakfast establishments, moderately priced motels, vacation rentals, and campgrounds. Resort and lodging owners are trying to attract visitors during the weekdays and off-season periods in order to soften the boom-and-bust cycle of visitor spending and to stabilize employment. During the peak summer periods it can be difficult to find available lodging along the coast. There is a limited supply of rooms and lodging owners find it difficult to obtain permits to expand or build new facilities within the Coastal Zone.

Table 2: Mendocino County Visitor Spending

Mendocino County Visitor Spending (\$Million)	2018	2019	2020
Accommodations	123.0	134.3	109.2
Food Service	130.1	139.0	80.2
Food Stores	22.8	24.1	16.2
Art, Entertainment & Recreation	60.4	62.8	35.1
Retail Sales	48.9	53.2	28.4
Local Trans. & Gas	50.0	53.4	25.0
TOTAL	435.2	466.8	294.1

Source: Visit California, 2023

Tourism is the largest draw for visitors to Mendocino County. The vast majority of visitors come from the San Francisco Bay Area to Sacramento corridor. Visitors are attracted to Mendocino County because of the beautiful scenery, especially the ocean and forests, good, affordable wines, and a peaceful and relaxing atmosphere. County attractions include wineries and vineyards, state parks, and the Point Arena Lighthouse. Another attraction is the Skunk Train, which is owned and operated by Mendocino Railway and runs between Fort Bragg and Willits. Visitor activities include dining out, shopping, going to beaches, hiking, and visiting wineries. The towns of Mendocino and Fort Bragg are especially popular with visitors, as is the Anderson Valley.

Native American Cultural Tourism

Native American communities are popular tourist attractions in the United States. Domestic and international travelers visit tribal lands to purchase handmade goods, such as clay pots, baskets, and blankets, and watch dances and pow-wows. In 2016, Congress passed the NATIVE Act (Native American Tourism and Improving Visitor Experience Act, Public Law 114-221), the purpose of which is “To enhance and integrate Native American tourism, empower Native American communities, increase coordination and collaboration between Federal tourism assets, and expand heritage and cultural tourism opportunities in the United States.” (Congress.gov, 2016)

According to the American Indian Alaska Native Tourism Association (AIANTA), approximately 1.96 million overseas travelers to the United States visited Indian country in 2016, a 180 percent increase since AIANTA began outreach efforts in 2007. In 2019, 4.7 percent of the more than 40 million overseas visitors to the United States visited a Native American community, totaling about 1.9 million visitors. Such visitors represent a sector of overseas travelers known as Cultural Heritage Travelers, who typically stay longer, visit more destinations, and visit more culturally significant sites than other travelers (AIANTA, 2023).

A 2021 survey report by AIANTA showed that tribal tourism enterprises were optimistic in 2021 regarding future tourism prospects. Although 77 percent of respondents indicated that the COVID-19 pandemic had negatively impacted tribal tourism in 2020, almost 70 percent of survey respondents in 2020 said that they believed tourism would increase in the coming year (AIANTA, 2021). According to 24 percent of respondents from this survey, Canada is the top international market for inbound visitors. Respondents identified the second-most important markets as Germany (20%) and the United Kingdom (14%).

Tribal tourism entities identified a number of challenges facing their enterprises. Chief among these were concerns about the U.S. economy, and the government not prioritizing tourism. Other challenges that respondents identified including staffing issues, under-funded marketing, and a lack of coordinated regional tourism efforts.

One of the most in-depth studies of visitors to Native American tribal lands was conducted in 2004–2005, on behalf of the Arizona Office of Tourism. This study found that visitors to these Native American tribes in Arizona are slightly older, have higher annual incomes, stay longer, and have higher daily expenditures (for lodging, shopping, and entertainment) than Arizona visitors generally. Visitors to Arizona’s tribes are also more interested in cultural and historic activities, shopping for arts and crafts, educational experiences and sightseeing than are visitors overall.

More than half of visitors (56.5%) were repeat visitors to tribal lands, while 43.5 percent were first-time visitors. The average visitor had visited the particular tribe where they were surveyed more than 10 times in the past five years; the median number of visits was four times in five years. More than half of visitors (54.7%) indicated that the tribe was the main destination of their trip, while 45.3 percent said the visit to the tribe was one stop on a longer trip. Those who spent the night on tribal lands spent an average of 5.8 days and a median of 3.0 days. Almost all respondents (96%) used motor vehicles as transportation to reach tribal lands, dominated by automobiles (71%), Camper/RVs (18.6%), and rental cars (11.3%).

The dominant reason for visiting Arizona’s Native American tribes was for sightseeing or scenic beauty (44.8%). Other important reasons were shopping for Native American arts & crafts (23.8%), recreation (22.3%), cultural/historic activities (20.4%), educational experiences (16.8%), and casino gaming (12.4%).

While visiting tribal lands, visitors’ activities were concentrated on general sightseeing (52.8%), shopping (36.7%), looking at/buying arts and crafts (24.8%), visiting historic sites (22.3%), and casino gaming (20.4%). Visiting cultural centers/museums (18.8%) and eating traditional foods (18.0%) were also important activities (Arizona Office of Tourism, 2006).

A 2011 study of visitors to the Navajo nation found that more than half of visitors (57%) were first-time visitors while 43 percent were repeat visitors. About three-quarters (72%) were stopping in Navajo nation as part of a longer trip. Approximately two-third of the visitors were from the United States, with the remaining one-third arriving from foreign countries. Most visitors (66%) were drawn to the Navajo nation because of the scenic attractions, while 28 percent visited for the purposes of outdoor recreation (Navajo Tourism Department, 2012).

INDIAN GAMING

Gambling has long been an important part of American Indian culture and tradition. The ancient stick game played in various forms among most tribes is still played at tribal gatherings. Horse and foot races were also a focus of traditional gambling activity. Today, gambling provides many tribes with revenue for essential governmental services (Nash, 1999).

In 1987, the U.S. Supreme Court re-affirmed the right of tribal governments to offer gaming on their own lands in the *California v. Cabazon Band of Mission Indians* case. Subsequently, in 1988, the U.S.

Congress passed the Indian Gaming Regulatory Act (IGRA), which authorized tribes to sign gaming compacts with state governments in order to offer casino-style gaming.

After passage of the IGRA, the number of tribal governments operating gaming facilities grew rapidly, with at least 25 new facilities opening in the early 1990s. According to the California Gaming Control Commission (CGCC), as of early 2022 there were 63 tribes operating 66 tribal casinos in the state. This is an increase from 2005, when there were 55 tribes operating 56 casinos in California (Center for California Native Nations, 2006).

In accordance with the IGRA, net revenues derived from gaming by Indian tribes can only be used for specified purposes, namely: to fund tribal government operations or programs; to provide for the general welfare of the tribe and its members; to promote tribal economic development; to donate to charitable organizations; or to help fund operations of local government agencies (IGRA, 1988).

In 2022, when there were 574 officially recognized tribes nationwide, the National Indian Gaming Commission reported that it oversees over 520 gaming establishments operated by 251 tribes in 29 states. This is an increase from 1999, when 146 tribes had Class III gambling facilities. Although the general rule under the IGRA is that Indian gambling can only occur on “Indian lands,” there are multiple exceptions to this rule. Due to these exceptions, only a minority of tribes operate gambling facilities on their reservations (National Gambling Impact Study Commission, 1999).

Casinos near urban centers can do fabulously well, such as the Pequot’s Foxwoods casino in Connecticut, near the New York City metropolitan area, and Southern California casinos such as Pechanga, run by the Pechanga Band of Luiseño Indians, and the Sycuan Resort & Casino run by the Sycuan Band of the Kumeyaay Nation, east of San Diego. Northern California has numerous casinos, including the successful Cache Creek Casino Resort owned and operated by the Rumsey Band of Wintun Indians, located northwest of Sacramento (Owings, 2007).

In 2014, tribal gaming in California generated \$7.8 billion in economic output, added \$5 billion to the state’s economy, and produced almost \$400 million in state and local tax revenue. Gaming supported 63,000 jobs across the state and produced \$3.3 billion in worker earnings. Casinos in Northern California support an estimated 25,000 jobs (California Nations Indian Gaming Association, 2016).

Economic inequalities between gaming and non-gaming tribes are addressed by the Revenue Sharing Trust Fund, to which gaming tribes contribute revenues that are shared with non-gaming tribes. Gaming tribes in California have contributed over \$600 million to the Revenue Sharing Trust Fund, which assists non-gaming tribes in developing their own local economies. In 2014, gaming tribes made charitable contributions totaling \$57.9 million. Sixty percent of tribal leaders from tribes with gaming operations report that gaming has been positive for their community, while 8 percent believe that it has had a negative impact (California Nations Indian Gaming Association, 2016).

Studies conducted by Harvard University and UC Riverside on the socioeconomic impacts of Indian gaming found that:

- Gaming revenues have contributed to significant increases in Indian per capita income with corresponding decreases in poverty rates, unemployment, and overcrowding.
- Despite gains from gaming revenues, tribal communities in general, continue to experience significant socioeconomic deficits compared to other Americans.

- The location of Indian reservations in California places a natural limit on the size and scope of gaming in California.
- Tribal government gaming that is located on reservations concentrates employment and other benefits in counties that need them most.
- The off-reservation impacts are significant, and local governments near Indian gaming facilities recognize their benefits.

In the federal government’s large-scale study of tribal gaming, published in 1999, tribal governments reported that gaming revenues help fund the development of sewage management projects, energy assistance, housing, job training, conservation, education, native language programs, and many other services that previously were absent or poorly funded before the introduction of gambling. There has also been an emphasis by many tribes on using gambling revenues for preserving cultural practices and strengthening tribal bonds (National Gambling Impact Study Commission, 1999).

More recent studies have shown that casino gaming on Native American lands has led to improved health of tribal communities. A 2016 qualitative study showed that tribal leaders in California perceive casino gaming on tribal lands to influence community health by “1) improving the tribal economy, 2) altering the built environment, and 3) disrupting the social landscape” (Kodish et al., 2016). A 2019 study of California tribes found a positive relationship between casino ownership and improved health, likely due to the higher availability of health-related community resources (Oddo, Walkinshaw, and Jones-Smith, 2019).

While tribal gaming has generated many economic benefits for Native American communities, there have been unfavorable outcomes. One problematic outcome is the disenrollment of tribal members; a reduction in a tribe’s size can lead to greater payouts for other members if there is per capita distribution of casino revenues. Gaming has also led to intertribal divisions due to competition between casinos. This can occur in situations in which a tribe wishes to open a casino off-reservation in a populous locale, a move that other tribes see as threatening to their casinos’ success (Akee, Spilde, and Taylor, 2015). Finally, studies have also shown that Native Americans have a higher rate of gambling addiction than the general population (Johnson, 2019).

MENDOCINO NATIONAL FOREST VISITATION

The USDA Forest Service maintains a recreation sampling system called National Forest Use Monitoring (NVUM), which provides statistical recreation use information at the forest, regional, and national level. In the 2018 financial year, Mendocino National Forest received 339,000 visits. Approximately 83 percent of visitors came for the purposes of recreation. The remaining visitors were passing through, coming for work, or commuting, or for another unspecified reason.

Visitors to the Mendocino National Forest skew male (57.8%) and are overwhelmingly white (92.7%). Hispanic/Latino (11.5%) constitute the second most common visiting group, followed by American India/Alaska Native (2.7%), Asian (2.6%), African American (2%), and Hawaiian/Pacific Islander (0.6%). Unlike visitors surveyed in Mendocino County, visitors to the Mendocino National Forest include a significant number of young people; about 20 percent of visitors are under 20 years of age. Adult visitors are spread fairly evenly over the age groups between 20 and 70+ years of age.

Sixty percent of these were people traveling less than 25 miles from home. The most commonly reported home counties of visitors were Tehama and Butte counties. The most frequent visitors likely

come from communities between Red Bluff and Chico. Over 75 percent of visitors to the Mendocino National Forest came on a day trip from home, and their trip did not include overnight lodging. Approximately 6 percent of visits were a side trip, for which the forest was not the primary destination.

Many respondents (11.9%) visit the forest between 51-100 times per year and significant percentage (10.8%) visit between 101-200 times a year. Most visit only one site in the forest. The average group size is 2.3 people. Most visitors participate in activities such as hiking or walking (52.4%), relaxing (35.1%), viewing natural features (24.6%), and viewing wildlife (20%). A significant number of visitors (10.7%) visit to participate in motorized trail activity, and 9.8 percent bring Off Highway Vehicles (OHV).

Over 25 percent of the visiting population comes from households in the \$150,000 and above range; about the same percentage (23.9%) come from households in the \$25,000 to \$49,999 range, and 21 percent come from households in the \$50,000 to \$74,999 range. (USDA, 2022)

LOCAL COMMUNITIES

Round Valley/Covelo Area

Round Valley residents typically make their living grazing cattle and sheep, raising horses, growing crops such as alfalfa, pears, organic produce and/or working for the government. The Indian health clinic is the largest employer. Round Valley is a picturesque location providing a western gateway to the Mendocino National Forest. Hunters, fishermen, and hikers are the primary visitors to the area.

In 2006, the Department of the Treasury established 38,000 acres in Round Valley as the Covelo Viticultural Area, recognizing the area's unique climate, grape-growing conditions, and lack of summer fog. Currently, there is one two-acre vineyard growing four types of grapes (Tempranillo, Pinot Noir, Granacha, Mencia), which it supplies to one commercial winery. Although the area has a short growing season climate, it is capable of producing quality grapes. (U.S. Department of the Treasury, 2006)

The town of Covelo may have potential for limited additional tourism if the local parks add more campgrounds and other facilities. Covelo has a fully developed industrial park, patterned on the European live-work model, with seven industrial lots and nine home sites, plus existing space for lease. The community's remoteness limits its attractiveness to new industry. Skilled labor would also have to be imported and housing is scarce. The small downtown has the potential for limited commercial expansion to support the local population.

Laytonville

Nearby Laytonville is the northernmost community along State Route 101 with significant commercial activity in Mendocino County. In the past, many of the community's residents worked at the family-owned Harwood mill in nearby Branscomb; the mill filed for bankruptcy in 2007 and finally closed in 2008. Also noteworthy is the Red Fox Casino, run by the Cahto Tribe of the Laytonville Rancheria.

Undeveloped land with industrial potential exists along State Route 101 both north and south of town. Retail services in Laytonville have historically been limited. In 2008, the city formulated the "Laytonville Traffic Calming and Revitalization Plan," which built on the earlier Downtown Development Plan. The 2008 plan outlined policies to encourage business development along the State Route 101 frontage, coupled with rezoning and coordination with Caltrans to improve traffic and pedestrian safety in downtown Laytonville.

Since the Willits bypass opened in 2016, Laytonville has become a more convenient stopping point on State Route 101 on the way to Garberville or to points south. This development has led the city's residents, under the auspices of the Laytonville Area Municipal Advisory Council (LAMAC), to consider how the city can grow in sustainable and beneficial ways (Maxwell, 2016).

Willits

The city of Willits is constrained by wetlands to the east and north, and hilly terrain to the west and south. Most of the available commercial and industrial land in the area is within the city limits. The city has three industrial areas. The industrial area to the northeast includes several businesses as well as the city's sewer plant. This area also has plenty of vacant land for future expansion.

Willits has several commercial establishments along State Route 20 (formerly a section of State Route 101), including its share of national chains, a significant downtown, and overnight lodging. Most of these establishments have seen a loss in sales since the bypass opened (Ojeda, 2017). There is currently little commercial development outside the city limits. The Willits freeway bypass, which opened on November 3, 2016, includes two interchanges outside the city limits. Both are constrained by topography but probably have some commercial development potential.

MENDOCINO EMPLOYMENT TRENDS

Mendocino County's employment dropped from 30,250 in 2000 to 29,770 in 2009, before rising to 35,720 by early 2022. The available labor force in the county totaled 45,980 in 2002 before dropping to 43,900 in 2008 and further to 37,450 in 2022. As of early 2022, the County had an unemployment rate of 4.6 percent (California Employment Development Department, 2022). The state predicts that employment in Mendocino County will expand by 4,300 jobs between 2021-2026 (Caltrans, 2021).

Mendocino County's economy is affected by seasonality, which can result in cyclical instability and slow growth. The fluctuating growth and decline in the County's civilian labor force reflect this key factor.

Comparing employment by industry between 2000 and 2020 demonstrates the further decline in the timber and mining industries, which decreased by more than 58 percent. During this time, the manufacturing and durable goods industry also declined. The most significant increase in employment has been in the educational and health services industry, which grew by over 2,000 jobs (60.2 percent). The leisure and hospitality industry decreased slightly during this period, but remained overall strong, and has thus helped to counterbalance the decline in the timber industry and diversify the county's economy.

State and local government employment has grown slightly over this time (5.8 percent), mostly due to growth in State government employment, which increased by 28 percent. Federal government employment declined by almost 15 percent during this period. (California Employment Development Department, 2022).

The closure of the Louisiana lumber mill contributed to the peak in unemployment in Mendocino County in the early 1990s. The unemployment rate was over 12 percent in 1992. As the service and hospitality industries grew, the unemployment rate gradually declined to 5.2 percent in 2006, then rose

dramatically during the economic downturn to 11.9 percent in 2010. By 2019, the unemployment rate had dropped again to 4 percent, but rose in 2020 to 9.2 percent due to the pandemic. As of early 2022, unemployment had dropped again to the pre-pandemic rate of 3.9% (California Employment Development Department, 2022).

Figure 6: Louisiana Pacific Sawmill in 1957



Photo courtesy of Theron Brown and Chris Baldo

Table 3: Employment by Industry in Mendocino County

Employment by Industry in Mendocino County, 2000-2020				
CES Industry Title	2020 Employed	2010 Employed	2000 Employed	Percent Change 2000-2020
Total Nonfarm	28,990	28,860	30,250	-4.1%
Total Wage and Salary	30,390	30,450	32,740	-7.2%
Total Private	22,320	21,560	23,880	-6.5%
Goods Producing	3,950	3,380	6,930	-43%
Service Providing	25,040	25,480	23,330	7.3%
Private Services Providing	18,380	18,180	16,950	8.4%
Mining and Logging	270	250	650	-58.4%
Total Farm	1,410	1,600	2,490	-43.3%
Natural Resources, Mining, and Construction	1,590	1,190	2,140	-25%
Construction	1,320	940	1,490	-11.4%
Manufacturing	2,360	2,190	4,790	-50.7%
Durable Goods	1,050	950	3,080	-65.9%
Nondurable Goods	1,300	1,240	1,710	-23.9%
Trade, Transportation and Utilities	6,020	5,620	5,870	2.5%
Wholesale Trade	700	670	610	14.7%
Retail Trade	4,480	4,380	4,560	-1.7%
Transportation, Warehousing and Utilities	840	570	700	20%
Information	170	330	480	-64.5%
Financial Activities	980	1,160	950	3.1%
Professional and Business Services	1,800	1,770	1,670	7.7%
Educational and Health Services	5,530	4,910	3,450	60.2%
Leisure and Hospitality	3,200	3,660	3,730	-14.2%
Other Services	700	730	790	-11.4%
Government	6,670	7,300	6,370	4.7%
Federal Government	290	330	340	-14.7%
State Government	640	520	500	28%
Local Government	5,740	6,450	5,540	3.6%
State and Local Government	6,380	6,970	6,030	5.8%

Source: California Employment Development Department

DEMOGRAPHIC TRENDS

Population and Enrollment

Despite economic trends, the population of Mendocino as well as the Reservation have grown significantly since the mid-twentieth century. Mendocino County's population grew from 51,101 residents in 1950 to 91,601 in 2020 (www.census.gov). However, this growth has been tempered by slow population growth since 2000, and by depopulation through outmigration in recent years (Mendocino County, 2021).

Historic data on the population of the Round Valley Indian Tribes is incomplete and often inaccurate. The U.S. Census data typically underrepresents reservation population levels. For example, the tribal population of the Round Valley Reservation and Off-Reservation Trust Land is indicated as 322 (170 male and 152 female) in 2020. (U.S. Department of Commerce, 2020).

The Tribes' original Comprehensive Plan of 1974 showed a 1930 population of 739 members. Of these, 442 (60%) resided on the Reservation. The tribal enrollment grew to 1,720 members in 1974, however, the number of members residing on the Reservation (353) represented only 21% of tribal enrollment. The outmigration of Reservation residents was attributed to a lack of educational and job opportunities, poor housing conditions, and isolation. (RVIT, 1974)

Following adoption of the Comprehensive Plan in 1974, the Tribes became eligible for funding for housing construction and the percent of tribal members residing on the Reservation began to grow. Improved tribal community services and the economic recession of the mid-1970s also contributed to an in-migration of tribal members to the Reservation.

The 2020 Census count for the Covelo Census County Division which encompasses Round Valley was 3,100 people. Of these, 1,026 identified as American Indian or Alaska Native (AIAN). Another 150 people identified as White/AIAN and 27 people indicated at least some AIAN ancestry. The combined total of people with at least some AIAN ancestry was 1,203. The population of the town of Covelo was 1,394 in 2020. (U.S. Department of Commerce, 2020).

The RVIT Enrollment Office recorded 5,781 enrolled tribal members in 2022. Of these, 1,195 (21%) were residing on the Reservation in 2023. In addition, some households include members of other tribes or non-tribal members. Housing occupancy rates were estimated by the RVIHA to be 5 to 7 occupants. This indicates a minimum Reservation population of 1,750. (RVIT, 2022)

Population Projections

The Center for Applied Research conducted a population study of the Reservation in 2010 that analyzed historic population data, enrollment records and housing survey data. The Center also conducted a focus group of tribal managers and staff to discuss Reservation population and migration trends.

At that time, there were 329 homes in Round Valley occupied by tribal members. Occupancy was estimated at 5 to 7 persons per house indicating an on-reservation population of at least 1,645 in 2009. The study also provided a projection of future Reservation population that predicted a 2020 population of 1,752, which is consistent with current estimates based on housing and occupancy. (Center for Applied Research, 2010).

Population projections for Mendocino County by the California Department of Finance anticipate a 1 percent increase in population over the next 10 years, resulting in a total population of 89,273 in 2032. Over time, the growth rate is expected to slow slightly, resulting in a 2042 population of 87,766 in the county. (California Department of Finance, 2022).

ROUND VALLEY INDIAN RESERVATION

TRIBAL EMPLOYMENT TRENDS

The Round Valley Indian Housing Authority conducts periodic demographic surveys of tribal households to assess housing conditions, occupancy and household income. The most recent surveys were conducted in 2004 and 2010. The 2004 survey included 434 households and the 2010 survey included 200 households. (RVIHA, 2010)

Of the tribal household members over 18 years old who were surveyed, 46 percent were employed either full time or part time, or were self-employed or seasonally employed in 2004 and 2010. During this time, however, more of them were reduced to part time jobs. The unemployment rate has increased to 43% reflecting the increase in unemployment in the rest of the country.

Table 4: Tribal Employment Status

Tribal Employment Status, 2004 and 2010				
Status	2004		2010	
	Number	Percent	Number	Percent
Employed Full Time	133	31%	54	27%
Part Time	39	9%	23	12%
Seasonal	22	5%	9	5%
Employed Other	0	0%	2	1%
Self-Employed	6	1%	1	1%
Retired	56	13%	21	11%
Unemployed	178	41%	86	43%
Total Sample	434	100%	196	100%

Source: Round Valley Indian Housing Authority, 2010

Women represent 63% of the employed tribal members. The Tribal Enrollment Office reports that a majority of the employed members work in the public sector, typically for the tribal government or the health center or housing authority. Retired members accounted for 13 percent of respondents.

The housing survey indicates that in recent years over 40 percent of tribal members over age 18 were unemployed. This contrasts dramatically with the County's unemployment rate of 10.5 percent in 2009. Most members cite either the lack of available jobs, responsibilities for dependent family members, or disabilities as the main reasons for unemployment.

Non-employment income sources for tribal members primarily include social security or welfare such as the Department of Health and Human Services Temporary Assistance for Needy Families (TANF) program.

In addition, labor force data reports that 213 tribal members who are employed still have incomes below the poverty line. Most of these members are women. The housing survey revealed a median income for tribal members of only \$10,800 in 2004 and \$12,888 in 2010. Over 50 percent of heads of households on the reservation are women. This is dramatically higher than the county (12.2%), the State (12.9%) and the nation (12.6%).

High School diplomas were held by 62 percent of respondents in 2004 and by 70 percent in 2010. College graduates account for 8.5 percent in 2004 and 13 percent in 2010 (Round Valley Indian Housing Authority, 2010).

TRIBAL INCOME

Demographic data from the Round Valley Indian Housing Authority indicates that 80 percent of households on the Reservation had annual incomes below \$36,000 in 2009. The median annual household income for tribal members was \$12,888. This is considered very low income by the Census for Mendocino County and is well below the 2009 Office of Management and Budget poverty threshold of \$21,954 for a family of four. (Round Valley Indian Housing Authority, 2010).

TRIBAL ECONOMIC DEVELOPMENT

The Tribes' vision for economic development has remained consistent in the desire for community related business services and for economic development projects that would tap into the tourism market. Creating a destination-based attraction that includes lodging, restaurants, entertainment, and outdoor recreation along with service industries, would be consistent with regional economic trends, but requires substantial financial investment.

The Tribes also recognize the economic value of natural resource-based industries including timber harvesting, wood products, aggregate mining, and specialized agricultural products such as organic beef, bison, produce and processed food products.

Implementing the 2010 CEDS, the Tribes developed the Hidden Oaks Casino and Restaurant, the Gift Shop, and the Hidden Oaks Convenience Store and fuel stop. The casino is a Class 2 casino having less than 100 machines. The Tribes also purchased the Golden Oaks Motel in Covelo, which they refurbished. Initiatives are underway to upgrade the Hidden Oaks RV Park and Campground.

ROUND VALLEY INDIAN TRIBES FINANCIAL PROFILE

As a federally recognized tribal entity, the Round Valley Indian Tribes can both provide government services and act as a for-profit business through its commercial enterprises. These dual roles enhance the Tribes' ability to drive economic development in the region, provide critical social services, and offer unique employment opportunities to both its members and the general population that might otherwise not be possible.

The Tribes' revenues and expenses associated with its governmental activities during the most recent available audited year, 2018, are summarized below in the following table.

Table 5: Revenues and Expenses from Governmental Functions and Programs

Functions/Programs	Expenses	Program Revenues		Total Governmental Activities
		Charges for Services	Operating Grants and Contributions	
General government	\$ 2,693,632	\$ 134,668	\$ 835,160	\$ (1,723,804)
Social services	\$ 3,329,900	\$ 11,121	\$ 3,053,688	\$ (265,091)
Education	\$ 38,487	\$ -	\$ 38,487	\$ -
Public safety	\$ 574,706	\$ 50	\$ 494,267	\$ (80,389)
Cultural	\$ 72,642	\$ -	\$ 39,494	\$ (33,148)
Natural resources	\$ 1,269,592	\$ -	\$ 633,072	\$ (636,520)
Environmental	\$ 167,122	\$ -	\$ 38,026	\$ (129,096)
Public works	\$ 1,282,546	\$ 18,360	\$ 843,321	\$ (420,865)
Housing	\$ 145,000	\$ -	\$ 145,000	\$ -
Interest expense	\$ 164	\$ -	\$ -	\$ (164)
Total governmental activities	\$ 9,573,791	\$ 164,199	\$ 6,120,515	\$ (3,289,077)

Source: 2018 Independently Audited Financial Statement prepared by Moss Adams, December 31, 2018

Table 6: Summary of Revenue Sources Used to Fund Government Functions and Programs

General Revenues and Transfers	Revenues by Fund				Total Governmental Funds
	General Fund	Special Revenue Fund	Round Valley Tribal TANF Fund	BIA 638 Contracts	
Federal grants and contracts	\$ 66,107	\$ 2,327,147	\$ 743,811	\$ 1,626,505	\$ 4,763,570
State grants and contracts	\$ -	\$ -	\$ 1,356,945	\$ -	\$ 1,356,945
Revenue sharing - gaming	\$ 1,110,000	\$ -	\$ -	\$ -	\$ 1,110,000
Interest income	\$ 12,465	\$ -	\$ -	\$ -	\$ 12,465
Indirect revenue	\$ 1,105,189	\$ -	\$ -	\$ -	\$ 1,105,189
Settlement revenue	\$ 966,638	\$ -	\$ -	\$ -	\$ 966,638
Water and sewer income	\$ 113,324	\$ -	\$ -	\$ -	\$ 113,324
Donations	\$ 100	\$ 2,121	\$ -	\$ -	\$ 2,221
Program income and other	\$ 258,274	\$ 9,000	\$ -	\$ 18,410	\$ 285,684
Investment loss	\$ (111,128)	\$ -	\$ -	\$ -	\$ (111,128)
Hidden Oaks Casino	\$ 622,092	\$ -	\$ -	\$ -	\$ 622,092
Hidden Oaks Convenience Store	\$ 837,084	\$ -	\$ -	\$ -	\$ 837,084
Total revenues & transfers	\$ 4,980,145	\$ 2,338,268	\$ 2,100,756	\$ 1,644,915	\$ 11,064,084

Source: 2018 Independently Audited Financial Statement prepared by Moss Adams, December 31, 2018

S.W.O.T. ANALYSIS

The Tribal Council held an economic development workshop in November 2022 which included a discussion of the Reservation's strengths, weaknesses, opportunities, and threats (S. W.O.T.). These included the following:

STRENGTHS

- Natural resources:
 - Forests and woodlands
 - Surface and Groundwater
 - Excellent air quality
 - Rangeland
 - Fish and Wildlife
- Existing industry:
 - Timber and carbon sequestration
 - Livestock Grazing
 - Casino
 - Fuel Stop and Convenience Store
 - Motel
 - Healthcare and dental clinics
- Proximity to:
 - Mendocino National Forest
 - Eel River
 - Covelo, California
- Low cost of living
- Northern California rural environment
- Availability of federal grant funding

The Tribes have benefitted from the natural resources of the Reservation, primarily from timber harvesting in the past and from ongoing livestock grazing. Tribal member families benefit from the Reservation's fish and game, and woodland resources providing firewood, posts, and poles.

The fuel stop, convenience store, casino/restaurant, and motel are successful enterprises benefitting the Tribe and providing employment. Federal funding for tribal programs such as health services and housing also provide employment and benefit the tribal community with important local services. Funding from the Economic Development Administration facilitated the development of the convenience store and fuel stop.

Round Valley is a scenic location, and the tribal community values the rural environment and their proximity to the Mendocino National Forest and the Eel River. The town of Covelo provides goods and services not available on the Reservation.

The cost of living is ostensibly lower than other areas of Mendocino, however, Council members noted that residents who commute to jobs outside the valley incur significant travel costs that offset savings from living in the valley. Low-income tribal members, on the other hand, receive housing assistance which offsets costs and helps supplement the cost of gas and groceries.

WEAKNESSES

- Isolation from larger population centers
- Lack of diverse career and job opportunities
- Lack of broadband
- Undeveloped properties
- Inadequate infrastructure
- Generational poverty
- Limited transportation network
- High unemployment rate
- Crime and drug abuse

The Reservation is in a remote area of Mendocino County. Highway 162 is a 28-mile road connecting the valley to Highway 101. It is a winding road often subject to repair and can be dangerous in winter weather. There is no public transportation between Covelo and communities located on Highway 101, so valley residents need private vehicles to commute to work in other communities or to access retail businesses and services that are not available in the valley.

The Reservation's infrastructure is limited. Although domestic water and wastewater systems have been installed with help from the Indian Health Services, the systems are near capacity and many homes rely on septic systems and wells. Efforts are underway to consolidate domestic water supplies and expand wastewater capacity. The valley has telephone and electrical infrastructure; however, cellular and Internet coverage is limited.

There is a lack of career and job opportunities in the valley resulting in a high unemployment. The 2020 Census of the valley indicates an unemployment rate of over 22 percent. Previous surveys of tribal households have indicated unemployment levels of over 40 percent on the Reservation. This has resulted in generational poverty, exasperated by crime and drug abuse.

OPPORTUNITIES

- Development of broadband infrastructure and connectivity
- Creation and promotion of new industries and small businesses
- Improvements to infrastructure
- Land acquisition and fee-to-trust land opportunities

Broadband

Broadband is in development and will eventually provide high-speed connections for the community and create business opportunities. Deployment is not complete at this time, but high-speed Internet is already available to some extent in Round Valley. The Tribes' consultant EnerTribe is expanding broadband coverage in the valley with the Tribes' grant funding from the National Telecommunications and Information Administration. New cell towers have been constructed to cover dead areas and fiber optic cable has been brought into the valley by Frontier Communications. The Tribes anticipate establishing a tribally owned ISP. (EnerTribe, 2023).

Broadband access will make the TANF office park more attractive to businesses in need of office space. The Economic Development Board would provide management and promotion of the office park. In addition, tribal members will have more options for remote work or self-employment when their homes have high-speed connectivity.

Water and Wastewater Infrastructure

The Tribes, in coordination with Indian Health Services continue to expand the water and wastewater infrastructure on the Reservation. Consolidation and expansion of the domestic water supply will reduce the need for individual wells, many of which are not subject to regulation and testing. Plans are in development to expand wastewater treatment which will accommodate future housing and commercial development.

Land Acquisition and Fee-to-Trust Land Opportunities

The Reservation is compromised by the checkerboard land ownership resulting from the General Allotment Act of 1887. Access to some tribal trust parcels lack right-of-way access. Fractionated ownership of allotment parcels has effectively prevented development of valuable land on the Reservation.

A longtime development strategy for the Tribes has been to acquire fee lands throughout the valley with the intent of converting those lands to trust. These fee-to-trust conversions can be a multi-year, resource intensive, and arduous process that come with both benefits and drawbacks. While the Tribes' ownership of land in fee simple allows the Tribes to utilize the land for any legal purpose, the ownership status also exposes the land to state and local laws and tax requirements.

Fee-to-trust conversion liberates the Tribes from state and local jurisdiction but brings increased exposure to federal oversight. However, once converted, trust lands can also benefit from the Tribes' access to federal resources and programs and benefit from greater environmental protections. Therefore, when deciding whether or not to undertake the fee-to-trust conversion process, the Tribes should carefully consider the long planning objectives for each given parcel and strategize accordingly.

THREATS

- Multi-jurisdictional authority on the Reservation (fee inholdings)
- Climate change exasperating drought and wildfire incidents
- Lack of comprehensive well regulation and protection
- Illegal marijuana grows
- Limited housing availability
- Low retention of educated tribal members

The checkerboard ownership within the Reservation boundaries will continue to create obstacles for business development as well as housing. Right-of-way and access issues will continue to inhibit development and management of Reservation lands.

Climate Change has increased the threat of wildfire; however, the Reservation has the advantage of a significant groundwater resource. Unregulated wells, however, are a threat to the water quality in the aquifer. The Tribes don't have well permitting, metering, or protection requirements except for those

connected to the municipal water system. Private cannabis operations utilize the Reservation's groundwater, and the use of fertilizers are a potential threat to groundwater quality. However, with legalization, large-scale operations outside the valley, and a persistent black market, small growing operations in the valley are becoming less viable.

Limited housing, the lack of employment opportunities, and the remote location of Round Valley results in the low retention of educated tribal members. Despite potential opportunities to develop business enterprises, the Tribes' pool of talent to exploit and manage new opportunities is limited. Consequently, opportunities can be missed, especially when limiting factors such as a lack of housing dissuade tribal members from returning to the Reservation.

STRATEGIC DIRECTION

VISION STATEMENT OF THE ROUND VALLEY INDIAN TRIBES

Quality of Life

- We endeavor to maintain and enhance our unique culture, languages, traditions, and exercise of sovereignty.
- Our sustainable wealth is based on a healthy, diverse economy that does not waste our natural resources or sacrifice our culture, traditions, and values.
- We understand the importance of community involvement and are committed to providing opportunities to increase awareness and understanding throughout the membership and community.
- We promote the honor and respect of all human beings, and we honor the integrity of our people by protecting our children and providing for our elders.
- We promote a clean and peaceful community.
- Our people and land are sacred and so we are committed to creating and maintaining a society of individuals who are healthy in body, mind, and spirit.

The Tribes' vision statement recognizes the need to create a healthy, diverse economy that does not waste the Reservation's natural resources or sacrifice tribal culture, traditions, and values. The economic goals and objectives of the CEDS are intended to realize that vision.

ECONOMIC GOALS AND OBJECTIVES

Goal 1. Create a community environment conducive to business development.

Objectives

- Expand Community Infrastructure
 - Broadband
 - Cellular Coverage
 - Water and Wastewater
 - Housing
- Reestablish Education Programs
 - Technical Preparation
 - Education Center

Expanding community infrastructure will facilitate construction of additional housing and commercial facilities. The Tribes continue to work with the Indian Health Services and the U.S. Department of Housing and Urban Development's Native American Housing Assistance and Self Determination Act (NAHASDA) program to accomplish this objective. The Tribes have ongoing initiatives to bring broadband Internet into the valley and expand cellular service. These actions will work to realize the goal of a community environment that includes a sufficient housing supply and commercial areas serviced with Internet connectivity, water, and wastewater systems.

Goal 2. Promote sustainable business ventures that bring economic prosperity creating jobs and business opportunities for the tribal community and revenue for tribal government programs.

Objectives

- Establish an Economic Development Board to provide guidance, support, and promotion for tribally sponsored businesses.
 - Forest Enterprises
 - Hidden Oaks Casino, Restaurant, Convenience Store, Fuel Stop, and Gift Shop
 - Golden Oaks Motel
- Establish business entities to manage priority economic development initiatives.
 - Aggregate Mining
 - Broadband ISP
 - Laundromat
 - Car Wash
 - Bulk/Bottled Water Sales
 - Microgrid
 - Tribal Community Center
- Identify funding sources for tribal economic development.
 - Department of Energy Tribal Renewable Energy Grants
 - Department of Commerce/Economic Development Administration
 - Department of Commerce/National Telecommunications and Information Administration (NTIA) Tribal Broadband Connectivity Program
 - Sonoma-Mendocino Economic Development District

Establishing a corporation separate from tribal governance and administration will create an entity focused on economic development. It will provide an umbrella organization supporting and promoting the formation and growth of underlying business ventures. The Tribes are currently working to form the Board with qualified directors and staff.

The Board will identify funding sources to establish business enterprises and facilitate grant applications. Although the Tribal Council performs this function to a certain degree, a development board can provide additional focus and resources to take advantage of additional opportunities.

ACTION PLAN: IMPLEMENTATION

In November 2022 the project team conducted a CEDS workshop with the Tribal Council to discuss the strengths, weaknesses, opportunities, and threats as described in the S.W.O.T. analysis above. During the workshop, the Tribal Council discussed ongoing and potential economic development initiatives.

The Tribal Council designated the following economic development initiatives as top priorities:

- Formation of an Economic Development Board
- Aggregate mining
- Broadband deployment
- Laundromat

The first priority is to establish a corporate board separate from tribal government, that would facilitate economic development and provide guidance and support for tribal enterprises. The aggregate mining project and broadband deployment are both in the initial stages of implementation, however, there is much to be done before they are fully realized. The establishment of a laundromat will be easier to achieve but will require determining the cost of construction and utilities, as well as preparing an operating plan.

The Tribal Council also designated four additional projects as second priority economic development initiatives:

- Car wash
- Bottled or bulk water sales
- Microgrid
- Tribal Cultural Center

Of these projects, the car wash would likely involve the least cost and effort to establish and could feasibly operate at a small profit. Bulk sales of water would also involve minimal cost to initiate. The microgrid would be a major effort, however, there are significant funding opportunities. Establishing a cultural center currently depends on potential funding from the University of California College of the Law.

The Tribal Council also considered projects such as organic produce farming and infrastructure improvements to Hidden Oaks Park that were given a low priority. Decisions need to be made regarding land designation and revenue potential for these projects.

Implementing the aggregate mining project and forming an ISP have the greatest immediate potential for creating employment and generating revenue for the Tribes. Developing a microgrid for Round Valley would also generate significant revenue for the Tribes as an electric utility. The laundromat, car wash, and a Tribal Cultural Center might not generate significant revenue or employment, however, locating them in the Tribes' commercial district could have a synergistic effect supporting the Tribes' existing businesses.

Implementation of these projects would significantly diversify the Tribes' enterprises as well as the economy of Round Valley. Establishing a local ISP and a microgrid would increase the valley's resilience. The following provides additional information on each of the priority initiatives.

FIRST PRIORITY ECONOMIC DEVELOPMENT INITIATIVES

Economic Development Board

The Tribes are in the process to establish an Economic Development Board. The Tribal Council is seeking volunteers to join the Board, which would likely include one or two Tribal Council members, the Tribal Administrator, appropriate industry experts, and a legal advisor. The Tribes would place all their business enterprises under the Board. They recognize the need for board members with business expertise. Managers of the store and motel are operating pretty much on their own and the board could provide them with structure and support.

In the past, tribal councils have balked at establishing a corporation with finances separate from tribal finances. The Round Valley Tribes Development Enterprise was an early attempt that ultimately was not achieved. Although the Council received legal advice on forming different types of corporations, as well as options and benefits, no Council has authorized forming a corporation.

The Board would be a corporate entity, an LLC in the short term and ultimately a federal Section 17 corporation. Over time, however, community members have begun to recognize the benefits of separating business activity from tribal politics. Community education outreach has been effective in gaining more support and involvement in the process.

In the 1970s, a corporation was formed for a gravel mining operation near the Round Valley Indian Housing Authority (RVIHA) that likely involved a limited waiver of tribal sovereignty to get funded. The enterprise went bankrupt, and the bank sold assets to get their money back. The community recognizes the fact that the Tribe can get sued. Investors won't come in if they don't have recourse if things go wrong. But the community is learning that a corporate structure is needed.

Aggregate Mining

The Tribes have been interested in developing an aggregate extraction business for many years and have conducted several studies to assess the quality and quantity of gravel resources in and along streams in the valley. These studies revealed some potential due to the quality of the resource but also revealed environmental concerns related to potential adverse impacts to stream channel integrity and to anadromous fish habitat in the streams.

A large majority of 2020 survey respondents (77%) support development of an aggregate mining business. However, respondents were adamant that safeguards and mining practices should be in place to protect fish habitat and creeks.

In 2007, the Tribes shifted their attention from streambed development and began investigating the potential for two hard rock upland quarry sites in the Short Creek area. An assessment and testing of rock samples from these sites was conducted, an environmental assessment and reclamation plan were prepared, and a Streambed Alteration permit to construct a bridge over Short Creek and other road work was approved by the Department of Fish and Game in 2008.

The quarry sits on two parcels, both owned and operated by the Tribes. The overall project site encompasses approximately 120 acres. The site is estimated to have as much as 4 million tons of good quality rock. The project anticipates a crushing screening operation onsite as well as an asphalt plant. A geotechnical report was completed by Bajada Geosciences, Inc.

Short Creek Road Quarry currently operates two aggregate pits on two separate south-facing slopes. These slopes have steep gradients. Operations at Pit 1 (west pit) and Pit 2 (east pit) are currently excavating shattered greywacke and chert landslide deposits resulting in unstable slopes. The low-lying areas to the south of the pit currently function as access and staging areas for the two pits. Currently, operations at the two pits are excavating shattered greywacke sandstone and chert which range from weak- to medium-strong material.

The current market value for aggregate that is suitable for road construction and asphalt is \$8-\$10 per ton. The available rock could ultimately generate \$32-\$40 million over the life of the quarry. There is an ongoing demand for aggregate for Highway 101 road maintenance between Willits and Ukiah.

Vestra Resources, Inc. noted that the available rock is in the Franciscan formation which can be mined in large pieces used in constructing coastal jetties. There is only one other quarry mining Franciscan rock in Northern California. Mined in large pieces, the rock is much more valuable, selling for \$40-\$100 per ton. This has the potential of generating \$160-\$400 million over the lifetime of the quarry. It would require blasting and heavy equipment.

Aggregate is typically surface mined in pits and quarries, and thus does not require seismic surveying. Start-up costs for an aggregate mining operation can be substantial, running into the hundreds of thousands of dollars. Aggregate operations require equipment for excavation, extraction, crushing, screening, and washing, as well as dump trucks for transporting materials. Trucks can range from \$30,000 for a used model to \$100,000 for a new vehicle. The Tribes have assembled a D8 Caterpillar, dump truck, excavator, and rock crusher. Additional equipment that may be needed on the project site could include:

- Power screen
- Grader
- Backhoe
- Loader
- Water truck
- Scale
- Office

The Tribes currently intend to operate the mining operation as a tribal business. They are coordinating with the Bureau of Indian Affairs (BIA) that has provided guidance on requirements to establish the business enterprise. A mining business and marketing plan is in development. The Tribes consultant Vestra has prepared a Mining and Reclamation Plan that meets SMARA requirements. Environmental analysis that was prepared early in the process is in need of updating and approval.

The mining project will require experienced staff and equipment which will be challenging for the Tribes' business operation to assemble. Optionally, the Tribes could lease the quarry to a mining company. (VESTRA, 2023)

Broadband

The Tribes' primary interest in broadband deployment is to provide high-speed Internet to the tribal administration and programs, and to provide connectivity for tribal members. The Tribes are also interested in establishing a tribal ISP. The Tribes have received NTIA grant funding to bring broadband into the valley. Frontier Communications, a regional ISP, has brought fiber to the valley with Middle Mile funding. Final Mile funding should be available to distribute broadband services to homes and businesses. To this end, EnerTribe is working on behalf of the Tribes. Frontier may choose to sell their interest in the valley's fiber system at some point, as the market is small. This would be the opportunity for the Tribes to set up their ISP.

The NTIA's Tribal Broadband Connectivity Program (TBCP), previously implemented under the Consolidated Appropriations Act in 2021, provides an additional \$2 billion in funding to tribal governments to be used for broadband deployment on tribal lands, as well as for telehealth, distance learning, broadband affordability, and digital inclusion.

In the past few years, there have been multiple federal and state legislative efforts to increase broadband access in rural communities and on tribal lands. In August 2020, California Governor Gavin Newsom signed Executive Order N-73-20 to address the digital divide in the state, where 2 million residents do not have access to broadband, including half of rural housing units. This order directed state agencies to aim for a goal of 100 Mbps download speeds (California State Executive Department, 2020). This order built on earlier efforts in the state, including the establishment of the California Department of Technology's California Broadband Council in 2010.

Access to broadband within the community may lead to the Tribes forming their own ISP, which could:

- 1) Allow the Tribes to create an intranet-based compendium of information on language and culture and help preserve those resources online, making those resources accessible to tribal members on and off-reservation. It can also be provided as an internal, closed network only members or those approved by the tribe.
- 2) Create jobs in network construction and operation such as jobs in the network's administration, including billing services, account management, home installation, and technical support.
- 3) Allow for increased bandwidth for security cameras and streaming services.
- 4) Provide the Tribes with greater control over their own data and information, rather than having it managed or potentially exploited by third parties.
- 5) Extend services to off-Reservation homes and businesses and thus bring revenue to the Tribes from non-members.
- 6) Allow tribal members to benefit from distance learning and remote working, and bring opportunities for small business that wouldn't otherwise be available.
- 7) Provide access to healthcare, education, transportation, energy, employment, and public safety services that otherwise would not be available due to rural setting of the Reservation.

- 8) Deliver external monitoring services such as home health sensing, critical intervention for chronic disease patients, and support data collection for use by doctors to monitor disease progression in patients in real-time.
- 9) Serve as a pre-requisite of the Tribes' goal of adopting clean energy sources through a microgrid.

Laundromat

Establishing a laundromat has long been a priority for the RVIT. In the 2007 Community Survey, respondents were asked how they would prioritize establishing a laundromat on the Reservation. It was given a high priority designation by 72% of respondents and a medium priority designation by another 23%. In the 2020 survey, 75% of respondents indicated they would make use of a laundromat.

A laundromat is an all cash business with the potential for successful operation requiring minimum amounts of management time requiring little direct customer contact or prior knowledge of the business, little labor costs, no monthly franchise fees, no accounts receivables to collect, no inventory to manage, no bad checks, no skilled staff required, no professional license required, and no competition from mass merchandisers.

Laundromats have persisted as one of the most recession-proof businesses because clean clothes, like health, food, and shelter, are considered a necessity of life. They appeal particularly to the vast majority or middle and low-income households whose laundry facilities may be limited. Excellent opportunities exist in smaller, lower volume, and less expensive locations. The national average cost of washing and drying a load of laundry is \$6.20.

The price of a Laundromat depends on its location, size, the type and mix of equipment, and the amount of construction that is needed. In general, the cost of a new Laundromat can run from \$200.00 to \$300.00 per square foot for a typical size and location. The facility will need to be connected to the community water and wastewater systems. Equipment costs include a water heater, washers, dryers, soap dispensers, change machines, laundry carts and folding tables. The business will also need insurance for fire, vandalism, and liability. (Larsen, 2023)

Operating a significantly profitable laundromat business would require a much greater population density than currently exists in the valley. However, the primary goal of establishing a laundromat would be to provide a much needed community facility to accommodate local residents who do not have laundry facilities in their homes or have well water with concentrations of minerals that stain clothing.

The laundromat would be a tribal business that would benefit from being situated on tribal trust land and connection to the water and wastewater systems. Due to minimal administrative and labor costs, the laundromat has the potential to generate enough revenue to cover operating costs. Situating the laundromat in the Reservation's commercial area near the Hidden Oaks convenience store, fuel stop, and Casino/Restaurant would add to the area's business synergy as patrons of the laundromat would likely also avail themselves of those businesses as they wait for loads to finish.

SECOND PRIORITY ECONOMIC DEVELOPMENT INITIATIVES

Car Wash

In the 2020 Community Survey, 76% of respondents indicated that they would make use of a car wash if one were established on the Reservation. This appears to suggest an increased demand since the 2007 Community Survey, when only 29% of respondents gave a car wash a high priority designation, 30% of respondents gave it a medium designation, and a majority (41%) gave a car wash a low priority.

Typically, a four-bay carwash would cost approximately \$250,000 to install. If an administrative building is included, the cost would increase to about \$500,000. If the carwash is associated with a fuel stop, the fuel stop would need to sell about 150,000 gallons of gas a month. Every 100 gallons of gas sold will often result in a car wash sale. That would result in 50 car wash sales a day. At \$8/wash, it would generate \$400/day or \$12,000/month (gross income).

A four-bay carwash is likely too large for the Round Valley community to support, given the community's size. However, a two-bay metal carwash could feasibly be set up for about \$20,000. Such a carwash might generate \$2,000/month, and net income would typically be 65% of the gross income, or about \$1,300. This would require someone to attend to the carwash about 1-2 hours per day. The valley's wastewater system would also have to deal with suspended hydrocarbons in the wastewater from the carwash. (Car Wash Consulting, 2023)

A business feasibility study should be completed for the car wash to determine the anticipated daily, monthly and annual traffic. That will determine loading to the sewer collection and treatment system. The car wash should incorporate low water consumption equipment and nozzles, if possible, to lower the strain on the Tribes' water and wastewater systems.

As with the proposed establishment of a laundromat, the car wash would also function as a much desired community facility. Similarly, should the car wash be located in the Tribes' commercial area, it would benefit from being situated on tribal trust land and connection to the water and wastewater. It has the potential to cover operating costs and achieve a net profit. Like the laundromat, the car wash could add to the business synergy of the commercial area as customers purchase fuel for their car, buy groceries and beverages at the convenience store, or dine at the restaurant.

Bulk or Bottled Water

The Tribes have long considered establishing a bottled water enterprise that would take advantage of artesian springs in the valley. In 2007, 55 percent of respondents to the Tribal Community Survey designated a bottled water plant to be a high priority. Although groundwater in the valley is characterized by high hardness, iron and calcium concentrations, and localized high magnesium (California Department of Water Resources, 2004), spring water in the valley is considered to be of good quality suitable for bottling. In the 2020 survey, respondents were asked how often they purchase bottled water. The majority of respondents (70%) indicated they frequently purchase bottled water, and another 27 percent indicated they purchase bottled water occasionally. The Tribes are also considering the alternate possibility of selling their water in bulk, trucking it out to existing bottling plants outside of the valley and thus obviating the need to set up a plant.

A bottled water enterprise would face significant competition from major corporations that dominate the industry. The United States is the largest consumer of bottled water in the world. Aquafina and

Dasani, owned by PepsiCo and the Coca-Cola Company respectively, are the largest bottled water companies in the country. (Kim, 2020)

The start-up cost of a small-scale water bottling plant is estimated to be between \$500,000-750,000. This estimate includes costs such as legal expenses, insurance, rent, construction, filtration and bottling equipment, distribution vans, and other start-up inventory items and operational costs. The start-up cost of a plant increases to about \$1.5 million for a medium-scale plant. (Ajaero, 2023)

The Round Valley Groundwater Basin is about 8 miles long and averages 4 miles in width, and totals about 26 square miles (16,400 acres). The basin is drained by Mill Creek, a tributary of the Eel River that runs east and southeast. As of a 2004 study by the California Department of Water Resources (DWR), yearly precipitation was between 43 and 45 inches per year. Groundwater storage capacity is estimated to be about 230,000 acre-feet, and as of 2004 the basin's storage was reported to have filled to capacity each spring. Ongoing drought conditions in recent years, however, have likely impacted groundwater levels. (California Department of Water Resources, 2004).

Microgrid

Blue Lake Rancheria (north of Eureka) installed a microgrid about three years ago to keep the power flowing during outages and to lower energy costs and emissions during normal conditions. The Schatz Energy Research Center out of Cal Poly Humboldt deployed a solar-based microgrid for the Blue Lake Rancheria Tribe, which enables the Rancheria campus to function as a Red Cross emergency evacuation center and provide critical support during outages. This microgrid has been recognized for providing lifesaving services during wildfire-driven power shutoff events. (Humboldt Now, 2019)

The Schatz Center was interested in studying the feasibility of a microgrid in Round Valley but wanted the Tribes to provide \$300,000 for the effort. Solar could be set up near the airport or on Wilson Field. The old power lines in the valley may not be able to handle the extra load but PG&E representatives said that a microgrid in Round Valley makes a lot of sense and could feasibly power the whole valley. PG&E could possibly provide a feasibility analysis, but the Tribes have not had anyone available to pursue the project. The Tribes' consultant EnerTribe is familiar with microgrids and could provide the expertise needed to evaluate the feasibility of a microgrid in the valley.

Tribal Cultural Center

Recently, the University of California, College of the Law (formerly Hastings College of the Law) investigated the role of its founder, Serranus Hastings, in one of the darkest, yet least discussed, chapters of the state's history. Mr. Hastings, one of the wealthiest men in California in that era and the state's first chief justice, masterminded one set of massacres.

Across Northern California thousands of Native people, and perhaps more whose deaths were not recorded, were massacred by officially sanctioned militias and U.S. troops from the 1840s to the 1870s, campaigns often initiated by white settlers like Mr. Hastings who wanted to use the land for their own purposes. The Yuki tribe of Round Valley were significantly targeted by these militias.

In 1878, Mr. Hastings founded the school that carried his name, California's first law school. designated as 'Hastings' College of the Law,' according to the school's enactment. Now, both the law school and its critics agree that Mr. Hastings "bears significant responsibility" for the massacres, in the words of the Hastings inquiry, but they disagree on what to do about it.

The law school announced a number of measures that it described as restorative justice: It agreed to allocate space for a memorial in the main lobby of its administrative building in San Francisco; provide members of all tribes in Round Valley pro bono legal help; maintain a program focused on Indigenous law; and assist in the establishment of a charitable foundation, an initiative currently on hold because of disagreement among tribal members on how to carry it out. (Fuller, 2021)

Discussions have also included the establishment of a cultural museum in the town of Willits. Although tribal members are very supportive of a cultural museum, the Round Valley Tribes have not supported this initiative as it is located outside of the valley and would not be easily accessed by the tribal community. In addition, the Tribes would have to develop curatorial capabilities to operate a tribal museum that could house and maintain repatriated cultural items.

The tribal community is also very supportive of establishing a tribal cultural center that would provide a meeting place for cultural events and a venue to display historical information about the tribes. It could also function as place for tribal artists and artisans to display and sell their work. A cultural center as such could feasibly help the Tribes to tap into the cultural tourism market, providing additional incentive for outdoor recreationists, hunters, and tourists to visit the valley.

It remains to be seen if UC Law agrees to funding a cultural center or museum in Round Valley. A cultural center would be less expensive to build as it would not require the specialized storage facilities of a museum. In addition, it would be constructed on tribal trust land and could be connected to the Reservation's water and wastewater systems.

EVALUATION FRAMEWORK

The Round Valley Tribal Council and the forthcoming Economic Development Board will provide oversight and management of the Tribes' economic initiatives. The performance measures used to evaluate implementation of the CEDS and its impact on the local economy will include:

- Establishment of the Economic Development Board.
- Successful establishment of priority business initiatives.
- Profitability of business ventures over time.
- Increased revenue for the tribal government and administration.
- Reduction of tribal unemployment.
- Expansion of community infrastructure to accommodate growth.

The Tribal Council and the Economic Development Board will be monitoring the implementation of the CEDS goals and objectives via these measures. Successful implementation should have a beneficial effect on the current "weaknesses" and "threats" identified in the S.W.O.T. analysis. Growing the economy of the Reservation would help stimulate the economy of Round Valley and Mendocino County. Tracking population, employment, income, housing, and other economic indicators will provide data to identify trends and evaluate success.

ECONOMIC RESILIENCE

The Tribes are committed to planning for an economically resilient future and are doing so by developing this CEDS as a component of their Comprehensive Plan. The planning effort has involved broad community engagement, including numerous workshops and community surveys, which have enabled the Tribes to formulate a vision for their future.

The Reservation faces multiple challenges to economic growth, as outlined in the S.W.O.T. analysis. Most notable among these are isolation from large population centers, lack of job opportunities, lack of robust broadband infrastructure, generational poverty, and limited infrastructure and transportation networks.

The RVIT are working towards broadening and diversifying economic opportunities in the valley, most notably through incorporating the Economic Development Board, installing broadband internet infrastructure, and establishing an aggregate mining enterprise. Other efforts include building infrastructure for tourism and through-travel, including the fuel stop, convenience store, motel, casino, and restaurant. The Tribes' business park will become more attractive as broadband Internet becomes available.

The Round Valley Unified School District has had significant difficulty in meeting education standards. In addition, the Tribes' Education Center grants have not been renewed. The Technical Preparation program, which was considered very successful in qualifying many tribal students to enter Mendocino College, was discontinued. The Tribes are seeking to create a more robust economic future by facilitating education opportunities that will result in a more diversely skilled workforce. This will involve restarting the Education Center and Technical Preparation programs. Providing broadband Internet connectivity for education facilities will enhance education capabilities for the school district and tribal education programs.

Climate change is a major factor affecting the economic resiliency of Round Valley and Mendocino County more generally, as the wider region is particularly vulnerable to droughts and wildfires. The Reservation is surrounded by Wildland Urban Interface areas and have limited options of ingress and egress roads. The valley floor has a moderate fire risk, although response times can be greater than 30 minutes. The mountain area is considered high fire risk and has greater suppression response times. The California Department of Forestry and Fire Protection (Cal Fire) provides wildland protection on the Round Valley Indian Reservation. Cal Fire maintains three engines in Covelo and estimates a response time of 5 minutes to the tribal community area on the valley floor. The Covelo Volunteer Fire Department responds to structural fires in the community. (RVIT, 2011).

Oak woodlands on the Round Valley Indian Reservation are an important cultural, economic, and ecological resource, however the extent and resilience of this vegetation type has been noticeably decreasing. Fire suppression, cultural transition and climate change are correlated with this trend and may be causal. Conifer encroachment into oak woodland is a well-documented pattern in Northern California and appears to be occurring on the Reservation as well.

Black oak woodlands are highly vulnerable to conifer encroachment. These areas were historically less dense with fewer conifers; the last few decades have shown a marked increase in conifer cover in these types of stands. If Douglas-fir is not removed from these stands through fire, harvest, or other

disturbance, the black oaks eventually become overtopped and die. These areas have the highest risk for possibly irreversible conifer encroachment and are targeted for oak woodland restoration management. (BBW & Associates, 2023)

Mendocino County's Executive Office coordinates with numerous local, state, and federal partners to strengthen community resilience and preparedness (Mendocino County, 2023a). In recent years, the County's Disaster Recovery program has provided property owners affected by wildfires by providing information on and direct assistance with clean-up, debris removal, repopulation, and mental health services. The County's website www.MendoReady.org is a portal for disaster preparedness and information on emergencies. The website also allows residents to sign up for emergency alerts with MendoAlert and Nixle. (Mendocino County, 2023b).

North Coast Opportunities (NCO) is a Community Action Agency that primarily serves Mendocino and Lake Counties and focuses on assisting low-income and disadvantaged people. NCO has an annual budget of around \$33 million and has received grants from federal, state, and foundation funders. The NCO is the local community outreach and engagement partner with the California Center for Rural Policy (CCRP) at Cal Poly Humboldt, a research and evaluation center that promotes the health and well-being of people living in rural California. (North Coast Opportunities, 2023b)

In recent years, NCO has provided assistance to those affected by wildfires and other challenges associated with climate change. One of NCO's recent projects is United Disaster Relief of Northern California (UDRNC), which was set up after the 2017 wildfires in Northern California. UDRNC helps clients with immediate and long-term relief during the process of recovering from man-made and natural disasters. (North Coast Opportunities, 2023a)

In terms of broader economic concerns, the Employment Development Department of the State of California initiated the Community Economic Resilience Fund (CERF) in early 2023 to promote recovery from the COVID-19 pandemic. The goal of CERF is to diversify local economies and grow sustainable industries (OPR, 2023).

The Sonoma-Mendocino Economic Development District (SMEDD) was initiated in 2015 as the first joint two-county economic development strategy. The SMEDD's goal is to diversify and strengthen the economy of this interconnected region to foster resilience against future economic downturns (SMEDD, 2023). The district also partners with the Economic Development Administration.

The SMEDD's goals include several objectives to strengthen rural and tribal communities in the two counties. The SMEDD currently works with the Dry Creek Rancheria, the Coyote Valley Reservation, and the Kashia Band of Pomo Indians of the Stewarts Point Rancheria. Projects include a Mendocino Coast Tribal Center, housing, commercial facilities, public infrastructure, and environmental projects.

The Round Valley Indian Tribes could potentially benefit by coordinating economic development initiatives with the SMEDD as the other tribes have done. SMEDD contracts with Regional Government Services (RGS) to provide Administrative and Professional services. RGS fields advisors from the public sector talent pool with extensive professional and public administration experience.

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