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INTRODUCTION

Mandan, North Dakota has grown from a rough-and-tumble outpost to a city poised to take the next step in its evolution as a local community of choice. To help manage and plan for the dynamics of this evolution, the Bismarck-Mandan Chamber of Commerce, the City of Mandan, Mandan Public Schools, and Mandan Parks and Recreation have partnered with *Market Street Services*, a national community and economic consulting firm based in Atlanta, to coordinate a visioning process for the city's residents, businesses and elected/appointed leadership. At the end of the months-long effort, Mandan will have a clear picture of what type of place it wants to be and a prioritized set of action areas to achieve this vision.

The first step in Mandan's visioning process was the *Economic and Demographic Snapshot*, which helped to provide a common understanding of the community's recent trends. It used official local, state, and national statistical data sources to conclusively analyze key economic and demographic indicators including what has happened in the community in the recent past. The results of this analysis serve as the basis of *Market Street's* work for this deliverable - the *Community Assessment*.

This report presents a breadth of research to demonstrate Mandan-Morton County's competitive position to accommodate visionary growth and development. A combination of factors that determine a community's strengths as a place to live, work, and do business are assessed including indicators related to education and workforce development, infrastructure and land use, business costs, and quality of life. This *Community Assessment* also includes perspectives of community members and project stakeholders which were gathered through interviews, focus groups, and an online survey.

The results of this analysis and the community input will be the basis of *Market Street's* work as the project proceeds to the two remaining stages, as outlined below:

- **Strategic Vision Plan.** This plan will represent the culmination of all research completed and will present action items geared toward addressing challenges and capitalizing on opportunities for visionary growth. This *Strategic Vision Plan* will serve as a tool to unify Mandan's public and private leadership behind a consensus blueprint for the community's future. The final plan will include best practices as well as benchmarks and performance measures.
- **Implementation Guidelines.** The *Vision Plan* represents "what" Mandan needs to do to achieve its preferred future, while the *Implementation Guidelines* determine "how" that will be done. This report will include a capacity assessment, a first year action plan, and a five year action plan and will determine which organization(s) should lead plan implementation efforts.

EXECUTIVE SUMMARY

Across the Missouri River from the state capital of Bismarck, the City of Mandan is a fast-growing community making the transition from a bedroom community into a more economically and commercially diverse city. Quality schools, a community character that is both rural and urban, friendly neighbors, a revitalizing downtown, and its location within a metropolitan area are increasingly making Mandan a community of choice. As new development has occurred and the city has achieved new successes, the need to articulate a clear, unified vision for the future of Mandan has become apparent. That is what this process is all about. This *Community Assessment* report investigates issues related to community trends and business competitiveness in Mandan-Morton County in order to help identify what that vision might look like, and the toolbox of strategies will best serve the community in the coming years.

In addition to presenting quantitative research in (1) education and workforce development, (2) infrastructure and land use, (3) business costs and support capacity, and (4) quality of life, this *Community Assessment* also presents qualitative research gathered through one-on-one interviews, focus groups with community members, and an online survey. **Comprehensive results from the online survey can be found in Appendix B, and highlights of the public input process are noted throughout the document in red, bolded font.**

It is clear that the Mandan community has registered solid success in improving the competitiveness of its schools, business environment and quality of life. But, there is still work to do both in addressing long-term problems and facing new challenges head on. The report's key findings are discussed below.

Education and Workforce Development

- ✓ Overall, Mandan schools have seen solid gains in student performance despite having a student population that has grown in its percentage of special needs and economically disadvantaged children.
- ✓ Over the last five years, Mandan lost students in all grades groups (K-6, 7-8, and 9-12) while the Bismarck School District gained students in grades K-6 and 7-8. Despite a high school enrollment nearly three times larger than that of Mandan School District, Bismarck's enrollment decline in grades 9 through 12 is still less than Mandan's.
- ✓ Mandan public schools have a comparatively lower per pupil expenditure (\$6,609) compared to Bismarck (\$7,518) and the State (\$8,514). At the same time, the community's proportion of students in special education and the number of economically disadvantaged students has risen. Oftentimes, special needs students need more resources. Additionally, the issue of the

small number of AP courses is a competitive disadvantage at the high school level.

- ✓ In the 2007-08 academic year, five out of the seven schools in the Mandan Public School District did not meet No Child Left Behind's adequate yearly progress goals due to sub-target performance in reading and math tests.
- ✓ Mandan's high school graduates attend college and vocational school at a much lower rate than Bismarck's or the state average. Twenty-six percent of high school graduates intended to attend a four-year college compared with 49 percent of total state graduates. This causes some level of concern in terms of future workforce capabilities.
- ✓ In the 2007 school year, almost half of the degrees granted at two-year institutions in Bismarck-Mandan were in liberal arts. This reflects the trend in the region for young adults to spend the first two years of a bachelor's degree matriculating at Bismarck State College and then complete their education at a four-year institution outside of the region. The lack of a public four-year higher education options in Bismarck-Mandan means those looking for an affordable bachelor's or master's degree must consider relocating to other communities.
- ✓ According to a 2007 survey by the Bismarck-Mandan Development Association (BMDA), Bismarck-Mandan employers appeared to be relatively satisfied with the overall quality of the basic skills of applicants and employees. Almost half of potential job seekers acknowledged a desire for further professional development and training, especially on-the-job training in computer-related fields and business services.

Infrastructure and Land Use

- ✓ The Bismarck Airport ranks towards the bottom of the Airports Council International rankings in terms of quantity of passengers served and cargo movement. The growing expense and decreasing quantity of flights serving the Bismarck-Mandan region continues to be a business disadvantage.
- ✓ In North Dakota, many communities lack broadband service or have low bandwidth capacity. However, federal economic stimulus funding may help to expand and enhance services in the future. Mandan is well served by telecommunications infrastructure – most survey respondents expressed satisfaction with the availability and speed of internet access throughout the community.
- ✓ Since 2000, northwest and southeast quadrants in Mandan have absorbed most of the community's new residential development. Many community

input participants cited the City's tax abatement for first-time homebuyers as a key incentive promoting quality growth in Mandan.

- ✓ Residents and project stakeholders have cited the need for the City to develop an industrial or technology park to have a ready stock of developable sites and buildings.
- ✓ In terms of zoning and permitting, most business community stakeholders feel that the City is extremely business friendly and not bogged down in red tape. These stakeholders agree that City staff members want to work with - not against - the development community.
- ✓ Some people feel that increasing local retail options would improve quality of life by augmenting the scope of amenities in Mandan while also helping to expand the sales tax base. Others feel that traveling to Bismarck for everyday items is acceptable. What Bismarck was said not to have is an "old town" with nightlife, music, and "funky shops." This could be Mandan's niche.

Business Costs and Support Capacity

- ✓ In 2007, Mandan-Morton County's average annual wage in 2007 was \$30,772 compared to \$33,086 for the state and \$44,458 for the nation. Because of Mandan's position within a growing metropolitan area with a highly diversified regional economy, its lower labor costs compared to national wage averages are a key competitive advantage.
- ✓ Due to Mandan's proximity to the western North Dakota lignite coal mines, power costs are relatively less expensive and more abundant than in other regions of the country. Commercial and industrial power costs in Mandan-Morton County increased slowly between 2002 and 2006 remain more affordable than those of Bismarck-Burleigh County.
- ✓ According to several community input participants, self-perception in Mandan is partially holding it back from making bold decisions or being aggressive in pursuing regionalism and taking advantage of certain of the same economic opportunities as Bismarck.
- ✓ The corporate income tax structure in North Dakota is relatively favorable to small businesses with low taxable income. However, Mandan ranks fourth highest statewide in property taxes. Growth is needed to lower property taxes, but making investments in competitive and development capacity could increase property taxes in the short term, so many residents and elected officials are leery of it.

- ✓ As cited in the *Economic and Demographic Snapshot*, Mandan's self-employed residents earn less, on average, than self-employed people statewide. This may be a result of the fewer locally-based entrepreneur and small business development resources. Additionally, the number of loans and the average loan amount granted to Mandan-Morton small businesses are lower than for Bismarck-Burleigh. Small businesses in metro area still receive, on average, significantly lower loan amounts than do businesses in the rest of the state of North Dakota.

Quality of Life

- ✓ The overall cost of living in the Bismarck-Mandan MSA is below the national average, due to comparatively lower prices for housing and utilities; however, local households are more likely to spend slightly more on groceries, transportation, and miscellaneous goods and services compared to the average American household.
- ✓ In 2008, the average single-family home sale price in Mandan was \$146,000 (average days on market: 64) compared to \$178,000 in Bismarck (average days on market: 68). As of February 2009, Mandan has 88 homes on the market while Bismarck has 238. Detached single-family style housing is the most popular housing type in the region. Housing affordability is an increasing issue of concern throughout the region. In the Bismarck-Mandan metro, an entry level worker's wages are 79 percent of the amount needed to afford the fair market rent for two-bedroom apartment.
- ✓ Mandan reportedly has a negative stereotype amongst Bismarck residents. Some of this negativity stems from the history of Mandan's downtown bars and strip joints. However, many Bismarck residents noted that this perception is changing somewhat as new subdivisions are built in Mandan.
- ✓ Although Mandan has a slightly higher number of residents lacking health care coverage (10.1 percent) compared to Bismarck (8.8 percent), its rate is lower than the state (12.7 percent) and the nation (17.2 percent). While it has a lower amount of physicians per capita compared to the state and the nation, this is typical of "bedroom communities" that rely on certain services offered in nearby big cities.
- ✓ Most community input participants expressed the need for Mandan to "not try to be like Bismarck" if it is to succeed in the long term. Some people think that Mandan could be a more dynamic community by leveraging historic tourism potential and unique destinations.
- ✓ Between 2003 and 2007, the City of Mandan's taxable sales increased from \$158 million to \$196 million (24.2 percent), while the City of Bismarck's

increased from \$941 million to \$1.2 billion (31.4 percent). Compared to other North Dakota communities of similar size, Mandan has the lowest total taxable sales.

- ✓ Revenues of Mandan’s nonprofit organizations have grown significantly in recent years – 44 percent, compared to 36 percent growth nationwide – indicating that the community has a growing base of philanthropic resources to support Mandan’s families.

KEY CONCLUSIONS

Mandan’s leadership has made notable strides in enhancing the community. From successfully addressing the fuel spill and investing in new public school facilities to exploring future development options and leveraging its special events – positive things *are* happening in Mandan. A key hurdle is what many public input participants referred to as “poor community self-esteem” that keeps Mandan from thinking big, being visionary, and making aggressive, bold decisions.

Reportedly considered both internally and externally as less dynamic than its companion city across the river, Mandan is seemingly torn between a desire to “out-Bismarck Bismarck” and the belief it must carve out its own niche. The building blocks for the future are certainly in place in Mandan: good schools, a hard-working labor force, attractive quality of life, a historic downtown core with strong development potential, access to competitive infrastructure, a presence in a growing and economically diverse metro area, a competitive business climate and a desire among leadership and citizen alike to make the community better.

But challenges remain, including high property tax rates caused by deferred infrastructure development; a seeming lack of pre-assembled “shovel ready” commercial and industrial sites; a population experiencing slightly higher rates of poverty and lower percentages of educational attainment; and a lack of retail and commercial amenities that compel residents to travel to Bismarck for even basic goods and services.

But most of all, it is the lack of a unifying vision that seems to be holding Mandan back. This *Community Assessment* produced a wealth of quantitative and qualitative research that will serve to focus Mandan’s ambitions towards a specific and achievable direction for future growth and development. The forthcoming *Strategic Vision Plan* will detail strategies that will serve to bring public and private leadership together with local constituents in a directed process to become the type of place that Mandan truly wants to be.

EDUCATION AND WORKFORCE DEVELOPMENT

In today’s knowledge-based economy, employers are increasingly focusing on the skill levels of the workforce. Additionally, the capacity to build upon those skill levels is a critical component of a community’s ability to remain competitive for the long term. This section will analyze Mandan’s capacity to build a strong workforce today and in the future by assessing its school system and workforce development resources.

K-12 EDUCATION

The quality of a community’s K-12 schools is related to its overall economic competitiveness. Business relocation decisions are often tied to the condition of a community’s public K-12 system. Typically, communities that succeed in educating their children have a strong workforce and are more competitive in the global economy.

Enrollment Trends

Between the 2002 and 2006 academic years, K-12 enrollment dropped by six percent in the Mandan School District. This trend is not surprising when we consider that Morton County’s “Under 17” population dropped by 10.9 percent over the first seven years of the decade. This decline was faster than both the Bismarck metro area and the state during the period (see “Age Distribution” section of the *Economic and Demographic Snapshot*). However, North Dakota’s K-12 enrollment decline was even more dramatic than Mandan’s. Bismarck saw a positive change of three percent in enrollment during the five years.

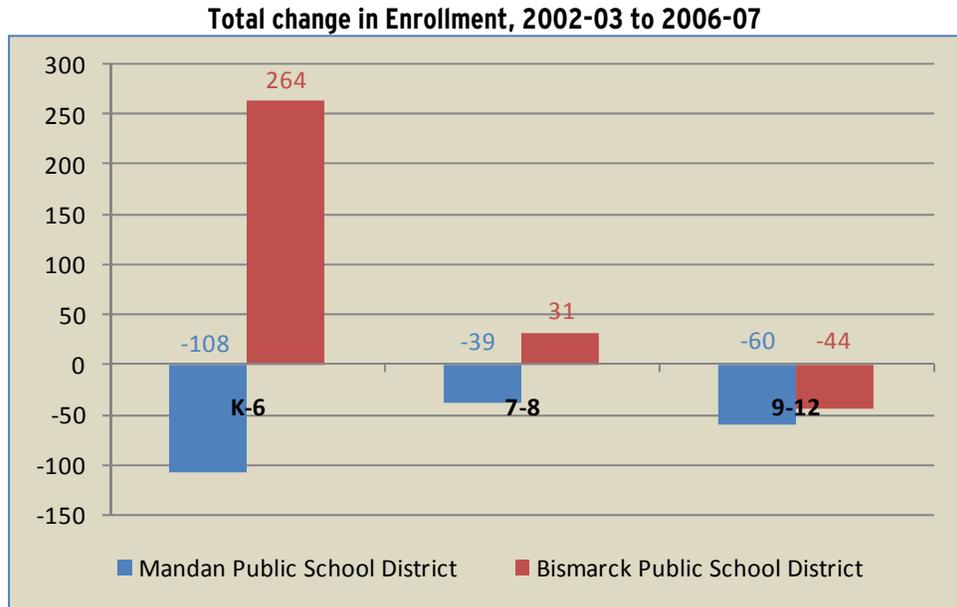
Total K-12 Enrollment, 5 year Trends

	K-12 Enrollment		Change	
	2002-03	2006-07	Number	Percent
Mandan Public Schools	3,351	3,144	-207	-6%
Bismarck Public Schools	10,370	10,650	280	3%
North Dakota	104,225	95,600	-8,625	-8%

Source: North Dakota Department of Public Instruction

With a closer look at enrollment changes between Mandan and Bismarck’s school districts during the five year period, one can see that while the Bismarck School District gained students in K-6 and grades 7 and 8, Mandan lost students. Despite a

high school enrollment nearly three times larger than that of Mandan School District, Bismarck’s enrollment decline in grades 9 through 12 is still less than Mandan’s.

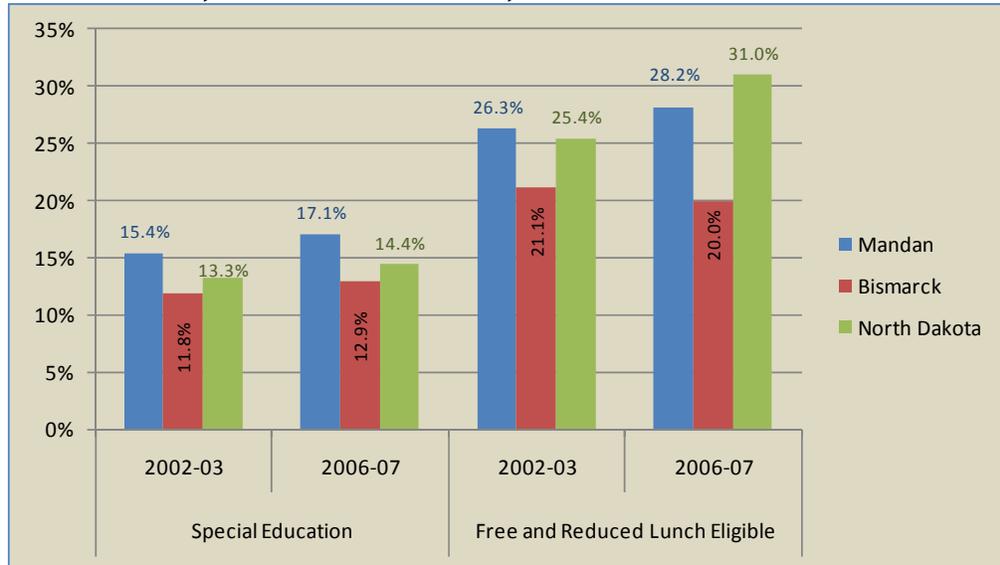


Source: North Dakota Department of Public Instruction

To qualify for the federal National School Lunch and Child Nutrition Program that provides free and reduced price school lunches, households must meet income guidelines based on a sliding scale similar to federal poverty rate thresholds. This indicator helps to show the proportion of students who come from economically disadvantaged families. Students with physical, mental, or learning disabilities in special education receive individualized education programs (IEP), which are customized, written plans according to federal and state regulations that ensure all children’s educational needs are being met.

Both students in special education and those that come from economically disadvantaged backgrounds often require increased educational and support resources to achieve success. The following chart shows the proportion of these students as a percentage of total enrollment in the 2002-03 and 2006-07 school years. The proportion of both student populations has increased in Mandan Schools, following statewide trends. While Mandan’s proportion of students with special needs is significantly higher than Bismarck’s schools, it remains considerably lower than many communities with similar competitive dynamics.

Special Need Students (as a percent of total enrollment)



Source: North Dakota Department of Public Instruction

Participants of interviews and focus groups who work in - or with - Mandan’s public schools feel that the relationships between teachers, the administration, and the school board have greatly improved in recent years. Specifically, most feel there is more transparency, greater team work, and less tension. Teachers feel supported. One teacher who participated in the input process said, “I feel like I work with people who are doing their absolute best every day.” This is reflected in parents’ confidence in the school system: 79 percent of survey respondents feel that their children are receiving an above average educational experience at Mandan’s public schools.

School System Expenditures

Lower per pupil expenditures (PPE) can indicate underinvestment in school systems and the community’s youth. On the other hand, high per pupil expenditures do not always indicate better quality schools; it is always costlier to teach students who come into the school system with special needs.

Currently, the Mandan School District receives 42 percent of revenue from city and county property taxes. The district levies 232.5 mills, each mill valued at approximately \$55,467.¹ To date, the Mandan School District is at the maximum number of mills it can levy on local taxes. The district can only levy what it needs to pay off bonds, so the mills levied may change from one year to the next. At the maximum mill level, the only way the district can increase its revenue is as property values in the city and county grow. It is interesting to note, however, that Bismarck

¹ Eckroth, Leann. “Residents receive tax news.” *Bismarck Tribune*, 16 December 2008. <<http://www.bismarcktribune.com/articles/2008/12/16/news/local/171903.txt>>.

schools have an unlimited mil levy. As shown in the following chart, Mandan Public Schools' PPE was \$6,609 in the 2006-07 academic year, less than Bismarck (\$7,518) and the state (\$8,514). Considering the increasing proportion of special needs students in Mandan's schools, resources are extremely tight.

Per Pupil Expenditures, 5-year Trends

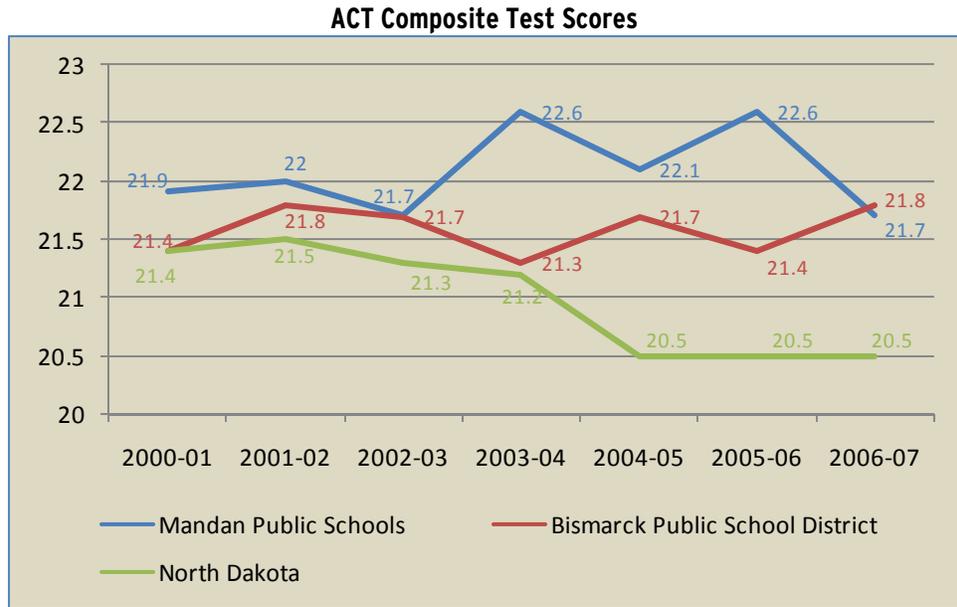
	Total PPE		Change	
	2002-03	2006-07	Amount	Percent
Mandan Public Schools	\$5,377	\$6,609	\$1,232	23%
Bismarck Public Schools	\$5,842	\$7,518	\$1,676	29%
North Dakota	\$7,252	\$8,514	\$1,262	17%

Source: North Dakota Department of Public Instruction

Mandan Public Schools does not have a foundation; however many who focus group participants in education and the business community support the idea of forming one. Educational foundations provide a mechanism for the private business sector and private citizens to donate to the school system. Foundations can provide scholarships for students, provide funding for short-term programs or help districts make capital investments in facilities and equipment.

Performance Indicators

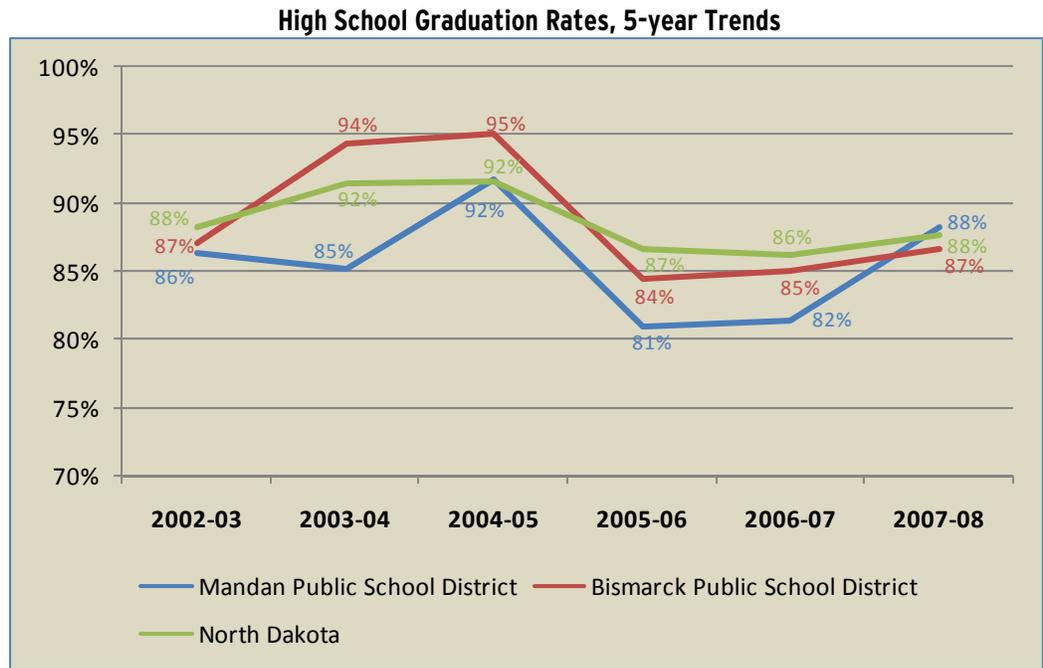
The ACT exam tests college-bound high school juniors and seniors on English, reading, science, and math reasoning with an optional writing component. ACT previously stood for American College Testing but has dropped its acronym. The ACT is used most widely in Midwestern and central southern states as the standard college readiness exam, while most other regions of the United States prefer the Scholastic Aptitude Test (SAT). In the 2006-07 academic year, 75.5 percent of Mandan's high school juniors took the ACT exam, a higher proportion than Bismarck and the state (both at 68 percent). Mandan students consistently perform higher than their peers in the state and nation on the ACT exam, and until 2006-07 also surpassed Bismarck in average composite score. The performance decline from 2005-06 to 2006-07 could represent a one-time drop, or might be indicative of a more serious, longer-term issue if this trend persists.



Source: North Dakota Department of Public Instruction, ACT

High school graduation rates are key indicators of student achievement as well as the skill levels of the future workforce. The graduation rate is the percentage of students who graduate from secondary school with a regular diploma in the standard number of years. The federal No Child Left Behind of 2001 requires school districts to report graduation rates for all high schools. North Dakota consistently has one of the highest high school graduation rates in the nation.

As shown in the following chart, Mandan’s graduation rate has generally fluctuated in line with Bismarck’s rate while the state rate remains more constant. By 2007-08, the Mandan high school graduation rate was 1.7 percent higher than that of Bismarck. A key challenge for Mandan educators is to ensure that the rate of students who successfully complete high school remains more constant. Even so, the six percent increase in the Mandan School Districts graduation rate in the last year for which data is available is a very positive achievement.

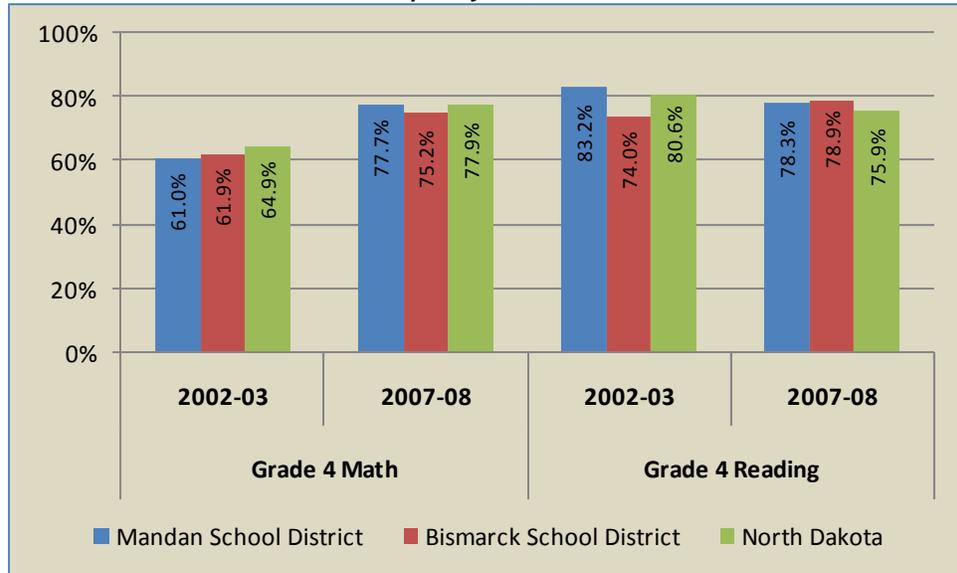


Source: North Dakota Department of Public Instruction

Adequate Yearly Progress (AYP) is defined and measured by No Child Left Behind to determine how every public school in the nation is performing academically. Standardized tests in reading and math measure if students are meeting the minimum annual target established for each subject. Additionally, schools must meet annual attendance rate targets. In the 2007-08 academic year, five out of the seven schools in the Mandan Public School District did not meet the adequate yearly progress goals due to sub-target performance in reading and math tests.

The following chart shows fourth grade AYP in the 2002-03 and 2007-08 academic years. The State of North Dakota's AYP goals in 2007-08 were 72.9 percent in math and 82.6 percent proficiency in reading. While Mandan fourth graders exceeded Bismarck in reading proficiency in 2002, they fell behind five years later. However, their reading progress was still over two percentage points above the state average both years. In math, Mandan fourth grade students made significant progress over five years but still lagged behind the state average in proficiency. They remain slightly ahead of Bismarck in math achievement; however, the gap is closing.

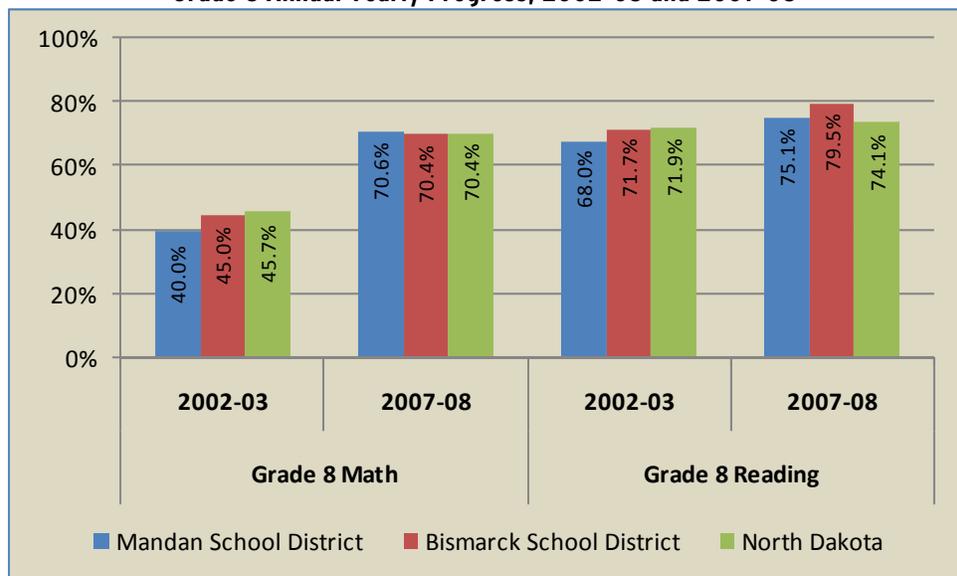
Grade 4 Annual Yearly Progress, 2002-03 and 2007-08



Source: North Dakota Department of Public Instruction

In both math and reading, Mandan’s eighth graders made significant progress over the last five years. Scores progressed from falling behind their state peers to surpassing the state average in proficiency. However, Bismarck students still excelled over Mandan students in grade eight reading by 4.4 percentage points in 2007-08. During this year, state AYP goals were 66.7 proficiency in math and 80.7 percent in reading.

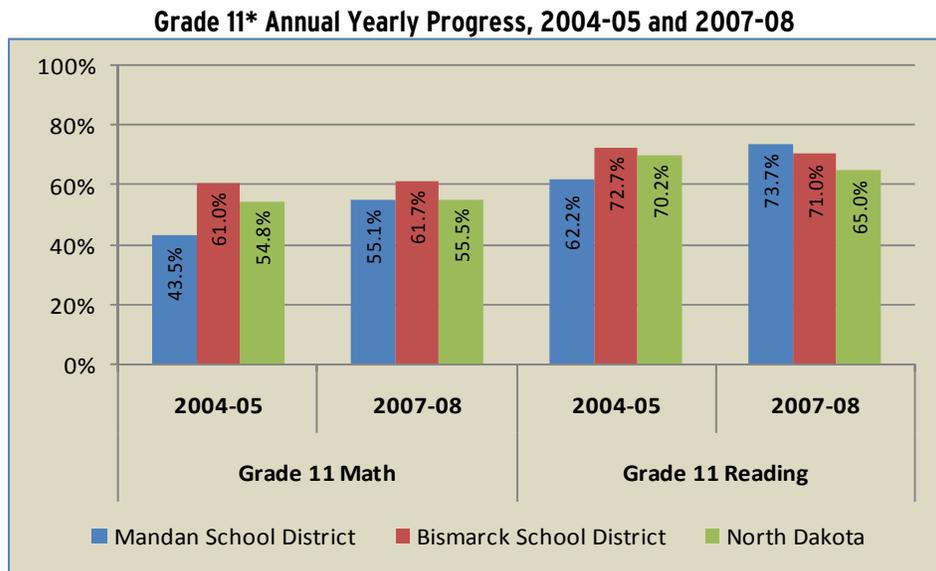
Grade 8 Annual Yearly Progress, 2002-03 and 2007-08



Source: North Dakota Department of Public Instruction

Collectively, grade 11 AYP scores exhibit the lowest levels of proficiency across primary and secondary school scores. In the 2007-08 academic year, the State of North Dakota’s AYP proficiency goals were 62.1 percent in math and 71.5 percent in reading.

Just over half of Mandan’s high school juniors were proficient in math, remaining behind Bismarck and North Dakota overall despite three year progress. Reading proficiency showed a marked improvement among eleventh graders, growing by over 10 percentage points since 2004-05 and exceeding Bismarck and the state.



Source: North Dakota Department of Public Instruction
 *Grade 11 data not available prior to 2004-05

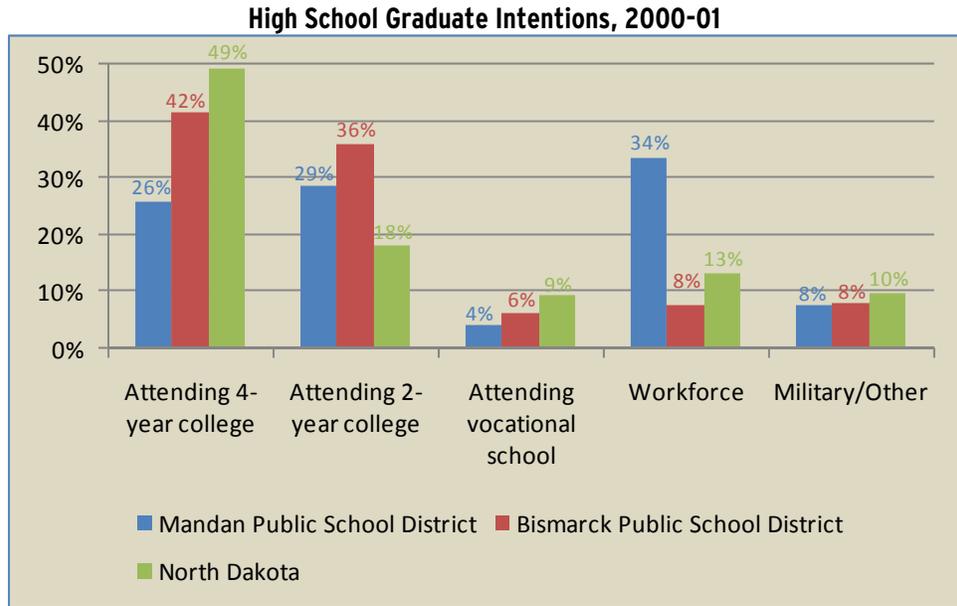
According to one input participant, “There is a Mandan ‘Athlete of the Month,’ why no ‘Student of the Month?’”

High School Graduate Intentions

The quality of K-12 education in the region has a tremendous impact on the preparation and success of its graduates in higher education. North Dakota surveyed graduating classes in 2001 to track post-graduation intentions. The State has not updated this survey since then.

The following chart shows student’s plans after graduating from Mandan schools, compared with students’ plans in Bismarck and statewide. Mandan Public Schools graduated the highest proportion of students who enter straight into the workforce after high school. Over one third of high school graduates in the 2000-01 academic year intended to work after graduation. Conversely, local high school graduates attend college and vocational school at a much lower rate than Bismarck’s or the state

average. Twenty-six percent of high school graduates intended to attend a four-year college compared with 49 percent of total state graduates. Although these dynamics may have changed since these polls were completed, this causes some level of concern in terms of future workforce capabilities.



Source: North Dakota Department of Public Instruction

According to younger residents, many choose to move away for educational opportunities that are not offered locally. While many plan to move back to Mandan to raise a family, most expressed dissatisfaction with the variety of amenities available to younger residents. They would like to see more restaurants, bars, coffee shops, or a second-run movie theater in downtown to provide “third base” options of places to spend time - besides work, and home. Almost all of the young people who participated in the survey see Downtown development as the key to making Mandan a more attractive place to live in the future. Many see leveraging the BSC satellite campus or the Lewis and Clark hotel as potential lynchpins for redevelopment.

Many would like to see expansion of vocational programming at Mandan High School. The school’s vocational director has been successful in developing several occupational clusters; however demand is outstripping capacity in key areas. Students who participated in focus groups noted this issue as well as the limited number of AP course offerings. Because students have to pay to access AP courses in Bismarck schools or at Bismarck State College, many of their bright peers who come from lower income families cannot achieve their full potential due to the inability to pay these fees.

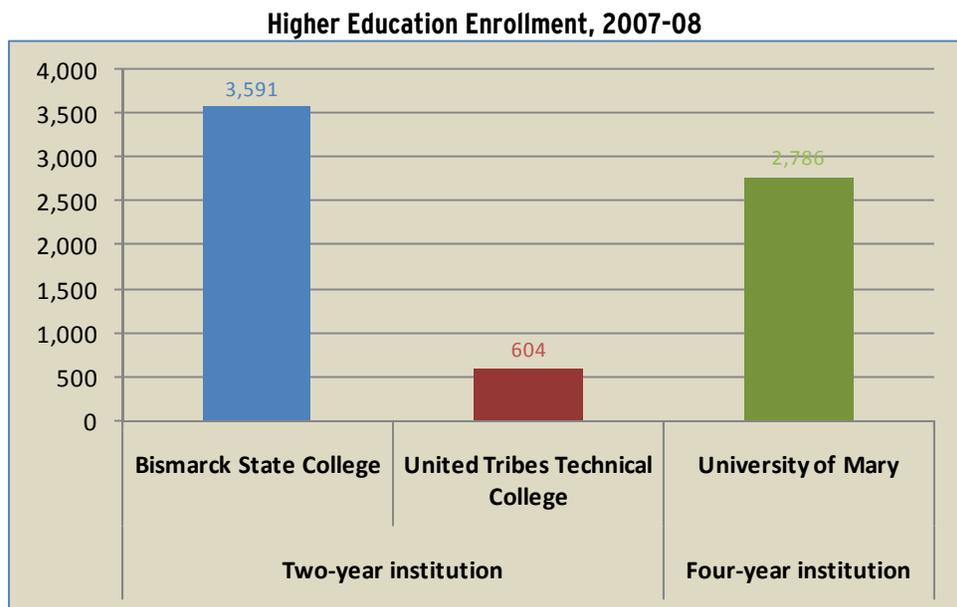
HIGHER EDUCATION

Institutions of higher education provide significant economic impact within their regions. They educate existing residents, draw young people from outside the region, create value and innovation through research and development, revitalize surrounding neighborhoods, and support existing businesses and industry clusters through targeted training and degree programs.

Public higher education in the Bismarck-Mandan metropolitan area consists of Bismarck State College, which is the fourth largest college in the North Dakota University System, and the United Tribes Technical College, a tribal community college. Private education includes the University of Mary, a four-year private university. Bismarck is also home to Medcenter One College of Nursing.

In 2006, Bismarck State College extended its campus to Downtown Mandan with the launch of their new Industrial Maintenance Technology degree and certificate program. The program boasts its own 12,500 square foot facility and enrolls over 70 students annually for formal training in the installation, repair, and maintenance of valves, pumps, and bearings, and alignment of rotating and other industrial production and processing equipment.

The following table shows the fall 2007 enrollment for key institutions of higher education for Bismarck-Mandan metro area.



Source: National Center for Education Statistics

Degrees Awarded

The availability of quality graduates with the educational backgrounds to fill vacant positions in the region is paramount to the success of the region's businesses. The recruitment of talented young professionals is a challenge for every community, and Mandan is no exception.

The following table displays degrees awarded at the region's one four-year institution by subject area and degree level.

Degrees Awarded at Four-Year Institution* (2007-2008)

	Associate	Bachelor	Master	Total degrees
Biological and biomedical sciences	0	22	0	22
Business, management, marketing, and related support services	1	196	276	473
Communication, journalism, and related programs	0	10	0	10
Computer and information sciences and support services	0	23	0	23
Education	0	45	22	67
Engineering	0	1	0	1
English language and literature/letters	0	0	0	0
Health professions and related clinical sciences	0	100	73	173
Liberal arts and sciences, general studies and humanities	0	50	0	50
Mathematics and statistics	0	1	0	1
Parks, recreation, leisure, and fitness studies	0	11	0	11
Philosophy and religious studies	0	4	0	4
Psychology	0	9	0	9
Public administration and social service professions	0	7	0	7
Security and protective services	0	2	0	2
Social sciences	0	15	0	15
Theology and religious vocations	0	1	0	1
Visual and performing arts	0	5	0	5
Total degrees, 2007-09	1	502	371	874

Source: National Center for Education Statistics

*Institution included: University of Mary

Business, management, and marketing degrees typically occupy the top spot in most communities; in Bismarck-Mandan this subject area produces the largest number of degrees. Almost 200 bachelor's degrees and 276 master's degrees in business, management, and marketing were awarded during the 2007 academic year. Health professions and education were the next largest academic fields in terms of degrees conferred with 173 and 67 degrees, respectively.

Degrees Awarded at Two-Year Institutions* (2007-2008)

	<1 year Certificate	1 to <2 year Certificate	Associate	Total degrees
Agriculture, agriculture operations, and related sciences	0	0	18	18
Biological and biomedical sciences	0	0	1	1
Business, management, marketing, and related support services	0	2	71	73
Computer and information sciences and support services	0	2	18	20
Construction trades	0	42	23	65
Education	0	0	1	1
Engineering technologies/technicians	1	30	151	182
Family and consumer sciences/human sciences	0	0	15	15
Health professions and related clinical sciences	0	47	63	110
Legal professions and studies	0	0	6	6
Liberal arts and sciences, general studies and humanities	0	0	424	424
Mechanic and repair technologies/technicians	0	23	11	34
Precision production	0	8	3	11
Public administration and social service professions	0	0	8	8
Security and protective services	0	0	9	9
Visual and performing arts	0	1	16	17
Total degrees, 2007-08	1	155	838	994

Source: National Center for Education Statistics

*Institution included: Bismarck State College and United Tribes Technical College

In the 2007 school year, almost half of the degrees granted at two-year institutions in Bismarck-Mandan were in liberal arts. This reflects the trend in the region for young adults to spend the first two years of a bachelor's degree matriculating at Bismarck State College and then complete their education at a four-year institution outside of the region. The lack of a public four-year higher education options in Bismarck-Mandan means those looking for an affordable bachelor's or master's degree must consider relocating to other communities. The high number of engineering technology degrees is laudable, although these students may be leaving the region to complete their four-year degree.

WORKFORCE DEVELOPMENT PROGRAMS

Workforce quality is the most important competitive issue facing today's communities. Without qualified adults to work in existing positions – and attract companies offering high-value jobs – Mandan will suffer economically and demographically.

Ideally, workforce development exists as a seamless system, with school-age children made aware of local opportunities and prepared either to transition to a two- or four-year college or directly to the workplace through public school career education programs. Education and training curricula are developed in partnership with local companies to ensure that skills developed by students and adults are consistent with employer needs.

In 2007, the Bismarck-Mandan Development Authority and its partners sponsored the *Greater Bismarck-Mandan Labor Availability and Business Needs Study*. Through phone surveys with Greater Bismarck-Mandan Area adult residents, the study examined characteristics of the labor force. A mail- and internet-based questionnaire was sent to area businesses to explore from the perspective of the employers the issues related to employment. The surveys received over 1,100 responses from the metro population and over 400 responses from area employers.

The phone survey with residents discovered an increase in employee satisfaction concerning current employment and an increase in economic opportunity as workers strive to be upwardly mobile. While 94 percent of respondents had a high school education or higher, almost half of potential job seekers acknowledged a desire for further professional development and training, especially in computer-related fields and business services. The type of training most desirable to respondents was on-the-job training as opposed to higher education or certification.

Employers appeared to be relatively satisfied with the overall quality of the basic skills of applicants and employees. They were also satisfied with the computer skills of technical and administrative workers. In an 8 point decline since the 2005 survey, 36 percent of employers stated it was common for them to receive applicants who appear overqualified and 35 percent thought it common that area applicants were employed below their skill level. Employers were also pleased with the training quality and opportunities in the region as well as quality of life factors that make Bismarck-Mandan attractive to outside job seekers.

When asked about the greatest strengths of the local workforce, survey respondents overwhelmingly noted its work ethic, integrity, and reliability. When asked about the greatest weakness of the local workforce, there was less agreement. Some noted the low wages are an issue, other cited the supply of workers and worker skills.

The following entities comprise the key workforce development infrastructure in Mandan.

- **Job Service North Dakota:** Job Service North Dakota offers job seekers in Mandan professional development opportunities. The program connects businesses and qualified job seekers through the North Dakota Workforce Connection online labor exchange system. Employment seekers may attend

workshops and training sessions on job search techniques such as resume writing and job interviews. Job Service staff also guide potential applicants through career interest assessments and the overall job search process. Eligible youth under the Workforce Investment Act may also receive services such as GED preparation, occupational skills training, and summer employment opportunity projects. The North Dakota Workforce Intelligence System tracks the most current state labor market data. Job Service North Dakota's office nearest Mandan is located in Bismarck.

- **Career Conversations:** In the fall of 2008, Governor John Hoeven and the North Dakota Department of Commerce launched the Career Conversations program for North Dakota's high school students and their parents at Mandan High School. The initiative is a collaborative effort between the Department of Commerce, Career and Technical Education, the North Dakota Department of Public Instruction, Job Service North Dakota, and target industry business leaders to promote career opportunities in the state. Classroom students may participate in interactive webcam career conversations and workers in high-demand occupations that have a strong future in the state.
- **Bismarck State College Corporate and Continuing Education Division:** Located at the BSC's Mandan facility for its Industrial Maintenance Technology program, the Bismarck-Mandan Training Program includes computer training in word processing and database programs and technical training for maintenance, technology, and mechanical careers that are predominant in the region. The program also offers workplace development opportunities in strengthening communication, leadership, and problem-solving skills and quality management principles.
- **Bismarck-Mandan Young Professionals Network's Ambassador Program:** The Young Professional Network (YPN) is dedicated to recruiting other young professionals to the region's workforce. The Ambassador Program engages young professionals new to Mandan and Bismarck and assists businesses with the recruitment, retention, and development of a young, highly skilled workforce.
- **NDYCC Adult Education Program:** The North Dakota Youth Correctional Center in Mandan is also home to the Adult Education Program, one of the Department of Public Instruction's many Adult Learning Centers around the state. The program offers GED training, displaced homemaker support, and family, individual, and workplace literacy services.
 - **Displaced Homemakers Program:** The state legislature identified a growing population of homemakers who, through separation, divorce, death or disability of a spouse, or other hardship, were "displaced" in

middle age and in need of counseling, career guidance, and job training to fully integrate into the local workforce. The North Dakota Department of Public Instruction established Adult Learning Centers to provide this support, skill building and training, information, and referrals to displaced homemakers.

According to some business and industry leaders who participated in the public input process, there are local issues with labor force availability issues because unemployment rate is so low and labor force participation is so high. However, BMDA is involved in state-level talent recruitment efforts including "Experience North Dakota" to recruit former residents back in-state and its partnership with Monster.com to recruit workers with specific skill sets to North Dakota.

"Work ethic in region is very strong. I'd put Mandan's skill sets up against anyone. It's our biggest competitive advantage - the innovation and imagination of our employees."

INFRASTRUCTURE AND LAND USE

In today’s global economy, a community can create a competitive edge by developing and maintaining traditional infrastructure such as transportation and utilities, as well as information and communications infrastructure such as broadband and wireless services. In addition to affecting bottom line business costs, quality infrastructure (like highways and public transit options) impacts residents’ daily lives and can affect their overall satisfaction with the community. This section will examine Mandan’s roads and highway network, rail and air travel services, infrastructure, and land use patterns.

ROADS AND HIGHWAYS

Connections to major arterials are important because they provide workers greater job and housing options and are critical for the rapid and efficient movement of goods. Mandan is connected to other major metro areas via east/west Interstate 94 and north/south Highway 83. The following map shows Mandan-Morton County’s regional connections via interstates and state highways.

Mandan: Connections to Intestates and Highways



Because of its location and the nature of the Bismarck-Mandan economy, most of the region's consumer goods are imported by truck freight carriers. Both the City of Mandan and Bismarck are well served by major in-town thoroughfares that connect to I-94 and Highway 83.

The Bismarck-Mandan Metropolitan Planning Organization's (MPO) most recent regional transportation plan outlines three key recommendations for improving freight movement throughout the metro area. These include (1) continue development and preservation of a regional beltway, (2) study metropolitan rail relocation options, and (3) implement plans for construction of a North Plains Commerce Centre (NPCC). Since the plan was developed in 2005, NPCC has been constructed.

Road Improvement Plans and Initiatives

As required by the federal government, the MPO develops a regional transportation plan every five years. The *2030 Long Range Transportation Plan* identifies several priority projects and long-term actions for Mandan-Morton County including the following:

- Major long-range projects identified for Mandan-Morton County include an underpass and enhancements to Division Street, an interchange on I-94 and 24th Avenue, and paving and widening County Road 139A.
- Ten identified trail projects in Mandan-Morton County to allow pedestrians and cyclists greater recreational options and access to more community amenities.
- Priority corridors for planning, preservation, and enhancements include a northern bridge, Highway 1806 realignment, McKenzie Drive extension, 23rd Avenue/I-94 underpass, I-94 interchanges at Co. 82 Beltway and 29th Avenue, Boundary Street NW extension west, southern beltline and bridge corridor, Captain's Landing access, and 34th Street.

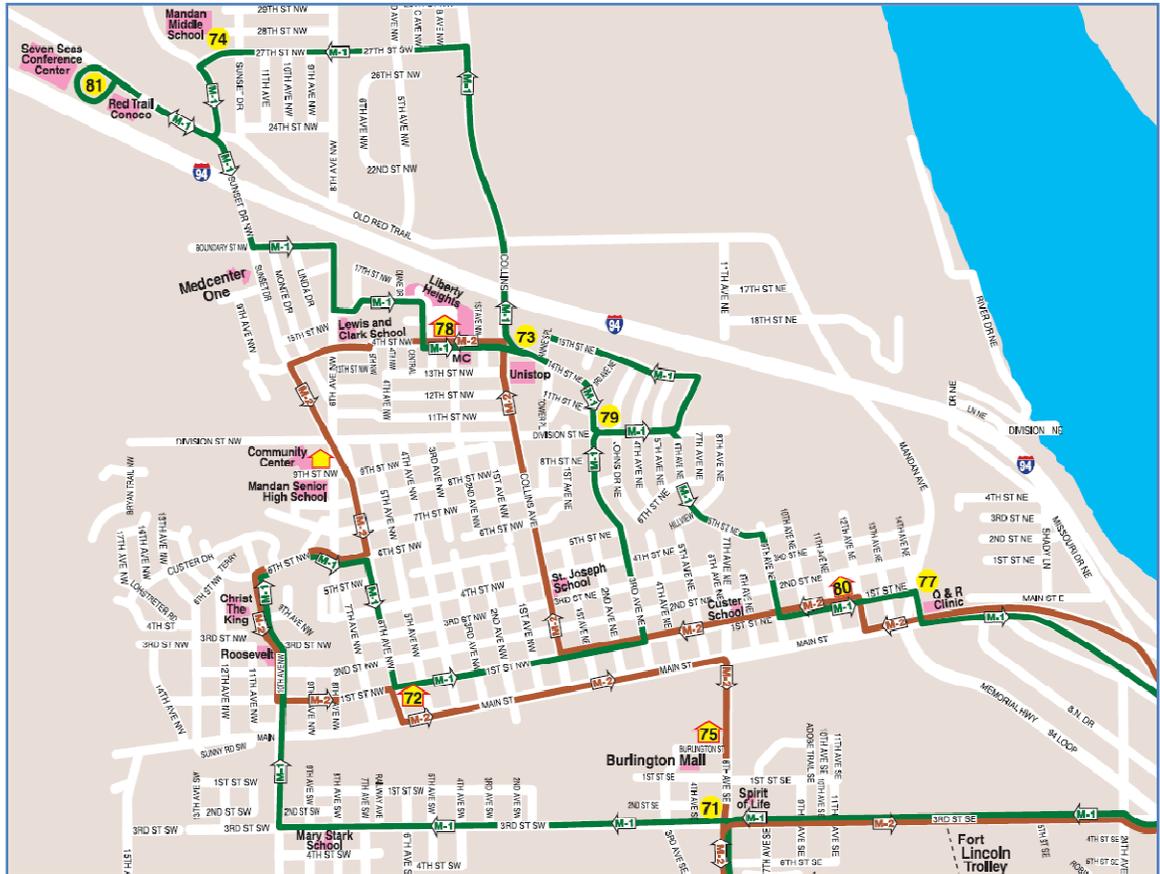
The MPO is currently developing and soliciting input for its next updated plan to be released in 2010.

Public Transportation

Until 2004, the metropolitan area had only been served by demand-response public transportation. Demand-response rides continue to operate 24 hours a day, seven days a week. Fares range between \$1.50 and \$12.00 depending on if locations are within Bismarck-Mandan city limits and the age and disability status of the rider.

In May 2004, a fixed route bus system called the Capital Area Transit System (CAT) began serving the region. CAT generally runs between 6:30am and 6:30pm. The fare for students, low-income residents, disabled riders, and the elderly is 75 cents per ride or \$20 for a 30-day pass, and \$1.25 per ride for adults or \$30 for a 30-day pass. The following map shows CAT's bus services within Mandan's city limits.

Mandan CAT Fixed Service Routes



Source: Capital Area Transit

AIR AND RAIL SERVICE

In 2005, the Bismarck Airport completed its new terminal. The updated facility added parking, faster security screening, and increased amenities for flyers. Bismarck Airport is currently served by three commercial airlines (United Express, Allegiant, and Northwest) which provide nonstop service to three major travel hubs: Minneapolis, Denver, and Las Vegas. With its merger with Northwest Airlines, Delta has announced it will also begin to provide service to Salt Lake City via Bismarck Airport.

According to Airports Council International, an organization which maintains statistics on airports worldwide, the Bismarck Airport passenger volume ranked 147th out of 181 commercial airports in North America serving 362,620 passengers in 2007. In terms of cargo movement, the airport ranked 142 out of 153 commercial airports with cargo service, moving approximately 97 metric tons of goods in the same years. While passenger service experienced slight growth between 2006 and 2007 (up by 0.5 percent), cargo service significantly declined (down by 17.2 percent). Because the region's population and economy continued to grow during this time, the change in cargo movements is likely due to shifts in modal usage.

The Mandan Municipal Airport is publicly owned by the Mandan Airport Authority and serves the City of Mandan and surrounding Morton County. Located four miles south of Mandan, the airport averages 22 flights daily, primarily for the purposes of local general aviation and transient general aviation. Bismarck Airport also provides services for general aviation users including hangaring, fuel services, flight training, aircraft sales, and repair and maintenance. It does not charge ramp or landing fees.

The City of Mandan is served by BNSF railroad; however, most rail activity is centered in Bismarck. Opened in 2006, the Northern Plains Commerce Centre is located adjacent to the Bismarck Airport and the Bobcat plant. It is operated by Mallory Alexander International Logistics. NPCC is a 243 acre industrial park with rail service (via BNSF and Canada Pacific) and access to I-94 and Highway 83. While NPCC already has many tenants, it still has construction ready sites available to accommodate future growth. It is part of BNSF's Premier Transload Facility Network, which provides combined services for customers including trucking, warehousing, inventory control, and transloading.

BNSF Premiere Transload Network



Source: BNSF Railroad

One of the region’s key competitive challenges is air travel into and out of area – flights and seats have diminished while costs have increased. One businessperson said lack of capacity at the Bismarck airport is a “\$20,000 competitive disadvantage.”

WATER AND SEWER

It goes without saying that businesses cannot operate effectively without adequate and reliable sources of water, power, and waste removal capacity. While many residents and businesses take for granted there will be consistent supplies of basic utilities, communities must never grow complacent about insuring that capacity exists to serve local businesses well into the future.

The City of Mandan has identified the need to make long-term capital investments in its water and sewer infrastructure in order to provide quality service and keep up with demand. Since 2000, citywide daily water consumption increased by 38 percent. Planned infrastructure upgrades include a \$8.6 million investment in a four-million gallon water reservoir and transmission line in south Mandan, an additional \$4.5 million for water treatment plant optimization, \$1.8 million for waste water treatment plant improvements to dispose of solid waste sludge, and \$1 million for a south side sanitary sewer force main.

To help finance these long-term infrastructure improvements, the City of Mandan has raised water and sewer rates. The new base rate has increased from \$8.00 to \$20.84 per month for commercial and industrial users, and from \$4.00 to \$10.42 per month for residential users. Commercial and industrial users generally produce a

higher demand for these types of services, thus their base rate is double that for residential users. The City plans on conducting a water rate analysis to determine the most equitable base rates by user group for the future.

Many input respondents said - and city officials acknowledged - that the need to upgrade Mandan's water and sewer infrastructure has led to local property taxes that are well above the regional average.

Broadband

Mandan-Morton County is served by three broadband internet providers: Midcontinent Communications, Earthlink, and HughesNet. Current, reliable statistics related to national broadband coverage are difficult to source. In North Dakota, many communities lack broadband service or have low bandwidth capacity. However, federal economic stimulus funding may help to expand and enhance services in the future.

LAND USE

The results of a CEOs for Cities survey of young professionals showed that college educated, 25-to-34 year olds place a high importance on quality of life aspects when considering where to live, including “a strong inclination to live downtown or close to downtown” and the desire to live somewhere where “they can connect with others and have meaningful social interactions.”² Thus, having vibrant, community areas are important to attracting young professional workers and often young families.

The online survey asked participants to rank items which may potentially be barriers to, or potential advantages for, the existing and future ability of the community to be successful. The vast majority of respondents feel that the City's ability to retain (75 percent agree) and attract (81 percent agree) young professionals is one of the City's biggest roadblocks to success. Only 29 percent of survey respondents feel that there are sufficient programs and amenities available for young people and young adults in the region.

Land and Building Availability

As was reported in the *Economic and Demographic Snapshot*, the City of Mandan grew by 1,018 residents since 2000, bringing its 2007 total population to 17,736 residents. Since this time, northwest and southeast Mandan have absorbed most of the community's new residential development. More specifically, in southeast Mandan, Lakewood has added 573 new units and the Plainview/Ft. Lincoln School area has added 240. In northwest Mandan, 250 new units have been constructed.

² CEOs for Cities. June 9, 2006. Survey of 1,000 25-to-34 year old, college educated men and women from diverse backgrounds and locations, conducted March 3-11, 2006.

Each year, the Bismarck-Mandan Development Association (BMDA) conducts a survey as part of its Business Retention and Expansion Program. A key finding of the 2008 survey revealed a perceived lack of industrial sites within the region. As such, BMDA and the City of Mandan worked together to develop an inventory list of developable industrial properties that (1) are currently zoned for industrial development or agricultural use, (2) have been identified for industrial development by the region’s future land use plan, and (3) have access to a major roadway. Ten privately-owned sites (totaling just approximately 1,000 acres) were identified, of which at least five have owners who are willing to sell.

BMDA also recently conducted a review of potential retail-oriented sites in Mandan, identifying two key areas for potential retail locations – southeast Mandan, and the I-94 corridor. The following table summarizes some of the basic information related to these areas.

Key Areas for Potential Retail Locations in Mandan

	SE Mandan	SE Memorial Highway	I-94 East	I-94 Central	I-94 Terra Valle
Total Size	33.89 acres	65.57 acres	74.07 acres	97.01 acres	73.9 acres
Number of Parcels	3	9	3	4	6
Number of Owners	3	9	3	4	6
Utilities on Site	Yes	No	Yes	Yes	Yes

Source: BMDA

Some stakeholders cited the need for the City to develop an industrial park to have a ready stock of developable sites and buildings. Others have suggested that the community develop a research park focused on technology and energy - potentially in partnership with the University of North Dakota’s Energy and Environmental Research Center. It has been suggested that the community’s agricultural heritage and economic base would be a natural fit with such a venture.

Among stakeholders in the business community who have had experience working the City of Mandan, most feel that the City is extremely business friendly. Permits and zoning inquiries are always processed or responded to in a timely manner. Most feel that City staff members want to work with - not against - the development community. There is not the perception that the City is bogged down with “red tape.”

Members of the community’s agribusiness community noted that agriculture as a business cluster is not greatly supported by local economic development entities. As residential development encroaches on agricultural land and industry assets (like the Kist Livestock Auction), many agribusiness owners and stakeholders wonder if regional leaders are committed to maintaining this sector of the economy in the long-term. Members of the agribusiness community - and many residents at large - would support a focused, comprehensive land use plan. However, it is difficult to gain consensus about guiding

development outside of the City's limits. The City has "extra jurisdictional zoning rights" two miles outside of City limits. So, its elected leaders are making decisions related to land use in areas where constituents cannot vote.

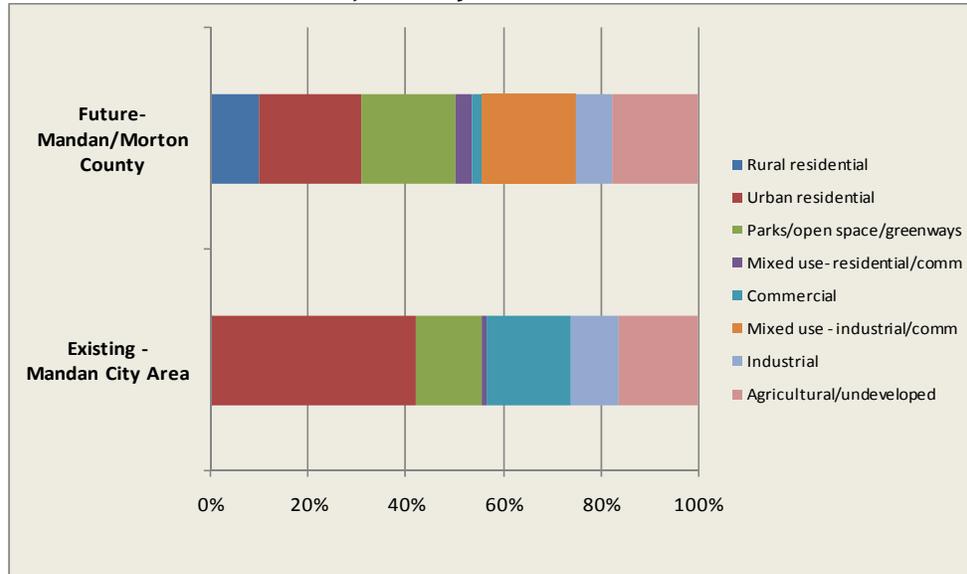
Future Planned Development

The map on page 32 shows preferred future land use patterns, as identified by the *Bismarck-Mandan Regional Land Use Plan* developed through extensive analysis and public input from the MPO. The purpose of the Plan is to establish a common vision for land use patterns so that regional leaders can make more informed decisions related to long-term infrastructure, transportation, and land use needs.

It is hoped that future development patterns will differ from current trends in the following ways: expansion of "rural residential" development and parks/open space, and the expansion of commercial development through the integration of increased mixed uses for industrial/commercial and residential/commercial developments. The following chart compares current and future land use by type. Notice that current land use studied by the MPO included the City (3,570 acres), while future land included the entire County (47,087 acres). This is a helpful graphic because it shows that the community is striving to grow in a way that maintains its rural character, which is attractive to many current and potential future residents, while also accommodating for growth in its commercial and industrial economic bases.

Key areas for commercial development, as identified by the City, include downtown (for niche businesses and professional services), Memorial Highway/East Mandan (for big box retail and neighborhood convenience retail), and I-94/North Mandan (for travel-oriented, big box, and land-intensive retail).

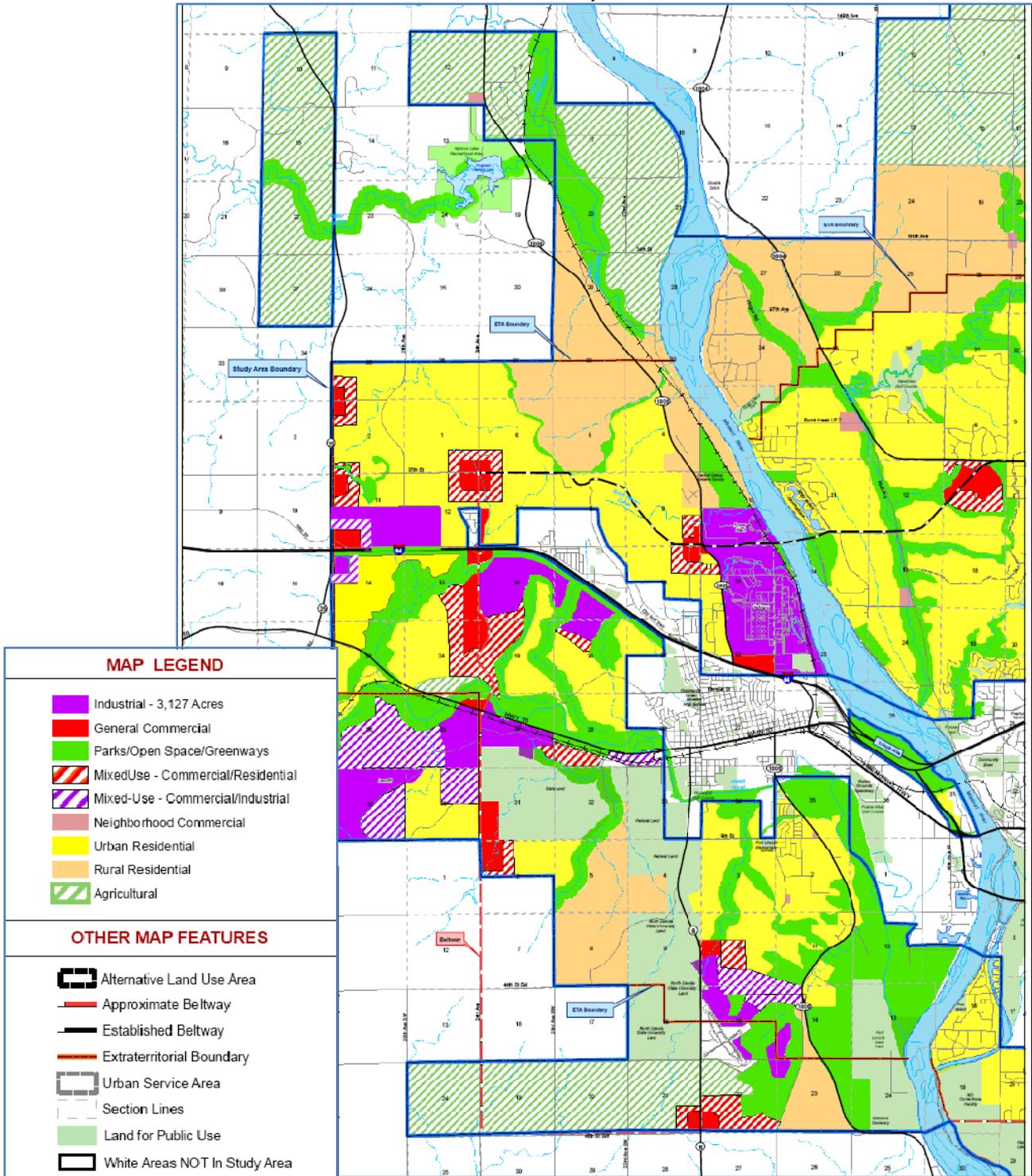
**Current and Future Land Use by Type, City of Mandan and Morton County,
(As a percentage of total land area)**



Source: Bismarck-Mandan MPO, *Bismarck-Mandan Regional Future Land Use Plan*
 Note: Land use for Transportation and Infrastructure is not included.

Focus Group Participant Comment: Our ultraconservative approach to long-range planning and investment (or lack thereof) in infrastructure has hurt us and driven up property tax rates.

Mandan-Morton County Future Land Use Plan



Source: Bismarck-Mandan Metropolitan Planning Organization

The City is examining the feasibility of potential developments to enhance the community's commercial base including downtown parking and an events center. Because many surface parking lots which are currently used by those who work Downtown are slated for development, the City plans to conduct an analysis of the downtown parking situation. The study will begin in March 2009 and will likely be completed by the August 2009. It will assess current parking inventory, current usage, future needs, and estimate demand according to redevelopment progress and increasing downtown occupancy rates.

Additionally, after conducting a survey to gauge support for the concept, the City recently completed a feasibility study to consider the possibility of developing a mid-size event facility to complement (not directly compete with) Bismarck's Civic Center. A location Downtown was considered; however, acquiring the parcels to accommodate the facility and ample parking may be cost prohibitive. An alternative site on the I-94 Corridor was identified and determined to be most feasible if coupled with private business development, including a combination of retail, lodging, and eating establishments. Possible identified uses include athletic events, flat-floor exhibition events, equestrian/agricultural events, motorcross/motorsporting events, small concerts, conferences, and meetings. Stakeholders commented that the need to provide and fill roughly 100,000 square feet of retail is a challenge that may ultimately derail the development of the events center.

Finally, the City has placed increased focus on broadening retail and restaurant choices in Mandan. According to a 2008 survey, residents would most like to see the following types of retail development in Mandan in the future:

- General discount merchandise (Target, Wal-Mart, K-Mart, etc.)
- Restaurants (specifically casual dining, Italian, fast food, and 24-hour breakfast establishments)
- Hardware/home improvement
- Sporting goods stores
- Clothing/department stores

One of the most popular phrases heard throughout the public input process was, "You can't buy socks in Mandan." Some people feel that increasing local retail options would improve quality of life by augmenting the scope of amenities in Mandan while also helping to expand the sales tax base. Others feel that crossing the river for everyday items - like socks - is acceptable. What Bismarck does not have is an "old town" - with bars, music, and "funky shops" - and this could be Mandan's niche.

BUSINESS COSTS AND SUPPORT CAPACITY

The Bismarck-Mandan metro area has been ranked among the best small places for business and careers by both *Forbes* and *Inc. Magazine*. Companies carefully consider the cost of doing business in a locality before relocating, expanding or starting a new enterprise. Every business must factor in the cost of real estate, utilities, labor, and taxes into their growth plans. Knowing this, local governments can focus on the best way to provide support to their business communities. Businesses of various sizes and scope need different support mechanisms. This section discusses both the cost of doing business and the types of support offered at the local level.

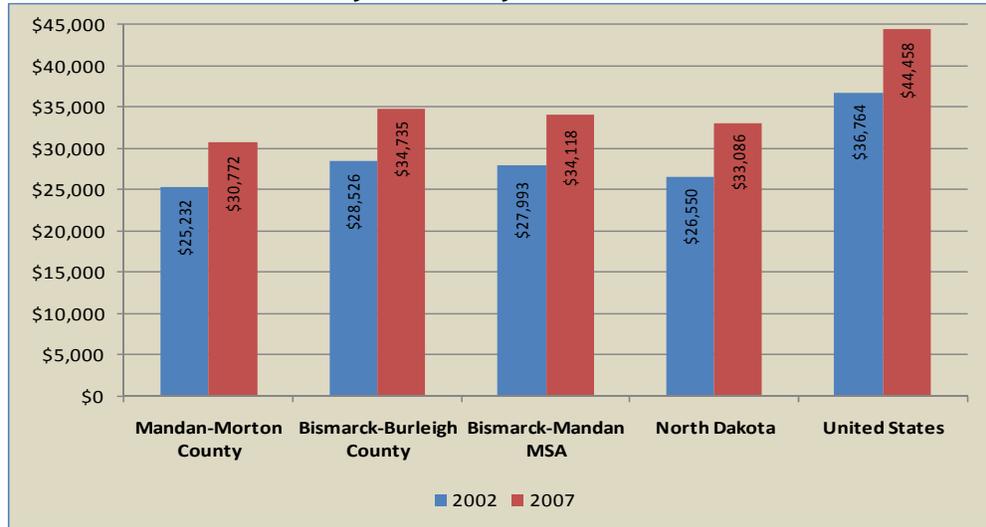
Online survey participants who expressed lower confidence in remaining in the community in the long-run cited the following reasons: lack of job opportunities in professional occupations, high taxes, climate, cost of living, and lower wages. Many communities in the Great Plains confront similar issues.

LABOR COSTS

Average wages can be a double-edged sword in community and economic development. On one hand, employees want higher wages to raise their standard of living. On the other hand, businesses want lower wages to maintain profitability and competitiveness. Viable communities are those where wages are balanced between the interests of both workers and businesses. Mandan-Morton County's average annual wage has lagged behind metro, state, and national averages.

In 2007, Mandan-Morton County's average annual wage was \$30,772 compared to \$33,086 for the state and \$44,458 for the nation. While the annual wage grew at a rate consistent with Bismarck-Burleigh County and the rest of the MSA (22 percent), and slightly faster than the national wage growth rate (20.9 percent), North Dakota still increased more rapidly (24.6 percent).

Average Annual Wage, 2002 and 2007



U.S. Bureau of Labor Statistics

Examining wages by occupation can shed light into the competitiveness of local labor costs; however, this data from the U.S. Bureau of Labor Statistics is only available at the metropolitan level. In median hourly wages, the Bismarck-Mandan MSA generally surpasses the state but still falls behind the national median. Production and farming, fishing, and forestry occupations are the only fields where Bismarck-Mandan exceeds the United States. Because of Mandan’s position within a growing metropolitan area with a highly diversified regional economy, its lower labor costs compared to national wage averages are a key competitive advantage.

Median Hourly Wages by Occupation, 2007

	Bismarck-Mandan MSA	North Dakota	United States
Management occupations	\$38.65	\$32.61	\$46.22
Business and financial operations occupations	\$25.31	\$22.26	\$30.01
Computer and mathematical occupations	\$22.46	\$20.31	\$34.71
Architecture and engineering occupations	\$26.84	\$25.33	\$33.11
Life, physical, and social science occupations	\$23.95	\$21.91	\$29.82
Community and social services occupations	\$17.48	\$17.18	\$19.49
Legal occupations	\$33.86	\$23.93	\$42.53
Education, training, and library occupations	\$19.01	\$18.36	\$22.41
Arts, design, entertainment, sports, and media occupations	\$16.63	\$13.70	\$23.27
Healthcare practitioners and technical occupations	\$26.87	\$22.14	\$31.26
Healthcare support occupations	\$11.42	\$10.89	\$12.31
Protective service occupations	\$16.15	\$15.52	\$18.63
Food preparation and serving related occupations	\$8.70	\$6.53	\$9.35
Building and grounds cleaning and maintenance occupations	\$10.75	\$9.51	\$11.33
Personal care and service occupations	\$9.58	\$8.67	\$11.53
Sales and related occupations	\$13.91	\$9.73	\$16.94
Office and administrative support occupations	\$13.22	\$11.92	\$15.00
Farming, fishing, and forestry occupations	\$11.04	\$11.16	\$10.89
Construction and extraction occupations	\$15.71	\$16.01	\$19.53
Installation, maintenance, and repair occupations	\$18.63	\$17.19	\$19.20
Production occupations	\$15.35	\$13.63	\$15.05
Transportation and material moving occupations	\$12.30	\$12.88	\$14.75
All Occupations	\$16.52	\$13.25	\$19.56

Source: U.S. Bureau of Labor Statistics

Note: Data were not available at the county level.

ENERGY COSTS

An important concern for many industrial and manufacturing businesses is the local cost of energy. Profit margins of high-volume power users can be significantly affected by fluctuating rate scales, enough so that companies may choose to relocate to a lower-cost community (or pass a community over, in the case of a firm conducting a site search) if rates are non-competitive. Due to Mandan's proximity to the western North Dakota lignite coal mines, power costs are comparatively less expensive and more abundant than in other regions of the country. Commercial power costs in Mandan-Morton County increased more slowly than in Bismarck-Burleigh County and remain more affordable.

Commercial Power Costs, 2002-2006 (cents per kilowatt hour)³

	2002	2006	2002-2006 Change	
			Amount	Percent
Mandan-Morton County	\$0.061	\$0.066	\$0.005	7.4%
Bismarck-Burleigh County	\$0.062	\$0.068	\$0.006	9.4%

Source: U.S. Department of Energy, Energy Information Administration

The industrial power rate declined significantly in Bismarck-Burleigh County over the four years analyzed, while Mandan-Morton County industrial power costs grew at a steady rate. However, Mandan-Morton’s costs still remained lower than Bismarck-Burleigh County’s in 2006.

Industrial Power Costs, 2002-2006 (cents per kilowatt hour)⁴

	2002	2006	2002-2006 Change	
			Amount	Percent
Mandan-Morton County	\$0.050	\$0.052	\$0.002	4.9%
Bismarck-Burleigh County	\$0.061	\$0.054	-\$0.007	-9.0%

Source: U.S. Department of Energy, Energy Information Administration

Fuel costs have seen roller-coaster highs and lows in the past year. Gas prices leapt toward all-time highs over the majority of 2008, peaking in June, but began dropping significantly by September. However, prices have begun again to grow slowly since their lowest point in December 2008.

Average Regular Gas Prices, February 2008 and 2009

	February 2008	February 2009	1-Year Change
Bismarck-Mandan MSA	\$3.15	\$2.00	-36.5%
North Dakota	\$3.18	\$1.95	-38.6%
United States	\$3.14	\$1.91	-39.2%

Source: AAA Daily Gauge Fuel Report

INCENTIVES

Provision of incentives has become a prominent component of economic development strategies throughout the U.S. They can come in many different forms, and are typically presented as a variety of benefits offered by local and state government to businesses they are hoping to lure to their communities. While some types of incentives are seen as more effective than others, they have nonetheless

³ Cost is calculated by weighing kWh rates for the respective utilities by number of customers, then totaled at the regional, metro and state levels. Cents per kilowatt-hour (kWh) is calculated by dividing revenue (thousand dollars) by sales (megawatt-hours).

⁴ Ibid.

become an integral part of business and industry recruitment, and can also be used to support small and other existing businesses interested in growing locally.

Local incentives available in Mandan-Morton County include:

- **Mandan Growth Fund:** For businesses hoping to locate to or expand in Mandan, the city sales tax-supported Mandan Growth Fund provides a variety of assistance and individually-tailored financing incentives and exemptions, such as interest buy downs, grants, equity positions, and reduced interest loans.
- **Mandan Renaissance Zone:** Established in 2005, the Mandan Renaissance Zone program provides tax incentives for the revitalization of residential and commercial properties within the specified 25 block area on the south side of Main Street. Significant improvements to homes and businesses in the zone may be eligible for property tax exemptions as well as up to five years of state income tax exemptions on income derived from the project. Currently, private investments totaling \$4.7 million are committed to 33 projects that rehabilitate, expand, and construct 19 buildings in the Mandan Renaissance Zone. This initiative is managed by the Bismarck-Mandan Development Association and the City of Mandan.
- **Storefront Improvement Program:** The Storefront Improvement Program offers forgivable loans as a dollar for dollar (up to \$10,000) to small existing businesses for building façade improvements such as doors and windows, signage, and awnings. The program began in 2006 through the Mandan Growth Fund for central business district improvements.
- **Community Development Loan Fund (CDLF):** Mandan is eligible to receive funds to finance infrastructure for economic development or equity for job creation projects through the CDLF, allocated by from the Community Development Block Grant Funds through the Lewis and Clark Development Council (LCRDC).
- **Industrial Revenue Bond (IRB):** The City of Mandan may lend its name to sell Municipal Industrial Revenue Bonds to help fund an industrial or economic development project. Taxable IRBs have no restrictions on use or the amount issued, while tax-exempt IRBs are issued to finance land and depreciable property for manufacturing facilities. The maximum tax-exempt IRB amount is \$100,000; these are sold at a lower interest rate since the interest earned is exempt from federal income tax.
- **Mandan Revolving Loan Fund:** Through city sales tax revenue and a USDA Rural Development loan, Mandan created a \$1 million fund for business

startup, expansion, and retention in the City and its ten mile radius in Morton County. The low-interest loans are administered by the LCRDC.

- **CAPITAL Funds:** Firms in Mandan and its surrounding rural areas looking to strengthen, create, or retain jobs and businesses may receive flexible and accessible loans of up to \$150,000 from the LCRDC, primarily in the form of gap financing.
- **Strategic Partners:** Many local utility service providers will negotiate favorable terms, grants, and conditions for new or expanding companies, in partnership with the Bismarck-Mandan Development Association.

Additionally, the Bismarck-Mandan Development Association's January 2009 report *Review of Potential Retail-Oriented Sites in Mandan* outlines potential incentives the City should consider to promote retail development. The City has studied and/or implemented several of these including property tax abatements, tax increment financing, local fee waivers, and a revolving loan fund.

Strong support was voiced by input participants for the provision of the TIF tool as a local incentive. Stakeholders also praised existing Mandan incentives as being a key reason why certain businesses chose to expand in the city.

A number of business incentives are also available through state level agencies. The Bank of North Dakota, the only state-run bank in the nation, offers a variety of financing opportunities to promote the development of industry, business, and agriculture in the state as well as providing student loans. Through programs such as the Business Development Loan Program, New Venture Capital Fund, Beginning Entrepreneur Loan Guarantee, MATCH, Partnership in Assisting Community Expansion (PACE) Fund, the Bank supports new and existing businesses in both general and targeted sectors that will in turn develop and diversify North Dakota communities.

The North Dakota Development Fund, through the state Department of Commerce, offers gap financing to any primary-sector business, with the exception of production agriculture. Gap financing, not available from most conventional lenders, is made possible through loans and equity investments.

The State of North Dakota provides exemptions in corporate income tax, property tax, and sales tax on computer and telecommunications, manufacturing, and agricultural processing plant equipment for new and expanding businesses in most sectors. Certain oil and gas refineries may also be eligible for personal property tax exemptions. Credits for wages and salaries, seed capital investment, research expenses, agricultural commodity processing facility investment, and biomass, geothermal, solar, and wind energy are available to eligible individuals, estate, trusts, partnerships, corporations, and limited liability companies.

According to several community input participants, self-perception in Mandan holding it back from making bold decisions or being aggressive. Many think Mandan’s leaders need to “get over” the bias against Bismarck and make real efforts to promote regionalism. Further, several people stated that the perception that regional economic development agencies favor Bismarck over Mandan diminishes the latter’s growth prospects.

TAX RATES

Another key business cost that consistently ranks high on companies’ priority location concerns is the local tax climate. Communities with anti-competitive tax structures risk driving away companies that are already located in the area and scaring off prospect companies that commonly select from a number of communities, many with highly competitive tax rates.

The following table shows state tax rates for North Dakota and nearby states. The corporate income tax structure in North Dakota is relatively favorable to small businesses with low taxable income. The highest tax rate bracket for corporate income is still lower than the lowest rate for Montana and Minnesota. However, the neighboring states of South Dakota and Montana are more competitive in their lower or non-existent individual income and sales and use taxes.

State Tax Rates, 2009

	North Dakota	South Dakota	Montana	Minnesota	Nebraska
Individual Income Tax	2.1-5.54%	None	1.0-6.9%	5.35-7.85%	2.56-6.84%
Corporate Income Tax	2.6-6.5%	None	6.75%	9.8%	5.58-7.81%
Sales and Use Tax	5.0%	4.0%	None	6.5%	5.5%
Sales Tax Exceptions	Groceries and prescription drugs	Prescription drugs	N/A	Groceries and prescription and non-prescription drugs	Groceries and prescription drugs

Source: Federation of Tax Administrators

Property taxes are a key factor contributing to relocation decisions. The North Dakota League of Cities recently ranked the state’s cities by consolidated levy – or the combined tax levy for county, school, city, and park district shares – for 2008 and payable in 2009. As shown in the following chart, Mandan ranks fourth highest among the state’s 12 largest cities. However, it is important to note that the City’s consolidated levy has decreased two years in a row from 504 in 2007 and 522 in

2006. The City has absorbed much of the decrease to help offset property valuation increases.

Consolidated Mill Levies for North Dakota's Largest Cities, 2008

Rank	City	Mills	Rank	City	Mills
1	Devils Lake	521.53	7	Fargo	455.53
2	Jamestown	511.53	8	West Fargo	441.38
3	Wahpeton	502.91	9	Williston	427.86
4	Mandan	497.61	10	Dickinson	424.75
5	Grand Forks	472.72	11	Minot	421.27
6	Valley City	471.67	12	Bismarck	400.61

Source: North Dakota League of Cities

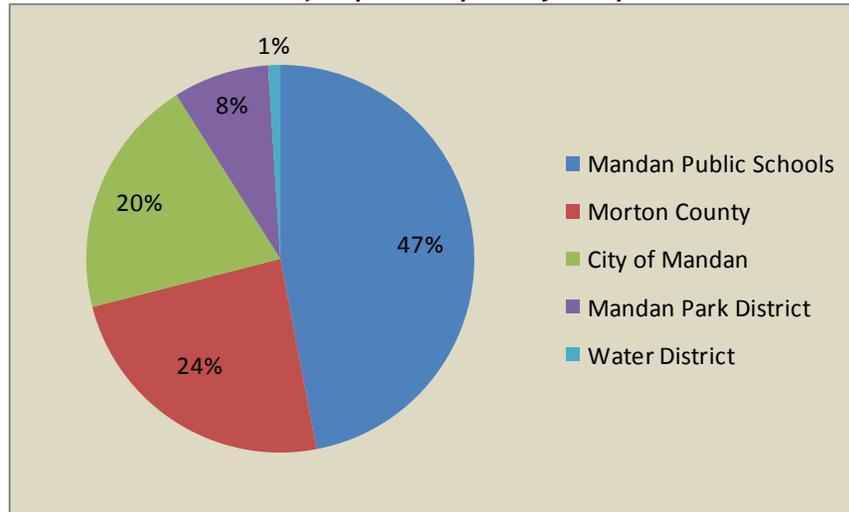
The online survey asked participants to rank items which may potentially be barriers to, or potential advantages for, the existing and future ability of the community to be successful. 55 percent of respondents feel that the City's tax climate is a major barrier to Mandan's future growth and development.

The City of Mandan follows a standard, accepted process to evaluate the property's *market value*. From this figure, the *assessed value* is calculated by dividing the market value in half. The *taxable value* is then calculated by multiplying the assessed value by nine percent for residential properties and ten percent for commercial properties. The taxable value is then multiplied by the mills levied to determine how much property tax is owed. An example is outlined below.

- True and full value = \$150,000
- Assessed value (50% of \$150,000) = \$75,000
- Taxable value (residential, \$75,000 X .09) = \$6,750
- 2008 Taxation (\$6,750 X .49761) = \$3,359

In 2008, the City of Mandan collected \$3.58 million in property taxes and \$8.04 million total in all taxes (property, sales, occupancy, and restaurant and lodging) and special assessments. The following chart shows the share of property taxes received by each entity in 2008.

Share of Property Taxes by Taxing Entity, 2008



Source: City of Mandan

There's a "catch-22" in Mandan – growth is needed to lower property taxes, but making investments in competitive development capacity could increase property taxes in the short term, so many residents and elected officials are hesitant to advocate for certain of these investments.

ENTREPRENEURSHIP AND SMALL BUSINESS RESOURCES

Individuals who start and grow small businesses are the third lynchpin of local economic success, complementing companies recruited from outside the community and jobs retained and expanded at existing firms. Providing the resources and support necessary to enable entrepreneurs and small-business people to effectively launch and sustain companies is a necessary and vital component of local economic development programming. Mandan's entrepreneurial and small business support services and entities include:

- **Bismarck-Mandan Chamber of Commerce Business Academy:** The Chamber is in conversation with Bismarck State College, the University of Mary, and the Small Business Development Center to partner for the creation of a Business Academy. The Business Academy would begin in the fall of 2009, offering courses in basic small business skills such as marketing, bookkeeping, human resources.
- **North Dakota Small Business Development Center (NDSBDC):** The NDSBDC provides research, counseling, and training for small businesses throughout the state. Services include one-on-one consulting in business plan creation, finance and budgets, purchasing or selling a business, funding, and

loans. The NDSBDC is a partnership of the University of North Dakota, the U.S. Small Business Administration, and the state Department of Commerce. Mandan's nearest regional NDSBDC office is in Bismarck.

- **Dakota Manufacturing Extension Partnership (MEP):** In partnership with the NDSBDC and the SBA, the Dakota MEP offers up to eight hours of complimentary consultation for small- to mid-size manufacturing businesses. This counseling may include discussion of topics such as start-up issues, implementing ISO and quality control guidelines, inventory control, marketing, management issues, and efficient workplace organization. The Dakota MEP is located in Bismarck.
- **City of Mandan Business Development Office:** This Department works to grow employment and investment in targeted business areas including industrial, manufacturing, technology, retail and service sectors. Through the administration of business services, recruiting, and incentives, Mandan's Business Development Office serves many small businesses and strives to enhance the base of businesses within the community.
- **Bismarck-Mandan Development Association (BMDA):** The BMDA is the primary vehicle for business recruitment services within the region. Through its partnership with the City's Business Development Office and the LCRDC (see below), it connects small businesses with development incentives including the storefront improvement program, the Mandan Growth Fund, and the revolving loan program.
- **Lewis and Clark Regional Development Council (LCRDC):** The LCRDC serves the state's 10-county south-central area with lending, grant, and technical assistance programs to promote community and economic development. It administers a \$1 million revolving loan fund to aid in the retention and expansion of existing businesses and the development of new businesses as well.
- **SCORE:** The Bismarck-Mandan metro area is served by a local chapter of the Service Corps of Retired Executives (SCORE). SCORE is a non-profit organization and a partner of the SBA which lends free counseling to local businesses. Volunteers assist small business persons in the areas of writing a business plan, developing a small business advisory board, investigating market potential for a product or service, assessing business start-up capital needs, and cash-flow management.
- **New Venture Capital Fund:** The Bank of North Dakota will invest up to \$300,000 in a variety of technologies and types of businesses with appropriate capital structures for early stage companies that demonstrate

completed product development and market acceptance substantiated by growing sales.

- **Beginning Entrepreneur Loan Guarantee Program:** Another program of the Bank of North Dakota, this assists businesses in start-up financing through an 85 percent loan guarantee to a financial institution borrowing to a North Dakota resident who meets specific criteria.
- **Small Business Administration 504 Loan Program:** To create and retain jobs in North Dakota, the U.S. Small Business Administration (SBA) provides businesses with long-term, fixed-rate financing for real estate and equipment. Participants may receive up to 40 percent of the total project costs, typically between \$50,000 and \$4,000,000, with remaining fund requirements obtained from local lending. The SBA Regional Office for North Dakota is located in Fargo.
- **Seed Capital Investment Credit:** Income tax credits equal to 45 percent of the investment are granted through the Division of Economic Development and Finance of the North Dakota Department of Commerce to persons or firms investing in a qualified primary sector business. The first \$500,000 of eligible investments in a certified business is eligible for the tax credit.
- **University of Mary I.D.E.A. Center:** The IDEA Center was born out of a business professor's desire to expand learning opportunities for his students, as well as a local business owner's drive to foster economic development through entrepreneurship. The center is intended to support fledgling entrepreneurs and established business owners in their attempts to start and grow small businesses. University of Mary students assist in the development of business plans, marketing strategies, competitive analysis and other support functions.

The lower average earnings for Mandan non-employers compared to those in the Bismarck-Mandan metro area and the state, as cited in the *Economic and Demographic Snapshot*, may be a result of the fewer locally-based entrepreneur and small business development resources available exclusively to Mandan and Morton County sole proprietorships.

ACCESS TO BUSINESS CAPITAL

The resources available to finance a new business or expand an existing one impact a community's ability to create jobs. A wide variety of financing methods must be available to serve the needs of all types of entrepreneurs and business owners, from the small home-based business to the high-risk, high-growth start-up venture. In the

world of economic development, ensuring that financing methods are available to meet the needs of local businesses is vital to promoting economic growth.

Under the Community Reinvestment Act, commercial and savings banks having at least \$250 million in assets must report their small business lending activity. As shown in the following table, the number of loans granted to Mandan-Morton small businesses is slightly less per capita than for Bismarck-Burleigh. The average loan amount is also lower for Mandan. Small businesses in the Bismarck-Mandan MSA still receive, on average, significantly lower loan amounts than do businesses in the rest of the state of North Dakota. The highest average loan amounts in North Dakota are in metro areas with the presence of a major state university. Bismarck-Mandan’s absence of a four-year public higher learning institution could play a role in its scarcity of small business funding, investment, and incubator activity.

Small Business Lending Activity of Commercial and Savings Banks, 2007

	# of Loans	Total Amount	Avg. Loan Amount
Mandan-Morton County	1,368	\$24,637,000	\$18,010
Bismarck-Burleigh County	4,197	\$91,654,000	\$21,838
Bismarck-Mandan MSA	5,565	\$116,291,000	\$20,897
North Dakota	39,557	\$1,351,649,000	\$34,170

Source: Federal Financial Institutions Examination Council

Most community input respondents expressed pride in Mandan’s employers, noting that the business community can truly play a role in helping this visioning process take root. However, both the private and public sectors must “pony up” and make investments in making the vision a reality.

QUALITY OF LIFE

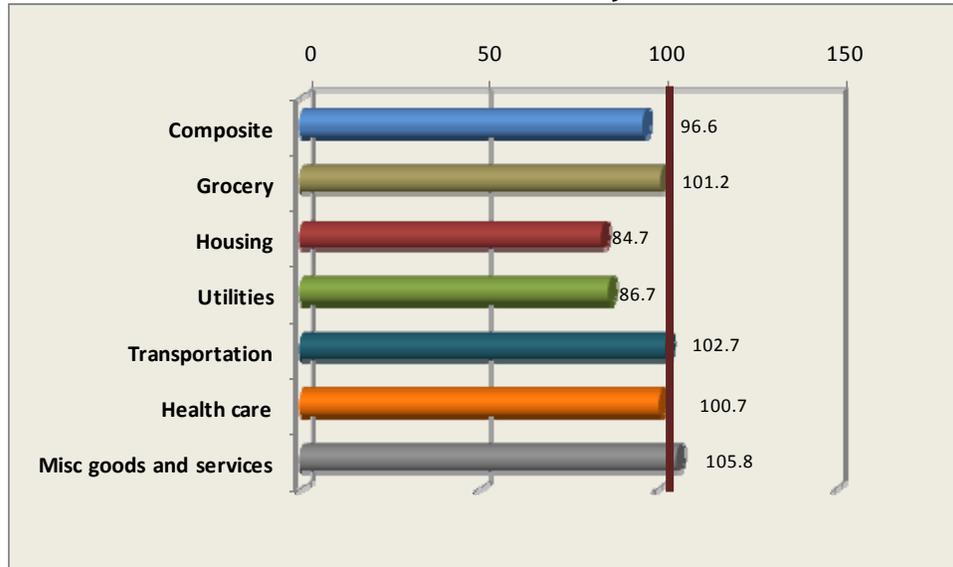
Quality of life is a subjective term that means different things to different people. In general, quality of life includes factors like location; cost of living; community safety; access to recreational and cultural amenities; and overall “livability.” Because businesses and workers are more mobile than ever, quality of life is increasingly an important factor for economically competitive communities. This section examines some of these concepts and their implications on Mandan-Morton County’s competitiveness as a place to live, work, and grow.

COST OF LIVING

A cost of living (COL) index provides more information about how expensive it is to live in a community or region because it considers not only home values, but also the cost of groceries, utilities, transportation, health care, and miscellaneous goods and services. The COL index can affect relocation decisions and a household’s standard of living when moving to a new community. National data sources are helpful for evaluating and comparing the cost of living relative to the national average, typically represented by the index value of 100. C₂ER (formerly ACCRA), a national community and economic development research organization, publishes quarterly cost of living indices for metropolitan communities across the nation. While the data provide some indication about the cost of living differences between regions, they do not provide direct comparison of actual costs in metro areas.

The following table shows the COL for the Bismarck-Mandan metro area in 2008. Overall cost of living is below the national average, due to comparatively lower prices for housing and utilities; however, local households are more likely to spend slightly more on groceries, transportation, and miscellaneous goods and services compared to the average American household.

Bismarck-Mandan MSA: Cost of Living Index, 2008



Source: The Council for Community and Economic Research
(100=National Average)

Percentage each category contributes to overall cost of living: Total (100%), Grocery (13%), Housing (28%), Utilities (10%), Transportation (10%), Health care (4%), and Miscellaneous good and services (35%).

HOUSING

For a community to be economically competitive, it must have housing that is both affordable and attractive to its workforce. Because regional economies have workers of all pay scales, it is important to have housing options to suit the needs of all types of workers, families, and individuals.

The following table shows average home sale prices, furnished by the North Dakota Housing Finance Agency and the North Dakota Association of Realtors. Not only does the Bismarck-Mandan market boast higher home values compared to other major metros in North Dakota and statewide, but average sale prices have increase by 22 percent in two years compared to ten percent statewide. These trends are typical of regions which are experiencing population and wage growth, as housing stock options diversify.

Data provided by a local realtor shed light on housing dynamics within the region. In 2008, the average single-family home sale price in Mandan was \$146,000 (average days on market: 64) compared to \$178,000 in Bismarck (average days on market: 68). As of February 2009, Mandan has 88 homes on the market while Bismarck has 238. Detached single-family style housing is the most popular housing type in the region. For every condo or townhouse that sold in Mandan in 2008, 5.5 single-family homes were sold; in Bismarck this figure is 3.45, indicating that Bismarck has a larger stock of condos and townhomes.

Average Home Sale Price: Major Metros, 2007

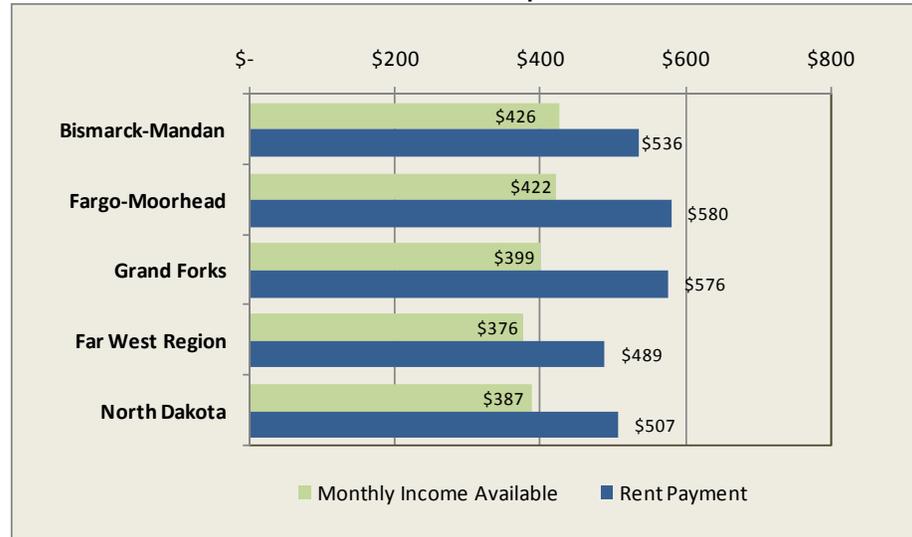
	2007	2-year Growth
Bismarck-Mandan	\$162,068	22%
Fargo-Moorhead	\$156,322	6%
Minot	\$114,785	7%
Grand Forks	\$140,881	7%
North Dakota	\$142,159	10%

Source: *The State of Affordable Housing in North Dakota*, North Dakota Housing Finance Agency utilizing data by the North Dakota Association of Realtors

The City of Mandan offers a two-year tax abatement for first-time home buyers on the first \$75,000 of the value of their home. Many residents who participated in the public input process noted this, along with the quality of Mandan’s schools, were key factors influencing their decision to settle in Mandan.

The North Dakota Housing Finance Agency also estimates rental availability throughout the state based on an entry-level worker’s income (this analysis used local wages for cashiers), fair market rent for a two-bedroom apartment, and the assumption that a household can afford to spend 30 percent of its income on housing. Disparities between entry-level wages and the cost of rent occur statewide; however, the local wage gap is smaller compared to the other studied housing markets and the state. In Bismarck-Mandan, a cashier’s wages are 79 percent of the amount needed to afford a two-bedroom apartment compared to 77 percent in the Far West, 76 percent statewide, 73 percent in Fargo, and 69 percent in Grand Forks. As the real estate market continues to appreciate, maintaining the community’s stock of affordable housing may become a challenge for Mandan’s next generation of leaders.

Rental Affordability, 2007



Source: *The State of Affordable Housing in North Dakota*, North Dakota Housing Finance Agency
 Note: The Far West Region includes the western North Dakota counties of Adams, Billings, Bowman, Divide, Dunn, Golden Valley, Hettinger, McKenzie, Slope, Stark and Williams.

Mandan reportedly has a negative stereotype amongst Bismarck residents. One newcomer to the region was told by a coworker, “Why would you even go over there (to Mandan)?” According to Bismarck residents participating in public input, some of this negativity stems from the history of downtown bars and strip joints. However, many noted that this perception is changing somewhat as new subdivisions are built in Mandan. Others noted that a greater number of stories covering Mandan’s local news in the Bismarck Tribune would help to increase understanding of the community.

Two Bismarck residents also commented that real estate agents had advised them not to live in Mandan, insisting that they only look at properties in Bismarck. A number of other input participants noted that they have heard many similar stories from friends and colleagues.

HEALTH CARE

Accessibility to quality health care services is one of the most important factors affecting a community’s overall quality of life and competitiveness. Two useful measures that give indications of the comprehensiveness of health care services available in a community are physicians per capita and the percent of uninsured residents. As shown in the following table, although Mandan has a slightly higher number of uninsured residents (10.1 percent) compared to Bismarck (8.8 percent), its rate is lower than the state (12.7 percent) and the nation (17.2 percent). While it has a lower amount of physicians per capita compared to the state and the nation, this is typical of “bedroom communities” that rely on some services offered in nearby big cities.

Health Care Accessibility

	% uninsured (under age 65), 2005	Physicians per 100,000 residents, 2007
Mandan	10.1%	59.9
Bismarck	8.8%	374.4
Bismarck MSA	9.1%	291.2
North Dakota	12.7%	90.8
United States	17.2%	169.7

Source: U.S. Census Bureau and Sperling's

Mandan is served by Triumph Hospital of the Central Dakotas. Triumph is a 41 bed specialty acute care hospital for critically ill patients, providing medical and rehabilitative care. Additionally, Medcenter One Health Systems invested \$12 million in a new 98-bed living center in Mandan, and is currently rehabbing an existing 40-50 bed facility. It is also worth noting that Mandan has a strong presence of other medical services including family practice medical clinics, eye care businesses, dental offices, chiropractic clinics, and pharmacies. Mandan is a short drive from Bismarck's hospitals: Medcenter One and St. Alexius Medical Center are both general medical/surgical hospital with 221 beds and 282 beds, respectively.

CRIME AND SAFETY

Another of the most important factors contributing to the attractiveness of a community for existing and potential residents is public safety. In certain urban areas, perceptions about crime and safety are localized to specific neighborhoods. The U.S. Bureau of Justice Statistics reports both property and crime at the community, state, and national level. As shown in the following table, while violent and property crime rates are higher locally compared to the state, they remain well below national averages. The City of Mandan recorded 1.9 violent crimes per 1,000 residents (compared to 4.7 nationwide) and 24.9 property crimes per 1,000 residents (compared to 32.6 nationwide).

Crime Rates per 1,000 Persons, 2007

	Violent Crime	Property Crime
City of Mandan	1.9	24.9
City of Bismarck	1.8	26.4
North Dakota	1.4	18.9
United States	4.7	32.6

Source: U.S. Bureau of Justice Statistics

Note: Comparisons of local data over recent years cannot be made due to municipal annexations and/or incomplete data. Violent crimes include manslaughter, rape, robbery, aggravated assault, and murder. Property crime includes burglary, larceny, and motor vehicle theft.

ENVIRONMENTAL QUALITY

Environmental health is an important consideration for any business because it affects their personal health, their families, and their employees. There are long-term health consequences that can induce regulations on businesses in areas with poor air and water quality. The following chart summarizes the number of facilities that release pollutants in the area, as recorded by the U.S. Environmental Protection Agency (EPA). The City of Mandan has a comparatively higher proportion of facilities that pollute the environment, compared to Bismarck and the metro area as a whole.

EPA Envirofacts (per 1,000 residents), 2009

	Mandan, ND	Bismarck, ND	Bismarck MSA
Facilities that produce and release air pollutants	0.51	0.45	0.27
Facilities that have reported toxic releases	0.17	0.07	0.09
Facilities that have reported hazardous waste activities	2.93	2.54	2.09
Facilities issued permits to discharge to waters of the United States	0.68	0.22	0.37

Source: U.S. Environmental Protection Agency

The City of Mandan is still working to remediate a diesel fuel spill that occurred in 1985. It was discovered that approximately 3 million gallons of petroleum product settled in the bedrock beneath Mandan’s central business district. BNSF railroad removed approximately 650,000 gallons of petroleum over several years following

the spill. When the railroad denied responsibility for further cleanup, the City (and other governmental partners) filed suit against BNSF. A \$30.25 million out-of-court settlement was reached. It is the largest such settlement in the State's history and included:

- \$24 million placed in the Mandan Remediation Trust account to clean up the site and to address the effects of the fuel spill.
- \$2.5 placed in the Mandan Supplemental Environment Projects Trust to alleviate the impacts to the community of the remediation efforts.
- \$1.0 million paid to the state as a penalty for violations of North Dakota law.
- \$500,000 paid to reimburse the state's Leaking Underground Storage Tank Trust Fund.
- \$1.0 million paid to reimburse Mandan's legal fees.
- Land and buildings valued at \$1.25 million were transferred to the City.⁵

Resources committed from the fuel spill settlement led to a spike in investment in once-thriving downtown Mandan. Almost 25 years later, the community and its elected leadership are now largely optimistic about downtown Mandan's potential.

Many community members hold a great deal of pride in the natural beauty of the area, including the Missouri River. A key challenge involves providing greater access to the riverfront. Much of the frontage is controlled by the federal government (Army Corps of Engineers) or restricted by the Lady Bird Johnson Act. Local officials have tried to work with the local congressional delegation to try to expand access to the river, but it has not been productive.

RECREATIONAL, CULTURAL, AND ENTERTAINMENT AMENITIES

Developing an array of recreational, cultural, arts and entertainment amenities is a key strategy for communities trying to attract visitors, and attract and retain families and workers. Some of Mandan's recreational, cultural, and entertainment amenities are listed below. While not a comprehensive list, it represents the wide array of entertainment options open to residents and visitors.

Historic Sites and Museums:

- Ft. Lincoln State Park and the Custer House
- Five Nations Art Depot
- The Railroad Museum
- Lewis and Clark Trail

Entertainment Options:

- Local sports and sport tournaments

⁵ Bismarck-Mandan Development Association.

- Downtown Mandan
- Midway Lanes
- Mysteria Theater
- Dacotah Speedway

Festivals:

- Buggies-n-Blues
- Rodeo Days

Mandan's public events and festivals were lauded in nearly every focus group and interview as being the most dynamic asset the city provides to attract regional visitors to the community. The challenge was said to be how to leverage these visitors when they are in Mandan, and how to expand event offerings to create even more opportunities for Mandan to receive visitors and their disposable income.

It is important to note that residents and visitors assess their options of activities on more of a regional level – or within a reasonable drive time. Other amenities in the region are just a short drive away from Mandan including the Lewis and Clark Interpretive Center, the Dakota Zoo, the North Dakota Heritage Center, Huff Hills, the Lewis and Clark Riverboat, Downtown Bismarck, and Prairie Knights Casino.

Most community input participants expressed the need for Mandan to not be like Bismarck if is to succeed in the long term. Some people think that Mandan should be a more dynamic community by leveraging historic tourism potential and unique destinations. Many expressed the desire to see "niche" businesses develop Downtown including art galleries, antique shops, coffee houses, restaurants, or even a children's museum.

RETAIL PREFERENCES

The City of Mandan and the Bismarck-Mandan Development Association commissioned a study in January 2009 to analyze the potential for big box retail development and attracting or expanding other retail establishments. Between 2003 and 2007, the City of Mandan's taxable sales increased from \$158 million to \$196 million (24.2 percent), while the City of Bismarck's increased from \$941 million to \$1.2 billion (31.4 percent). The report noted that, "In spite of Mandan's growing taxable sales and purchases, its location next to the larger community of Bismarck has lead to a diminished level of retail activity." Compared to other North Dakota communities of similar size, Mandan has the lowest total taxable sales.

The following chart shows that demand for retail is outstripping Mandan's supply. The potential to capture some of this retail sales leakage could have positive impacts for City operations, as Mandan relies heavily on property sales taxes which are among the highest in the state.

Retail Gap Analysis, 2008

Retail Stores	Demand Consumer Expenditures	Supply Retail Sales	Opportunity Surplus or Gap
Motor Vehicle & Parts Dealers	\$65,779,204	\$197,617,332	\$131,838,128
Furniture & Home Furnishings	\$7,460,582	\$3,061,531	-\$4,399,051
Building Materials, Garden Equipment Stores	\$34,481,340	\$20,804,920	-\$13,676,420
Food and Beverage Stores	\$35,275,845	\$28,377,024	\$6,898,821
Health and Personal Care Stores	\$15,793,868	\$8,077,553	-\$7,716,315
Gas Stations	\$35,169,946	\$59,641,215	\$24,471,269
Clothing and Accessories	\$13,022,310	\$1,071,438	-\$11,950,872
Sporting Goods, Hobby, Book and Music Stores	\$5,836,287	\$436,038	-\$5,400,249
General Merchandise Stores	\$36,176,797	\$924,703	-\$35,252,094
Miscellaneous	\$7,960,178	\$3,446,143	-\$4,514,035
Foodservices and Drinking Places	\$25,154,460	\$17,496,678	-\$7,657,782

Source: 2008 Claritas Report –RPM Opportunity Gap - Retail Sales

The report also included results from a retail development preference survey that included responses from 17 percent of Mandan’s households (994 out of approximately 5,700). The survey confirmed the resident’s view that more retail shopping was the most important factor in improving Mandan. When asked about which part of the City should provide a development emphasis, 36 responded throughout the town, 35 percent downtown, 23 percent along I-94, 11 percent Memorial Highway, three percent other.⁶ Based on the survey’s results, the City and BMDA are moving forward with assembling and marketing potential retail sites.

⁶ *Review of Potential Retail-Oriented Sites in Mandan*, Bismarck-Mandan Development Association and the City of Mandan, January 2009

PHILANTHROPY

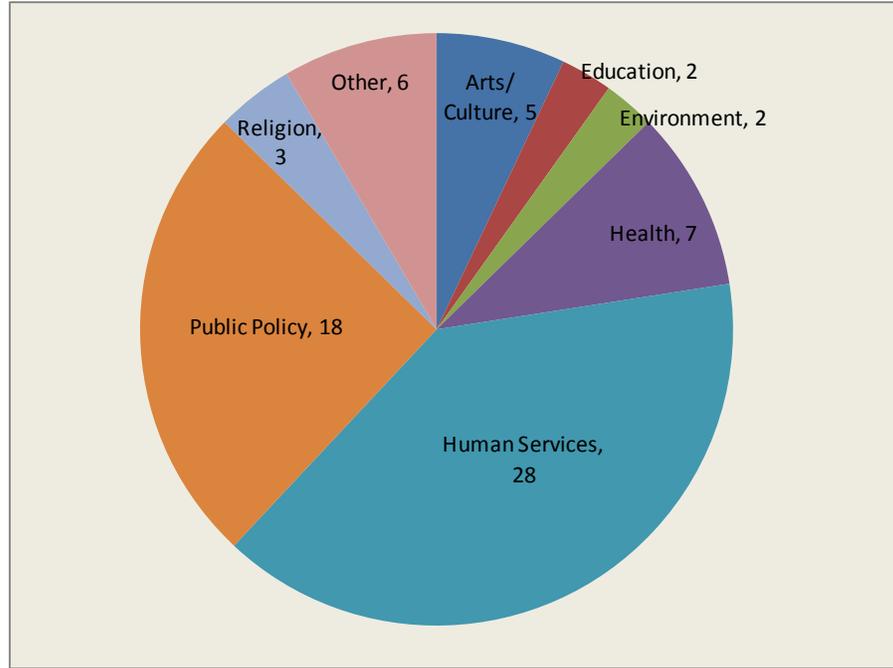
Volunteer activities and charitable donations are a form of civic participation that underpins all stable, vibrant communities. The number of nonprofit 501(c)(3) organizations in Mandan-Morton County per 1,000 people is 2.7, a lower proportion than Bismarck-Burleigh County and the state, but one that is on par with national figures. Nonprofits in health care, human services, and public policy advocacy account for three out of four of Mandan-Morton County’s charities. Revenues of Mandan’s nonprofit organizations have grown significantly in recent years – 44 percent, compared to 36 percent growth nationwide- indicating that the community has a growing base of philanthropic resources to support Mandan’s families. Still, Mandan’s non-profit assets are dwarfed by those in Burleigh County.

Registered Nonprofit Organizations, 2008

	<i>Organizations</i>		<i>Revenue</i>	
	Number	Per 1,000 Residents	Total (in \$1,000)	Growth Since 2004
Mandan-Morton County	71	2.7	\$73,760	44%
Bismarck-Burleigh County	455	5.9	\$781,190	32%
Bismarck-Mandan MSA	526	5.1	\$854,950	33%
North Dakota	2,942	4.6	\$4,319,952	23%
United States	802,157	2.7	\$1,995,093,051	36%

Sources: National Center for Charitable Statistics and U.S. Census Bureau
 Includes organizations that filed Form 990 (including 990EZ and 990PF) within the last 24 months.
 Organizations that file a Form 990 are tax-exempt nonprofits that have incomes of more than \$25,000.

Mandan-Morton County Nonprofits by Sector, 2008



Sources: National Center for Charitable Statistics and U.S. Census Bureau
Includes organizations that filed Form 990 (including 990EZ and 990PF) within the last 24 months.
Organizations that file a Form 990 are tax-exempt nonprofits that have incomes of more than \$25,000.

Most input respondents feel that the quality of Mandan’s public leadership is inconsistent. Many also expressed the need to engage more local businesspeople, young people and young professionals in civic life.

CONCLUSION

After many years of slow but steady growth, Mandan has matured from a small town into one of North Dakota's largest cities. As the metropolitan area continues to benefit from economic growth and an increasingly attractive overall quality of life, communities within the region must be poised to leverage growth and development in a way that enhances – rather than hinders – local character and competitiveness.

Research presented in the *Economic and Demographic Snapshot* and this *Community Assessment* outline not only the key opportunities but also the critical challenges Mandan faces as it looks to continue growing and diversifying its economy and retail base. As this planning process moves forward with the development of the *Strategic Vision Plan*, these issues and trends will clarify goal areas and actions that need to be achieved so that the community can reach its full potential. The *Plan* will serve as a tool to unify Mandan's public and private leadership behind a consensus blueprint for the community's future.

Key themes were clearly heard in community input related to residents' vision for Mandan's future. When asked to describe Mandan in the year 2020, input participants expressed the following ideas:

- ✓ Leveraging Mandan's heritage as "Where the West Begins"
- ✓ Expanding on Mandan's image as a family-friendly, safe community
- ✓ Growing into a high-end suburb with a "village feel"
- ✓ Developing and investing in our existing assets: our historic downtown and unique special events
- ✓ Maturing into a "Uniquely Western" community that is both urban and rural
- ✓ Overcoming challenges – Mandan can be known as the "Comeback Kid"
- ✓ Continuing to be a nice place where you would want to grow up and retire

As this vision is formalized in the *Strategic Vision Plan* and coupled with action items to enable the city to reach its goals, opportunities for all public and private stakeholders to contribute to implementation of these efforts will be championed.

APPENDIX A: METHODOLOGY

This *Community Assessment* provides an understanding of Mandan-Morton County's competitive position as a place to live, work, grow, and do business compared to Bismarck-Burleigh County, the Bismarck Metropolitan Statistical Area (MSA), North Dakota, and the United States. This section describes the methodology used in the research and data analysis of the report.

GEOGRAPHY

For most indicators, Mandan-Morton County was compared to the Bismarck, North Dakota metropolitan statistical area, as defined by the U.S. Office of Management and Budget (OMB). The current definition of the Bismarck MSA includes Burleigh and Morton Counties. The geographical definition for the MSA has remained unchanged since the release of the 2000 Decennial Census.

Due to Mandan's small population size, recent reliable data is not available for many indicators. In these instances, *Market Street* has used Morton County data to gauge community trends. In 2007, the City of Mandan's population was 17,316 – or approximately 70 percent of Morton County's total population (25,926). For indicators where data for small counties is not reported either, *Market Street* calculated Morton County information by subtracting Burleigh County from the MSA estimates, which are both largely available due to their larger population sizes.

DATA SOURCES

Market Street used the most recent data available for this report. Reputable and reliable private, non-profit, local, state, and national government data sources were leveraged, with every effort made to match methodologies and units of comparison across sources to provide the most accurate and informative analysis of Mandan-Morton County's demographic and economic trends.

Major data sources for this report included the U.S. Census Bureau, the U.S. Bureau of Economic Analysis (BEA), the U.S. Bureau of Labor Statistics (BLS), and the Internal Revenue Service (IRS). State and local data sources included the City of Mandan, the Bismarck-Mandan Chamber of Commerce, and other sources.

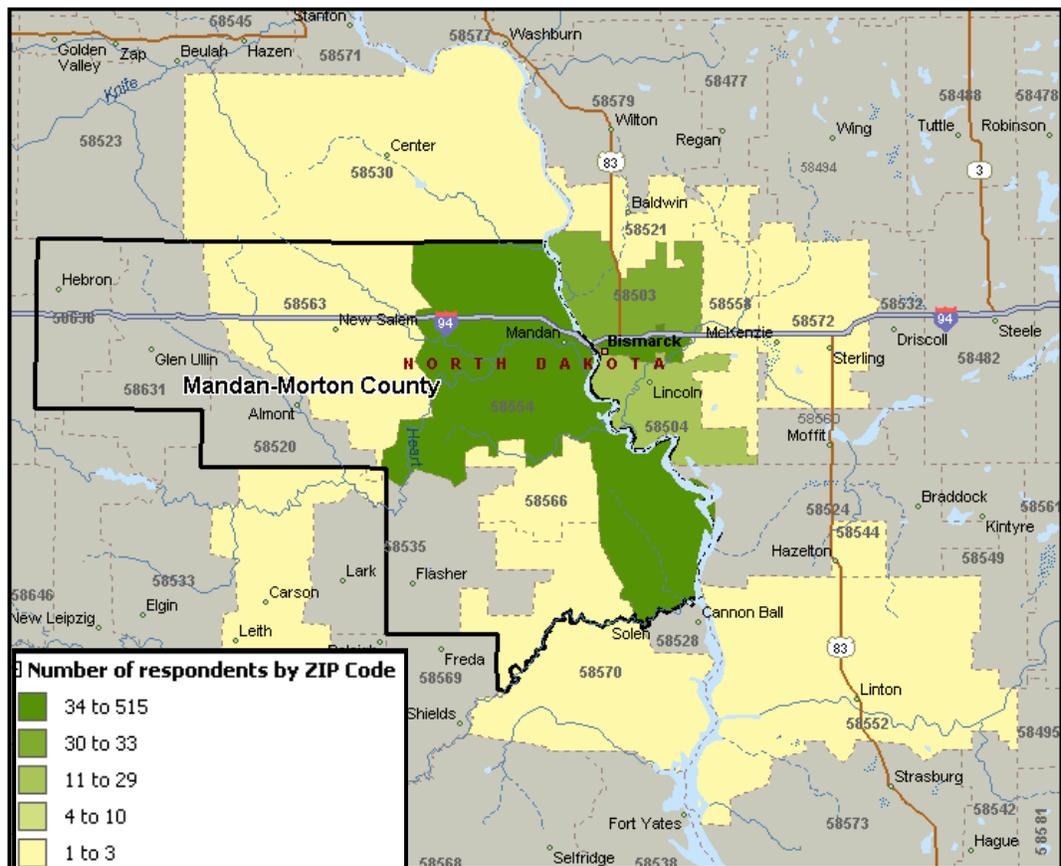
In many cases, the data are presented in a chart as the percentage each component represents of the total. In these cases, unless otherwise noted, if the summation of the percentages of all the components does not equal 100 percent, it is due to rounding.

APPENDIX B: ONLINE SURVEY RESULTS

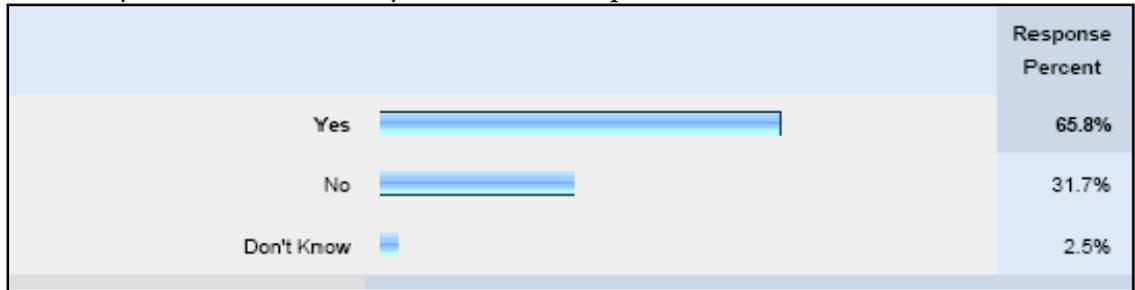
Critical to the success of this strategic process is the inclusion of feedback and opinions solicited from a broad range of community stakeholders. An online survey was posted on the Chamber of Commerce’s website to help garner community input. The survey yielded 660 respondents between January 14, 2009 and February 25, 2009. Information about the survey’s respondents as well as the survey results are posted below.

Respondent Information:

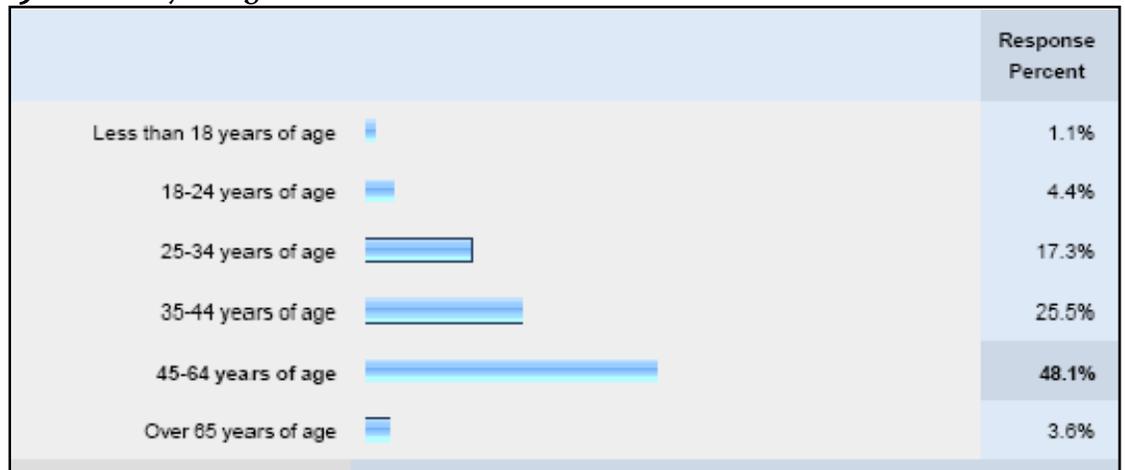
i. What is the zip code of your primary residence?



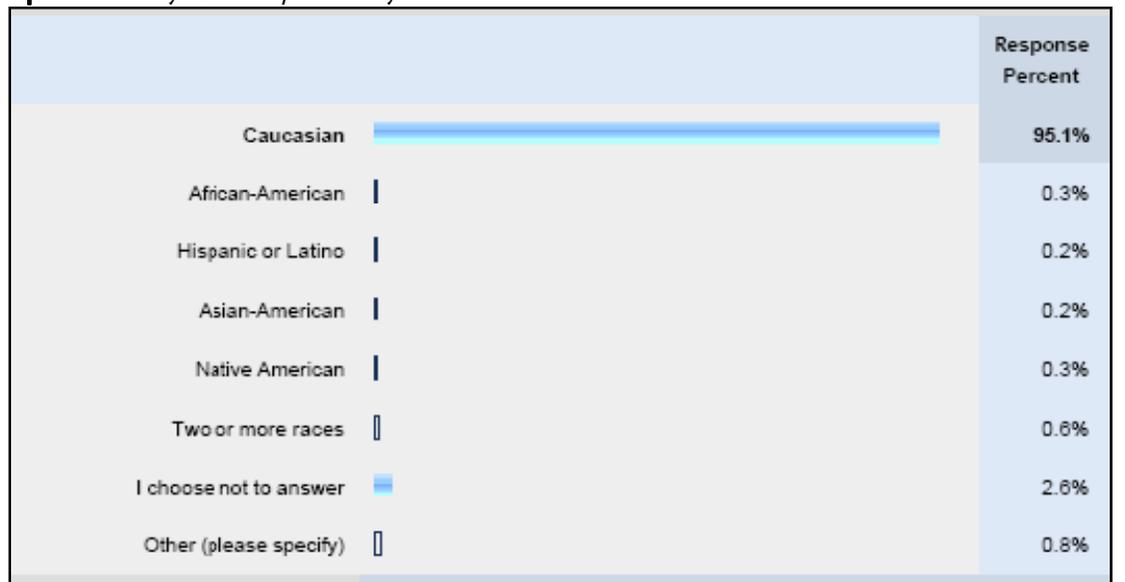
2. Do you live within the City of Mandan's corporate limits?



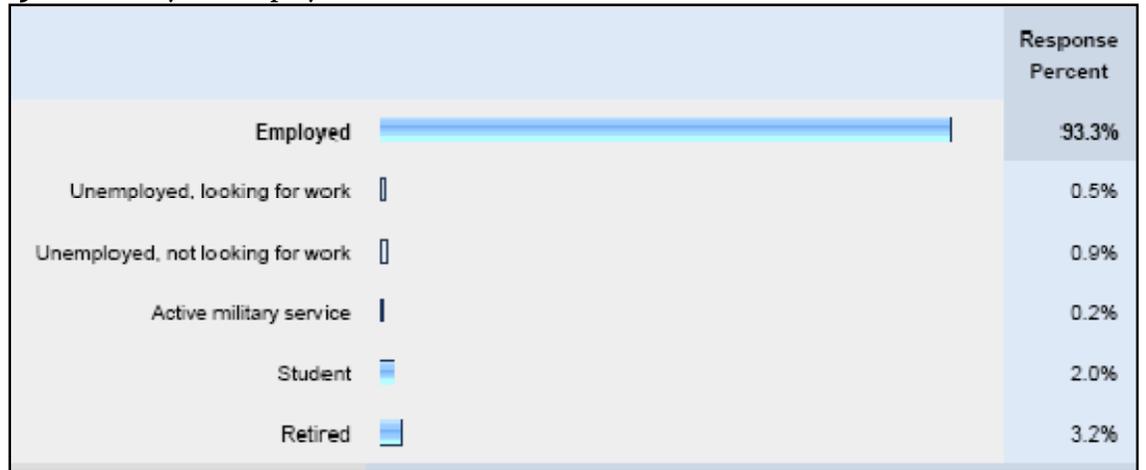
3. What is your age?



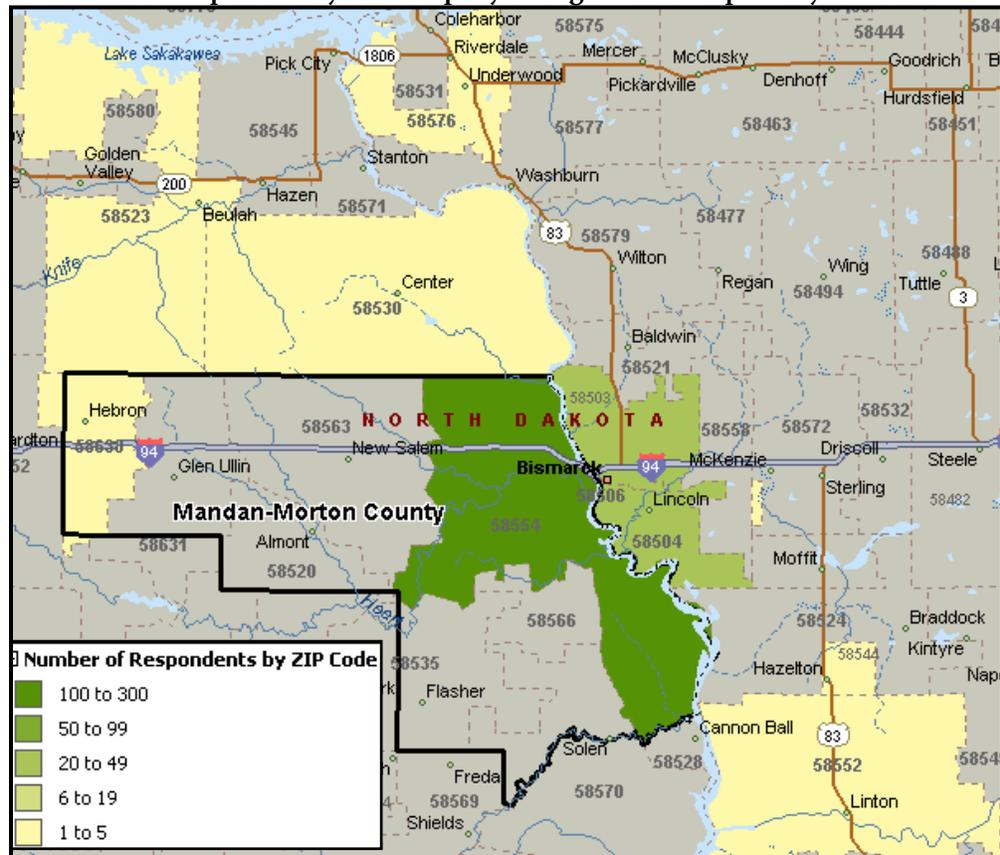
4. What is your race/ethnicity?



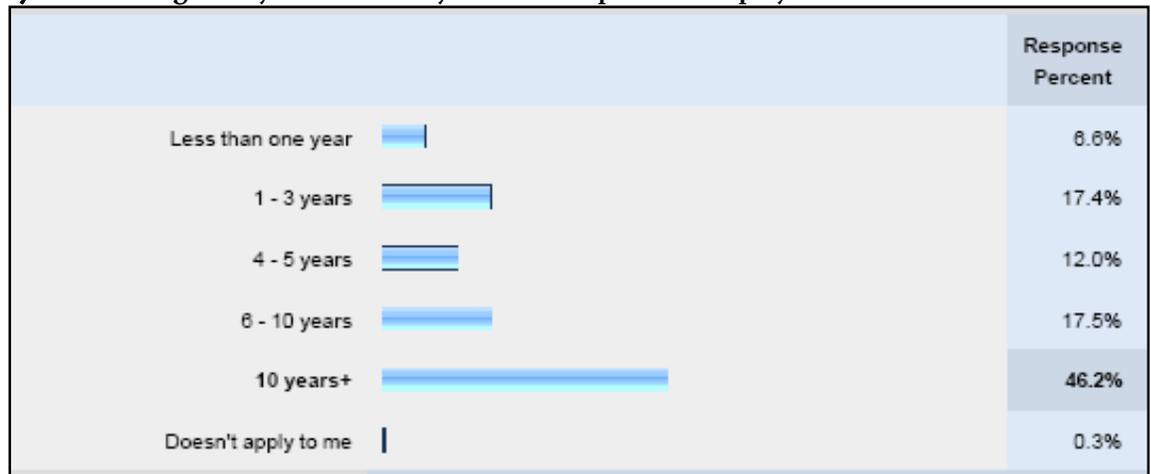
5. What is your employment status?



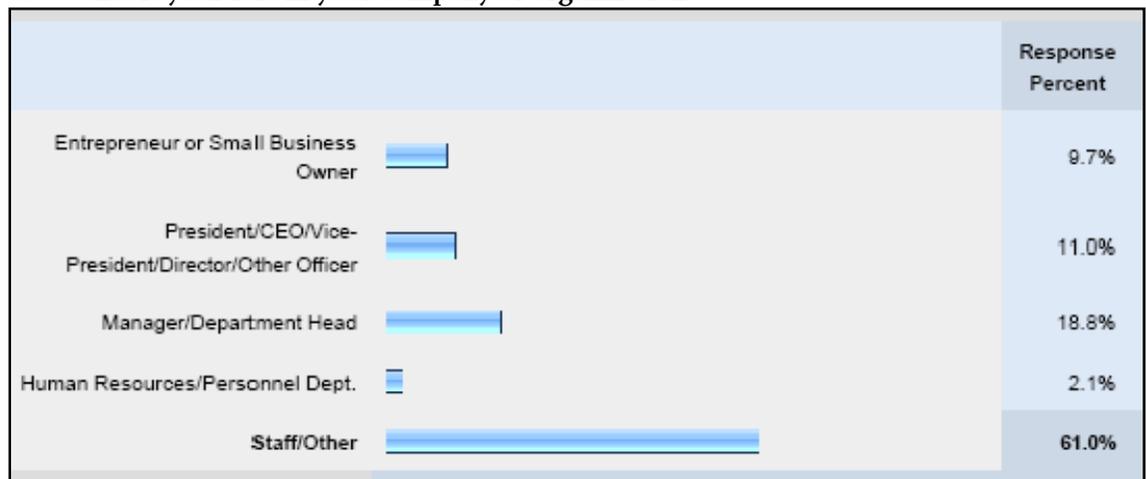
6. What is the zip code of your company or organization's primary location?



7. How long have you worked at your current place of employment?



8. What is your role in your company or organization?

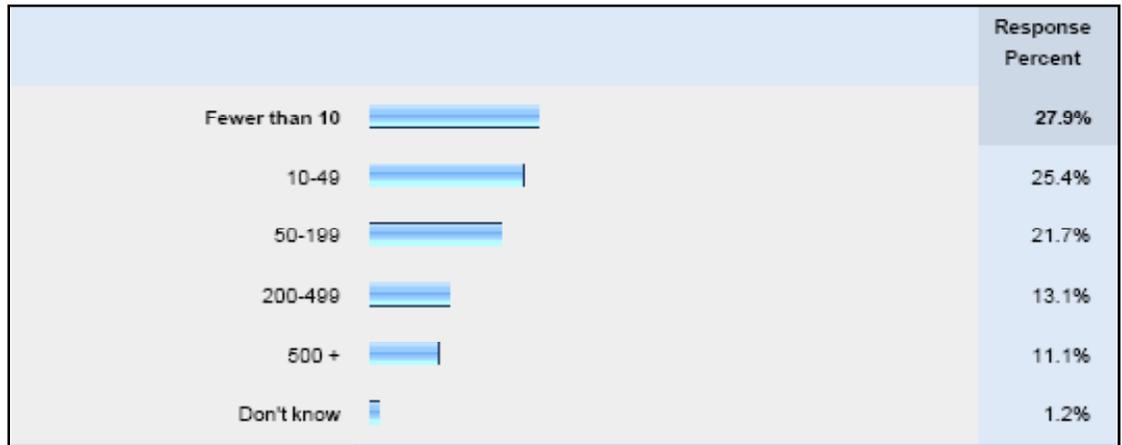


9. How would you characterize your company or organization's type of business?

	Response Percent
Administrative services and waste services	0.0%
Agriculture	5.3%
Arts, entertainment, and recreation	1.2%
Construction	5.3%
Education services	12.2%
Health care services	2.8%
Hospitality (Accommodation and food services)	2.0%
Finance and insurance	15.4%
Government	15.9%
Information (media, publishing, broadcasting, data processing)	2.0%
Manufacturing	4.9%
Non-Profit	5.3%
Professional and technical services (legal, accounting, engineering, design, scientific research, advertising, computer services)	8.1%
Real estate	0.8%
Retail trade	7.3%
Logistics (Transportation and warehousing)	2.0%
Wholesale trade	0.8%
Other (please specify)	8.5%

Note: Many people who answered “other” indicated they worked in the energy business.

10. How many employees work for your company or organization at all of its locations?



**11. What is the primary market/service area of your company or organization?
Please check all that apply.**



12. Please rate the following statements according to the degree to which you agree.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Don't Know
My business will grow in Mandan	19.1% (40)	39.7% (83)	30.6% (64)	2.9% (6)	4.3% (9)	3.3% (7)
My business will remain in Mandan in the long-term	41.7% (86)	32.0% (66)	16.5% (34)	2.4% (5)	3.9% (8)	3.4% (7)
My business receives the support it needs to grow	9.7% (20)	38.2% (79)	31.9% (66)	10.1% (21)	5.8% (12)	4.3% (9)
I have no trouble finding quality employees for my business	4.8% (10)	32.7% (68)	31.3% (65)	18.3% (38)	8.2% (17)	4.8% (10)
Labor costs are not too high	7.2% (15)	38.0% (79)	37.5% (78)	10.1% (21)	2.9% (6)	4.3% (9)
The cost of utilities are not too high	6.2% (13)	30.0% (63)	32.4% (68)	21.0% (44)	6.2% (13)	4.3% (9)
The cost of commercial/industrial space is not too high	3.3% (7)	30.8% (65)	34.1% (72)	16.6% (35)	4.7% (10)	10.4% (22)

13. Please rate the following components of Mandan's small business and entrepreneurship climate, with 1 being Very Poor and 5 being Very Good. If you are unsure of your answer, please select "Don't Know."

	Very Poor 1	2	3	4	Very Good 5	Don't Know
Small business start-up and development assistance	8.8% (19)	11.6% (25)	20.5% (44)	13.5% (29)	6.5% (14)	39.1% (84)
Availability of capital	8.0% (17)	8.0% (17)	21.2% (45)	17.9% (38)	6.6% (14)	38.2% (81)
Networking opportunities with other entrepreneurs	8.5% (18)	10.8% (23)	25.4% (54)	19.7% (42)	9.4% (20)	26.3% (56)
Business incubation or low-cost business space	8.5% (18)	12.7% (27)	21.1% (45)	15.0% (32)	4.7% (10)	38.0% (81)

14. Please indicate if the following items are barriers to, or potential advantages for, the existing and future ability of the community to be successful.

	Significant Problem	Minor Problem	Little to No Concern	Minor Advantage	Significant Advantage	No Opinion
Tax climate	55.1% (297)	25.2% (136)	9.1% (49)	2.4% (13)	2.2% (12)	5.9% (32)
Quality of K-12 education	4.7% (25)	15.8% (84)	25.2% (134)	22.8% (121)	28.2% (150)	3.2% (17)
Higher education opportunities	13.8% (74)	24.1% (129)	27.6% (148)	18.6% (89)	12.7% (68)	5.2% (28)
Retention of college graduates and young professionals	45.3% (246)	30.8% (166)	10.5% (57)	6.3% (34)	3.7% (20)	3.7% (20)
Ability to attract young professionals	48.3% (262)	33.0% (179)	7.6% (41)	5.2% (28)	3.9% (21)	2.2% (12)
Cost of living	22.8% (124)	36.1% (197)	19.1% (104)	14.1% (77)	7.2% (39)	0.7% (4)
Cost of doing business	22.8% (121)	30.0% (159)	20.9% (111)	11.1% (59)	3.4% (18)	11.7% (62)
Local elected leadership	17.7% (95)	20.9% (112)	32.1% (172)	14.2% (76)	6.3% (34)	8.8% (47)
State elected leadership	10.7% (58)	20.7% (112)	34.1% (184)	17.0% (92)	9.8% (53)	7.6% (41)
Infrastructure	18.3% (98)	32.5% (174)	25.2% (135)	13.6% (73)	4.1% (22)	6.3% (34)
Public Safety	2.8% (15)	12.3% (66)	35.7% (192)	21.6% (116)	25.1% (135)	2.6% (14)

15. Please rate the following elements of Mandan's infrastructure, with 1 being Very Poor and 5 being Very Good. If you are unsure of your answer, please select "Don't Know."

	Very Poor 1	2	3	4	Very Good 5	Don't Know
Road and highway capacity serving existing developed areas	5.3% (29)	14.7% (80)	34.3% (187)	32.3% (178)	10.8% (59)	2.6% (14)
Road and highway capacity serving undeveloped areas	5.4% (29)	16.7% (85)	40.6% (220)	19.7% (107)	4.8% (25)	14.0% (76)
Water and sewer capacity to support growth	1.9% (10)	12.8% (68)	27.0% (146)	22.8% (123)	9.1% (49)	26.7% (144)
High-speed telecommunications	2.8% (14)	6.8% (36)	28.2% (153)	34.9% (189)	18.1% (98)	9.6% (52)
Class A office space	8.1% (44)	19.4% (105)	27.1% (147)	12.4% (67)	2.0% (11)	31.0% (168)
Industrial sites and buildings	9.8% (52)	19.8% (107)	30.3% (164)	16.6% (90)	3.3% (18)	20.3% (110)

16. If you are a business owner or are involved in management/staffing decisions within your organization, please rate to what level you agree with the following statement.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't Know
I am aware of the region's workforce development resources that can help my business find or train workers.	1.9% (8)	20.2% (86)	20.2% (86)	12.2% (52)	4.9% (21)	40.8% (174)

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- All in Bismarck, nothing in Mandan.
- Enough with the workforce. If we had jobs we could find workers.
- I am a professor for a local university and am aware of training opportunities for educators.
- The department I am involved in requires people with college degrees in fields not typically pursued locally. Most of our employees come from other states.
- The city is in the process of trying to make Mandan attractive to others who live outside the city. However, the city is anything but pretty.

17. Please comment on local workforce training resources.

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- What resources are available?
- I think that we have great training areas, but we just don't have the business and resources to hire the young people and a competitive wage that the other states offer for that same position.
- I think the Mandan-Bismarck area has great workforce training opportunities for those who want to work!
- I work for a government agency and we have plenty of resources.
- People are not treated like they are valuable...expected to go to training on our own time...flex time not considered...wears people out...but people do it to keep up and keep their jobs.

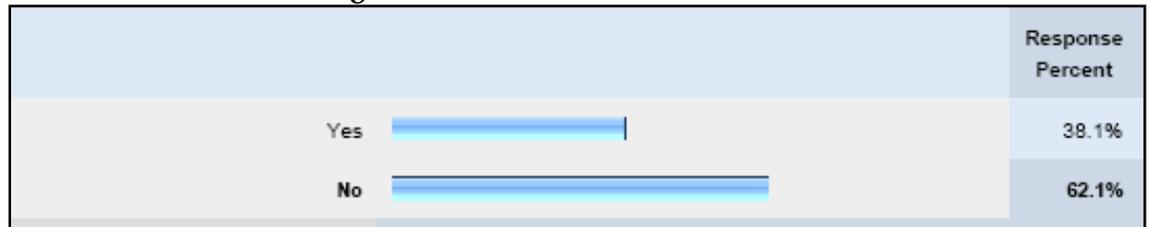
18. What do you feel is the GREATEST STRENGTH of the local workforce?

Response Category	Count
Work Ethic	89
Honesty/Loyalty/Integrity	24
Dedication/Dependability/Reliability	16
Education/Skills	10
Dedication to Community	9
Inexpensive	5
Number of available workers	5
Proximity	3

19. What do you think is the GREATEST WEAKNESS of the workforce?

Response Category	Count
Low wages	25
Lack of education/skills	14
Lack of young talent	12
Limited opportunities	12
Not enough work	12
Work ethic/Attitude	10
Over educated	10
Not enough workers	10
Lack of commitment/Retention	9
Not forward thinking	9
Taxes	7
Age	6
Lack of professionals	5

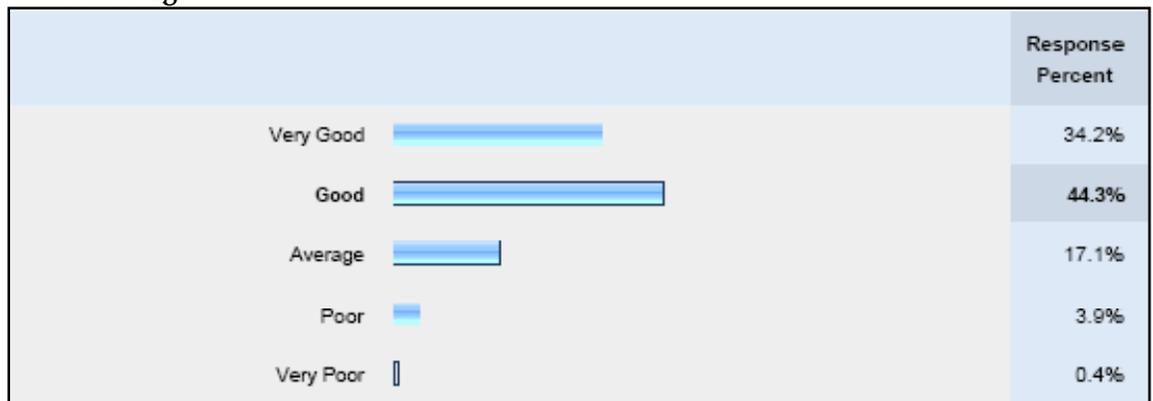
20. Do you have a child or children who are currently students in Mandan public schools or an area college?



21. Where do you (or your child) attend school?

Response Category	Count
Mandan High School	71
Lewis and Clark	32
Mandan Middle School	29
Fort Lincoln	18
Roosevelt	13
Bismarck State College	13
Great Plains	11
Christ the King	9
Mandan Public Schools	8
University of Mary	7
Custer	6
University of North Dakota	5
6th Grade Academy	5
St. Josephs	4
Mary Stark	4
University of Nebraska-Lincoln	3
Rasmussen College	2

22. How would you rate the quality of the education that you (or your children) are receiving?



Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

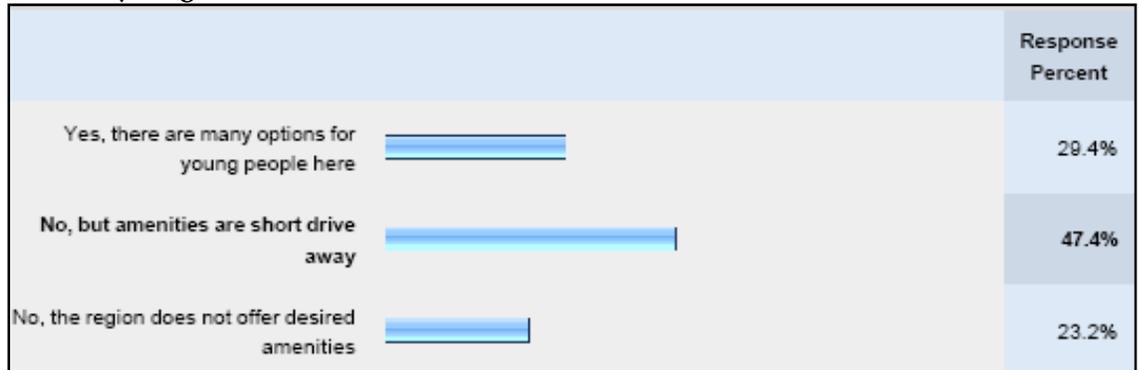
- Buildings do not work together. Staff does not meet and work with other staff from other buildings.
- Caring and dedicated teachers.

- Education is good but I see way too much time and resources spent on sporting activities.
- I think we have wonderful teachers in the Mandan Public Schools.
- I love having all 6th graders in one building - would like to keep it that way!
- Some children are allowed to fall through the cracks if not kept tabs on a regular basis.
- The dropout rate is high, conformity is stressed over creativity. No programs for gifted students.
- There are no special programs in Mandan - my 5th grade daughter in Mandan is reading at an 8th grade level and there is no chance for her to be challenged by a high level course - my daughter in Bismarck has this chance.

23. What do you think needs to be done to improve your school or school district?

Response Category	Count
Raise salaries	23
Better teachers	22
Increased funding	15
Improve aging infrastructure	12
Increased parental involvement	10
Less focus on sports, more focus on academics	10
More advanced course options	10
Greater accountability/assessment	9
Before/after school programs	8
More vocational/technical course offerings	7
Lower taxes	7
Decrease dropout rate	6
Technological focus	5
Smaller classes	5
Better planning	5
Better leadership	5
Build a new school	5
Transportation	3

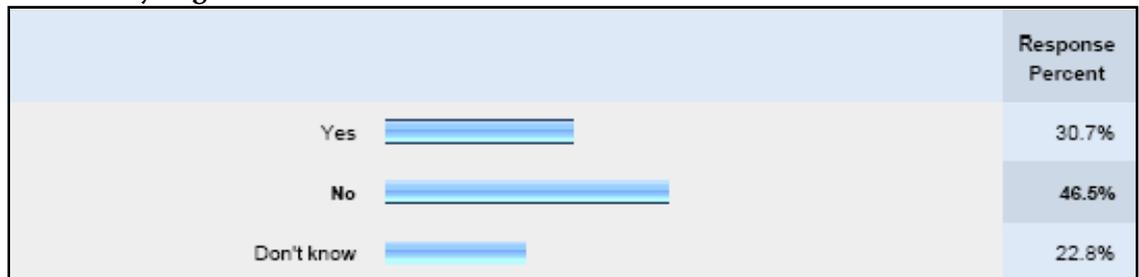
24. Do you feel sufficient programs and amenities are available for young people and young adults in Mandan?



What kinds of programs or amenities for young people would you like to see?

- Bigger recreational areas.
- Downtown theater, more restaurants
- More vocational/training classes
- People friendly environments, whether they have a club for people 15-18 with no alcohol, or more a club like environments for college students to go to
- Roller skating rink, more kids events - they're always packed when Mandan Community Center has them
- Teen center, movie theaters, video arcades, volunteer opportunities
- Game Halls, social places.

25. Do you feel there will be job opportunities available to you (or your child) locally when you graduate?

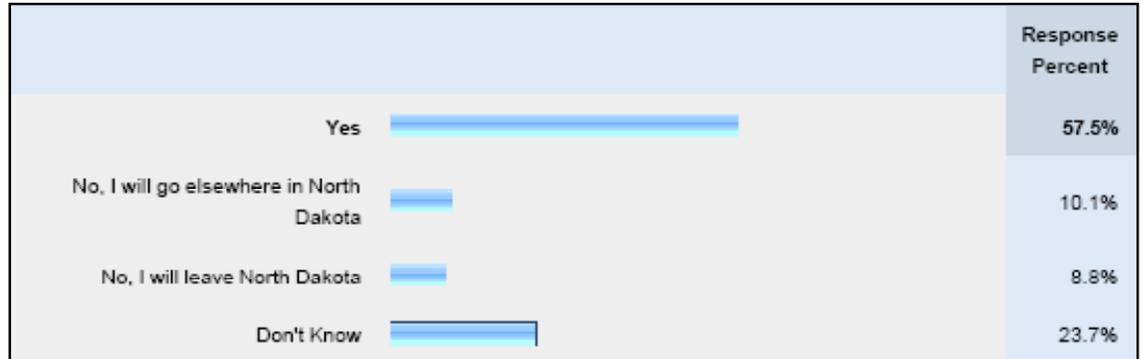


Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- Depends if you want to make a good living, Then, my answer would be no.
- I have 2 children who have graduated from NDSU. My son is an engineer working in Minneapolis, MN and my daughter has a business marketing degree and works in Fargo. Both would love to be able to get back to the Bismarck Mandan area, but there are few jobs available here.

- Limited opportunities for professionals except in Bismarck; also limits for people interested in the arts.
- More dollar stores aren't going to provide career jobs.
- Very few good jobs in Mandan, but Bismarck does have some opportunities.

26. Do you see yourself (or your child) remaining in the Mandan area for the long term?



If you answered “No” or “Don’t Know,” why do you think you will leave?

Response Category	Count
Lack of opportunities/jobs in field of interest	25
Children will leave	22
To seek better/higher paying jobs	20
High taxes	9
Cost of living	5
Weather	5

27. From your perspective, how is the local economy performing? Rank from Excellent to Poor.

	Excellent	Good	Average	Below Average	Poor	Don't Know
Overall strength of the economy	1.3% (7)	32.1% (180)	41.3% (231)	14.3% (80)	9.5% (53)	1.6% (9)
Availability of quality local jobs	1.1% (6)	14.7% (82)	28.8% (160)	32.9% (183)	20.3% (113)	2.2% (12)
Opportunities to earn good wages to meet daily needs	0.5% (3)	11.2% (62)	30.0% (167)	35.3% (196)	21.0% (122)	1.1% (6)
Opportunities to work close to where you live	12.3% (69)	32.6% (182)	31.3% (175)	12.5% (70)	10.0% (56)	1.3% (7)
Opportunities for advancement	1.1% (6)	15.5% (87)	38.2% (214)	24.8% (138)	15.7% (88)	4.8% (27)

28. Please rank the top ten (10) challenges Mandan faces in attracting and/or retaining residents with one (1) being the most important challenge. You may only vote once for each challenge.

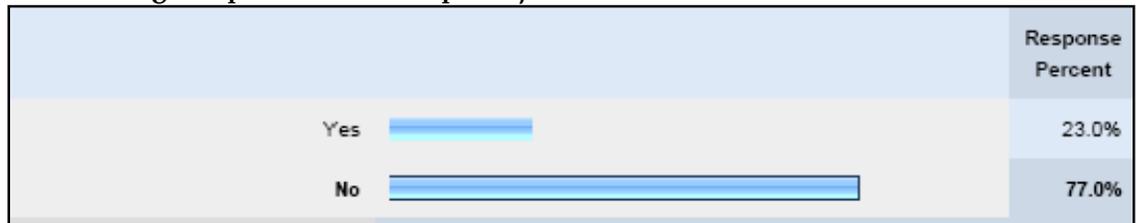
	1	2	3	4	5	6	7	8	9	10
Quality development and planning	10.0% (45)	10.9% (49)	12.9% (58)	11.9% (53)	14.9% (67)	11.8% (53)	8.5% (38)	9.8% (44)	6.2% (28)	3.1% (14)
Transportation and infrastructure	1.8% (8)	3.8% (17)	7.3% (33)	8.0% (36)	15.1% (68)	13.3% (60)	14.9% (67)	14.7% (66)	12.2% (55)	8.9% (40)
Local government collaboration and cooperation	7.1% (32)	7.1% (32)	7.5% (34)	12.2% (55)	9.7% (44)	12.8% (58)	14.4% (65)	12.4% (56)	10.4% (47)	6.4% (29)
More retail stores	32.3% (152)	20.2% (95)	11.0% (52)	7.9% (37)	8.3% (39)	6.2% (29)	4.5% (21)	3.8% (18)	3.0% (14)	3.0% (14)
More entertainment amenities	2.9% (13)	13.4% (59)	11.1% (49)	14.1% (62)	11.1% (49)	9.3% (41)	10.7% (47)	8.8% (39)	10.4% (48)	8.2% (38)
More recreation amenities	1.3% (6)	3.8% (17)	10.0% (45)	11.3% (51)	10.0% (45)	12.4% (56)	13.1% (59)	13.9% (63)	14.8% (67)	9.5% (43)
A more vital Downtown	11.0% (50)	16.7% (76)	13.7% (62)	15.9% (72)	8.8% (40)	9.9% (45)	6.4% (29)	7.0% (32)	6.2% (28)	4.4% (20)
Creating more quality jobs	24.2% (115)	16.6% (79)	16.2% (77)	10.1% (46)	10.1% (46)	6.9% (33)	5.3% (25)	5.7% (27)	3.4% (16)	1.7% (8)
K-12 capacity, financing, and quality	6.1% (29)	9.7% (46)	9.3% (44)	7.8% (37)	9.5% (45)	10.1% (48)	11.8% (56)	10.3% (49)	14.3% (68)	11.0% (52)
More diverse housing stock (i.e., apartments, more choices of single family homes)	3.4% (16)	4.4% (21)	5.5% (26)	6.3% (30)	6.7% (32)	8.8% (42)	9.4% (45)	12.4% (59)	14.7% (70)	28.5% (136)
Other	30.3% (27)	3.4% (3)	4.5% (4)	5.6% (5)	4.5% (4)	0.0% (0)	3.4% (3)	2.2% (2)	7.9% (7)	38.2% (34)

Many people who answered “other” indicated high taxes, and the lack of high paying jobs were key challenges faced by Mandan in attracting/retaining residents.

29. The ability for local workers and families to find quality employment and build personal wealth is very important. Please rate the following statements. Do you feel that the City of Mandan provides:

	Excellent	Good	Average	Below Average	Poor	Don't Know
Access to jobs that provide a living wage	0.8% (4)	11.9% (62)	35.6% (185)	36.0% (187)	14.1% (73)	1.5% (8)
Access to jobs that provide health insurance benefits	0.4% (2)	10.4% (54)	35.5% (184)	31.9% (165)	15.3% (79)	8.6% (34)
Affordable housing options	2.3% (12)	20.8% (107)	48.4% (249)	16.0% (82)	9.9% (51)	2.5% (13)
Access to affordable education/training programs	5.4% (28)	24.3% (126)	40.3% (209)	17.6% (91)	6.8% (35)	5.6% (29)
Access to affordable child care	1.4% (7)	21.5% (110)	38.7% (198)	11.8% (61)	6.3% (32)	20.3% (104)
Access to affordable, reliable public transportation options	2.9% (15)	23.4% (121)	34.2% (177)	18.4% (95)	12.6% (65)	8.5% (44)

30. Are you a "young professional" (e.g. someone between the ages of 22 and 35 working in a professional occupation)?



31. Please respond to the following statement: "Mandan is an attractive and desirable place to live."

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	No opinion
"Mandan is an attractive and desirable place to live."	5.3% (7)	32.1% (42)	28.2% (37)	29.0% (38)	5.3% (7)	0.0% (0)

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- Housing options for young professionals are not well maintained and are out-competed by those in Bismarck.
- I think it has the potential to be that, but just needs to be "cleaned up." Currently, I don't go anywhere in Mandan except my home. Some new businesses would really help add some life to Mandan. The strip would be a great place for that. A large discount sporting goods store to compete with Scheels, an outlet mall, Gordman's, a restaurant Bismarck doesn't have would be ideal!
- Mandan does not have much that would classify it as attractive. There is not much to do here other than go to a bar or fast food restaurant.
- The downtown has made improvements, but still needs to be spiffed up quite a bit. It looks like its making progress, though. It is not desirable because you have to go to Bismarck for almost everything!
- Mandan has a "dirty" reputation and is hard to get rid of. One of the highest property tax rates also hurts.
- I live in Mandan and sometime I feel when I tell people that they think of me less. Not sure why Mandan is seen as the underdog but it is. I just moved here a 1 1/2 ago.

32. What does the City of Mandan need to do to attract and retain young professionals?

Response Category	Count
Employment opportunities	26
More retail/restaurants/businesses	21
Higher wages	20
Professional job opportunities	18
Lower taxes	15
Entertainment/recreational opportunities	14
Opportunities for young people	10
Better downtown	8
Better housing	8
Better schools	7

33. Please select and answer below based on the following statement:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	No opinion
"Our community has a commitment to quality, public K-12 education."	20.8% (104)	43.5% (217)	10.2% (56)	9.6% (48)	2.2% (11)	4.6% (23)

Why do you feel this way? (Note: answers were randomly selected and may not be representative of overall respondent attitudes):

- For the amount in taxes we pay in this town, we should have top notch education. I haven't had the best experience with our education system. I feel we could do better.
- How do you show commitment? Is it in merely building more schools or should the focus be on the quality of the teachers? I say the teachers. Need to offer quality wages and benefits in order to attract better teachers.
- I am a teacher and I know what the commitment looks like as a teacher/parent. I am confident in the school system.
- I am originally from Mandan and spent 1-12 grades in Mandan. I am very satisfied with the education that I received. Would love for my own children to attend Mandan, but have settled down with my own family an hour away.

34. Please rate from 1 to 5 (with 5 being most important) the areas that Mandan Public Schools should focus on.

	1	2	3	4	5
Reducing the drop out rate	11.4% (51)	15.2% (68)	25.2% (113)	21.7% (97)	27.0% (121)
Providing leadership, professional, and technical skills training	10.9% (52)	12.2% (58)	18.5% (88)	30.3% (144)	28.4% (135)
Providing career guidance and hands-on work experiences	7.1% (33)	15.4% (72)	23.6% (110)	30.0% (140)	24.6% (115)
Providing alternative schools (or "schools inside schools") focused on training for a local industry	10.1% (45)	16.0% (71)	32.1% (143)	25.6% (114)	17.1% (76)
Providing opportunities for advanced academic education (i.e., dual-enrollment with two-year colleges)	9.6% (44)	11.8% (54)	28.2% (129)	26.7% (122)	24.3% (111)
Providing quality after-school programming	9.7% (42)	18.0% (78)	25.2% (109)	24.7% (107)	22.9% (99)
Providing a safe environment	12.9% (58)	9.6% (43)	13.8% (62)	20.8% (93)	43.1% (193)
Obtaining appropriate funding for schools	13.8% (63)	11.2% (51)	17.8% (81)	19.3% (88)	38.2% (174)
Other	26.3% (15)	9.4% (5)	15.1% (6)	9.4% (5)	37.7% (20)
					Other (please specify)

Many people who answered “other” indicated greater use of technology, reduced classroom sizes, providing afterschool programming, and raising teacher salaries would improve Mandan Public Schools.

35. On a scale of 1 to 5 with 5 being best, please rate the quality of the following regional higher educational institutions.

	Poor 1	2	3	4	Excellent 5	Don't Know
Bismarck State College	1.2% (6)	3.6% (18)	16.8% (85)	38.7% (196)	25.1% (127)	14.6% (74)
MedCenter One College of Nursing	0.8% (4)	1.4% (7)	10.0% (50)	24.1% (121)	19.1% (96)	44.6% (224)
Rasmussen Business College	6.2% (31)	10.4% (52)	14.5% (73)	9.6% (48)	2.0% (10)	57.4% (288)
United Tribes Technical College	8.1% (41)	12.7% (84)	14.3% (72)	7.9% (40)	3.0% (15)	54.0% (272)
University of Mary	1.6% (8)	3.2% (16)	9.9% (50)	27.0% (138)	42.1% (212)	16.3% (82)

36. Please list any programs not currently offered in the region that you feel should be added to one or more of the above college's curricula.

Top Responses
Engineering
Architecture
Dentistry
Vocational/trade programs
Nationally accredited degree programs
Law
Medicine
Graphic design
Finance
Veterinary medicine
Pharmaceutical Studies

37. Please rate to what level you agree with the following statements:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Don't Know
New members of the community are welcomed	8.5% (43)	41.4% (210)	26.4% (134)	13.6% (69)	2.8% (14)	7.3% (37)
Young adults are actively engaged in leadership	2.0% (10)	16.0% (81)	30.0% (152)	32.2% (163)	9.9% (50)	9.9% (50)
There are opportunities to volunteer your time for worthy causes	18.6% (94)	53.9% (272)	15.2% (77)	6.7% (34)	1.2% (6)	4.4% (22)
Your opinions are valued by government	2.9% (14)	19.4% (95)	30.3% (148)	23.1% (113)	17.8% (87)	6.5% (32)

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- Young people struggle to find a place even if they are well educated ... their talents aren't appreciated. Young Professionals Organization helps but more is needed.
- There are plenty of volunteer opportunities - but sometimes pay is nice too.
- New people are welcome to the community as long as you fit in to the age group of 50 and older to get respect from the local government. Our opinions may be heard but we are rarely listened to if we are younger.
- Conformity and passivity is KING.
- No plan for the future. Past 30 years of planning were horrible. Now we are stuck.

38. Please Rank:

	Excellent	Good	Average	Below Average	Poor	Don't Know
Likelihood you will continue to live in the community	31.5% (158)	30.5% (153)	18.0% (90)	9.0% (45)	6.6% (33)	4.4% (22)
Likelihood you will raise children in the community	30.4% (142)	24.8% (118)	17.6% (82)	4.1% (19)	10.9% (51)	12.2% (57)
Likelihood your children (once grown) will choose to live in the community	5.5% (27)	12.7% (63)	19.4% (96)	20.8% (103)	26.9% (133)	14.7% (73)
Likelihood you will retire in the community	20.5% (102)	21.1% (105)	19.9% (99)	11.0% (55)	19.5% (97)	8.0% (40)

39. If you will not continue to live in the community, and/or you feel your children will not choose to live in the community, why do you feel this way?

Top Responses
Lack of job opportunities, especially professional employment opportunities
Taxes are too high
Better opportunities elsewhere
Climate
Cost of living
Wages are too low
Schools are substandard

40. Please rate the following statements from Excellent to Poor.

	Excellent	Good	Average	Below Average	Poor	Don't Know
Quality of Mandan's public sector leadership	3.0% (15)	26.4% (132)	37.8% (189)	13.2% (66)	9.2% (46)	10.4% (52)
Quality of Morton County's public sector leadership	1.0% (5)	16.2% (81)	43.1% (215)	16.6% (83)	9.8% (49)	13.2% (66)
Quality of Mandan's private sector leadership	2.2% (11)	23.1% (115)	43.9% (218)	9.9% (49)	4.2% (21)	16.7% (83)
Willingness of City, County, and school leaders to work together	4.0% (20)	19.4% (97)	27.9% (139)	20.0% (100)	12.8% (64)	15.8% (79)
Willingness of City, County, and school leaders to work with private sector leadership	2.2% (11)	19.1% (95)	28.2% (140)	19.1% (95)	9.5% (47)	21.9% (109)

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- The leadership of the city needs to listen to the people of Mandan. Mandan is the 5th highest property taxed community in the state and the city wants to spend more. Event center won't even make money so who's going to pay for it?
- They work together all right - but not necessarily for the greatest degree of benefit to the constituents.
- This town has no vision. Make the hard choices.
- I really don't see much actually being done, except talking about development, business growth, etc. I don't see it actually happening.
- Annexation of land to the north is an example of unwillingness to work together

41. If you could make one recommendation for strengthening the effectiveness of your community's leadership (within the public or private sector), what would it be?

Top Responses
Focus on cooperation
Better communication
Be proactive
New leadership
Provide more educational opportunities
Younger faces in government
More affordable housing
Lower taxes
Increase wages
Modernize
Listen to the citizens of Mandan

42. Quality of Life in Mandan

	Excellent	Good	Average	Below average	Poor	Don't Know
Availability of health care	16.9% (84)	35.8% (178)	29.8% (148)	10.5% (52)	5.0% (25)	2.0% (10)
Quality of health care	20.8% (103)	40.7% (202)	26.0% (129)	7.3% (38)	2.4% (12)	2.8% (14)
Availability of child care	4.8% (23)	26.4% (131)	30.4% (151)	7.5% (37)	3.0% (15)	28.0% (139)
Quality of child care	6.5% (32)	27.7% (137)	29.7% (147)	5.7% (28)	1.2% (6)	29.3% (145)
Sense of personal and property safety	22.3% (111)	48.3% (240)	21.1% (105)	5.0% (25)	2.0% (10)	1.2% (8)
Affordability of overall cost of living	2.8% (14)	30.6% (152)	38.2% (190)	16.7% (83)	11.3% (56)	0.4% (2)
Availability of for-sale housing	5.2% (26)	33.6% (167)	37.6% (187)	6.8% (34)	3.0% (15)	13.7% (68)
Availability of rental housing	1.6% (8)	11.7% (58)	32.0% (158)	17.4% (86)	4.9% (24)	32.4% (160)
Affordability of all housing	1.8% (9)	19.6% (97)	44.9% (222)	13.4% (66)	10.3% (51)	9.9% (49)
Quality of air, water, and the environment	25.8% (128)	44.7% (222)	22.9% (114)	4.0% (20)	2.2% (11)	0.4% (2)
Availability/quality of cultural and arts facilities & programs	3.6% (19)	15.9% (79)	29.6% (147)	28.8% (143)	17.1% (85)	1.8% (21)
Availability/quality of recreational opportunities	10.4% (51)	26.6% (131)	33.3% (164)	19.7% (97)	8.7% (43)	1.2% (6)
Comprehensiveness and connectivity of sidewalk network	7.3% (36)	28.5% (140)	32.9% (162)	14.2% (70)	7.5% (37)	9.8% (47)
Availability/quality of shopping and dining opportunities	1.4% (7)	4.2% (21)	10.3% (51)	29.7% (147)	53.3% (264)	1.0% (5)
Local levels of civic engagement (voting, community engagement, etc.)	1.6% (8)	16.1% (80)	47.2% (234)	19.4% (96)	9.1% (45)	6.7% (33)

Selected additional comments (Note: comments were randomly selected and may not be representative of overall respondent attitudes):

- A connection of the bike path down south and up north would be great.
- Availability of health care is only average because Mandan no longer has a hospital.
- Develop recreational (public) opportunities on the Mandan side of the river...bring people to Mandan.
- Mandan is trying to rebuild from the community they had 20-30 years ago. We don't even have a movie theatre.
- Shopping and dining options are so poor that all are done in Bismarck. Mandan really needs to step up in the retail and dining areas.
- Taxes are high in Mandan and may drive out some home owners.

43. Please share with us a phrase, quote, or slogan that might be appropriate for the future of Mandan.

- The time to grow is NOW!!!!!!!
- Quit living in the past!
- Movin' on up!
- Mandan: Come as Strangers, Leave as Friends.
- Mandan the king of small towns
- Building up business for all citizens of Mandan
- Mandan - the pioneer spirit lives on
- Mandan is still where the west begins and thank God for that
- Mandan the king of small towns
- Mandan, the Healthy and Healing Place
- Mandan... Growing Together

44. Please share your vision for the future of Mandan.

- I want to see Mandan grow and have it become a better community. I love Mandan, myself and I want us to be known better, not just the trashy side of the river. I want people to know that we are a good, friendly community that has a good future and will change North Dakota.
- I want to see Mandan looked at as equal to Bismarck, not as second class.
- I worry that our community will shrink with the high property taxes and so little tax base.
- I would like the city of Mandan to be more resident friendly instead of focusing on its appearance. While it is important for Main Street to look nice I think that it is also important for the roads to be drivable and the homes to be livable. In order for this to happen it is necessary to have job opportunities

for the people who live here instead of trying to bring more people in therefore making it harder for us to get jobs. It is also necessary to have amenities here so we do not have to go to Bismarck every time we need something.

- I would like to see a downtown with some actual entertainment, like live bands or nice places to eat and hang out with family. I am also looking for growth in retail and office sector jobs.
- I would like to see Mandan become a cultural environment with a wide variety of experiences to offer.
- I would like to see Mandan grow into a more self-sufficient community for all types of people (Not just family oriented).
- I would like to see Mandan have its own identity rather than the town across the river from Bismarck. When I explain to people from out of state where I live I would like to be able to tell them something other than "It's by Bismarck."
- I would like to see Mandan with a unique place where small and large businesses thrive. I would like to buy my clothing and supplies in Mandan rather than supporting Bismarck business. I would like to go out for dinner in Mandan and not Bismarck at a middle priced ranged place like Ground Round. I love the Seven Seas but it is many times out of our price range for a social night out.
- I would like to see more business, more recreation etc. I would like to have a hospital too.
- I would like to see more industry, business, restaurants, and a movie theater in our community. This would then create more jobs and opportunity for the community. Let's get a move on and get some action started here in Mandan. Enough talk let's see more ACTION!!!!
- I would like to see more money put into children's recreation and higher level job opportunities.
- I would love to see a younger generation to move here.

45. In your opinion, what is Mandan's greatest strength?

Response Category	Count
Citizens	98
Small town atmosphere	60
Community	45
Family friendliness	20
Location	18
Safety	18
Location	15
History/culture	15
Schools/education	10

46. What do you think is Mandan's most important challenge to overcome?

Top Responses
Lack of businesses and jobs
Its image/reputation
Competing with Bismarck
Downtown Development
Taxes
Lack of retail
Attracting young people
Education
Leadership

47. Do you have any final comments on Mandan or this strategic process?

- Be progressive.
- Be proud of the Mandan's heritage but look beyond it and use it to your advantage.
- Be visionary; innovative; and brave enough to take a leap into the future.
- Change is good, bite the bullet and step forward.
- Find new innovative businesses to locate here instead of housing for the elderly on our main streets.
- I like living in Mandan. Sometimes, though, I think that our leaders don't think big enough or open enough and that there are not enough ways for a typical citizen to become involved where they feel it will matter and they will be taken in to consideration.
- I like the effort that has been made to "clean up and make the city more attractive." When selling a home, the first impression regarding the cleanliness and appearance is important when selling. I think the same holds true for a city. I would like to see more trees planted along Main Street and more funding from the city to clean up, fix up and plant more flowers and shrubs in the downtown area.
- I love Mandan. I don't mind paying higher taxes for a while to ensure positive, responsible, growth. But these taxes can't last forever. We need the growth to come from a grass roots community effort and government...not just government. BUSY did a great job of promoting growth even knowing it would cost higher taxes. Community members help others in the community understand that investing now will make things better later. Everybody doesn't really trust the local leadership right now.
- I love this community, but it is very difficult to raise a family here. Both parents working fulltime at low paying jobs (14 dollars or less) just to make ends meet is not how families grow together. If Mandan truly is about family, then let's start proving it.

- Keep trying. We have this problem because people in the past didn't want the change and waited too long to get things rolling. It took 20 plus years of doing nothing it can't be fixed overnight either.
- Keeping working toward the plan...give everyone the renaissance advantage and help "dress" up the town...this will entice outside people and companies to come here...and promote the city better, we are a great place to live.
- Please do something to get bigger businesses in here to help create better jobs and improve our local economy.