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the next chapter

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## partners



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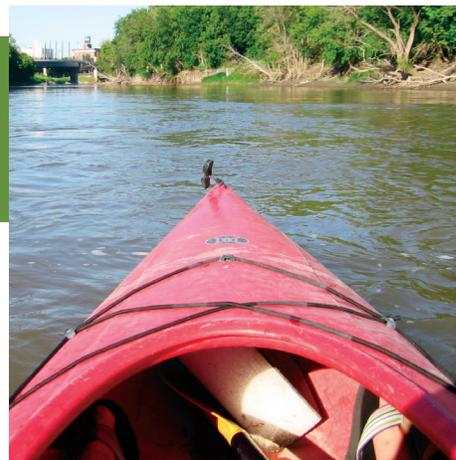


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# foreword

## Jasper Schneider State Director, USDA Rural Development



North Dakotans have a long history of controlling their own destiny. It is in this spirit that the initiative called North Dakota 2.0 originated. Our state's unprecedented economic prosperity creates a unique opportunity to write the next chapter. This report captures the thoughts and ideas of people all across the state during this important time in North Dakota. It is my hope that these findings will serve as a guide and resource for building a better tomorrow.

At USDA Rural Development, our mission is a commitment to the future of rural America and supporting our rural industries of agriculture, manufacturing and energy production. We follow through with this commitment by providing funding and financing for community infrastructure projects such as housing, water systems, utilities and emergency services. A key component to our ability to lend in rural communities is the long-term viability of an area. Items such as local support, demographics and tax structure are critical to a successful public investment. In addition to providing access to capital, we also provide technical assistance for the development of business, communities, and cooperatives. With this mission in mind, engaging people and communities is pivotal to what we do.

In crafting North Dakota 2.0, it was important that we structured the initiative in a way that would be diverse in participants and free of bias from any one particular point of view. To accomplish this, we assembled a comprehensive mix of partners who are committed to the future of North Dakota. From there, we held 14 regional meetings that provided us with a diverse cross-section of individuals. Most importantly, we wanted to give people a venue for everyone to participate and give feedback through a clicker system. This method not only posted the results anonymously and instantaneously, but also stimulated an important discussion on a wide variety of issues highlighted in this report.

The future of North Dakota is bright. Never before in the history of our state, have we had such an abundance of wealth and opportunity. The worst thing that could happen to us as a state is we reflect back on this time of prosperity and wish we had made better choices or wiser investments. Through North Dakota 2.0 and other efforts, together we can help build an even better North Dakota that capitalizes on our strengths and provides opportunity for all. Now, more than ever, we need to take a proactive approach in defining our future instead of letting the future define us.

## Dr. Richard Rathge Professor, North Dakota State University



I am pleased to have the opportunity to assist in bringing this important study to policy makers and leaders all across the state.

North Dakota is in a unique situation with regard to its robust economy. The strength of the state's agricultural base and the boom in energy development activity has energized the state's economy in an unprecedented way. It has catapulted the state from 38th in the nation in per-capita income in 2000 with \$25,592 to 9th in the nation by 2011 with \$45,747, a 78 percent increase. The increased demand for employment has lowered our state's seasonally adjusted unemployment rate to the lowest in the nation at 3.0 in March 2012, 1 percentage point lower than the next lowest state (Nebraska). The energized economy has fueled a population surge, especially in western North Dakota that placed the cities of Williston, Dickinson, and Minot in the top 10 fastest growing micropolitan areas in the nation from April 1, 2010 to July 1, 2011.

The state has an opportunity to capitalize on this unique situation. An important starting point is to listen to the voices of people within the state and hear their impressions of how to design a creative destiny for North Dakota given our current circumstances. The information within this document begins that dialogue. Conversations with key stakeholders, leaders, and community members from 14 meetings across the state have been compiled and analyzed in the following pages and serve as an initial foundation for exploring and prioritizing issues important to creating a better future for the residents of North Dakota.

This document is a combination of a comprehensive analysis of the quantitative and qualitative data collected from the North Dakota 2.0 meetings. Eight recommendations derived from the analysis by USDA Rural Development and their partners are presented for consideration. The goal of these recommendations is to develop a pathway towards a sustainable and successful future for people and our state.

I would like to thank the sponsors of North Dakota 2.0 for inviting me and my research team at North Dakota State University to contribute to the completion of this study and the reported results. I concur with the recommendations made within this document and the basis for their conclusions.

Most important are the many residents of North Dakota who took the time out of their busy schedules to participate in these events. Their participation is indicative of a strong desire to move North Dakota forward, and to make this state a better place for future generations.

# executive summary

North Dakota 2.0 was introduced to help stimulate a dialogue on the future of North Dakota. Fourteen community meetings were held across the state. The feedback from attendees is presented in this report and provides the basis for the eight recommendations that follow.

The eight recommendations focus on Infrastructure, Housing, Transparency, Leadership, Local Investment, Health Care, Education, and Bold Ideas. The recommendations can serve as a guide for those who are involved in public policy, non-profit organizations, the private sector, and academia. These recommendations represent the responses and input provided by the participants in North Dakota 2.0 through their votes on a variety of questions and their comments in discussion. More than 600 individuals attended these meetings from a broad cross-section of the state.

It is important to understand that this report is not based on a random sample of the entire state. The meeting locations represent a mix of communities by region, size, industry, and demographics. The recruitment effort was extensive, but participation was voluntary and largely reflected key stakeholders. Nonetheless, the participants represented a broad base of interests, and the methodology of North Dakota 2.0 elicited excellent discussion and participation which is culminated in this report.

## **North Dakota should develop and implement a 20-year infrastructure plan**

Energy and agriculture may provide a significant portion of the state's GDP, but without a strong infrastructure, productivity and economic growth are at risk. North Dakota 2.0 participants understand the need for adequate infrastructure now and into the future. They presented a clear message during the community discussions that more must be done and that planning is essential to meeting future infrastructure needs.

## **Increase access to housing for public sector employees and those who provide essential community services**

Housing needs are multi-faceted throughout the state. Those who work in the public sector are finding it most difficult to find affordable housing, especially in the oil production areas in the west. Solutions must be developed to accommodate these needs and ensure that a broad-based workforce can afford to live where their career leads them. In addition, the same focus must be applied to individuals and families on limited or fixed income.

## **Governments should embrace technology to achieve the highest level of transparency**

Governments, to be most effective, must hold the public trust. Transparency in the functions of government promotes accountability by making the information about governmental actions and decisions available to the citizens. This transparency can be facilitated by the utilization of technology, including websites and searchable databases making the information readily available.

## **Leadership development must be a priority to ensure long-term organizational vitality**

An organization's long-term vitality is dependent upon strong leadership. Leadership development is the cornerstone to building strong leaders able to take on the many challenges inherent in public service and volunteer organizations. Organizations should make it a part of their culture to encourage new people to participate and provide mentorship as a systemic component of leadership development.

## **Budget surpluses should be distributed to local subdivisions of government**

North Dakota enjoys significant revenues because of a growing economy fueled by energy and agriculture, but local subdivisions of government are not always sharing

in the good fortune. Infrastructure, social needs, law enforcement, fire protection, education, and emergency medical services are all dependent upon local government for a part of their support. Excess state revenues should be an important resource to serve local needs.

**Address the immediate needs of our rural health care system, including emergency services, mental health, aging facilities and professional workforce recruitment**

Adequate health care facilities and services, including emergency health, mental health, and nursing care, are critical to the viability of many rural communities. This is especially true in the western parts of the state where oil exploration and production are driving demand. It is in North Dakota's best interest to ensure that the full range of health care services are accessible to all residents.

**North Dakota should support early childhood education and access to quality child care**

Investments made in early childhood education make a significant difference in the lives of the children and families being served. They also provide an excellent economic return. Access to quality affordable child care



helps to ensure an adequate workforce for industry and economic growth.

**Boldly invest in the future**

North Dakota's future hinges on the investments made today. Making North Dakota a leader, known for its educational system, its industries, and its people, will require boldness and passion for the future. Nothing of import comes from timidity. Whether it is a student loan repayment plan, an oil refinery, a nationally renowned early child education program, or landmark research, North Dakota has the capability to be a national leader by acting boldly.

An important take away from this report is that a number of additional issues warrant consideration. These eight recommendations reflect salient concerns of the citizens who participated in North Dakota 2.0. The body of this report presents the findings from the North Dakota 2.0 journey across the state in graphic form to assist the reader in interpreting the data collected, and appendix tables providing community-specific data are also provided.



“North Dakota 2.0 provided a vibrant, interactive means for people to contribute their creative ideas, inspired vision and new ways of thinking about our state's future and potential.”

– Linda Boyd Coates  
Executive Director,  
Fargo-Moorhead  
Symphony Orchestra





# infrastructure

## North Dakota should develop and implement a 20-year infrastructure plan

Maintaining and improving infrastructure throughout the state was a clear message in the North Dakota 2.0 initiative. Participants identified infrastructure concerns and expressed optimism in finding solutions. As a result, it is recommended that North Dakota should develop a comprehensive infrastructure plan with local, tribal, state, and federal governments in addition to private sector partners.

Participants described infrastructure as: roads, bridges, schools, hospitals, child care facilities, utilities, housing, water and sewer systems, and human capital. Attention to these areas is critical to ensure a favorable business climate and a high quality of life.

Most poignant were the comments from community participants in the oil patch. Here, the pace of energy development has had a dramatic impact on all forms of infrastructure. The mechanism for addressing this impact has been problematic in terms of adequacy and timeliness. Aid is distributed through competitive grants in which oil communities compete for dollars made available through the oil production tax. Unfortunately, candidates for the grant funds find it unpredictable and, therefore, counter to good planning. The state has increased funding for impact aid considerably, but the needs far outpace the distribution of funds.

Inadequate and deteriorating roads were common themes at the North Dakota 2.0 meetings. The pressure being applied to the transportation network as a result of the demands of the energy industry and a changing agricultural economy has had a devastating effect. Roads and bridges built for much lighter and less frequent traffic are falling into disrepair and consequently affect the pace of development and the efficiency of our transportation system.

Aging public schools and overcrowded conditions in some parts of the state present a unique problem because of the time lag inherent with the state's school aid funding formula. The formula provides for adjustments one year following the increase in enrollment. This system does not meet the urgent needs of a community or its students.

Child care is in short supply throughout the state, but at emergency levels in the oil patch. One recent news report in Williston recounted that there were approximately 800 children receiving care outside the home, while 2,400 children were in need. Child care organizations face difficult challenges from a financial perspective because they are expected to provide affordable care, but also pay their child care personnel competitive wages. In addition, they need facilities that are affordable to meet their cash flow. Adequate child care is addressed in another section of this report, but it bears comment here as a component of infrastructure.

Utility constraints are also impacting the supply of housing. Many communities are faced with water and sewer systems that have reached capacity or their useful life and are in need of upgrade. Electric utilities are at their financial and workforce capacity to serve housing and industry. Until utility constraints are addressed, there will continue to be a bottleneck for additional development.

The issue of human infrastructure—such as human capital and workforce—is less tangible, but of no less importance. There is a need for a good quality workforce, not only in the oil patch, but throughout the state. Human infrastructure reaches all aspects of the traditional understanding of the term. As new schools and more classrooms become necessary, more teachers and aides are also required. Where health care services are

stressed, the need for trained personnel in the allied health fields is an imperative. North Dakota must focus more attention to filling these workforce needs.

For all these reasons, there is ample justification for a collaborative planning and implementation effort to address current needs and future growth. The collaboration should include representatives from all levels of government (local, tribal, state and federal) along with participation from the private sector and technical experts. These key contributors include:

engineers, planners, utilities, health care providers, contractors, and others.

North Dakota is in a unique position to provide solutions and meet the challenges of our dynamic economy. This 20-year plan must include a description of needs, both present and projected. It must include a methodology for prioritization that maximizes impact while providing for a sound financial basis for sources and distribution of funding. This plan must also be flexible to meet the needs of a changing economy.

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“Our aging water and sewer infrastructure is a serious problem and we need every tool in the tool belt to finance projects like our water tower, now that federal earmarks are gone. I’m glad to see the North Dakota 2.0 initiative being brought to our region of the state to seek our input.”

– Dan Stenvold, Mayor of Park River

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“Hopefully, North Dakota 2.0 will help chart a course not only for Devils Lake and the Lake Region, but the entire state.”

– Dick Johnson  
Mayor of Devils Lake

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# housing

## Increase access to housing for public sector employees and those who provide essential community services

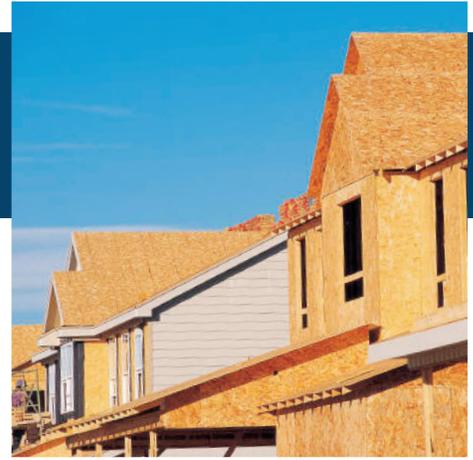


Housing represented a significant concern among the participants at North Dakota 2.0 sessions. Participants were particularly concerned about those who provide essential community services--teachers, nurses, law enforcement personnel, and others.

The issue of housing is multi-faceted. Availability, affordability, and quality represent some of the challenging variables for rural communities from Bowman to Grafton and Crosby to Oakes. The influx of oil patch workers has driven the demand for housing in western communities most aggressively. Demand has outpaced housing inventory for both single-family and multi-family units. This high demand and low supply has increased the cost of housing significantly. Rents have risen dramatically, in many cases beyond affordability for long-term residents and those on fixed or limited incomes.

The cost of construction, including materials and labor, has also risen to reflect the supply and demand pressures. Historic boom and bust cycles have had an impact on lending because of the associated risk. Throughout North Dakota, rural communities are frustrated by finance issues relating to the appraisal gap. This results when the appraised value estimated for mortgage security purposes falls below the cost of construction and land.

Many rural communities find it difficult to develop new housing because of a lack of available land and water and sewer infrastructure. Participants expressed the contention that landowners adjacent to many rural communities have been reluctant to sell land for development. Communities with available land often find it difficult to expand water and sewer infrastructure without debt financing. These problems deny some



communities the ability to grow in an efficient and methodical manner.

Several participants from rural communities, particularly those outside the oil patch, expressed that the long-term vitality of a community is dependent on the availability of quality housing. While housing supply may be adequate in some areas, the quality is often unattractive to those considering a move to the community.

The high cost of housing is especially problematic for residents who are not employed in oil development and related industries. Examples that are critical to community needs include public employment such as

law enforcement, county, city, and school employees. Just as critical are the needs of health care service providers who are also subject to the same affordability pressures. They find it difficult, if not nearly impossible, to attract individuals qualified to fill critical positions. The private sector has begun to address housing as a component for recruiting and retaining their employees, but more must be done to address affordability.

Until the supply of affordable housing is increased, it is recommended that public sector entities such as health care systems, emergency services, school districts, and others begin to explore options to recruit and retain a workforce which serves the public.



“AE<sub>2</sub>S is energized to be involved as a partner in the ND 2.0 initiative, including the specific emphasis on future infrastructure challenges and opportunities. It has been encouraging to see so many people engaged across the state. We are in a unique position to capitalize on our good economic situation, setting the stage for smart development, improved infrastructure, and stronger communities.”

– Steve Burian, CEO  
Advanced Engineering and Environmental Services, Inc.





# transparency

## Governments should embrace technology to achieve the highest level of transparency

A government must hold the public trust in order to be effective. This principle applies equally to policy-making activities as well as the administrative functions of government. Transparency promotes accountability by making information about the actions of government available to citizens. To achieve true transparency, citizens must understand the motivations and interests of decision-makers. There is ample justification from the collective feedback of North Dakota 2.0 participants to urge governments at all levels to provide as much transparency as possible to their constituents.

Technology can offer innovative and efficient ways to make information about decisions and operations readily available to the general public. For example, online searchable databases can provide full access to documents and records in a timely manner. Government websites should also be uniform in design and function to facilitate ease of access.

To avoid the perception of impropriety, elected officials should consider stronger policies on disclosure of their personal interests including financial holdings and organizational affiliations. Other examples of public disclosure should include: government expenditures, salaries of employees, and contracts between government and the private sector.

More effort should also be dedicated to streaming video for contemporaneous access to public meetings. Examples of coverage include entities like C-SPAN on the federal level and community access television on the local level. While floor sessions of the state legislature are now available through streaming video, committee hearings and deliberations are not accessible in this way.

Uniform transparency protocols and procedures should not be limited to just legislative agencies of government. The executive and administrative agencies must also be subject to full disclosure. Development and implementation of a unified system of judicial reporting would also contribute to more confidence in our systems of government. The North Dakota Supreme Court, for example, has made their proceedings available online in a user-friendly manner.

North Dakota 2.0 participants addressed the importance of a vigilant, thorough, and objective media as a means to improve trust in the functions and actions of government. While government should do its best to provide transparency, objective and investigative journalism is imperative to ensure the accountability needed for a well functioning democracy. It is also important that all citizens take more responsibility to be well-informed and be willing to go beyond the headlines to seek out more objective information.

There was extensive discussion during the North Dakota 2.0 initiative on the importance of transparency. Advancements in technology have improved streaming video, websites, and searchable databases. It is recommended that all levels of government make the necessary investments in technologies to provide the highest possible level of transparency.

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“Transparency is really crucial; that doesn’t mean having all the data in some file cabinet somewhere. But aggressive transparency, where anybody who is at all curious can easily see who is getting contracts. How is this being accessed and shared?”

– Adam Davidson, Host of Planet Money

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# Leadership

## Leadership development must be a priority to ensure long-term organizational vitality

Leadership development is indispensable to ensuring continuity and vibrancy in any community. Participants in North Dakota 2.0 shared the importance of having a constant supply of individuals willing and able to take on the responsibilities of community and public service. Many roadblocks were identified, both real and perceived, in providing the leadership necessary for North Dakota. Changing demographics should provide the impetus for all organizations and communities to engage in proactive leadership development to ensure long-term vitality.

Organizational leadership is part of this framework. Service clubs, community non-profits, churches, cooperative boards, and regional economic development organizations all need quality leadership as much as government and business. North Dakota is among the top states in the nation in terms of volunteering, but for many meeting participants, the term “worn out” came up frequently.

Interest in serving in a leadership role is often diminished by time constraints brought on by job and family responsibilities. A common theme during the discussion of leadership development was that too many people are “time starved.” Some argued that this was an example of changing priorities in society. Whatever the reason, the need for individuals to seek leadership positions is critical to the future of any community.

Engagement is a term that conjures up active participation and interest. The data revealed that people are interested in getting involved. However, some said they simply haven’t been asked to participate. There is also a perception that the “old guard” is not willing to give up the reins of power when, in fact, several self-described “old guard” participants said otherwise.

Another issue is the perception of public service. Taking a position of leadership often means making unpopular decisions which leads to negative public feedback. Many individuals are reluctant to take on such stresses. This is especially true for business people whose economic interests could be adversely affected by negative public perception. Add to this the negative characterization of politicians, and it is no surprise that many individuals are unwilling to take on leadership roles. To address this, a cultural change must take place to provide an appreciation of public service. The value to society and the inherent complexities in public decision-making must be better understood. Education and civic responsibility are critical to gaining respect for the process and the people who serve.

The feedback indicates that North Dakota could do a better job of developing leadership to bridge the gender and age gaps that exist today in organizations and government. In particular, women are underrepresented on county commissions and in the state legislature. This was an issue of concern as the decisions of policy-makers affect both men and women. To address this imbalance, more needs to be done to encourage and develop representative leadership.

Leadership development must focus on the future. Encouraging new people to participate in community affairs and mentorship will build a base of individuals ready to take on more responsibility when transitions occur. It is recommended that all organizations place a priority on leadership development to ensure long-term viability.



“Leadership is the key to ensuring a high quality of life we have come to expect in rural communities.”

– Don Frye  
Mayor of Carrington and  
President of ND League of Cities



“ND 2.0 has traveled the state visiting with local leaders and business people in order to identify the strengths and needs of our respective communities. The long term strength of our great state depends on good strong leadership, both now and in the future. The ND 2.0 project has drawn attention to the fact that we need to cultivate those future leaders now for a brighter tomorrow!”

– Lyn James, Mayor of Bowman





# local investment

## Budget surpluses should be distributed to local subdivisions of government

Participants at the North Dakota 2.0 meetings expressed significant local needs, primarily for infrastructure which is covered in more detail in the first recommendation. While North Dakota should have a comprehensive infrastructure plan, many of those concerns can be addressed by local governments. Throughout the North Dakota 2.0 community meetings, there was frustration with the lead-lag financing that local governments face from both state and federal entities. There is also a need for technical assistance to ensure that government dollars are distributed and expended with maximum effect. Our recommendation is to provide a more efficient distribution of state surplus dollars to local subdivisions where the need is great and resources are constrained.

The prosperity of North Dakota is not always evident with local budgets. The need to maintain and improve infrastructure is also not exclusive to the oil patch. Communities across the state expressed the sentiment that more of the state's surplus dollars should be distributed to local subdivisions of government.

Federal investments also continue to be a key source of financing for many North Dakota projects. This is especially true with water systems, roads, flood protection, bridges, and utilities; however, lean federal budgets have meant fewer resources than in prior years. To mitigate decreased levels of funding, federal agencies should strive to streamline their efforts and build efficiencies in deploying important resources; and the state should make up shortfalls where feasible and most effective.

North Dakota 2.0 participants overwhelmingly indicated support for the existing property tax replacement system as an effective way to lower property

taxes levied by public schools and, at the same time, distribute surplus state revenues. Under this program, state funds are distributed to school districts and these dollars are used to reduce the mill levy that would have otherwise been imposed by the district. The effect of this distribution from the state is to lower property taxes for each property owner. It adds no new dollars to the public school budget, but simply replaces property tax revenues. Pressure on property taxes has been mounting for several years and such relief also provides more flexibility to other subdivisions of local government to generate revenues when necessary to meet social service and infrastructure needs.

Support for local subdivisions of government represented a predominant theme among participants. The findings indicated little support for the elimination of property taxes; participants expressed the importance of property tax relief, but not at the sacrifice of local control.

The data also show that there is a preference towards distributing state revenue surpluses to local subdivisions of government rather than using the excess money to reduce other statewide levied taxes. Participants preferred to continue property tax replacement through school districts, rather than trying to address tax issues through corporate, sales, or personal income tax reductions.

The Legacy fund was passed by the voters of North Dakota to protect a portion of the oil revenues paid to the state through extraction and production taxes. There are two themes that can be taken from the discussion on the Legacy fund. The first is where future earnings should be deployed and the second is how the principal should be invested. Participants largely expressed a desire for infrastructure needs to be addressed with

future earnings from the Legacy fund. With regard to the principal, many indicated a preference to invest in North Dakota needs rather than a volatile Wall Street.

This recommendation is not intended to suggest that all surpluses should be distributed to local subdivisions. Only those dollars that exceed required deposits in constitutional trust funds and budget stabilization funds are considered surplus. Should the legislature propose changes in the utilization of the existing statutory funds, it is important to recognize that the needs at the local level are great and communities' ability to fund them is challenging.

Participants made it clear that there is justification, need, and public support to recommend an increase in distribution of state budget surplus dollars to local subdivisions of government.



“Local governments need to be empowered to plan from year to year to make vital infrastructure improvements. The current impact grant system does not allow for predictable distribution and appropriate planning.”

– Brent Sanford  
Mayor of Watford City



“ND 2.0 is an important effort because we need to have a serious discussion about the future and how we manage this energy boom. Counties in my region need help to address the challenges we face with infrastructure, law enforcement, social services and housing for our employees. I'm glad to see that the sponsors felt it was important to come to Crosby to get our input.”

– Doug Graupe, Divide County Commissioner and President of ND County Commissioners Association



# health care

## Address the immediate needs of our rural health care system, including emergency services, mental health, aging facilities and professional workforce recruitment

A common concern expressed at the North Dakota 2.0 meetings was the need to address the deficiencies of our overall health care system, especially in rural areas. Because of North Dakota's large geographic area, population shifts, and an aging demographic, it is recommended that immediate needs be addressed including emergency services, mental health, aging facilities, and professional workforce recruitment.

North Dakota is among the best in the nation when it comes to quality and cost of health care. Our network of providers has made health care services accessible for most citizens regardless of their location. However, senior citizens are often forced to leave their rural community because of the need for specialized and long-term care. The demographic shift taking place in North Dakota with aging baby-boomers and an increasing elderly population amplifies this concern. To help mitigate the effects of this demographic shift, North Dakota's health care providers have also embraced technology at a faster rate than in many parts of the country to assist accessibility in rural

areas. In spite of these factors, participants identified that there are many improvements that should be made.

The need for emergency medical services was identified as the greatest public sector need in the majority of the communities surveyed. Emergency medical services are especially being stretched in the west with the extraordinary growth of oil development. This has brought thousands of new oil workers who are at a high risk for injury. This dangerous work results in exponential increases in emergency calls to local volunteer ambulances. In turn, the extreme demand on volunteers is affecting their individual jobs, health, and family life. As a consequence, it is becoming more difficult to find volunteers who will dedicate the time it takes to be trained and be available on-call.

For many rural communities, their local health care facility is an anchor for sustainability. Seniors choose to live closer to quality health care services which place more pressure on maintaining and enhancing services. To provide those services, communities need talented and well-trained professionals who are willing to locate in a rural community and willing to work in specialized fields. North Dakota needs to focus attention on health care workforce initiatives to ensure that rural communities have the personnel needed to provide that care.

Hospital care in the oil patch is challenging as a consequence of uncompensated care and workforce shortages. North Dakota 2.0 attendees in the west included several hospital and clinic administrators. They spoke of the challenges they face in terms of retaining and recruiting nurses and CNA's in particular. Wage competition and the high cost of living have exacerbated any previous challenges. The number of emergency room visits, which in some cases has more





than doubled, further underscores the concerns raised by these participants.

Uncompensated care is a growing issue due to emergency room utilization by people without health insurance or who have unfamiliar out-of-network coverage. While most of the large oil companies provide health coverage to their employees, thousands of independent contractors and smaller companies do not. Some employees are offered a choice between a housing or health care allowance. Due to the shortage of affordable housing, the housing allowance is most often preferred. When someone does need health care, the likelihood of non-payment rises significantly. As a result,

uncompensated care drives up costs and threatens the economic viability of the service provider.

Mental health services, specifically inadequate resources for counseling and treatment, were emphasized as areas of need by several North Dakota 2.0 participants. Risk factors are high throughout the state for mental illness because of the pace of life, work stress, long winters, and substance abuse. More education is needed on the issue of mental health and available assistance. Providing quality mental health care lessens the need for other services such as police protection and emergency medical services.

Many health care facilities across North Dakota are also in need of repair or replacement. Facilities often suffer from air quality issues, privacy concerns, and a lack of technology to be more adaptive to state-of-the-art health care delivery. Population growth and aging demographics are also contributing to the need for modern facilities. Participants identified that building new facilities takes a tremendous amount of planning and financial resources.

For these reasons, there is ample justification to recommend that decision-makers from across the health care spectrum and government collaborate to address the immediate needs and plan for long-term solutions.



“AARP was a proud partner in the North Dakota 2.0 initiative as we look together at how the state can best meet the challenges of the future. Those challenges include an increasingly aging population and we want to assist the state, cities and towns, institutions and other organizations in planning for this future. This includes ensuring those 50 and over can live the lives they want, where they want, and with the services and supports they need.”

– Janis Cheney  
State Director  
AARP North Dakota





# invest in our kids

## North Dakota should support early childhood education and access to quality child care

Participants in North Dakota 2.0 addressed education in the context of workforce development, quality of life factors, and early childhood education. It is generally acknowledged that North Dakota enjoys a high quality system of education, but Mr. Rich Karlgaard, publisher of Forbes, challenged North Dakota to go further. He said:

“You cannot over-invest in education, especially math, science, engineering, business, accounting, and entrepreneurship. Take what you are doing now and double and triple down. Don’t benchmark education against other states; benchmark your education against the world and get aggressive about that.”

This provocative statement challenged participants to think boldly about positioning our kids and our education system for a global economy. The theme of education and investing in people was prominent among participants throughout the state.

At the Dickinson meeting which was attended by many college students, there was a particular emphasis on the importance of scientific research and development. Participants discussed the need for more technical education and workforce training to meet the demands of a growing economy.

At the Fargo meeting, presenters Adam Davidson and Alex Blumberg, economics reporters for Planet Money, spoke of the workforce benefits of early childhood education. They emphasized that “soft skills”--skills that involve resolving conflict, expanding verbal skills, getting what one wants, keeping anger under control, and learning how to share--are of significant importance to success in the workplace. They expressed that research is showing the best place to learn these “soft skills” is in pre-school and, therefore, more investment should be focused on the development of early childhood education

programs and on providing universal access.

Participants highlighted the connection between economic development and the availability of affordable, quality child care and early childhood education. They saw this as especially important in recruiting families and supporting women in the workforce. While the need for child care and early education programs was expressed across the state, it was particularly stressed by participants in western North Dakota, where access to affordable, quality early education opportunities is difficult because of the growing demand and the limited number of qualified providers. Western North Dakota is also struggling with the escalating cost of living, which makes affordability of child care even more of an issue, especially for workers who are not employed in oil-related jobs.

Early childhood education programs for children in lower-income families, such as Head Start/Early Head Start, have demonstrated an excellent return on investment. Numerous studies show that participating children experience higher achievement test scores, reduced grade repetition and need for special education, and higher graduation rates compared to their peers. Long-term economic benefits include increased earnings, employment, and family stability, along with decreased welfare dependency and lower costs associated with crime. The disparity of income in the west is increasing the need for programs like Head Start and Early Head Start, but waiting lists exist across the state. There is an opportunity for greater investment in young children, especially those from low-income families, which can provide tremendous long-term benefits to North Dakota.

In addition to the benefits of early childhood education and quality child-care programs, North Dakota

should invest in kids by maximizing its contribution towards making health insurance available for every child who needs it. Preventive care keeps kids healthy for a better educational experience and also keeps health costs down in the long run. Addressing mental health and substance abuse issues for parents, as well as children, will also contribute to positive learning environments.

The state's efforts to address housing affordability can also contribute to increased consistency and stability for children, which is an important contributor to their ability to learn and succeed.

Investing in kids is a critical need when looking to the future. It became apparent throughout North Dakota 2.0 that investing in kids is a top priority. While there is no single specific recommendation, it was commonly expressed that North Dakota has the resources to make a difference and will benefit from investments in early childhood education, access to quality child care, and healthy children.



“You cannot over-invest in education, especially math, science, engineering, business, accounting and entrepreneurship. Take what you are doing now and double and triple down. Don't benchmark education against other states; benchmark your education against the world and get aggressive about that.”  
– Rich Karlgaard, Publisher of Forbes



# the next chapter

## Boldly invest in the future

North Dakota is at a defining moment in our state's history. For most of our existence, North Dakota has been static in population and industry. While we will always be an agrarian based economy, our energy industry continues to grow from both nonrenewable and renewable sources. Our economy also is diversifying with manufacturing and a growing technology sector. A common theme from North Dakota 2.0 participants focused on the question, "what investments can we make today to ensure that our success is sustained for generations to come?" Our final recommendation is to boldly invest in the future and distinguish North Dakota from the rest of the country.

Never before have we had so many unique opportunities in front of us. North Dakota is in a position to invest in our people and competitively position ourselves with the rest of the country and the world. This opportunity should not be squandered. Many participants expressed a desire for balance between economic prosperity and quality of life.

There was overwhelming feedback that resources should be invested in a way to "make it count" rather than to simply maintain or divvy up the wealth. This recommendation is not for one signature initiative. Instead, many big-ticket items were discussed by participants including: building a world-class education system, investment into research and development, addressing the needs of student and college debt, the concept of constructing a state-owned oil refinery, and the possibility of restructuring our tax system.

North Dakota has the opportunity to create a world-class educational system from pre-K through college. Education, especially in early childhood, was discussed in more depth in the prior recommendation, but the

evidence is overwhelming that an investment in our kids is an investment that pays dividends over a lifetime.

The energy and agricultural economies are testaments to highly focused efforts in research and development. Simply put, our economic success of today can largely be credited to the investments into research and development a generation ago. We have the ability to make sure we are on the cutting-edge of tomorrow's technologies by making similar investments now. North Dakota has successful research institutions of higher learning that can be challenged to expand their research if provided the resources to do so.

Participants were most emphatic about the issue of college debt and the desire to keep our graduates in state. The most popular response to the final question of the survey, regarding what we should be doing now to make a lasting impact on North Dakota's future, was to provide for a student loan repayment program to incentivize graduates to stay in North Dakota. North Dakota, if it chooses, can make such a program a reality.



"The North Dakota 2.0 effort was important to engaging our members. It is important for all citizens to have input on the future of the state."

– Woody Barth  
President of North  
Dakota Farmers Union





Next to addressing student loans, the concept of investing in an oil refinery was a top response across the North Dakota 2.0 meetings. While discussion often discounted the efficacy of a state-owned facility, there was strong interest in state assistance of a public/private partnership to see such an asset built here in North Dakota.

The choices we make today will have a lasting impact on the direction of North Dakota. There is common concurrence that we have to get this next chapter right. Our state's early leaders had the courage to make bold investments and adopt policies that protected our farmers, the land, our workers, and small businesses. To provide access to capital in uncertain times, the

Bank of North Dakota was developed. To ensure market availability and a fair price for our grains, North Dakota built and still operates our own mill and elevator. To protect our workers who get injured on the job, we require all employers to purchase insurance through a state-owned workers' compensation system. These institutions have stood the test of time and have been pivotal to our state's vitality in good times and in bad. We share this history to stress the importance of recognizing where we have come from as a state and to guide us with future investments.

The final recommendation for North Dakota 2.0 is to write the next chapter by making a bold investment for the future to ensure that better days are still ahead.



“North Dakota is no longer in the middle of nowhere, the future is *now* and *here* and it is ours to shape. Taking charge of our own destiny—that is the vision of ND 2.0.”

– Debora Dragseth, Ph.D.

Professor of Business, Dickinson State University



Courtesy of Bismarck State College



“Tribes play an important role in the future of North Dakota, and Tribal Colleges have played a critical role in helping lead the way.”

– Jim Davis, President

Turtle Mountain Community College



## History and Goals of the Initiative

North Dakota 2.0 is a collaborative effort, with the single purpose to focus on the future of North Dakota. The intention of the initial North Dakota 2.0 committee was to host a meeting in Bismarck to capture information on an array of pertinent questions regarding North Dakota's future. This meeting was intended to lead towards a dialogue that would culminate into reasoned recommendations for policy makers at the local, state, tribal and federal levels of government.

After holding the initial meeting, much of the feedback indicated that this initiative needed to go further. Participants were "hungry" for a discussion on the future of North Dakota. As a result of this feedback, the North Dakota 2.0 committee developed a plan to hold regional town-hall meetings in 12 communities across the state, in order to gather more information and compare outcomes. After the community tour, a capstone event was held in Fargo to complete the initiative and to share preliminary results from the rest of the state.

To capture the best reflection of the entire state, North Dakota 2.0 identified communities as host sites for regional meetings. It was a priority that the locations represented a broad base of interests. It was important to get a mix of communities by region, size, industry, and demographics, as well as representation from a tribal community. North Dakota 2.0 meetings were held in 14 cities and over 600 people participated.

- Bismarck, October 18, 2011
- Linton, January 18, 2012
- Devils Lake, January 23, 2012
- Grafton, January 24, 2012
- Jamestown, January 30, 2012
- Oakes, January 31, 2012
- Garrison, February 1, 2012
- Bottineau, February 6, 2012

- Belcourt, February 7, 2012
- Bowman, March 5, 2012
- Dickinson, March 5, 2012
- Watford City, March 8, 2012
- Crosby, March 9, 2012
- Fargo, April 17, 2012

Formulation of questions took place prior to the Bismarck event in October 2011 and was based on the collaboration of the North Dakota 2.0 committee. Questions revolved around leadership, local/state investment, and quality of life with several subcategories including government transparency, civic engagement, infrastructure needs, housing, economic opportunity, the tax system, crime, education, child care, and health care.

An extensive effort to recruit participants from the regions surrounding each host community revolved around contacting city, county, tribal and state officials, economic development entities, community leaders, and local and statewide media to encourage citizens to attend. This was done primarily through telephone, email and local marketing efforts.

USDA Rural Development State Director, Jasper Schneider, facilitated the community meetings. Attendees at these events were approximately 60 percent community activists and leaders who held positions on local boards of directors, city councils, county commissions, and state government. The remaining 40 percent were community members, many of whom indicated they would like to become involved in civic leadership. Each of the meetings included a mix of business people, farmers, and employees from a variety of sectors. The greatest representation of younger residents was in Dickinson, where a significant number of university students participated.

Meetings were conducted in an open forum with the facilitator posing questions being displayed using

a PowerPoint presentation. The presentation was an interactive application with each participant receiving a wireless clicker remote to select responses to the questions being posed. Once all responses had been transmitted, the cumulative result would appear on the next projected slide. After each question, the floor was opened for discussion on the question and the polled data results. While not every result produced discussion, often the feedback went beyond the formal questions. Comments made during these discussions were captured, analyzed and incorporated into this report.



## Approach to Analysis

The analysis of the North Dakota 2.0 community meetings provides narrative and figures covering the overall results from across the state. Emphasis is placed on overarching trends, rather than on specific percentages. In cases where broad differences between meeting locations stood out from the overall results, those differences are discussed in the narrative. Insights from the discussions are included as well, where applicable. The community-specific data are provided in the appendix tables at the end of the report.

The number of participants at each community meeting varied widely, from under 20 in Bowman and Watford City to over 100 at the conferences held in Bismarck and Fargo. It was important to give the perspectives offered at each meeting equal weight when determining a combined perspective across the state. The best way to accomplish this was to focus on the average responses to each question posed at each community meeting. Thus, the combined results represent an average of the overall community responses (rather than the total sum of all participants at all of the meetings). The N for each question reflects the number of communities who were asked the question, up to 14. The number varies because not every question was posed at the Bismarck and Fargo meetings.

When interpreting the results of the North Dakota 2.0 community meetings, it is important to understand that analysis is based on a combination of anecdotal comments and insights from the clicker remotes and discussion. Communities were selected in order to capture a variety of perspectives across the state and extensive effort was made to recruit people from each community and the surrounding area to each meeting. The selection of communities and attendance of participants at the meetings did not represent a random sample. Consequently, the reader should not attribute results from the questions as a generalization to the state as a whole. The methods used to convene the North Dakota 2.0 community meetings, and the results of this initiative, offer valuable insight from a cross section of invested citizens and key stakeholders regarding how to move our state forward.

# analysis of the North Dakota 2.0 Community Meetings

## Background Information

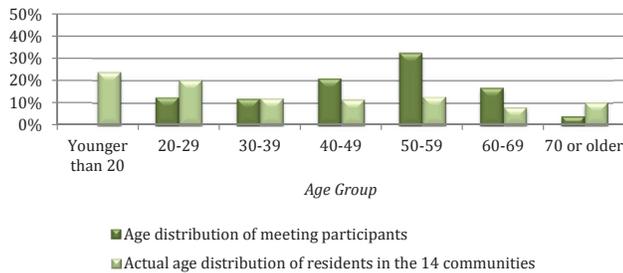
In terms of analysis of the information gathered at each meeting, we chose to deemphasize actual percentages of participants who answered questions in particular ways in order to focus on the overarching trends that the responses demonstrate.

More men than women participated in the meetings, but the distribution was nearly even.

The majority of participants were ages 40 to 59. Meeting participants were older than residents of the 14 communities in general.

- Dickinson had a larger than average proportion of participants younger than age 30 and Oakes had a larger than average proportion of participants ages 70 or older.

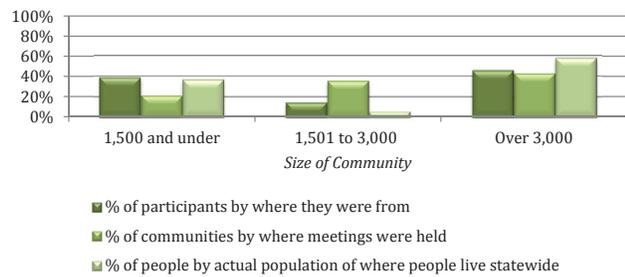
**Figure 1.** Age Distribution of Meeting Participants and Residents of the 14 Communities



*N=14/14 communities; Note: Actual age distribution of residents in the 14 communities comes from the U.S. Census Bureau, 2010 Decennial Census*

The North Dakota 2.0 meetings were successful in capturing participation from smaller communities as well as larger communities within the state.

**Figure 2.** Size of Community Where Participants Were From, Where Meetings Were Held, and Actual Statewide Distribution



*N=14/14 communities; Note: Actual population of where people live statewide comes from the U.S. Census Bureau, 2010 Decennial Census – the category “1,500 and under” includes people who live in communities of at most 1,500 people as well as people who do not live within the boundaries of a community*

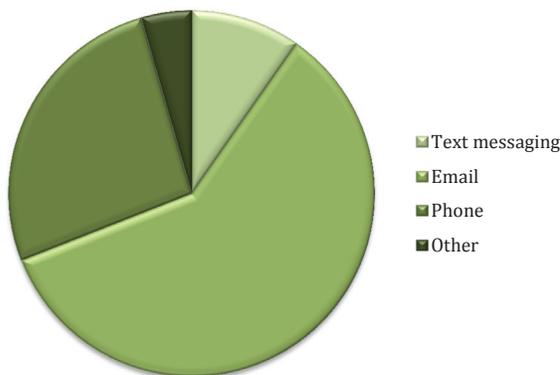
## North Dakota 2.0 Communities – USDA Rural Development 2012



The majority of participants used email as their most common form of communication. Phone was second most common.

- Text messaging was the preferred form of communication in Dickinson, which had the youngest participants. The proportion who preferred email was above average in the other urban areas.

Figure 3. Participants' Most Common Form of Communication

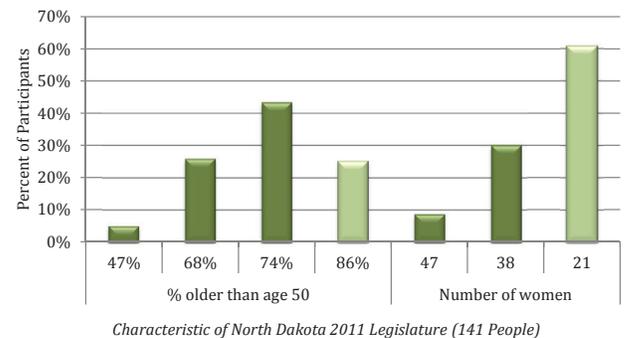


N=14/14 communities

Participants were provided four percentages representing the proportion of the North Dakota 2011 Legislature that was older than age 50. They were also provided three numbers representing the number of women in the legislature (out of 141 people). While most participants knew that only 21 of 141 legislators in 2011 were women, most underestimated the proportion of legislators that were older than 50.

- Participants in Bismarck were the most likely to have the correct answer for both questions.

Figure 4. Participants' Knowledge of Legislature Demographics



Characteristic of North Dakota 2011 Legislature (141 People)

N=13/14 communities; Note: Light green indicates the correct answer to the questions



“There is plenty of money; it’s just not being invested in rural communities.”

– Garrison participant



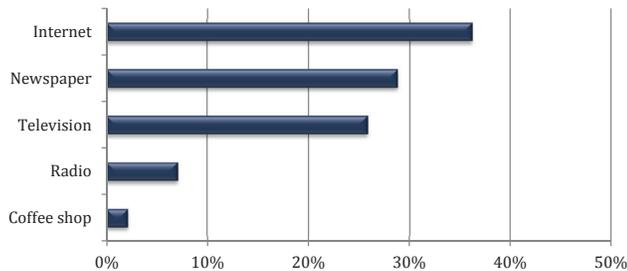
# analysis of the North Dakota 2.0 Community Meetings

## Transparency in Government

Participants were split regarding where they get most of their information about the operations of government. Internet was the most common response, followed by newspaper and television.

- The majority of participants at the Belcourt, Crosby, Devils Lake, and Dickinson meetings said they get most of their information from the Internet. The majority of participants at the Bowman meeting get their information from the newspaper. While still not a substantial proportion, an above average proportion of Fargo participants get their information from the radio.

**Figure 5.** Where Participants Get Most of Their Information About the Operations of Government

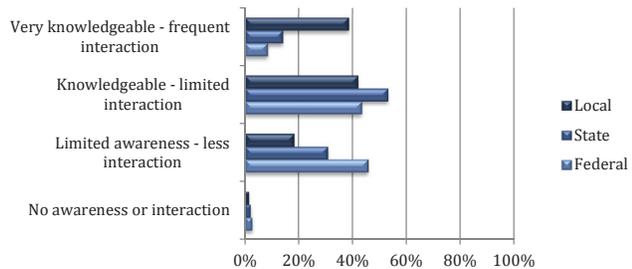


N=13/14 communities

The level of knowledge and interaction with levels of government was highest with local government and lowest with federal government. A substantial proportion of participants indicated having limited awareness and little interaction with federal government.

- An above average proportion of Watford City participants indicated they are very knowledgeable and have frequent interaction with local government. While still the minority, an above average proportion of Dickinson participants indicated no awareness or interaction with all three levels of government.
- In discussion, participants indicated that federal government is not as pertinent, available, and approachable as local government and that they feel it is more difficult to make an impact/difference on the federal level. Participants also expressed concerns about the credibility of information being disseminated about federal government actions. Consequently, some felt uncomfortable making conclusions on issues so complex where media coverage appears superficial.

**Figure 6.** Participants' Knowledge and Awareness of and Interaction with Local, State, and Federal Government



N=13/14 communities



“There is little investigative reporting, too much fluff.”  
– Oakes participant





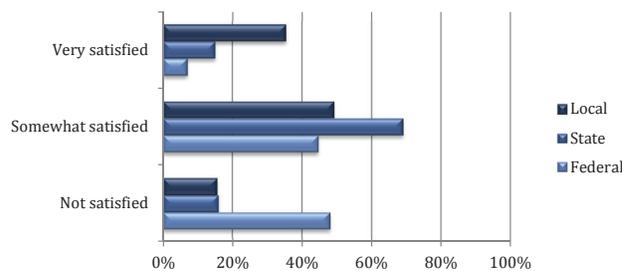
“There is a sense that what is going on behind the scenes is not easily observed or known.”  
– Fargo participant



Participants’ satisfaction with the information they receive from the media about government decisions was highest with local government and lowest with federal government. A substantial proportion of participants were not satisfied with media information about federal government.

- An above average proportion of Bowman and Linton participants indicated they are very satisfied with media information about local government decisions. An above average proportion of Fargo participants were not satisfied with media information about state government decisions.
- In discussion, participants indicated that they have greater trust in local media coverage, but that there still needs to be better coverage about important decisions that are made. Some participants said there is not much media coverage for the state legislature. Television coverage was seen to sometimes be incomplete with not all the relevant information being reported. At the federal level, coverage was seen as biased, overly selective, and too focused on entertainment. Some participants indicated that national media can sometimes provide an overload of information.

**Figure 7.** Participants’ Satisfaction with Information They Receive From the Media About Decisions Made by Local, State, and Federal Government

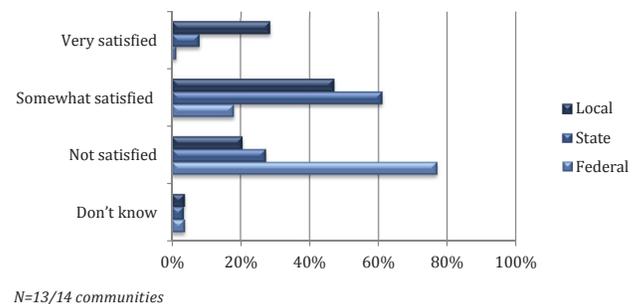


N=13/14 communities

Participants’ satisfaction with transparency in government was highest with local government and lowest with federal government. A large majority of participants were not satisfied with transparency at the federal level.

- A large majority of Watford City participants said they are very satisfied with transparency in local government. The majority of Fargo participants were not satisfied with transparency in state government.
- In discussion, some participants said that legislators do not know what they are voting on and that budgets and bills are not explained well enough. In general, there was the feeling that local government is more transparent and the officials are closer to the people. At the state level, there was a greater desire to see what goes on behind the scenes. There was less trust in the federal government, and the feeling that fewer opportunities for input are available. There was also a sentiment that there is too much information to fully grasp.

**Figure 8.** Participants’ Satisfaction with Transparency in Local, State, and Federal Government



N=13/14 communities

# analysis of the North Dakota 2.0 Community Meetings

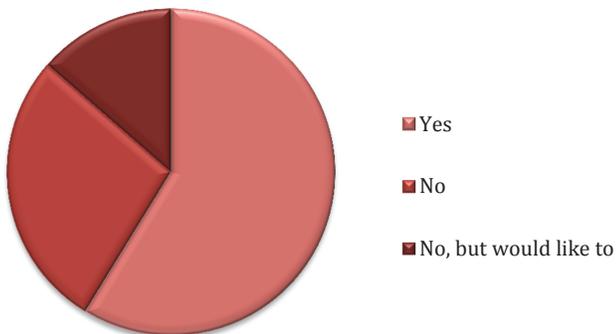
## Leadership

A large majority of meeting participants said they have mentored someone within an organization they belong to.

The majority of participants currently serve on a board of directors or serve in a position of elected leadership. Among some participants not currently serving, there is interest in doing so.

- An above average proportion of participants in Bowman and Watford City currently serve, while a below average proportion in Dickinson currently serve. An above average proportion of Belcourt meeting participants do not currently serve, but would like to.

**Figure 9.** Whether Participants Currently Serve on a Board of Directors or Serve in a Position of Elected Leadership



N=14/14 communities

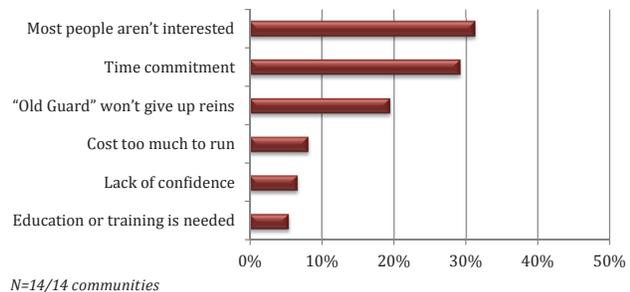
Participants indicated that lack of interest is the primary barrier to new people being elected or appointed to positions of leadership. Time commitment was the second most common barrier, followed by the “Old Guard” not giving up the reins. While not selected as the primary barrier by the largest proportions of participants, costing too much to run, lack of confidence, and the need for education or training were also seen as important barriers.

- Lack of interest was selected as the primary barrier by the majority of Watford City meeting participants. Time commitment was selected as the primary barrier by an above average proportion of participants in Bowman. An above average proportion of Fargo participants selected costing too much to run as the primary barrier. Lack of

confidence and the need for education or training were selected as primary barriers by an above average proportion of Belcourt participants.

- In discussion, participants also mentioned the fear of unpopular decisions hurting one’s business or reputation. There was also a feeling that when people are in positions for a long time it is hard to change leadership. Conversely, some participants who would be considered the “Old Guard” indicated they would be glad to hand over the reins to new people. Other suggested reasons for barriers to positions of leadership involve modesty, an unwillingness to compete, fear of failure and a lack of desire for such levels of responsibility.

**Figure 10.** Participants’ View on the Primary Barrier to New People Being Elected or Appointed to Positions of Leadership



N=14/14 communities



“People would get involved in a group if someone asks them to participate.”

– Bowman participant



“

“People don’t run because they don’t want to be punished for their decisions and their involvement. You become property of the public. It’s a step down, rather than a step up.”

– Dickinson participant

”

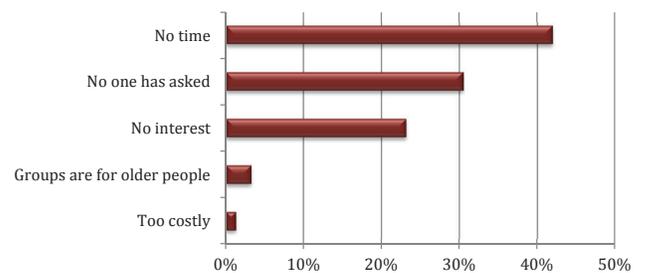


Lack of time was indicated by the largest proportion of participants as the reason why new people decline to volunteer to serve in civic organizations. No one asking and no interest were the next most commonly selected reasons.

- An above average proportion of Belcourt and Bowman participants saw lack of time as the primary reason for new people declining to volunteer to serve in civic organizations. An above average proportion of Bismarck participants said that not being asked was the primary reason. An above average proportion of Watford City participants saw lack of interest as the primary reason.
- In discussion, some participants emphasized the need for young people to be asked to serve and

to be mentored into these positions. There were also comments suggesting a correlation between “no time” and “no interest”, such that the lack of time contributes to a sense of indifference or lack of concern.

**Figure 11.** Participants’ View on Why New People Decline to Volunteer to Serve in Civic Organizations



N=14/14 communities

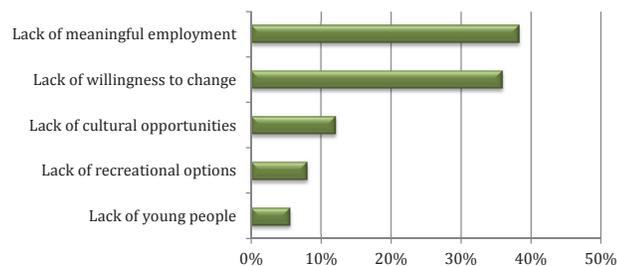
# analysis of the North Dakota 2.0 Community Meetings

## Economic and Community Development

Lack of meaningful employment was seen as the primary barrier to building an economically vibrant and socially inviting community by the largest proportion of meeting participants, followed closely by lack of willingness to change. Lack of cultural opportunities, lack of recreational opportunities, and lack of young people were less commonly selected as the primary barrier.

- There was a lot of variation in how this question was answered across the meeting locations in the state. The majority of participants in Belcourt, Bowman, Devils Lake, Grafton, and Linton indicated that lack of meaningful employment is their communities' primary barrier. In contrast, much smaller than average proportions of participants in Bismarck, Crosby, Dickinson, Garrison, and Watford City said lack of meaningful employment is their primary barrier; these communities are being impacted by energy development activities. Rather, for Crosby, Dickinson, and Garrison, as well as Jamestown, the majority of participants indicated that lack of willingness to change is the primary barrier in their community. The majority of Bismarck participants and an above average proportion of Watford City participants indicated lack of cultural opportunities is their community's primary barrier.
- In discussion, participants emphasized the negative impact that resistance to change has on a community. Participants in the western part of the state emphasized the high cost of living and the need to be proactive, while participants in other areas of the state emphasized the challenge of lack of good employment opportunities.

**Figure 12.** Participants' Perception of the Primary Barrier to Building an Economically Vibrant and Socially Inviting Community



N=14/14 communities



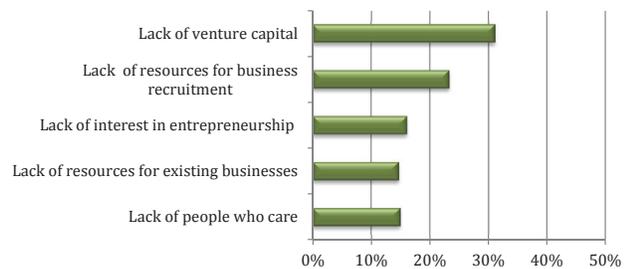
“People come, they work, they get a better job, and they go. It’s temporary for many. It happens often.”  
– Crosby participant



Participants' perceptions of the primary barrier to economic development within communities were divided across the categories offered. Lack of venture capital was selected by the largest proportion of participants, with lack of resources for business recruitment, lack of interest in entrepreneurship, lack of resources for existing businesses, and lack of people who care being selected by fairly even proportions of participants.

- The majority of Watford City participants indicated that lack of venture capital is the primary barrier to economic development within a community.
- Discussion focused on the concept that there is an abundance of wealth in North Dakota, but that it is not easily invested in North Dakota businesses.

**Figure 13.** Participants' Perception of the Primary Barrier to Economic Development within a Community



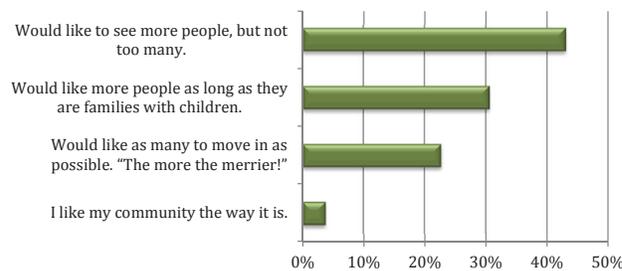
N=14/14 communities

Nearly all of the meeting participants, regardless of location, indicated an openness to changes that would grow and strengthen their community.

Participants would like to see more people in their community, as long as it isn't too many or as long as they are families with children. Some participants indicated they would like as many to move in as possible.

- There was variation in how this question was answered throughout the state. An above average proportion of participants in Grafton, Jamestown, and Linton indicated "The more the merrier." An above average proportion of participants in Crosby and Watford City indicated they would like more people as long as they are families with children. Only small proportions of participants in Bowman, Dickinson, and Garrison indicated they would like as many people to move in as possible. These five communities are among those being impacted by energy development activities in the western part of the state.

**Figure 14.** Participants' Feelings About Growth in Their Community



N=13/14 communities

The vast majority of meeting participants said it is important to develop a regional and state economic development and sustainability plan.

- While in the minority, a sizable proportion of Crosby participants were not sure if this type of plan is important.

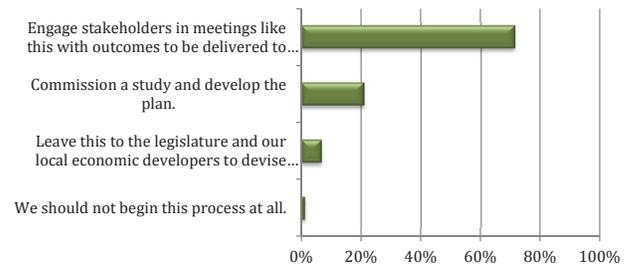
With respect to how to begin the process of developing such a plan, the majority of participants said that engaging stakeholders in meetings like the North Dakota 2.0 meetings was best, with outcomes to be delivered to policymakers.

- An above average proportion of Watford City

participants said that the best way to begin the process was to commission a study and develop the plan.

- Discussion pointed towards the value of a "bottom-up" or grassroots approach for developing such plans.

**Figure 15.** Participants' View Regarding How to Begin the Process of Developing a Regional and State Economic Development and Sustainability Plan

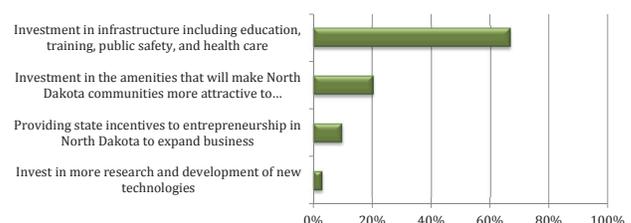


N=13/14 communities

The majority of meeting participants viewed investment in infrastructure, such as education, training, public safety, and health care, as the key components to the development of a diversified, sustainable economy. Though not selected by large proportions of participants, the other elements were also seen as important (i.e., investment in amenities to make North Dakota communities more attractive to entrepreneurs and young people, providing state incentives to entrepreneurship, and investing in more research and development of new technologies).

- For the first three community meetings, when participants were allowed to select "all of the above," the large majority of participants did so.

**Figure 16.** Participants' View Regarding the Key Components to the Development of a Diversified, Sustainable Economy



N=10/14 communities

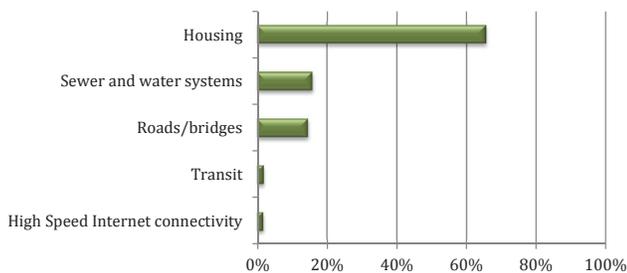
# analysis of the North Dakota 2.0 Community Meetings

## Economic and Community Development continued

The majority of meeting participants indicated that housing is the greatest infrastructure demand in their area.

- The vast majority of participants in Belcourt and Bowman selected housing as their communities' greatest infrastructure demand. In contrast, smaller than average proportions of meeting participants in Fargo, Grafton, and Jamestown selected housing. The majority of Jamestown participants indicated that sewer and water systems represent their community's greatest infrastructure demand.
- Discussion also indicated that access to affordable housing is a need throughout the state.

**Figure 17.** Participants' Perception of the Greatest Infrastructure Demand in the Area

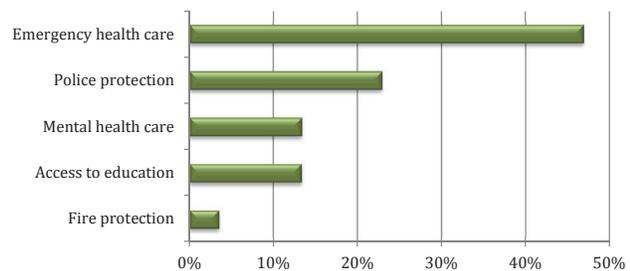


N=14/14 communities

Emergency health care was seen as the greatest public service sector need by the largest proportion of meeting participants. Police protection, mental health care, and access to education were top priorities for many participants as well.

- There was variation in how this question was answered depending on the meeting location. All of Watford City's meeting participants selected emergency health care as the greatest public service sector need in their area, while relatively small proportions of participants selected this public service sector in Fargo, Garrison, or Jamestown. The majority of participants in Crosby and Garrison indicated that police protection is the greatest public service sector need in their areas. Above average proportions of Fargo participants selected mental health care and access to education as the greatest needs in their area.
- Discussion of the need for adequate emergency services and adequate staffing was predominant. Areas affected by population growth due to oil development expressed more concern about the need for qualified law enforcement personnel. The need for mental health services was expressed in some of the oil producing areas as well.

**Figure 18.** Participants' Perception of the Greatest Public Service Sector Need in the Area



N=14/14 communities

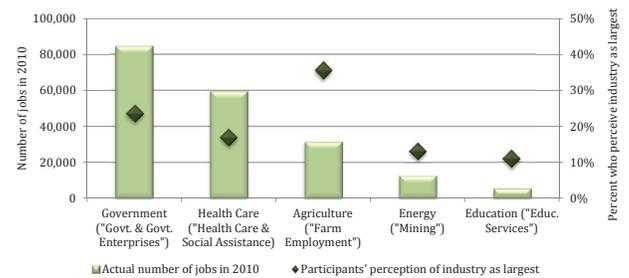
“We need to plan to ensure that what is built now is sustainable into the future.”  
– Dickinson participant

Participants were asked to indicate which industry was the largest employer in North Dakota. According to the number of jobs, government is the state's largest employer. The largest private employer is the health care industry. Agriculture was the most common response by participants.

Another way to look at the relative size of industries in North Dakota is to look at their contribution to the state's Gross Domestic Product (GDP). According to data from the Bureau of Economic Analysis, government was the largest contributor to GDP in 2010 (14 percent). In the private sector, the biggest contributor to GDP was real estate and rental and leasing (11 percent), followed by health care and social assistance (9 percent), agriculture, forestry, fishing, and hunting (8 percent), manufacturing (8 percent), wholesale trade (7 percent), finance and insurance (6 percent), retail trade (6 percent), and mining (6 percent). The mining industry is growing; mining represented 2 percent of GDP in 2000.



**Figure 19.** Participants' Perception of the Largest Employer in North Dakota



N=12/14 communities

Note: The green bars reflect job data from the Bureau of Economic Analysis ([www.bea.gov/regional/index.htm](http://www.bea.gov/regional/index.htm)); Government and government enterprises was the largest single employer in North Dakota in 2010, with 84,732 jobs; the health care and social assistance industry was the largest private employer in North Dakota in 2010, with 59,642 jobs

“Coming from an economic developer’s perspective, engaging stakeholders is most important.”  
– Bowman participant

“Everybody wants economic development, but no one is willing to go forward unless they can guarantee 100% success. Nobody wants to take a chance with failure. You have to prepare to take some losses.”  
– Crosby participant

# analysis of the North Dakota 2.0 Community Meetings

## Tax and Budget Issues

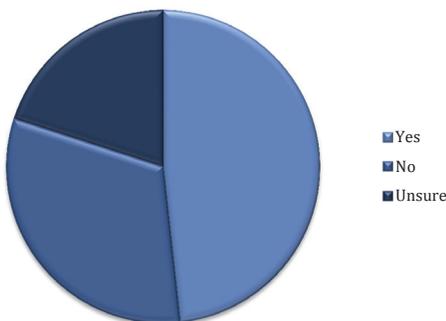
The vast majority of meeting participants said we should be advancing strategies for energy conservation and renewable energy.

- While still the majority, smaller proportions of participants in Garrison and Watford City agreed we should be advancing these types of strategies.

Approximately half of meeting participants agreed that we are leveraging too much of North Dakota’s future based on forecasted oil revenue.

- An above average proportion of participants in Dickinson and Fargo said that we are leveraging too much of the state’s future based on forecasted oil revenue. In contrast, smaller than average proportions of Garrison and Watford City participants agreed that we are leveraging too much of the future. An above average proportion of Belcourt participants indicated they are not sure if we are leveraging too much of the future.
- In discussion, participants of diverse views on the longevity of the “oil play” shared the common concern that too much reliance was being placed upon oil revenues for the support of state government. Concern was expressed about the debt that communities in the oil patch are accumulating to address the many needs that are not being funded by the state’s impact aid or distributions from the oil production tax.

**Figure 20.** Participants’ View on Whether We are Leveraging Too Much of the State’s Future Based on Forecasted Oil Revenue

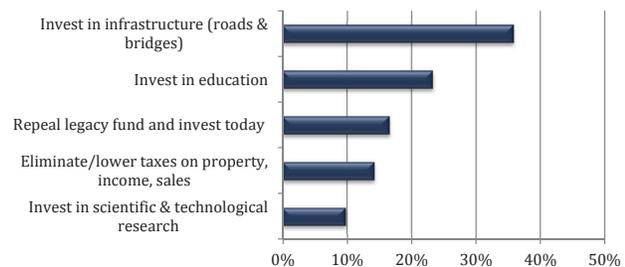


N=13/14 communities

When asked to name their top choice regarding what North Dakota should do with its legacy fund after the next 20 years of development, the largest proportion of participants said we should invest in infrastructure (such as roads and bridges). All of the other options were also seen as important (i.e., invest in education, eliminate/lower taxes, and invest in scientific and technological research). Some participants said we should repeal the legacy fund and invest the money today.

- The majority of meeting participants in Fargo indicated we should invest in education. The long-term importance of this topic was emphasized by the keynote speakers at the conference, which helped increase the level of priority that Fargo participants placed on investment in education. In Dickinson, an above average proportion of participants emphasized the need to invest in scientific and technological research, while a much smaller than average proportion said we should repeal the legacy fund.

**Figure 21.** Participants’ View Regarding What North Dakota Should Do with Its Legacy Fund After the Next 20 Years of Development



N=13/14 communities

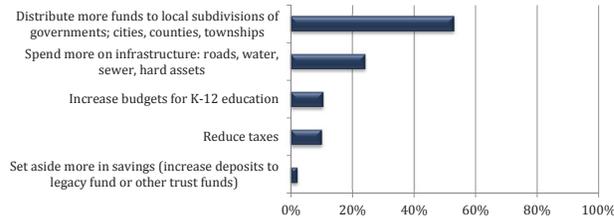
The majority of meeting participants said North Dakota should use its budget surplus dollars to distribute more funds to local governmental subdivisions. Spending more on infrastructure, increasing budgets for K-12 education, and reducing taxes were also selected as top choices by a minority of participants.

- An above average proportion of participants in Bowman and Crosby want more funds distributed to local subdivisions. An above average proportion of Fargo participants want to use the budget surplus

dollars to increase budgets for K-12 education, again reflecting the emphasis of the keynote speakers at the Fargo event.

- Discussion in western North Dakota identified the inadequacies of the impact aid that is coming to oil-producing counties. Participants familiar with the grant-making process indicated that the current system is not conducive to proper planning because the grants are usually too small to address a significant need.

**Figure 22.** Participants' View on How North Dakota Should Use Budget Surplus Dollars

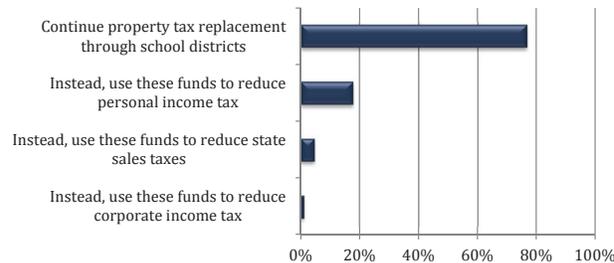


N=13/14 communities

A large majority of participants indicated that addressing taxes in the future should occur through continued property tax replacement through school districts. Some participants were interested in using these funds to reduce personal income tax instead.

- An above average proportion of participants in Grafton and Watford City preferred to use the funds to reduce personal income tax.

**Figure 23.** Participants' View on How We Should Address Taxes in the Future

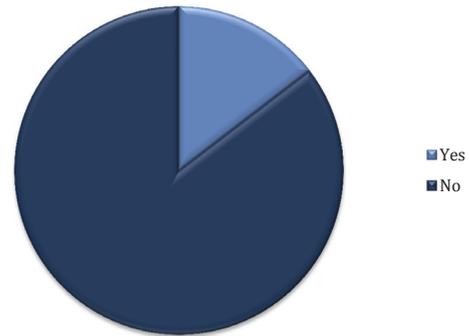


N=13/14 communities

The vast majority of meeting participants were not in support of eliminating local property taxes.

- Discussion focused on issues of potential loss of local decision-making authority and the mechanics of state replacement of the funding eliminated by repealing the property taxes.

**Figure 24.** Participants' View Regarding Eliminating Local Property Taxes



N=13/14 communities

“Three legged stool of taxation is important. Re-balance, but do not eliminate.”  
 – Devils Lake participant

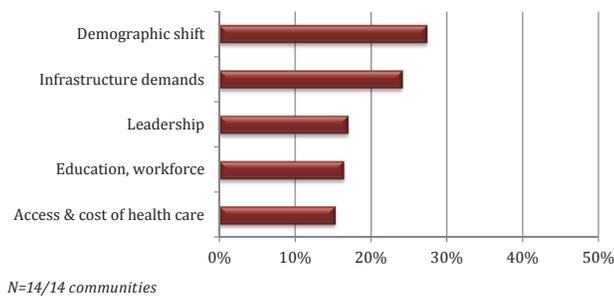
# analysis of the North Dakota 2.0 Community Meetings

## North Dakota's Future

Participants were nearly evenly divided regarding which of the topics presents the greatest challenge to North Dakota's long-term future. Demographic shift was selected by the largest proportion of participants, but infrastructure demands, leadership, education/workforce, and access and cost of health care were seen as the greatest challenge by many participants as well.

- An above average proportion of participants in Bowman and Watford City indicated that infrastructure demands are the greatest challenge to North Dakota's long-term future. An above average proportion of participants in Fargo and Oakes said education/workforce issues are the greatest challenge. A smaller than average proportion of participants in Belcourt and Watford City indicated that they are concerned about demographic shift, while an above average proportion of Grafton and Linton participants said demographic shift is the greatest challenge facing the state's long-term future.
- In discussion, participants from the smaller rural communities outside the oil production area expressed greater concerns about the demographic shift. This was expressed in terms of leadership capacity and succession for long-term elected officials. Infrastructure demands were expressed in discussion as the greatest challenge in oil impact areas.

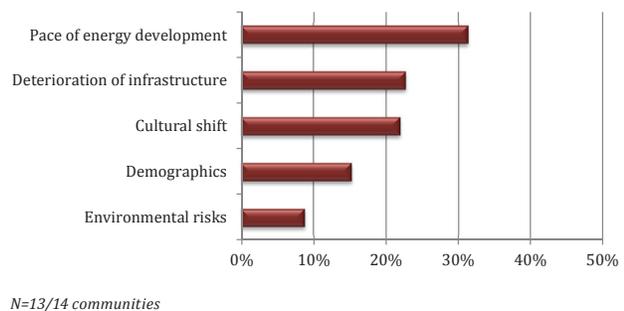
**Figure 25.** Participants' View Regarding the Greatest Challenge Facing North Dakota's Long-Term Future



Participants were again divided regarding which of the topics presented poses the biggest threat to the quality of life in North Dakota. The pace of energy development was selected by the largest proportion of participants, but deteriorating infrastructure, cultural shift, demographics, and environmental risks were the top concern for many participants as well.

- The majority of Bowman and Watford City participants indicated that the pace of energy development is the biggest threat to North Dakota's quality of life. Cultural shift was the top answer by Dickinson participants. An above average proportion of participants in Devils Lake and Grafton said demographics are the biggest threat to the quality of life. An above average proportion of Oakes participants saw deteriorating infrastructure as the biggest threat, while an above average proportion of Belcourt participants saw environmental risks as the biggest threat to the state's quality of life.

**Figure 26.** Participants' View Regarding the Biggest Threat to the Quality of Life in North Dakota



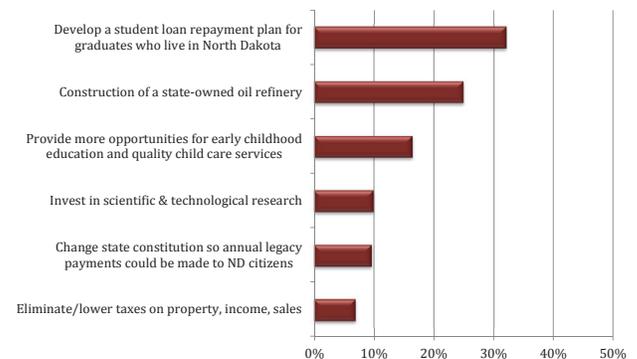
“If you have strong leadership – everything else will fall into place.”  
– Linton participant

Participants struggled to choose just one item on the list of strategies for making a lasting impact on the state's future. Developing a student loan repayment plan for college graduates who live in North Dakota was selected by the largest proportion of participants as the best thing we could do today to make a lasting impact on North Dakota's future. However, construction of a state-owned oil refinery and providing more opportunities for early childhood education and quality child care services were top strategies for many participants as well.

- The majority of Fargo participants indicated that providing more opportunities for early childhood education and quality child care services is the best thing the state could do to make a lasting impact. The majority of Belcourt participants said developing a student loan repayment program is the best strategy. An above average proportion of Dickinson participants believed that investing in

scientific and technological research is what we should be doing today to make a lasting impact on the state's future.

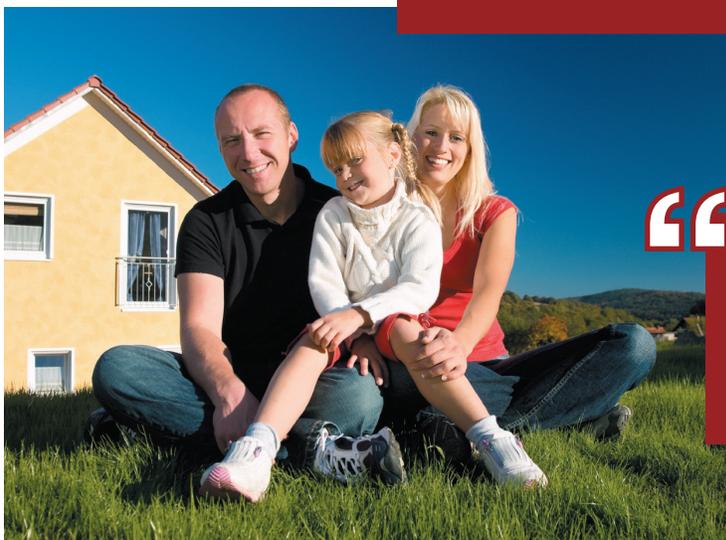
**Figure 27.** Participants' View Regarding What We Should Be Doing Today to Make a Lasting Impact on North Dakota's Future



*N=13/14 communities*



“If we want more families to move in, we need more child care and early childhood education to attract and keep those families.”  
– Crosby participant



“A lot of people in Rugby are working 2 and 3 jobs to make everything work.”  
– Bottineau participant



# appendix tables with community-specific data

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## About the Data Tables

The following appendix tables offer the community-specific data captured by the clicker system at each community meeting. The number of participants at each meeting varied substantially and together totaled over 600 responders.

- Bismarck, October 18, 2011 with 140 responders
- Linton, January 18, 2012 with 30 responders
- Devils Lake, January 23, 2012 with 28 responders
- Grafton, January 24, 2012 with 33 responders
- Jamestown, January 30, 2012 with 36 responders
- Oakes, January 31, 2012 with 29 responders
- Garrison, February 1, 2012 with 24 responders
- Bottineau, February 6, 2012 with 33 responders
- Belcourt, February 7, 2012 with 19 responders
- Bowman, March 5, 2012 with 16 responders
- Dickinson, March 5, 2012 with 67 responders
- Watford City, March 8, 2012 with 15 responders
- Crosby, March 9, 2012 with 24 responders
- Fargo, April 17, 2012 with 119 responders

In order to give each community an equal weight in the discussion of overall state results, the combined community percentage for each response represents an average of the percentages of each community. Since not every question was asked at the Bismarck and Fargo meetings, the number of communities represented in that combined total varies depending on the question.

It is important to view the community-specific data in context. The communities where North Dakota 2.0 meetings were held and the participants who chose to attend the meetings do not represent a random selection. Thus, the results cannot be treated as generalizable. Nonetheless, the results offer valuable insight into the perspectives of individuals from across the state, and from communities representing a variety of characteristics (e.g., size, geography, culture).



**“We must invest in scientific research and development to make everything else happen. We now have the ability to do this.”**  
– Dickinson participant



Appendix Table 1. Participant Demographics

Community	Participants' age						Participants' gender	
	20-29	30-39	40-49	50-59	60-69	70+	Male	Female
Belcourt	6%	12%	18%	35%	29%	0%	58%	42%
Bismarck	13%	19%	18%	34%	16%	0%	51%	49%
Bottineau	12%	6%	18%	33%	27%	3%	66%	34%
Bowman	15%	15%	31%	31%	0%	8%	53%	47%
Crosby	8%	17%	13%	42%	21%	0%	55%	45%
Devils Lake	15%	11%	26%	33%	15%	0%	50%	50%
Dickinson	60%	2%	6%	21%	8%	3%	47%	53%
Fargo	13%	23%	12%	24%	20%	8%	54%	46%
Garrison	8%	8%	24%	44%	16%	0%	54%	46%
Grafton	3%	6%	33%	39%	18%	0%	61%	39%
Jamestown	11%	31%	11%	31%	11%	6%	40%	60%
Linton	0%	3%	28%	41%	17%	10%	70%	30%
Oakes	0%	17%	30%	13%	17%	22%	65%	35%
Watford City	14%	0%	29%	36%	21%	0%	73%	27%
<b>Combined</b>	<b>13%</b>	<b>12%</b>	<b>21%</b>	<b>33%</b>	<b>17%</b>	<b>4%</b>	<b>57%</b>	<b>43%</b>

Appendix Table 2. Size of Community Participants Call Home

Community	Under 300 people	301-999 people	1,000-1,500 people	1,501-3,000 people	3,000+ people
Belcourt	16%	21%	21%	5%	37%
Bismarck	9%	8%	12%	1%	71%
Bottineau	19%	3%	8%	53%	17%
Bowman	7%	7%	13%	60%	13%
Crosby	13%	9%	57%	9%	13%
Devils Lake	11%	11%	7%	4%	68%
Dickinson	5%	12%	9%	3%	71%
Fargo	10%	10%	4%	5%	71%
Garrison	12%	16%	36%	20%	16%
Grafton	9%	6%	19%	0%	66%
Jamestown	9%	0%	0%	6%	85%
Linton	15%	21%	48%	0%	15%
Oakes	14%	14%	21%	43%	7%
Watford City	0%	7%	0%	0%	93%
<b>Combined</b>	<b>11%</b>	<b>10%</b>	<b>18%</b>	<b>15%</b>	<b>46%</b>

Appendix Table 3. Participants' Communication

Community	Form of communication participants use most				Where participants get most of their information about the operations of government				
	Text	Email	Phone	Other*	Newspaper	Radio	Television	Internet	Coffee shop
Belcourt	6%	59%	29%	6%	28%	0%	11%	56%	6%
Bismarck	12%	68%	15%	5%	NA	NA	NA	NA	NA
Bottineau	6%	53%	32%	9%	29%	0%	35%	29%	6%
Bowman	0%	60%	40%	0%	60%	0%	20%	20%	0%
Crosby	18%	50%	27%	5%	21%	4%	21%	50%	4%
Devils Lake	8%	69%	23%	0%	11%	11%	21%	57%	0%
Dickinson	36%	32%	18%	14%	16%	3%	24%	57%	0%
Fargo	13%	71%	10%	6%	24%	17%	22%	34%	2%
Garrison	8%	54%	38%	0%	26%	13%	26%	35%	0%
Grafton	9%	61%	30%	0%	41%	16%	22%	22%	0%
Jamestown	3%	86%	3%	9%	24%	15%	21%	39%	0%
Linton	6%	45%	39%	9%	34%	6%	34%	25%	0%
Oakes	4%	63%	33%	0%	31%	7%	34%	24%	3%
Watford City	7%	60%	33%	0%	29%	0%	43%	21%	7%
<b>Combined</b>	<b>10%</b>	<b>59%</b>	<b>26%</b>	<b>5%</b>	<b>29%</b>	<b>7%</b>	<b>26%</b>	<b>36%</b>	<b>2%</b>

Note: NA – No data available; \*Other includes Facebook, mail and “other”

Appendix Table 4. Participants' Knowledge About Legislature Demographics

Community	Proportion of the North Dakota legislature that is older than age 50				Of the 141 people in North Dakota's legislature, how many are women		
	47%	68%	74%	86%	21	38	47
Belcourt	5%	32%	37%	26%	63%	26%	11%
Bismarck	0%	11%	32%	57%	85%	15%	0%
Bottineau	12%	26%	41%	21%	66%	29%	6%
Bowman	0%	7%	57%	36%	50%	43%	7%
Crosby	5%	36%	45%	14%	50%	41%	9%
Devils Lake	0%	34%	55%	10%	52%	41%	7%
Dickinson	12%	30%	31%	27%	45%	42%	13%
Fargo	NA	NA	NA	NA	NA	NA	NA
Garrison	0%	35%	43%	22%	57%	22%	22%
Grafton	3%	33%	48%	15%	45%	35%	19%
Jamestown	3%	22%	56%	19%	69%	17%	14%
Linton	6%	19%	44%	31%	74%	23%	3%
Oakes	7%	39%	39%	14%	70%	26%	4%
Watford City	14%	14%	36%	36%	67%	33%	0%
<b>Combined</b>	<b>5%</b>	<b>26%</b>	<b>43%</b>	<b>25%</b>	<b>61%</b>	<b>30%</b>	<b>9%</b>

Note: Green italics indicate the correct answer; NA – No data available

Appendix Table 5. Participants' Knowledge/Awareness of and Interaction with Local, State, and Federal Government

Community	Local				State				Federal			
	1	2	3	4	1	2	3	4	1	2	3	4
Belcourt	39%	50%	11%	0%	20%	55%	25%	0%	5%	47%	47%	0%
Bismarck	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Bottineau	44%	39%	17%	0%	19%	58%	22%	0%	9%	43%	49%	0%
Bowman	50%	38%	13%	0%	6%	31%	63%	0%	6%	19%	69%	6%
Crosby	41%	36%	18%	5%	9%	59%	23%	9%	13%	38%	46%	4%
Devils Lake	36%	44%	20%	0%	19%	59%	22%	0%	7%	54%	39%	0%
Dickinson	12%	53%	26%	9%	8%	44%	42%	6%	14%	37%	37%	13%
Fargo	28%	47%	24%	2%	20%	53%	25%	2%	14%	59%	25%	2%
Garrison	38%	46%	17%	0%	9%	70%	22%	0%	4%	50%	46%	0%
Grafton	43%	40%	13%	3%	19%	56%	25%	0%	0%	59%	38%	3%
Jamestown	26%	53%	21%	0%	12%	52%	36%	0%	6%	47%	47%	0%
Linton	34%	41%	25%	0%	3%	59%	38%	0%	10%	39%	52%	0%
Oakes	44%	30%	26%	0%	18%	43%	36%	4%	14%	29%	50%	7%
Watford City	64%	29%	7%	0%	21%	50%	21%	7%	7%	43%	50%	0%
<b>Combined</b>	<b>38%</b>	<b>42%</b>	<b>18%</b>	<b>1%</b>	<b>14%</b>	<b>53%</b>	<b>31%</b>	<b>2%</b>	<b>8%</b>	<b>43%</b>	<b>46%</b>	<b>3%</b>

Legend: 1=Very knowledgeable – frequent interaction; 2=Knowledgeable – limited interaction; 3=Limited awareness – less interaction; 4=No awareness or interaction; NA – No data available

Appendix Table 6. Participants' Satisfaction with Information They Receive From the Media About Decisions Made by Local, State, and Federal Government

Community	Local			State			Federal		
	1	2	3	1	2	3	1	2	3
Belcourt	11%	83%	6%	6%	83%	11%	16%	26%	58%
Bismarck	NA	NA	NA	NA	NA	NA	NA	NA	NA
Bottineau	30%	54%	16%	20%	69%	11%	11%	35%	54%
Bowman	67%	27%	7%	33%	60%	7%	6%	63%	31%
Crosby	27%	50%	23%	14%	77%	9%	9%	36%	55%
Devils Lake	32%	46%	21%	0%	79%	21%	0%	55%	45%
Dickinson	26%	54%	20%	13%	68%	19%	11%	36%	53%
Fargo	20%	55%	25%	5%	51%	44%	8%	40%	52%
Garrison	46%	46%	8%	24%	64%	12%	8%	42%	50%
Grafton	39%	42%	18%	21%	61%	18%	3%	26%	71%
Jamestown	29%	60%	11%	6%	74%	20%	9%	51%	40%
Linton	58%	30%	12%	22%	78%	0%	10%	63%	27%
Oakes	24%	62%	14%	15%	56%	30%	4%	43%	54%
Watford City	50%	29%	21%	15%	77%	8%	0%	64%	36%
<b>Combined</b>	<b>35%</b>	<b>49%</b>	<b>16%</b>	<b>15%</b>	<b>69%</b>	<b>16%</b>	<b>7%</b>	<b>45%</b>	<b>48%</b>

Note: NA – No data available

**Appendix Table 7. Participants' Satisfaction with Transparency in Local, State, and Federal Government**

Community	Local				State				Federal			
	1	2	3	4	1	2	3	4	1	2	3	4
Belcourt	11%	53%	37%	0%	5%	60%	35%	0%	0%	20%	80%	0%
Bismarck	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Bottineau	14%	61%	25%	0%	15%	61%	24%	0%	0%	17%	81%	3%
Bowman	56%	38%	6%	0%	7%	80%	13%	0%	0%	25%	75%	0%
Crosby	9%	65%	17%	9%	0%	81%	10%	10%	0%	17%	74%	9%
Devils Lake	30%	48%	15%	7%	11%	50%	36%	4%	0%	13%	83%	3%
Dickinson	20%	42%	24%	14%	6%	58%	18%	18%	9%	12%	62%	17%
Fargo	14%	49%	30%	7%	2%	38%	54%	7%	1%	20%	73%	7%
Garrison	40%	44%	16%	0%	4%	68%	24%	4%	0%	23%	73%	5%
Grafton	23%	60%	13%	3%	0%	72%	28%	0%	0%	3%	94%	3%
Jamestown	18%	48%	30%	3%	3%	57%	40%	0%	3%	9%	88%	0%
Linton	28%	34%	34%	3%	6%	50%	44%	0%	0%	18%	82%	0%
Oakes	24%	62%	10%	3%	14%	61%	21%	4%	4%	22%	70%	4%
Watford City	85%	8%	8%	0%	33%	58%	8%	0%	0%	36%	64%	0%
<b>Combined</b>	<b>29%</b>	<b>47%</b>	<b>21%</b>	<b>4%</b>	<b>8%</b>	<b>61%</b>	<b>27%</b>	<b>4%</b>	<b>1%</b>	<b>18%</b>	<b>77%</b>	<b>4%</b>

Legend: 1=Very satisfied; 2=Somewhat satisfied; 3=Not satisfied; 4=Don't know; Note: NA – No data available

**Appendix Table 8. Participants' Leadership and Mentoring Experience**

Community	Whether participant currently serves on a board of directors or in a position of elected office			Whether participant has ever mentored someone within an organization they belong to		
	Yes	No	No, but want to	Yes	No	Not applicable
Belcourt	53%	21%	26%	95%	5%	0%
Bismarck	66%	17%	17%	68%	23%	9%
Bottineau	61%	28%	11%	83%	11%	6%
Bowman	79%	14%	7%	60%	40%	0%
Crosby	48%	38%	14%	54%	38%	8%
Devils Lake	55%	34%	10%	58%	38%	4%
Dickinson	23%	58%	18%	63%	23%	14%
Fargo	48%	31%	21%	76%	19%	5%
Garrison	65%	17%	17%	71%	17%	13%
Grafton	64%	30%	6%	78%	22%	0%
Jamestown	57%	29%	14%	64%	36%	0%
Linton	59%	28%	13%	70%	27%	3%
Oakes	67%	26%	7%	75%	21%	4%
Watford City	79%	14%	7%	86%	14%	0%
<b>Combined</b>	<b>59%</b>	<b>28%</b>	<b>14%</b>	<b>71%</b>	<b>24%</b>	<b>5%</b>

**Appendix Table 9. Participants' View on the Primary Barrier to New People Being Elected or Appointed to Positions of Leadership**

Community	"Old Guard" won't give up reins	Most people aren't interested	Cost too much to run	Education or training is needed	Lack of confidence	Time commitment
Belcourt	11%	21%	11%	16%	21%	21%
Bismarck	26%	23%	7%	5%	8%	31%
Bottineau	24%	38%	5%	3%	0%	30%
Bowman	13%	38%	0%	0%	6%	44%
Crosby	23%	45%	0%	0%	5%	27%
Devils Lake	19%	19%	15%	12%	4%	31%
Dickinson	18%	9%	15%	6%	18%	32%
Fargo	22%	20%	21%	3%	10%	24%
Garrison	13%	46%	4%	8%	0%	29%
Grafton	28%	25%	16%	6%	0%	25%
Jamestown	28%	22%	13%	6%	3%	28%
Linton	25%	32%	4%	11%	7%	21%
Oakes	22%	37%	4%	0%	4%	33%
Watford City	0%	62%	0%	0%	8%	31%
<b>Combined</b>	<b>19%</b>	<b>31%</b>	<b>8%</b>	<b>5%</b>	<b>7%</b>	<b>29%</b>

Appendix Table 10. Participants' View on Why New People Decline to Volunteer to Serve in Civic Organizations

Community	No time	Too costly	Groups are for older people	No interest	No one has asked
Belcourt	61%	6%	0%	17%	17%
Bismarck	24%	1%	8%	22%	45%
Bottineau	25%	0%	6%	42%	28%
Bowman	60%	0%	0%	20%	20%
Crosby	38%	0%	0%	24%	38%
Devils Lake	44%	0%	4%	20%	32%
Dickinson	35%	3%	9%	20%	33%
Fargo	42%	1%	3%	16%	39%
Garrison	41%	5%	0%	27%	27%
Grafton	41%	0%	6%	21%	32%
Jamestown	50%	0%	6%	13%	31%
Linton	47%	3%	3%	20%	27%
Oakes	37%	0%	0%	22%	41%
Watford City	42%	0%	0%	42%	17%
<b>Combined</b>	<b>42%</b>	<b>1%</b>	<b>3%</b>	<b>23%</b>	<b>30%</b>

Appendix Table 11. Participants' Perception of the Primary Barrier to Building an Economically Vibrant and Socially Inviting Community

Community	Lack of young people	Lack of recreational options	Lack of cultural opportunities	Lack of meaningful employment	Lack of willingness to change
Belcourt	0%	0%	0%	57%	43%
Bismarck	10%	12%	52%	7%	19%
Bottineau	8%	3%	8%	49%	32%
Bowman	6%	13%	6%	63%	13%
Crosby	5%	5%	5%	18%	68%
Devils Lake	11%	11%	7%	61%	11%
Dickinson	1%	15%	7%	18%	58%
Fargo	4%	2%	8%	38%	48%
Garrison	5%	9%	9%	9%	68%
Grafton	9%	12%	6%	64%	9%
Jamestown	3%	6%	6%	26%	60%
Linton	10%	10%	0%	68%	13%
Oakes	7%	0%	14%	43%	36%
Watford City	0%	17%	42%	17%	25%
<b>Combined</b>	<b>6%</b>	<b>8%</b>	<b>12%</b>	<b>38%</b>	<b>36%</b>

Appendix Table 12. Participants' Perception of the Primary Barrier to Economic Development within a Community

Community	Lack of resources for existing businesses	Lack of interest in entrepreneurship	Lack of resources for business recruitment	Lack of venture capital	Lack of people who care
Belcourt	9%	13%	22%	43%	13%
Bismarck	18%	22%	19%	21%	20%
Bottineau	11%	25%	25%	36%	3%
Bowman	6%	6%	38%	31%	19%
Crosby	10%	10%	19%	29%	33%
Devils Lake	8%	27%	15%	38%	12%
Dickinson	27%	10%	29%	26%	8%
Fargo	16%	23%	23%	23%	16%
Garrison	17%	25%	21%	29%	8%
Grafton	30%	18%	9%	24%	18%
Jamestown	12%	21%	21%	18%	29%
Linton	12%	8%	27%	35%	19%
Oakes	21%	18%	29%	21%	11%
Watford City	10%	0%	30%	60%	0%
<b>Combined</b>	<b>15%</b>	<b>16%</b>	<b>23%</b>	<b>31%</b>	<b>15%</b>

**Appendix Table 13. Participants' Openness to Changes that Would Grow and Strengthen Their Community and Feelings About Growth in Their Community**

Community	Whether participant is open to "changes"?		How participant feels about growth in their community			
	Yes	No/Not Applicable	Would like as many to move in as possible	Would like to see more people, but not too many	Would like more people as long as they are families with children	I like my community the way it is
Belcourt	100%	0%	20%	53%	20%	7%
Bismarck	NA	NA	NA	NA	NA	NA
Bottineau	100%	0%	29%	34%	31%	6%
Bowman	100%	0%	6%	56%	31%	6%
Crosby	100%	0%	13%	39%	48%	0%
Devils Lake	100%	0%	18%	50%	32%	0%
Dickinson	95%	5%	9%	36%	39%	16%
Fargo	NA	NA	25%	47%	20%	8%
Garrison	96%	4%	8%	67%	25%	0%
Grafton	100%	0%	39%	32%	26%	3%
Jamestown	97%	3%	42%	42%	15%	0%
Linton	100%	0%	43%	29%	29%	0%
Oakes	96%	4%	27%	35%	35%	4%
Watford City	100%	0%	15%	38%	46%	0%
<b>Combined</b>	<b>99%</b>	<b>1%</b>	<b>23%</b>	<b>43%</b>	<b>31%</b>	<b>4%</b>

Note: NA – No data available

**Appendix Table 14. Participants' View Regarding the Importance of Developing a Regional and State Economic Development and Sustainability Plan, and How to Begin the Process of Developing Such a Plan**

Community	Whether it is important to develop a plan		How participant feels the process of developing such a plan should begin			
	Yes	No/Not sure	Engage stakeholders in meetings like this, deliver outcomes to policymakers	Commission a study and develop the plan	Leave this to legislature and local economic developers to devise plans	We should not begin this process at all
Belcourt	84%	16%	70%	20%	10%	0%
Bismarck	NA	NA	NA	NA	NA	NA
Bottineau	95%	5%	66%	29%	5%	0%
Bowman	84%	16%	80%	7%	13%	0%
Crosby	67%	33%	65%	26%	9%	0%
Devils Lake	96%	4%	92%	8%	0%	0%
Dickinson	95%	5%	56%	31%	10%	3%
Fargo	NA	NA	82%	16%	1%	1%
Garrison	88%	12%	74%	22%	0%	4%
Grafton	88%	12%	81%	7%	11%	0%
Jamestown	97%	3%	75%	22%	3%	0%
Linton	90%	10%	69%	24%	7%	0%
Oakes	82%	18%	68%	21%	4%	7%
Watford City	100%	0%	46%	38%	15%	0%
<b>Combined</b>	<b>89%</b>	<b>11%</b>	<b>71%</b>	<b>21%</b>	<b>7%</b>	<b>1%</b>

Note: NA – No data available

**Appendix Table 15. Participants' View Regarding the Key Components to the Development of a Diversified, Sustainable Economy**

Community	Investment in infrastructure including education, training, public safety, and health care	Providing state incentives to entrepreneurship in North Dakota to expand business	Invest in more research and development of new technologies	Investment in amenities that will make ND communities more attractive to entrepreneurs and young people
Belcourt	63%	16%	11%	11%
Bismarck	NA	NA	NA	NA
Bottineau	72%	11%	0%	17%
Bowman	80%	7%	0%	13%
Crosby	70%	4%	0%	26%
Dickinson	58%	16%	5%	21%
Fargo	64%	15%	8%	13%
Garrison	50%	17%	0%	33%
Jamestown	67%	6%	3%	24%
Oakes	59%	7%	4%	30%
Watford City	85%	0%	0%	15%
<b>Combined</b>	<b>67%</b>	<b>10%</b>	<b>3%</b>	<b>20%</b>

Note: NA – No data available

Appendix Table 15a. Participants' View Regarding the Key Components to the Development of a Diversified, Sustainable Economy

Community	Investment in infrastructure including education, training, public safety, and health care	Providing state incentives to entrepreneurship in North Dakota to expand business	Invest in more research and development of new technologies	Investment in amenities that will make ND communities more attractive to entrepreneurs and young people	All of the above*
Devils Lake	4%	4%	4%	11%	78%
Grafton	0%	13%	0%	6%	81%
Linton	23%	8%	4%	0%	65%
<b>Combined</b>	<b>9%</b>	<b>8%</b>	<b>3%</b>	<b>6%</b>	<b>75%</b>

\*After these three community meetings, the option "all of the above" was removed in the rest of the meetings to force participants to choose one area.

Appendix Table 16. Participants' Perception of the Greatest Infrastructure Demand in the Area

Community	Housing	Roads/bridges	Transit	Sewer and water systems	High Speed Internet connectivity
Belcourt	86%	5%	5%	5%	0%
Bismarck	69%	23%	0%	6%	2%
Bottineau	68%	8%	0%	24%	0%
Bowman	88%	13%	0%	0%	0%
Crosby	84%	4%	0%	12%	0%
Devils Lake	61%	29%	0%	11%	0%
Dickinson	78%	5%	3%	14%	0%
Fargo	40%	24%	13%	16%	7%
Garrison	83%	4%	0%	13%	0%
Grafton	27%	27%	7%	30%	10%
Jamestown	12%	26%	0%	59%	3%
Linton	75%	11%	0%	14%	0%
Oakes	72%	20%	0%	4%	4%
Watford City	77%	8%	0%	15%	0%
<b>Combined</b>	<b>66%</b>	<b>15%</b>	<b>2%</b>	<b>16%</b>	<b>2%</b>

Appendix Table 17. Participants' Perception of the Greatest Public Service Sector Need in the Area

Community	Fire protection	Police protection	Emergency health care	Mental health care	Access to education
Belcourt	0%	23%	59%	5%	14%
Bismarck	0%	38%	41%	11%	11%
Bottineau	3%	26%	59%	9%	3%
Bowman	0%	20%	67%	7%	7%
Crosby	4%	52%	39%	0%	4%
Devils Lake	7%	7%	52%	26%	7%
Dickinson	6%	39%	34%	8%	13%
Fargo	3%	17%	17%	36%	27%
Garrison	8%	52%	16%	8%	16%
Grafton	7%	14%	48%	14%	17%
Jamestown	7%	13%	17%	30%	33%
Linton	0%	15%	46%	19%	19%
Oakes	4%	4%	62%	15%	15%
Watford City	0%	0%	100%	0%	0%
<b>Combined</b>	<b>4%</b>	<b>23%</b>	<b>47%</b>	<b>13%</b>	<b>13%</b>

Appendix Table 18. Participants' Perception of the Largest Employer in North Dakota

Community	Government*	Education	Agriculture	Health care*	Energy
Belcourt	35%	10%	20%	30%	5%
Bismarck	NA	NA	NA	NA	NA
Bottineau	31%	9%	40%	11%	9%
Bowman	13%	6%	44%	31%	6%
Crosby	17%	8%	29%	25%	21%
Devils Lake	24%	14%	28%	28%	7%
Dickinson	21%	5%	37%	6%	31%
Fargo	NA	NA	NA	NA	NA
Garrison	28%	12%	20%	12%	28%
Grafton	17%	7%	67%	7%	3%
Jamestown	21%	15%	33%	21%	9%
Linton	17%	17%	45%	21%	0%
Oakes	24%	20%	36%	4%	16%
Watford City	36%	7%	29%	7%	21%
<b>Combined</b>	<b>24%</b>	<b>11%</b>	<b>36%</b>	<b>17%</b>	<b>13%</b>

Note: Green italics indicates the correct answer; NA – No data available

\*Government and government enterprises was the largest single employer in North Dakota in 2010, with 84,732 jobs; the health care and social assistance industry was the largest private employer in North Dakota in 2010, with 59,642 jobs – Bureau of Economic Analysis, www.bea.gov/regional/index.htm

Appendix Table 19. Participants' View on Leveraging of the State's Future Based on Forecasted Oil Revenue and Advancement of Strategies for Energy Conservation and Renewable Energy

Community	Whether ND is leveraging too much of the state's future based on forecasted oil revenue			Whether ND should be advancing strategies for energy conversation and renewable energy		
	Yes	No	Unsure	Yes	No	Unsure
Belcourt	48%	10%	43%	91%	0%	9%
Bismarck	NA	NA	NA	NA	NA	NA
Bottineau	49%	32%	19%	94%	3%	3%
Bowman	56%	38%	6%	94%	6%	0%
Crosby	59%	23%	18%	71%	21%	8%
Devils Lake	46%	25%	29%	96%	0%	4%
Dickinson	64%	23%	13%	92%	8%	0%
Fargo	62%	18%	20%	94%	1%	5%
Garrison	29%	42%	29%	68%	28%	4%
Grafton	58%	26%	16%	81%	13%	6%
Jamestown	50%	43%	7%	94%	3%	3%
Linton	55%	23%	23%	73%	17%	10%
Oakes	38%	38%	25%	83%	4%	13%
Watford City	13%	73%	13%	69%	23%	8%
<b>Combined</b>	<b>48%</b>	<b>32%</b>	<b>20%</b>	<b>85%</b>	<b>10%</b>	<b>6%</b>

Note: NA – No data available

Appendix Table 20. Participants' View Regarding What North Dakota Should Do with Its Legacy Fund After the Next 20 Years of Development

Community	Invest in infrastructure (roads & bridges)	Invest in education	Invest in scientific & technological research	Eliminate/lower taxes on property, income, sales	Repeal legacy fund and invest today
Belcourt	32%	32%	21%	11%	5%
Bismarck	NA	NA	NA	NA	NA
Bottineau	42%	15%	12%	15%	15%
Bowman	38%	13%	13%	19%	19%
Crosby	39%	26%	0%	4%	30%
Devils Lake	41%	26%	4%	7%	22%
Dickinson	19%	19%	37%	21%	3%
Fargo	11%	58%	7%	8%	17%
Garrison	43%	24%	0%	24%	10%
Grafton	39%	10%	13%	16%	23%
Jamestown	39%	25%	0%	14%	21%
Linton	39%	29%	14%	7%	11%
Oakes	35%	19%	8%	23%	15%
Watford City	50%	8%	0%	17%	25%
<b>Combined</b>	<b>36%</b>	<b>23%</b>	<b>10%</b>	<b>14%</b>	<b>17%</b>

Note: NA – No data available

Appendix Table 21. Participants' View on How North Dakota Should Use Budget Surplus Dollars

Community	Spend more on infrastructure (roads, water, sewer, hard assets)	Increase budgets for K-12 education	Distribute more funds to local subdivisions of government (cities, counties, townships)	Set aside more in savings (increase deposits to legacy fund or other trust funds)	Reduce taxes
Belcourt	18%	6%	59%	0%	18%
Bismarck	NA	NA	NA	NA	NA
Bottineau	38%	9%	41%	0%	12%
Bowman	19%	6%	75%	0%	0%
Crosby	14%	5%	82%	0%	0%
Devils Lake	32%	14%	46%	0%	7%
Dickinson	29%	22%	31%	8%	10%
Fargo	21%	27%	30%	10%	12%
Garrison	29%	4%	42%	4%	21%
Grafton	21%	0%	61%	0%	18%
Jamestown	32%	15%	44%	0%	9%
Linton	14%	14%	55%	7%	10%
Oakes	12%	16%	64%	0%	8%
Watford City	36%	0%	57%	0%	7%
<b>Combined</b>	<b>24%</b>	<b>11%</b>	<b>53%</b>	<b>2%</b>	<b>10%</b>

Note: NA – No data available

Appendix Table 22. Participants' View on Addressing Taxes in the Future and Eliminating Local Property Taxes

Community	In the past, the state has increased distributions of funds to school districts to replace local property taxes; how participant feels the state should address taxes in the future				Whether participant supports eliminating local property taxes	
	Continue property tax replacement through school districts	Instead, use funds to reduce personal income tax	Instead, use funds to reduce corporate income tax	Instead, use funds to reduce state sales taxes	Yes	No
Belcourt	78%	22%	0%	0%	21%	79%
Bismarck	NA	NA	NA	NA	NA	NA
Bottineau	76%	18%	0%	6%	12%	88%
Bowman	87%	13%	0%	0%	7%	93%
Crosby	90%	10%	0%	0%	5%	95%
Devils Lake	78%	7%	7%	7%	15%	85%
Dickinson	66%	28%	3%	3%	49%	51%
Fargo	81%	12%	0%	7%	6%	94%
Garrison	86%	9%	0%	5%	21%	79%
Grafton	48%	37%	4%	11%	16%	84%
Jamestown	80%	10%	0%	10%	6%	94%
Linton	82%	14%	0%	4%	7%	93%
Oakes	76%	16%	0%	8%	12%	88%
Watford City	67%	33%	0%	0%	13%	87%
<b>Combined</b>	<b>76%</b>	<b>18%</b>	<b>1%</b>	<b>5%</b>	<b>15%</b>	<b>85%</b>

Note: NA – No data available

Appendix Table 23. Participants' View Regarding the Greatest Challenge Facing North Dakota's Long-Term Future

Community	Infrastructure demands	Education, workforce	Leadership	Access & cost of health care	Demographic shift
Belcourt	27%	9%	14%	41%	9%
Bismarck	20%	14%	22%	7%	36%
Bottineau	27%	15%	15%	24%	18%
Bowman	44%	13%	13%	13%	19%
Crosby	18%	5%	27%	23%	27%
Devils Lake	28%	17%	17%	3%	34%
Dickinson	38%	22%	8%	11%	21%
Fargo	15%	34%	30%	6%	15%
Garrison	17%	0%	25%	17%	42%
Grafton	22%	19%	6%	9%	44%
Jamestown	13%	27%	17%	17%	27%
Linton	17%	17%	10%	13%	43%
Oakes	8%	32%	12%	8%	40%
Watford City	43%	7%	21%	21%	7%
<b>Combined</b>	<b>24%</b>	<b>16%</b>	<b>17%</b>	<b>15%</b>	<b>27%</b>

Appendix Table 24. Participants' View Regarding the Biggest Threat to the Quality of Life in North Dakota

Community	Environmental risks	Pace of energy development	Demographics	Deterioration of infrastructure	Cultural shift
Belcourt	22%	17%	11%	28%	22%
Bismarck	NA	NA	NA	NA	NA
Bottineau	8%	36%	6%	33%	17%
Bowman	0%	53%	6%	12%	29%
Crosby	13%	29%	17%	21%	21%
Devils Lake	10%	7%	31%	21%	31%
Dickinson	12%	26%	3%	14%	45%
Fargo	13%	43%	10%	20%	15%
Garrison	0%	42%	13%	17%	29%
Grafton	9%	9%	34%	28%	19%
Jamestown	3%	38%	16%	31%	13%
Linton	10%	32%	26%	10%	23%
Oakes	7%	19%	26%	41%	7%
Watford City	7%	57%	0%	21%	14%
<b>Combined</b>	<b>9%</b>	<b>31%</b>	<b>15%</b>	<b>23%</b>	<b>22%</b>

Note: NA – No data available

Appendix Table 25. Participants' View Regarding What We Should Be Doing Today to Make a Lasting Impact on North Dakota's Future

Community	Provide more opportunities for early childhood education and quality child care services	Develop a student loan repayment plan for graduates who live in ND	Construct a state-owned oil refinery	Invest in scientific and technological research	Eliminate/ lower taxes on property, income, sales	Change state constitution so annual legacy payments could be made to ND citizens
Belcourt	10%	55%	10%	15%	0%	10%
Bismarck	NA	NA	NA	NA	NA	NA
Bottineau	18%	27%	39%	3%	3%	9%
Bowman	0%	40%	40%	13%	7%	0%
Crosby	22%	22%	26%	9%	0%	22%
Devils Lake	13%	46%	21%	8%	0%	13%
Dickinson	17%	32%	10%	32%	7%	2%
Fargo	55%	21%	14%	4%	3%	4%
Garrison	18%	23%	32%	5%	9%	14%
Grafton	7%	38%	24%	10%	10%	10%
Jamestown	13%	34%	28%	16%	3%	6%
Linton	7%	34%	28%	7%	7%	17%
Oakes	20%	16%	24%	8%	20%	12%
Watford City	14%	29%	29%	0%	21%	7%
<b>Combined</b>	<b>16%</b>	<b>32%</b>	<b>25%</b>	<b>10%</b>	<b>7%</b>	<b>10%</b>

Note: NA – No data available

# acknowledgments

## Keynote Speakers

Diane Smith, *The New Rural*  
Rich Karlgaard, *Forbes*  
Adam Davidson & Alex Blumberg, NPR's Planet Money  
Paul von Ebers, Blue Cross Blue Shield of North Dakota

## Partners

USDA Rural Development  
Advanced Engineering & Environmental Services, Inc.  
Basin Electric Power Cooperative  
North Dakota Farmers Union  
AARP  
Blue Cross Blue Shield of North Dakota  
North Dakota Association of Rural Electric Cooperatives  
North Dakota Department of Commerce  
Mortenson Construction  
Sanford Health  
The Consensus Council, Inc.  
NDSU Extension Service Center for Community Vitality

## Facilitators

Jason Matthews, KK Bold  
Steve Burian, Advanced Engineering & Environmental Services, Inc.  
Mike Eggl, Basin Electric Power Cooperative  
Rick Clayburgh, North Dakota Bankers Association  
Carmen Miller, Pew Environment Group  
Debora Dragseth, Dickinson State University  
Judd Wagner, Blue Cross Blue Shield of North Dakota  
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## Hosts for Community Meetings

Linton Community Center  
KEM Electric Cooperative, Linton, ND  
BEK Communications Cooperative, Steele, ND  
Lake Region State College, Devils Lake, ND  
Red River Regional Council, Grafton, ND  
McLean Electric Cooperative, Garrison, ND  
Garrison Area Improvement Association  
North Dakota Farmers Union, Jamestown, ND  
City of Oakes  
Angry Beaver Lodge, Oakes, ND  
Bottineau Ambulance Association  
Bottineau Economic Development Association  
St. Andrews Health Care, Bottineau, ND  
Turtle Mountain Community College, Belcourt, ND  
Bowman County Development  
Pioneer Trails Regional Museum, Bowman, ND  
St. Luke's Hospital, Crosby, ND  
Burke Divide Electric Cooperative, Columbus, ND  
Northwest Communications Cooperative, Ray, ND

