



# Appendices

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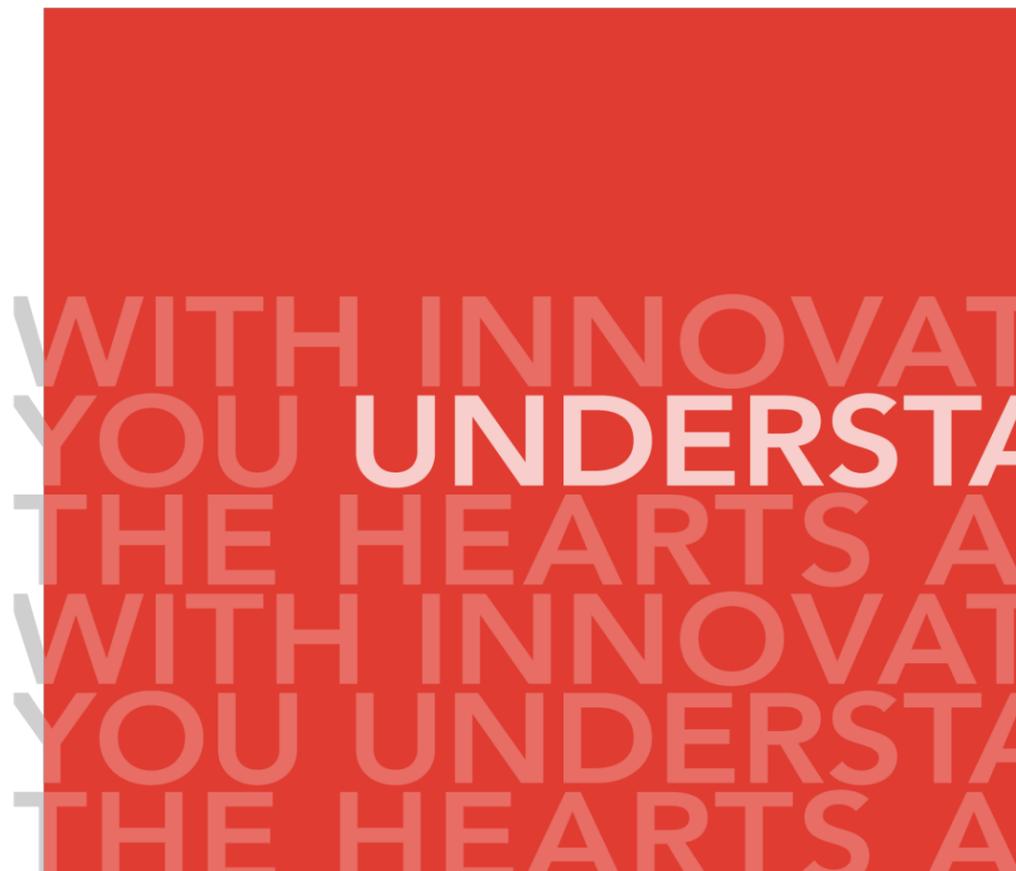
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# Appendix A

## Values Study

This document was prepared by Heart+Mind Strategies for the Envision Madison project. It's purpose is to illustrate the core values of Madison County Residents, and what values they want to see represented in the future.

Madison County  
June 13, 2013



## Research Design

### Methodology:

- Qualitative exploration with Advanced Strategy Online Session 4/19/2013
- Telephone survey
- 253 respondents

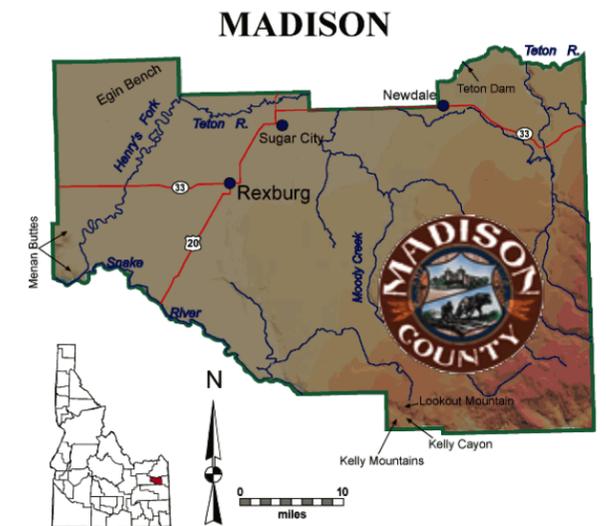
**Average Length:** 28 Minutes

### Sample:

- Madison County residents
- 18+ years old
- If student, year-round resident

### Weighting Procedure:

- Data was weighted on gender within age, to reflect population percentages excluding the student population at BYU-Idaho.



## Questionnaire Flow

Screening
600: Quality of Life
700: Confirming Values Ladder: <ul style="list-style-type: none"> <li>• Attributes</li> <li>• Functional benefits</li> <li>• Emotional benefits</li> </ul>
800: Economy and growth
900: Ideal community
950: Future development
1000: BYU-I
Demographics

# EXECUTIVE SUMMARY

YOUR GOALS WITH INNOVATIVE RESEARCH  
WE HELP YOU UNDERSTAND HOW TO ENGAGE  
THE HEARTS AND MINDS OF PEOPLE THAT  
MATTER MOST TO ACHIEVING YOUR GOALS

## Key Findings

- Madison County residents love where they live and the high quality of life it provides:
  - Madison County residents view their quality of life far more favorably than rest of the country—among highest measured in regional visioning.
  - Moreover, most residents believe the quality of life for future generations is promising—again, much higher than in the rest of the country.
  - The large majority of residents feel things in their local communities are headed in the right direction.
  - Positive things far outweigh negative factors about life in Madison County.



## Key Findings

- The “family friendly environment with strong values” is the key factor underlying what residents value most about life in Madison County. In addition, the “small town feel” and “strong sense of community” contributes to a feeling of “safe community”. Enjoying the outdoors and the high quality educational opportunities also exert a positive impact on the quality of life of residents.
- The weather and the inaccessibility to entertainment/shopping and jobs are factors which exert the greatest negative impact.

## Key Findings

- The sense of peace of mind, security, and belonging that comes from living in a family friendly community with strong values is the dominant positive value of the people of Madison County.
- For some, there is concern over the lack of jobs and the high cost of living which forces some residents **(or their children)** to live a lower quality of life and robs them of a sense of peace of mind and security.

## Key Findings

- For the large majority of residents, the opportunities and possibilities that accompany growth in the region are believed to be a good thing. Accordingly, most believe growth should be encouraged and fostered.
- Importantly, in light of the growth occurring in the region, the large majority of residents recognize the importance of planning and investing in the future.
- There is significant support for some growth-related strategies:
  - Locating student housing near the university
  - Encouraging a range of housing options
  - Preserving agricultural land and open space by concentrating growth in developed areas
  - Locating jobs/shopping near where people live
  - More walkable neighborhoods

## Key Findings

- Residents identify a few key projects important to the region:
  - Adding more parking near BYU-I
  - Improving the base infrastructure (major utilities, broadband, etc.)
  - Building indoor recreational centers
  - Making it easier for people to get around on foot, bike, car...
  - Planning more shopping and community retail
- Regarding New University Housing...
  - Preference for new single student housing to be within walking distance south and east of campus
  - Preference for new married student housing is spread it around the town.

## Key Findings

- The relationship between BYU–I and the Region is strong and positive:

### Benefits:

- Provides focus on importance of education in the community
- Contributes to strong values of community
- Provides economic engine
- Creates pipeline for well educated workforce
- Increases culture, arts, activities

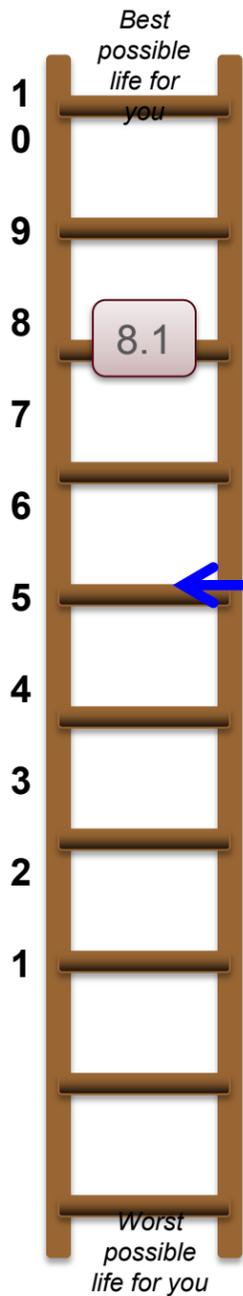
### Concerns:

- Increased traffic congestion
- Safety for large pedestrian population
- Need for community involvement in University decisions that impact community
- Need to plan for increased student growth

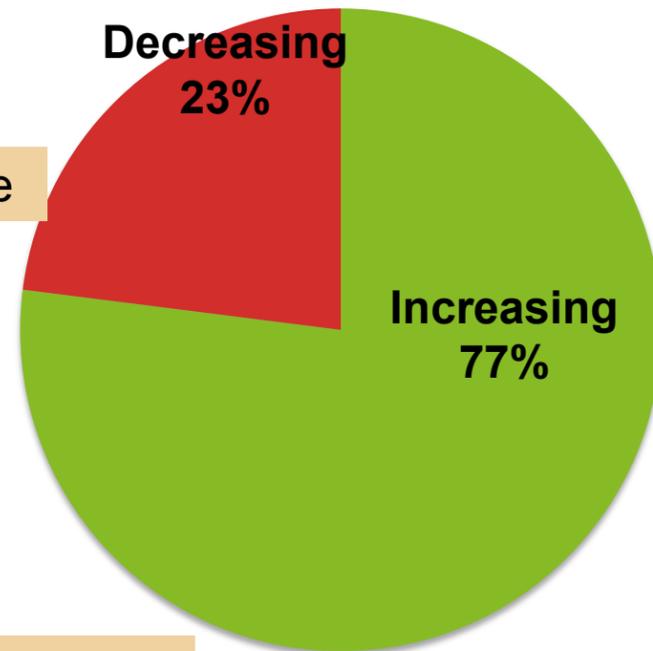
## QUALITY OF LIFE

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# Quality of Life Far Above Rest of the Nation



## Quality of Life for Future Generations



US Average

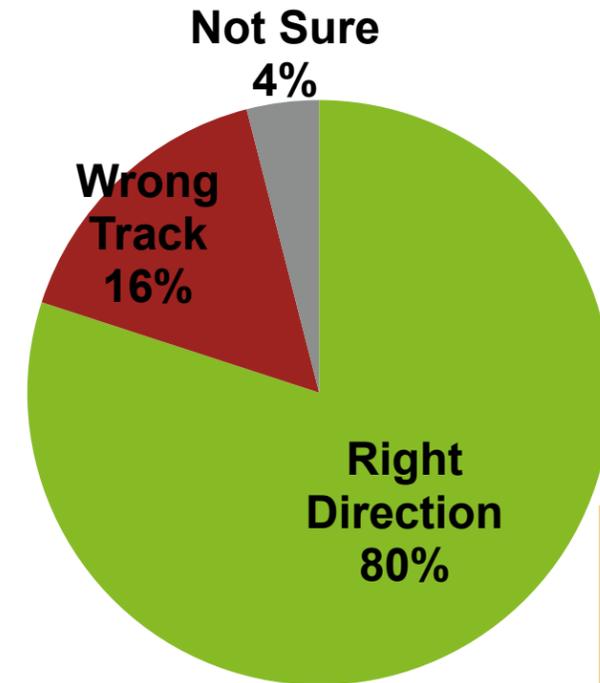
**US**  
56% Decreasing  
44% Increasing

**BASE: All Respondents (n=253)**  
Q620. Thinking about the quality of life that will be here for your or your friends' children and grandchildren, do you see their quality of life in Madison County increasing or decreasing in the future?

# People Highly Confident about Direction of Community



## Direction of Local Community



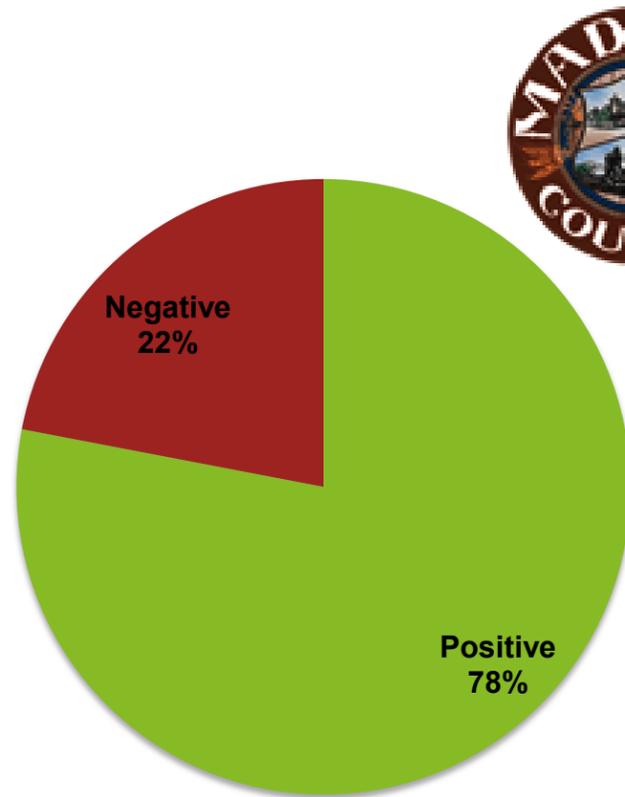
**US**  
29% Right Direction  
54% Wrong Track  
17% Not Sure

**BASE: All Respondents (n=253)**  
Q630. On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

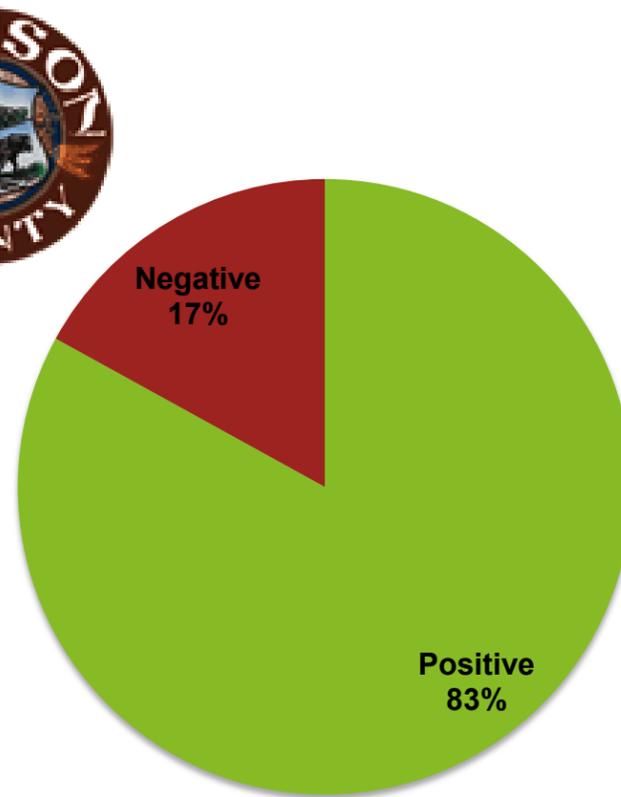
**BASE: All Respondents (n=253)**  
Q600. Thinking about the overall quality of your life here in Madison County, please imagine a ladder with ten steps representing the "ladder of life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you; and the bottom, the first step, the worst possible life for you. On a scale of 1 to 10, on which step of the ladder do you personally stand at the present time?

# Benefits of Living in Madison County Far Outweigh Negatives

Percent of factors influencing quality of life



Most influential factor positive or negative?



In most regions, this falls into the 2:1 – 3:1 Positive to Negative ratio

**BASE: All Respondents (n=253)**

Q635. Thinking about all the positive and negative aspects about the quality of life here in Madison County, what percentage of things would you classify as positive? What percentage is negative??

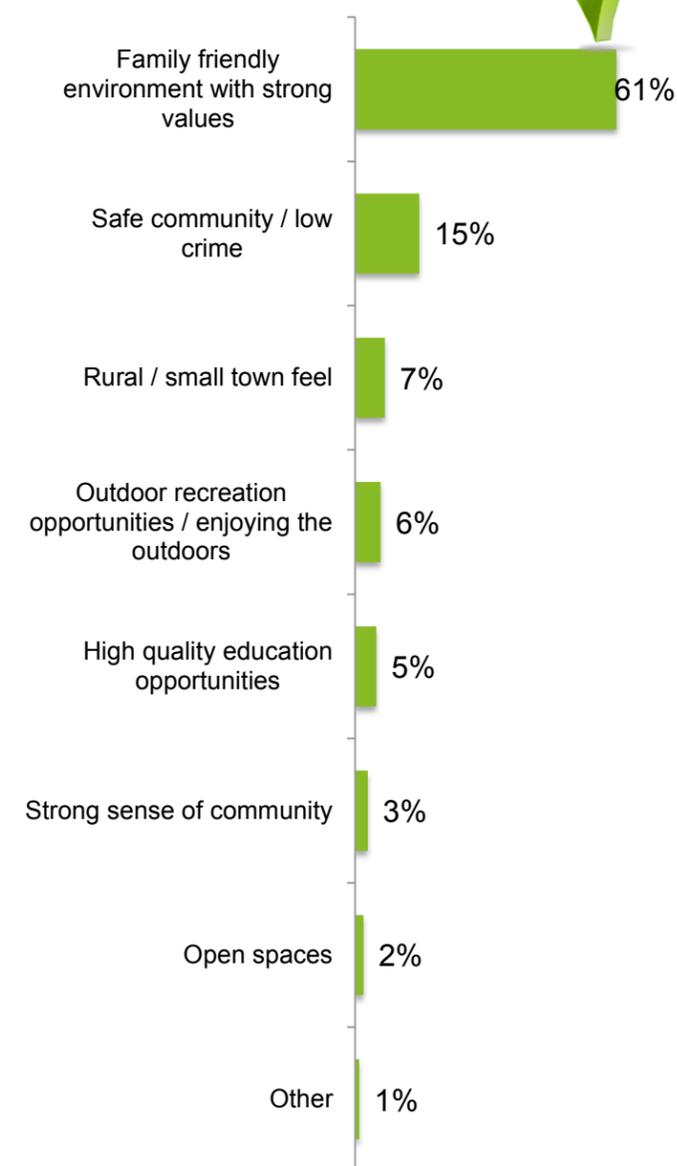
**BASE: All Respondents (n=253)**

Q702. Now, thinking about the positive and negative factors that have the most impact on your quality of life, which one has the most significant impact on your quality of life overall?

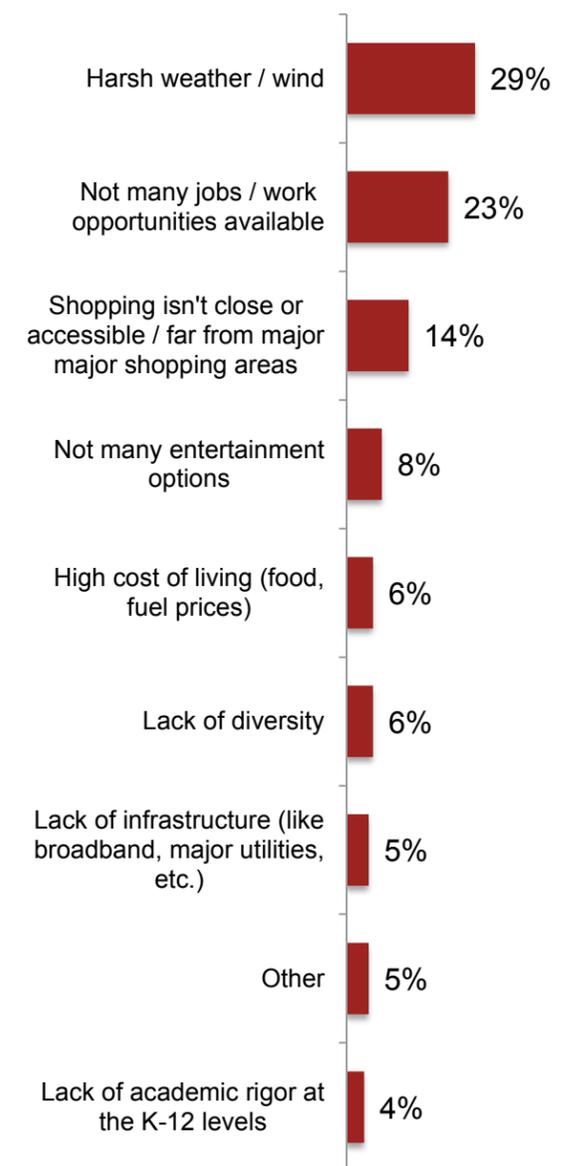


# Most Impactful Quality of Life Factors

Most Positive Impact



Most Negative Impact



**BASE: All Respondents (n=253)**

Q700. The people of Madison County have mentioned many factors—both positive and negative—that contribute to or detract from their quality of life. Thinking about the quality of life in Madison County where you live, please identify which **one** of the following factors has the most **positive** impact on the overall quality of life for you personally.  
Q701. Still thinking about the quality of life in Madison County where you live, please identify which **one** of the following factors has the most **negative** impact on the overall quality of life for you personally.



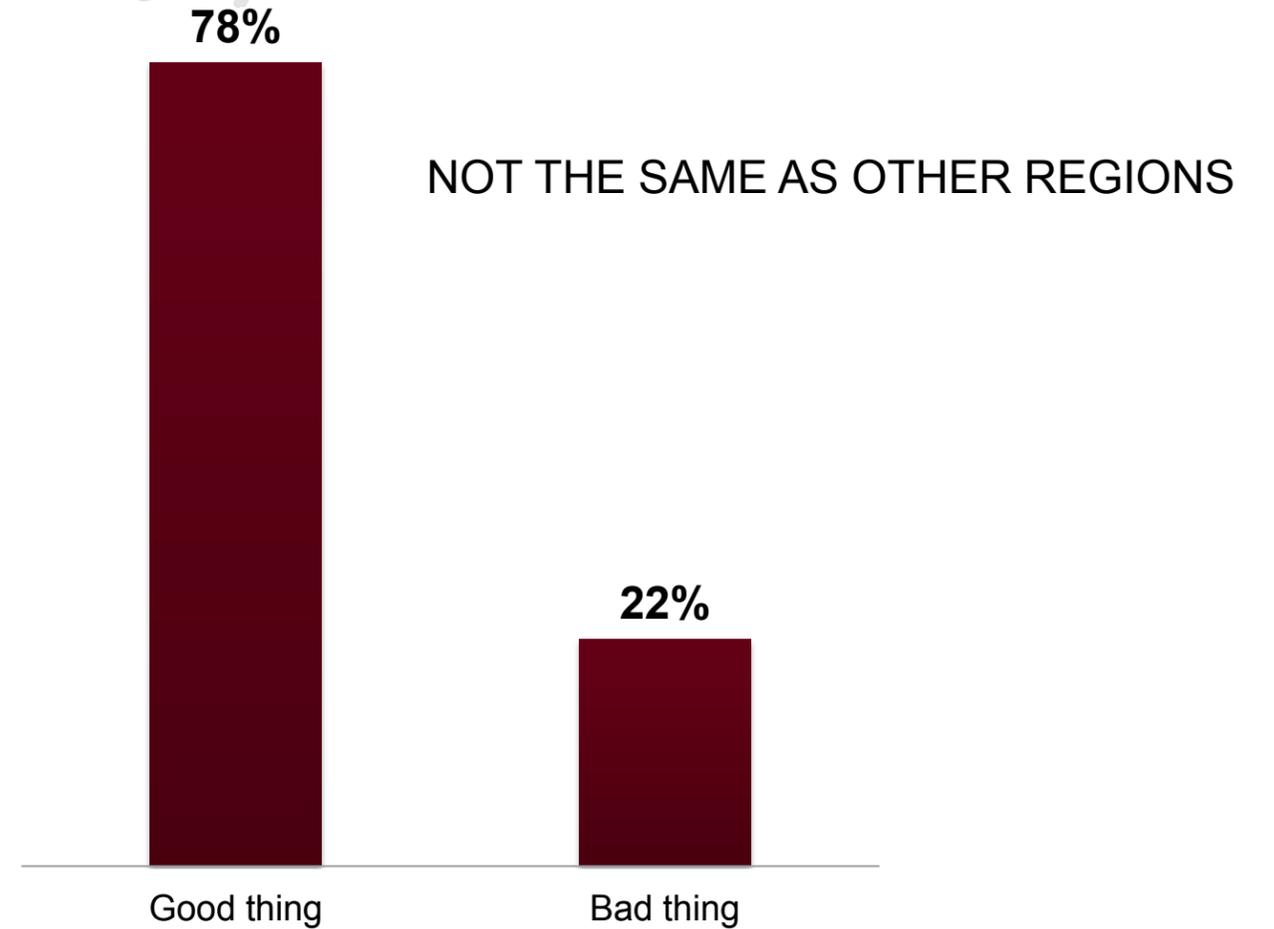
# ECONOMY AND GROWTH

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## High Growth Rate Seen as a Good Thing



Opinion on Madison County's High Growth Rate



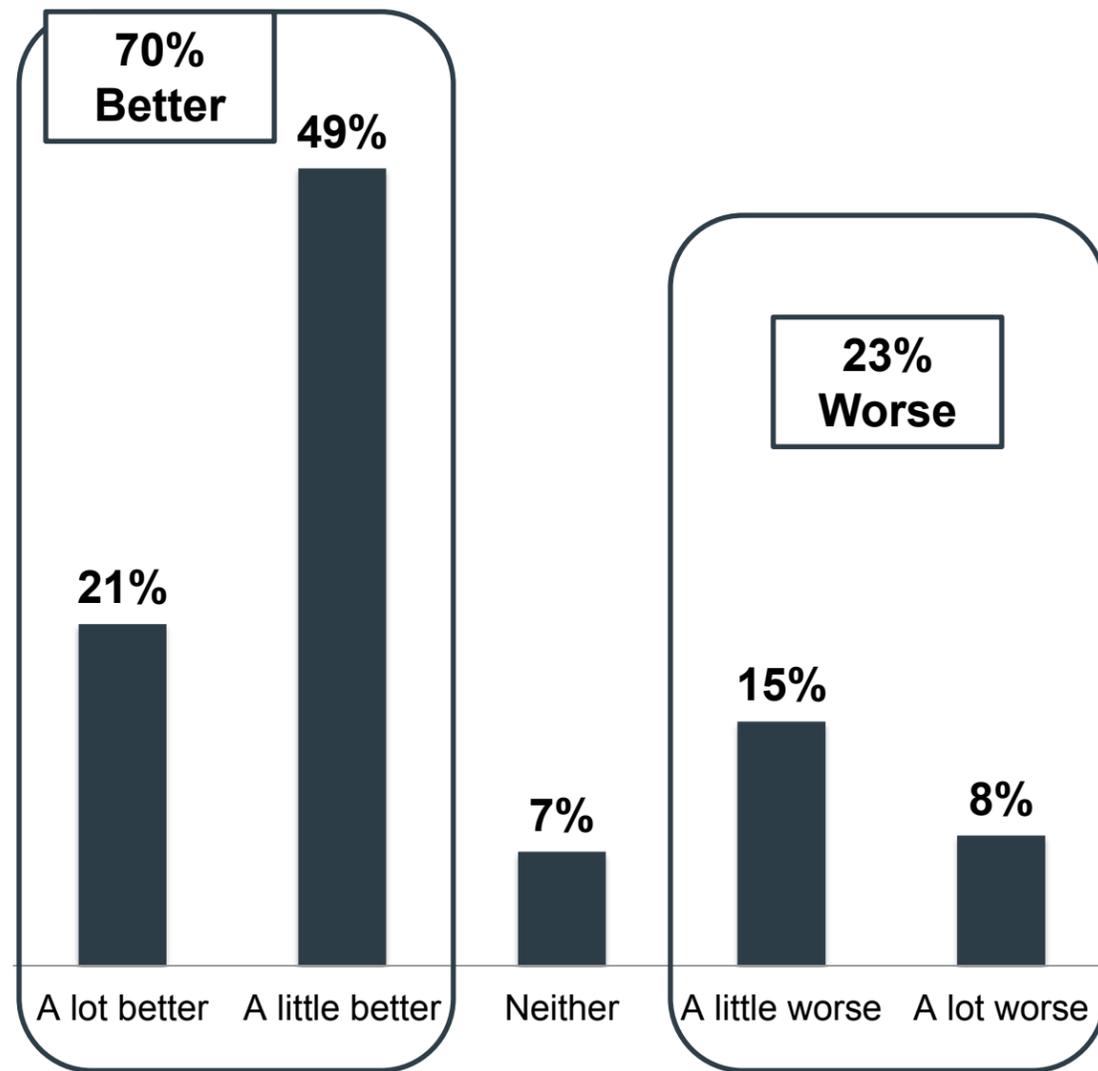
**BASE: All Respondents (n=253)**

Q855 As you may have heard or read, Madison County's growth trends sit well above the national population growth rate and the Idaho state population growth rate according to the initial 2010 census. Do you think that is a good thing or a bad thing?



Future growth/change is thought to make things better

Opinion on Future Growth

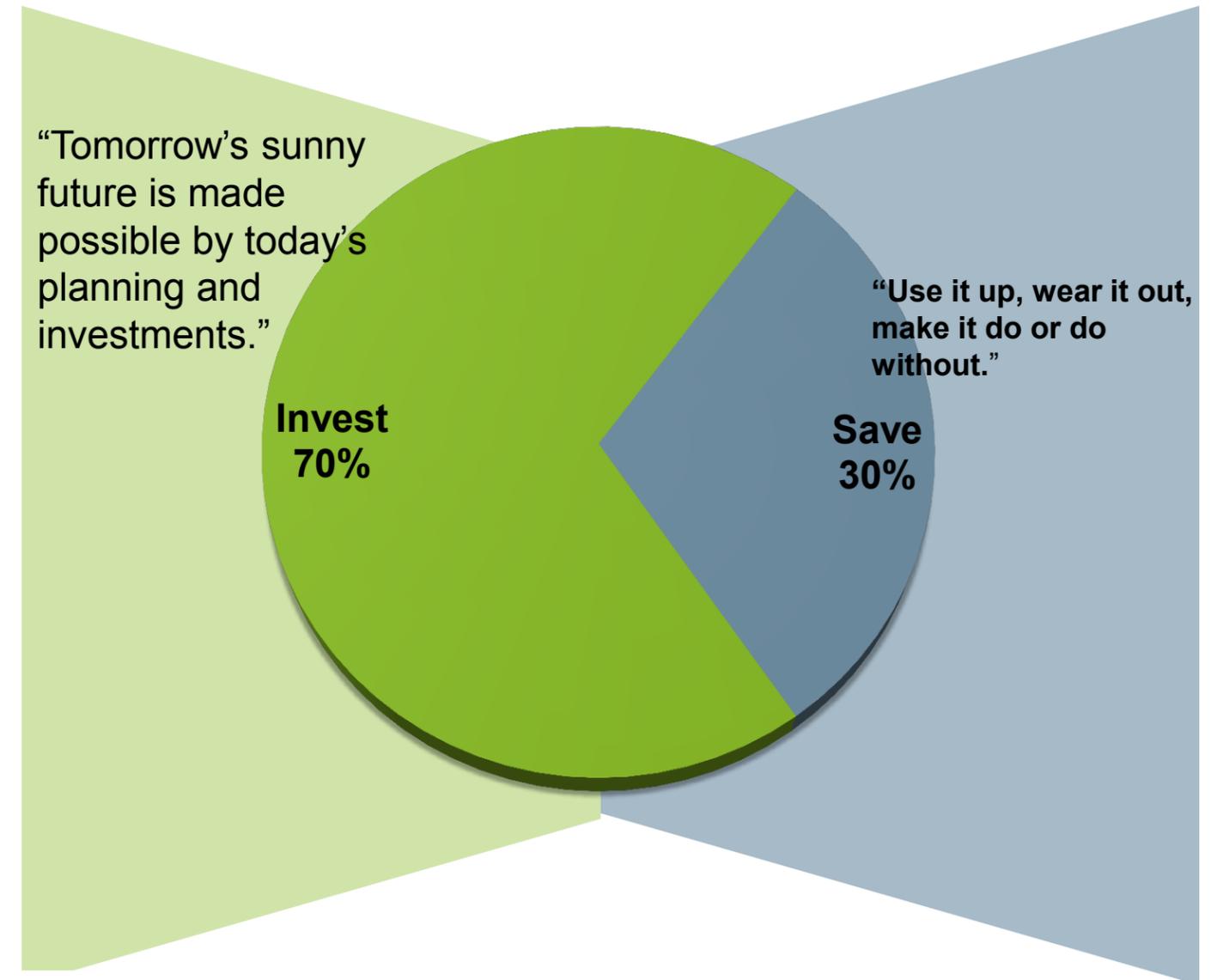


Neighboring States

17%	38%	10%	15%
20%	Utah		
11%	35%	18%	23%
13%	WY		

Q875. Most people see both positive and negative aspects of the changes taking place in the region where you live. Based on your own personal feelings, do you believe future growth in the region where you live will make things better or make things worse?

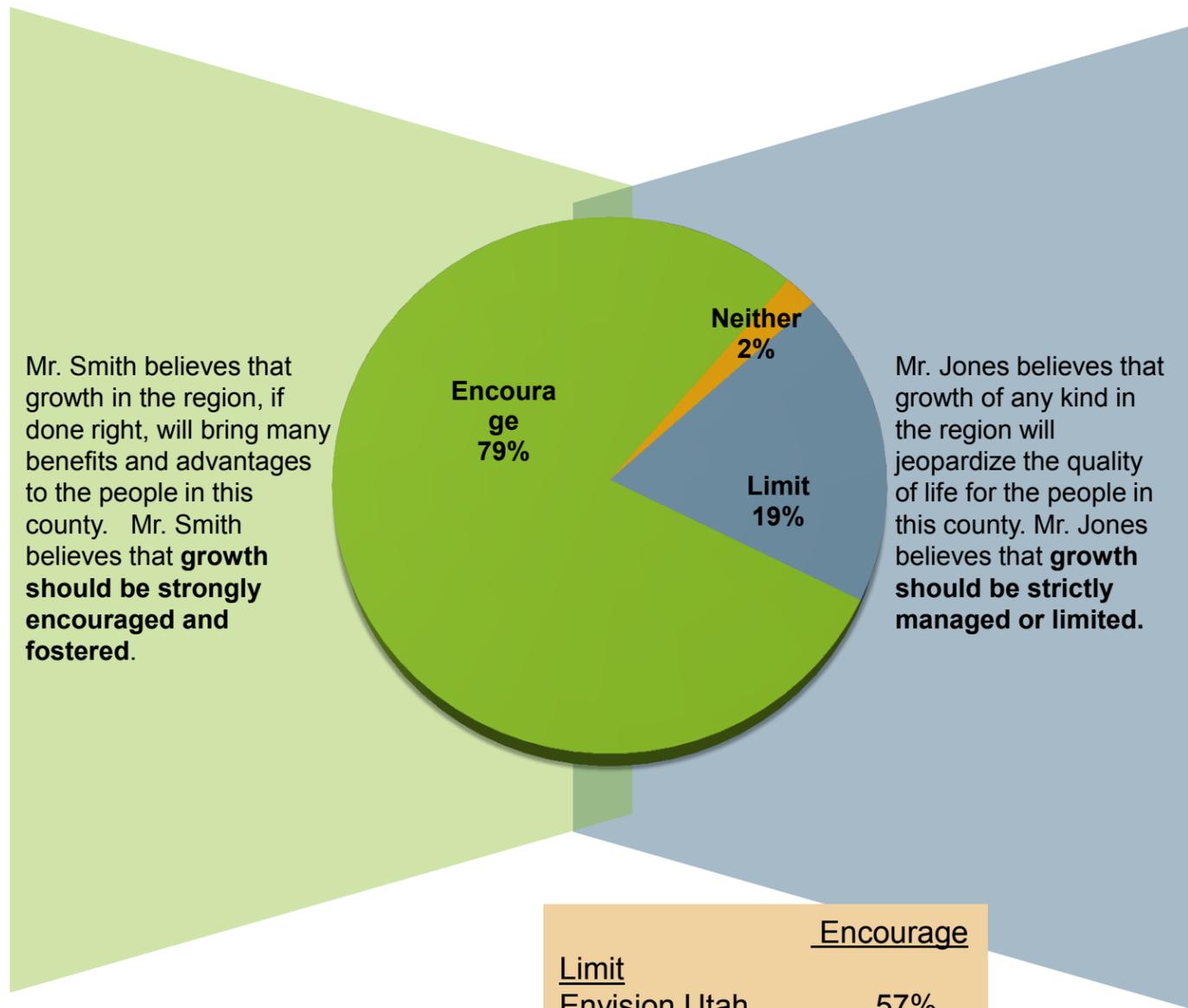
Strong Preference to INVEST in the Future



BASE: All Respondents (n=253)

Q870. There are two approaches to how people look at the resources a region has and the future of that region. Which of the following best reflects your own personal feeling?

# Strong Preference to Encourage Growth



	Limit	Encourage
Envision Utah	38%	57%
WY	29%	65%
SD	38%	49%

**BASE: All Respondents (n=253)**  
 Q885. Below are the opinions of two hypothetical respondents. Which opinion comes closest to your own. Is your opinion more like...



# IDEAL COMMUNITY

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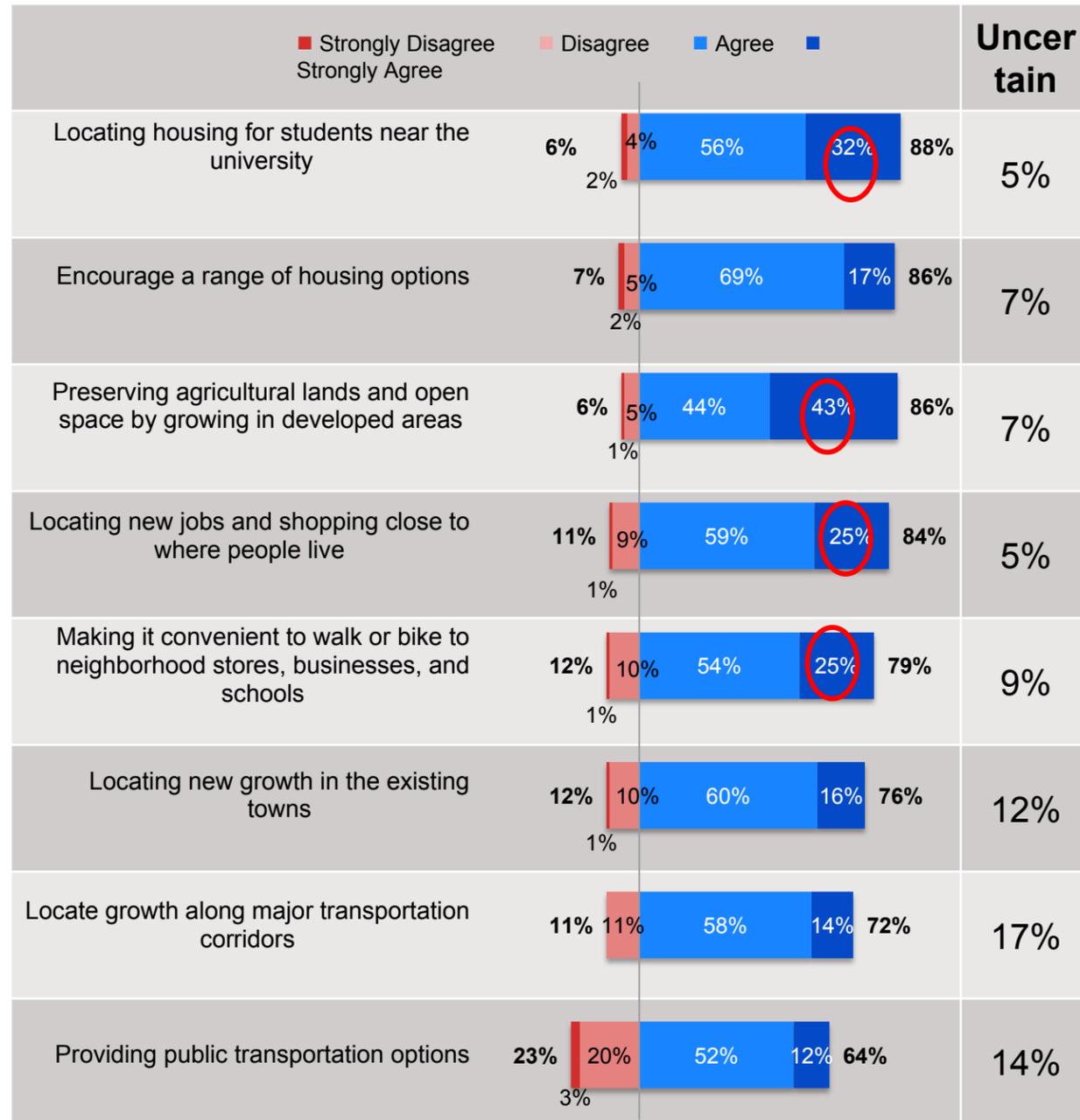
- Most residents like to keep church closest, with emergency services, and other daily errand locations also nearby.

# FUTURE GROWTH STRATEGIES

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**BASE: ALL QUALIFIED RESPONDENTS (Q99/1)**  
**Q905** Please imagine your ideal community. Now, thinking about that community, please indicate the distance you would prefer to have between the place you live and each of the following:

# Support of Growth Strategies



# Importance of Various Projects to the Region

Top 3 Box: Important



BASE: All Respondents (n=253)  
 Q960 How much do you agree or disagree with the following growth strategies for the region where you live in Madison County? Please note that these strategies are not mutually exclusive.



BASE: All Respondents (n=253)  
 Q965 Thinking about the projects, renovations, new elements, or considerations for future growth and development of Madison County, please tell me how important each of the following is for the region. Please use a scale where a '1' means not at all important and a '10' means extremely important.



# CONFIRMING VALUES LADDER

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## Values-Based Strategic Hinge

There is a “strategic hinge” which exists, linking the attributes and benefits of life in Madison County to the people

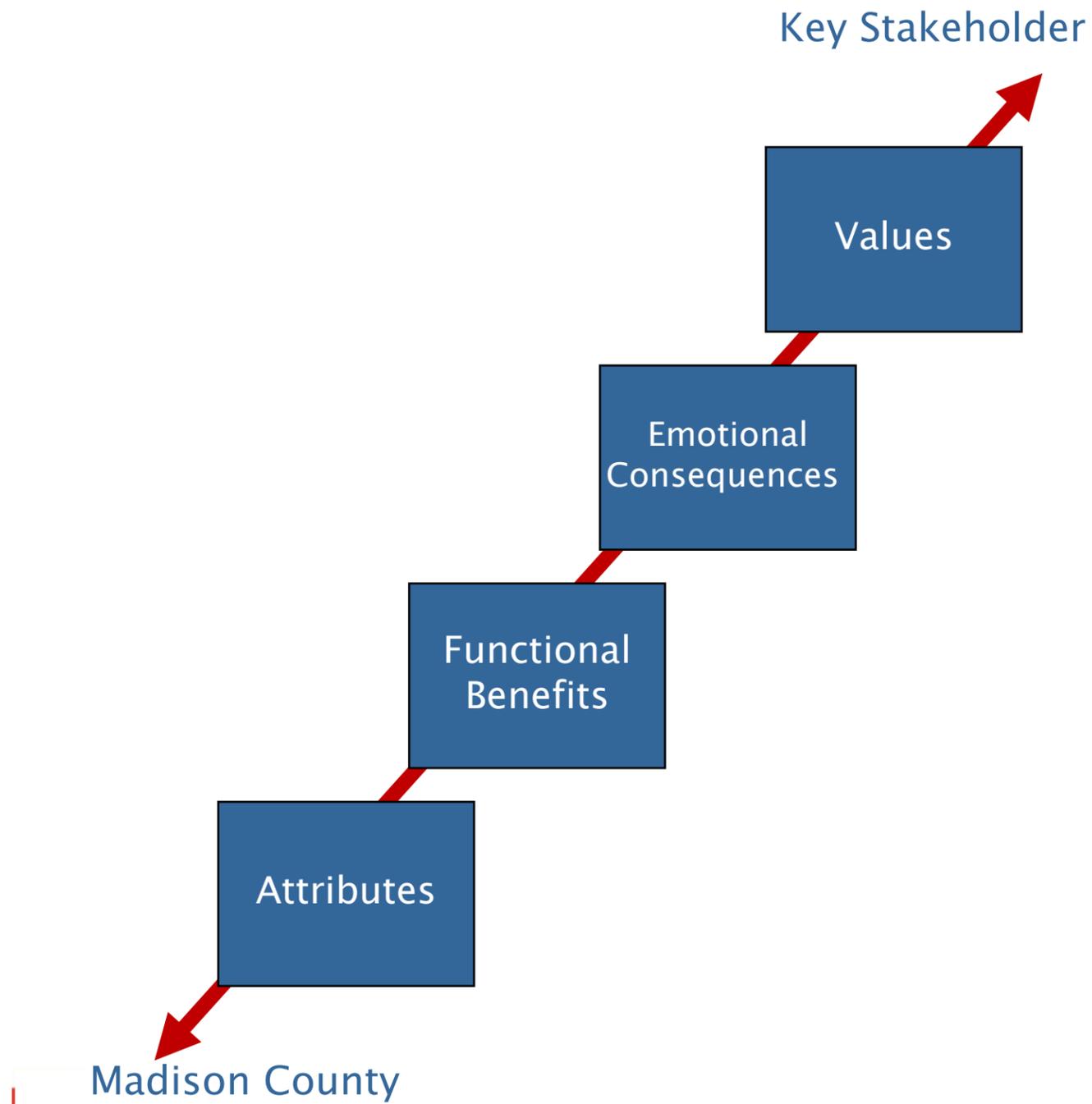


*Reason*  
*Emotion*

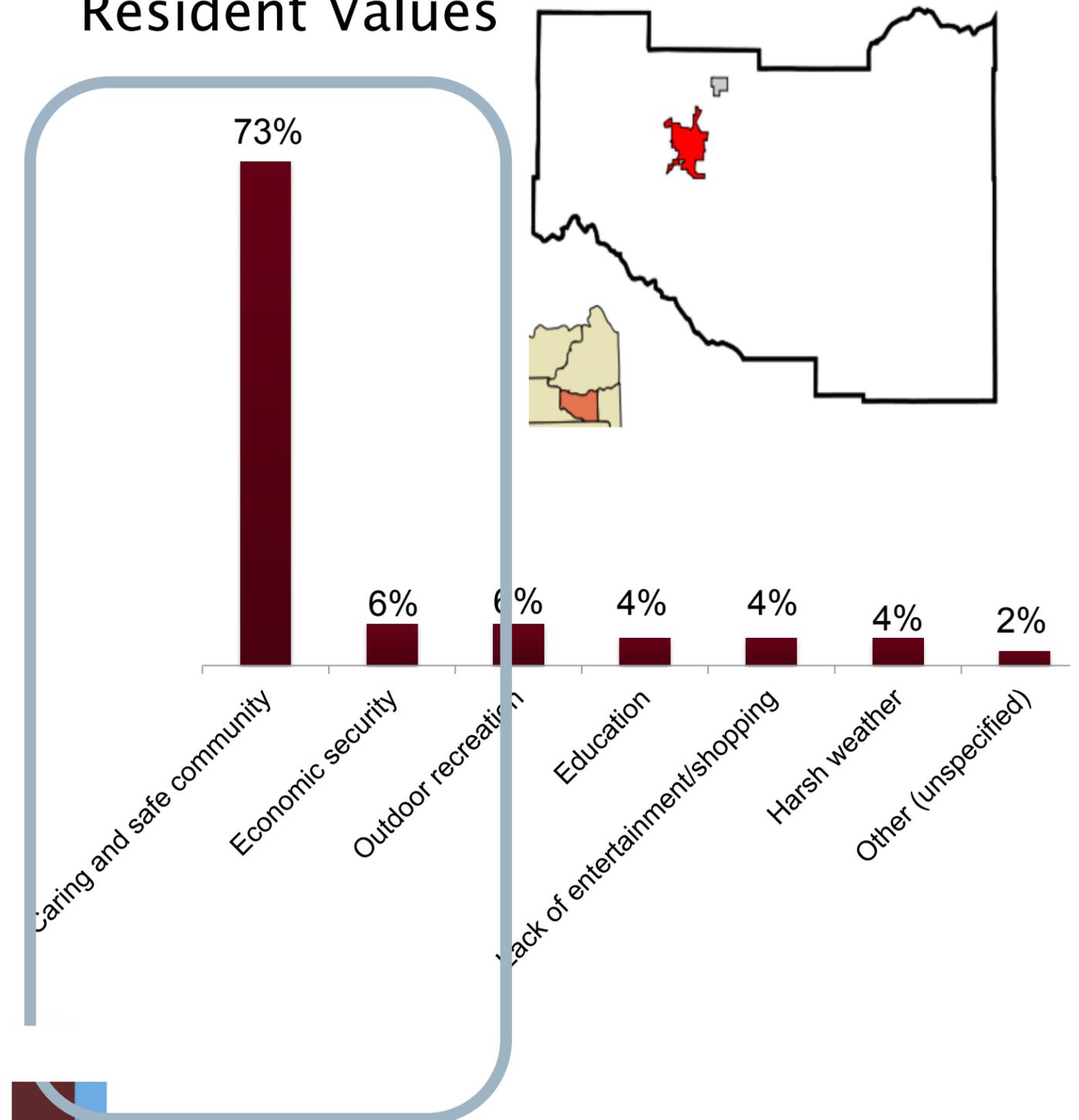


Identifying the rational and emotional drivers of this hinge is the purpose of “values” research.

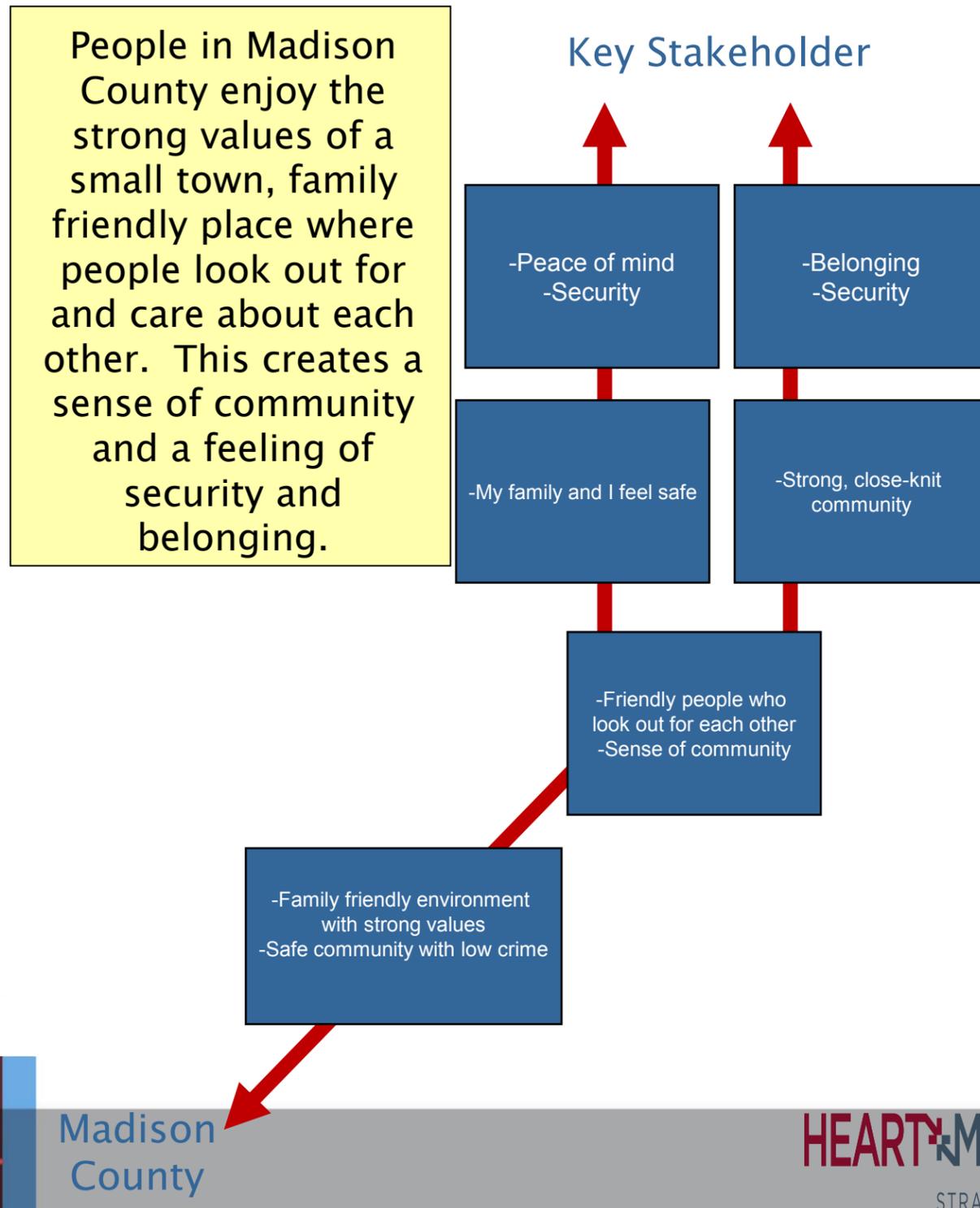
# Strategic Hinge: Levels



# Summary: Madison County Resident Values



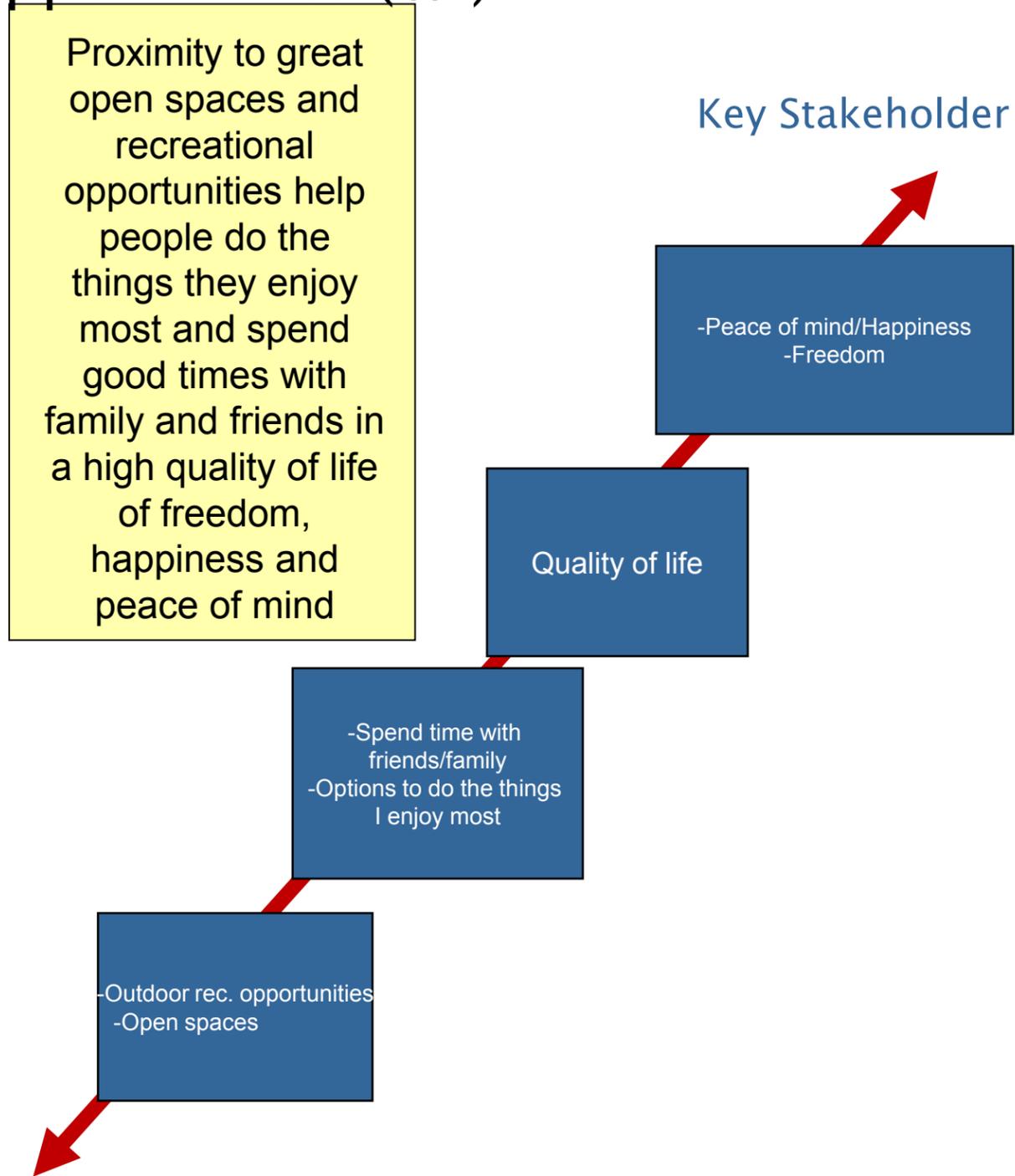
# Caring and Safe Community (73%)



# Economic Security (6%)



# Outdoor Recreation Opportunities (6%)



Madison County

# BYU-IDAHO

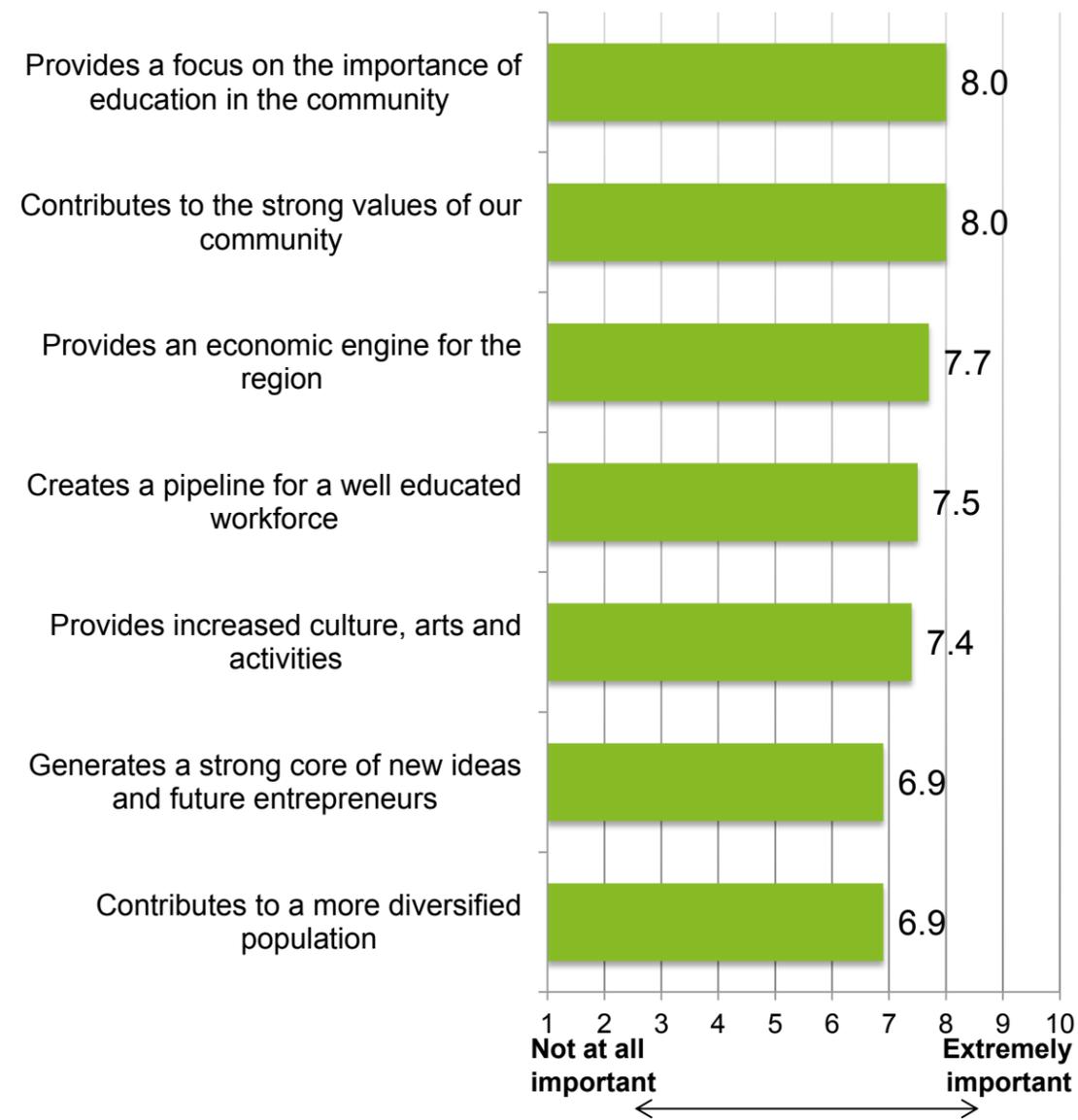
The relationship between BYU-I and the Region is strong and positive

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# Importance of Benefits of BYU-I to the Community



## Importance to Me Personally



BASE: All Respondents (n=253)

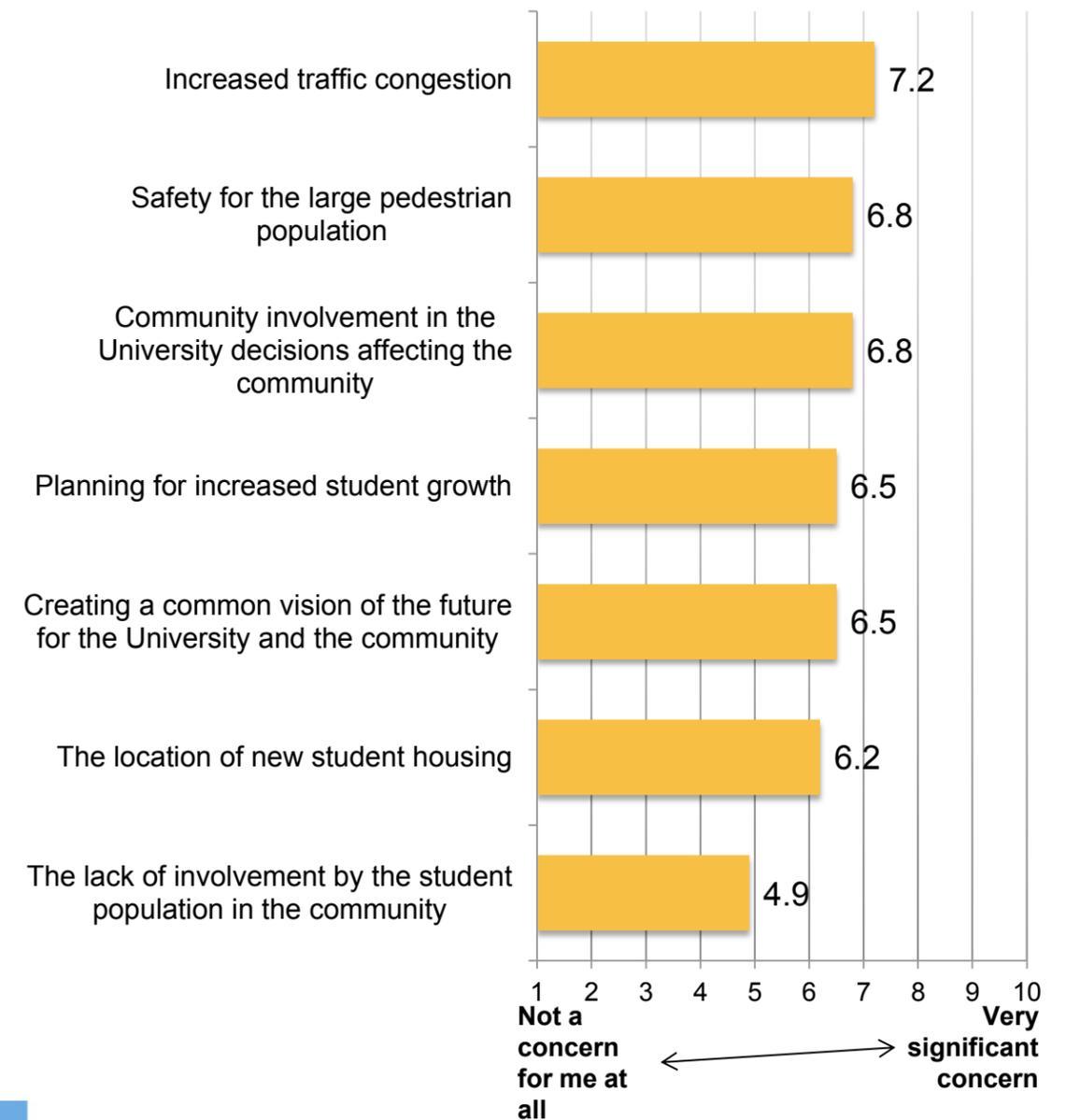
Q1000 The BYU-Idaho campus, faculty and student body are important parts of life in Madison County. I am going to read you a list of benefits they provide the community. Please assess each one in terms of how important that benefit is to you personally. Please use a rating scale where '1' means not at all important and '10' means extremely important



# Significance of Concerns about BYU-I



## Significance to Me Personally

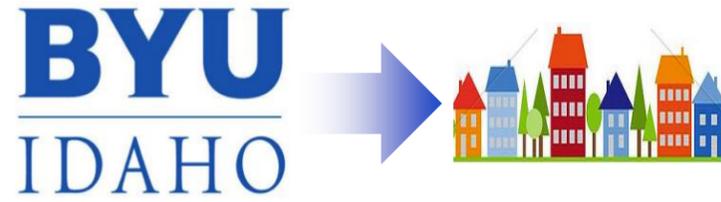


BASE: All Respondents (n=253)

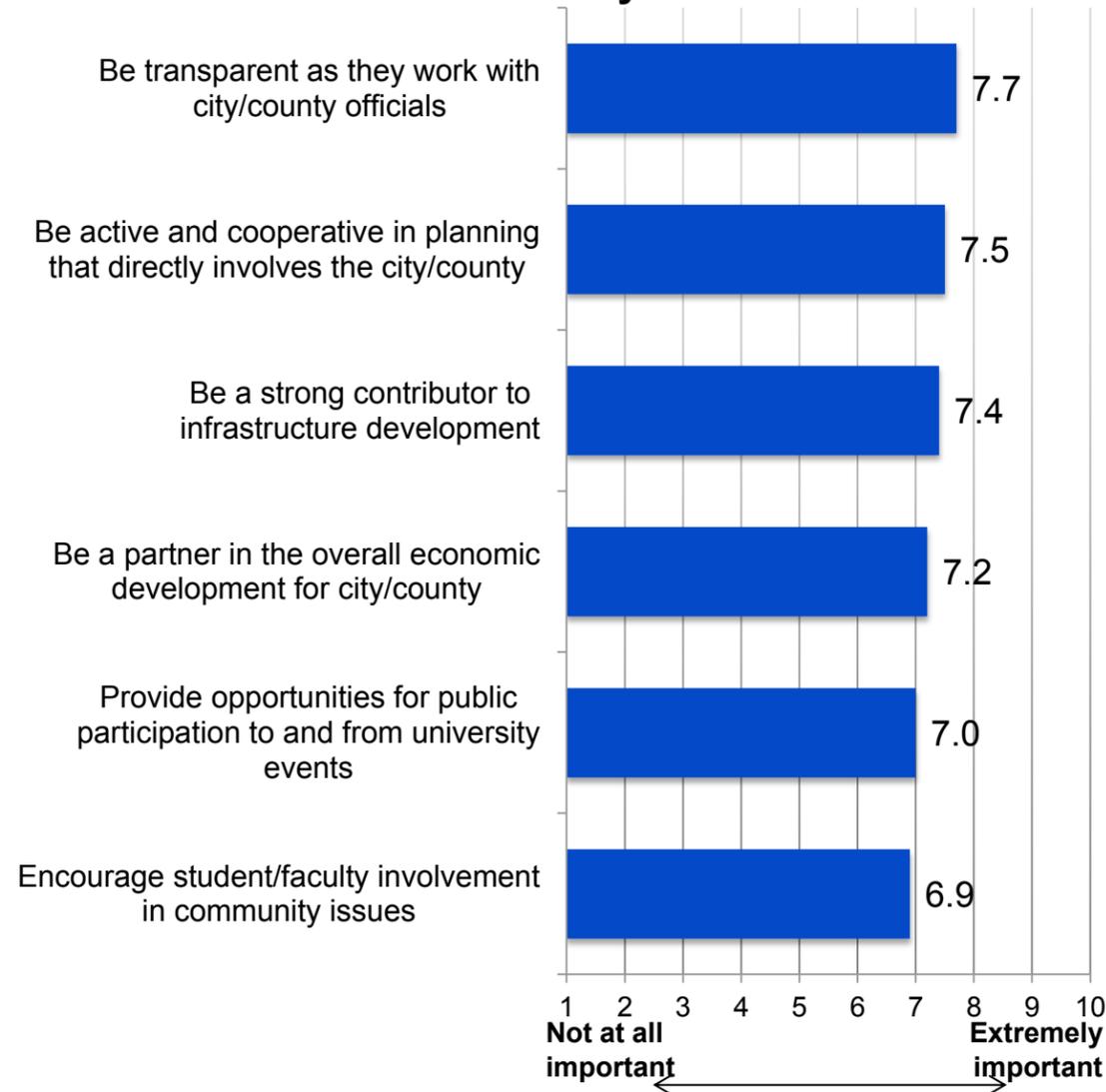
Q1005 Now let's think about this relationship a little differently. I'm going to read you a list of concerns that have been raised about having the BYU-Idaho here in Madison County. Please assess each of the concerns in terms of how significant of a concern it is for you personally. Please use a rating scale where '1' means not a concern for me at all and '10' means a very significant concern for me:



## How can BYU-I add value to the community for the future



### Importance to the Future of Madison County

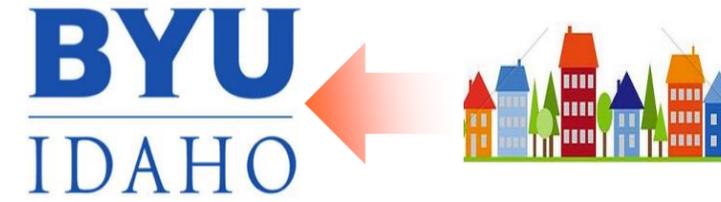


**BASE: All Respondents (n=253)**

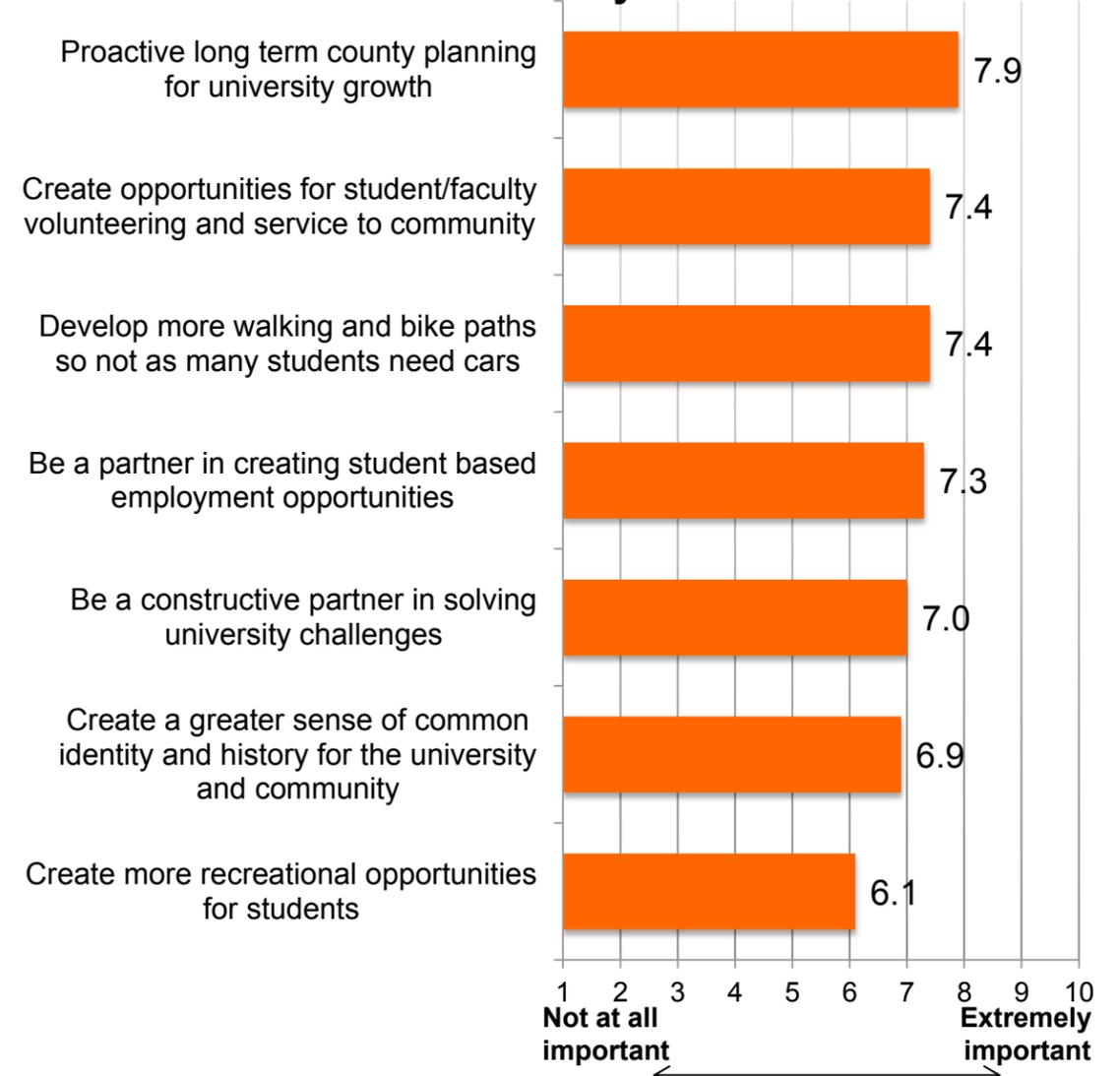
Q1010 Looking to the future of Madison County and its relationship with BYU-Idaho, 5, 10, even 20 years down the road, there are things that **BYU-I could do** to add value to the community. Please assess each of the following in terms of the priority BYU-Idaho should put on adhering to, solving or avoiding each item. Please use a rating scale where '1' means not at all important and '10' means extremely important and critical to the future of Madison County:



## How can the community add value to BYU-I for the future



### Importance to the Future of Madison County

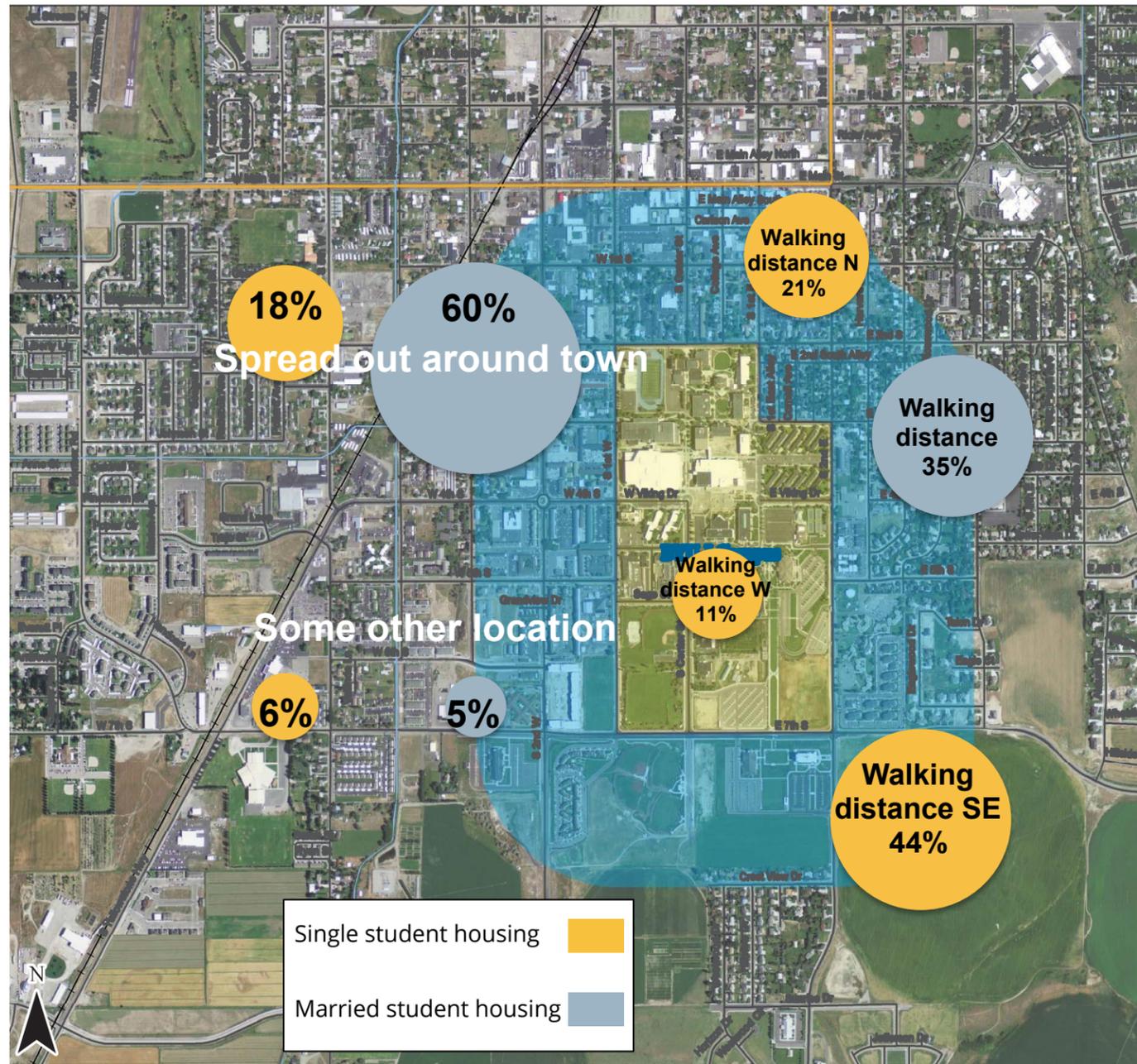


**BASE: All Respondents (n=253)**

Q1015 Looking to the future of Madison County and its relationship with BYU-Idaho, 5, 10, even 20 years down the road, there are things that **the community could do** to add value to BYU-Idaho. Please assess each of the following in terms of the priority the community should put on adhering to, solving or avoiding each item. Please use a rating scale where '1' means not at all important and '10' means extremely important and critical to the future of Madison County:



# WHERE TO PUT NEW HOUSING



BASE: All Respondents (n=253)

Q1020. There's been discussion about where to put new BYU-Idaho student housing. Thinking about potential locations where new single student housing might go, which of the following make the most sense:



# DEMOGRAPHICS

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Years in Madison County	
<5	7%
5-10	16%
11+	77%
<i>MEAN number of years</i>	<i>24.6</i>

Majority of Life in Madison County	
Yes	58%
No	42%

Type of home	
Detached single family home	86%
Attached town home/Duplex	4%
Condo/Apt	5%
Mobile home	4%

Own/Rent	
Own	87%
Rent	9%
Don't know	3%
Refused	1%

Employment status	
Employed	60%
Not employed	39%

Race/Hispanic Origin	
Hispanic	1%
White	94%
Black	-
Asian	-
Native Hawaiian or other Pacific Islander (non-Hispanic)	-
Multi-race, non-Hispanic	1%
All other, non-Hispanic	1%

Marital Status	
Single, never married	13%
Married	77%
Divorced	3%
Separated	-
Widow/Widower	5%
Living with partner	-

Education	
HS or less	15%
Some college	42%
College	24%
Post grad	18%

HH Income	
<\$25K	13%
\$25K-<\$75K	47%
\$75K to <\$100K	20%
\$100K+	13%

Adults in HH	
1	16%
2+	82%
<i>MEAN number of adults</i>	<i>2.3</i>

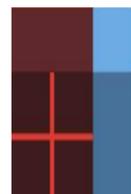
Children <18 in HH	
0	48%
1-2	21%
3-4	20%
5+	8%
<i>MEAN number of children</i>	<i>3.0</i>

## Workshop Poll Results

These polls were conducted during Envision Madison workshops and through online surveys.



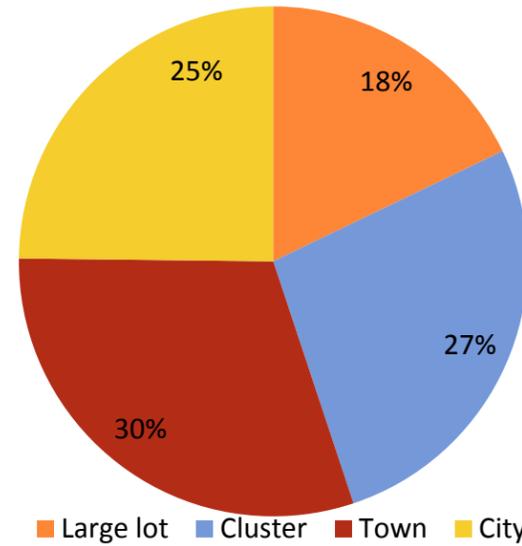
## Demographic Data



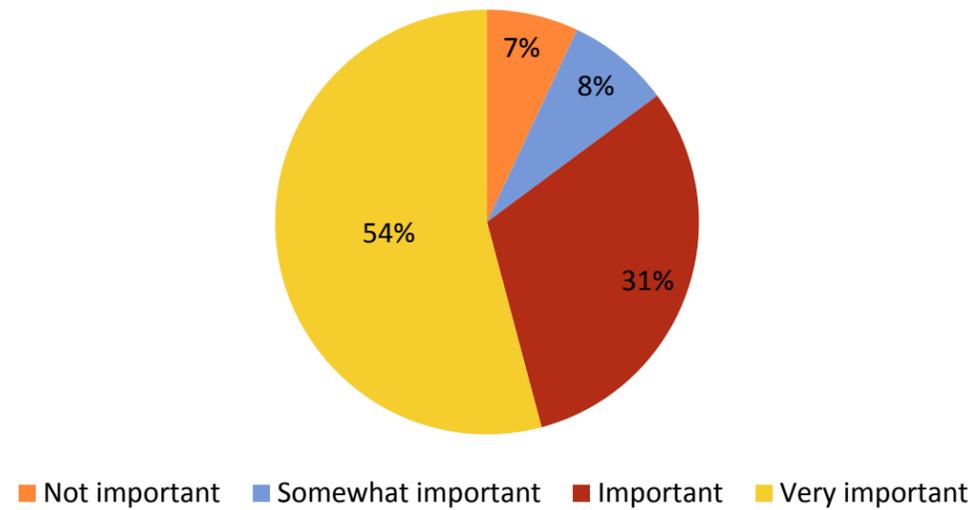


## Envision Madison Workshop and On-line Poll Results

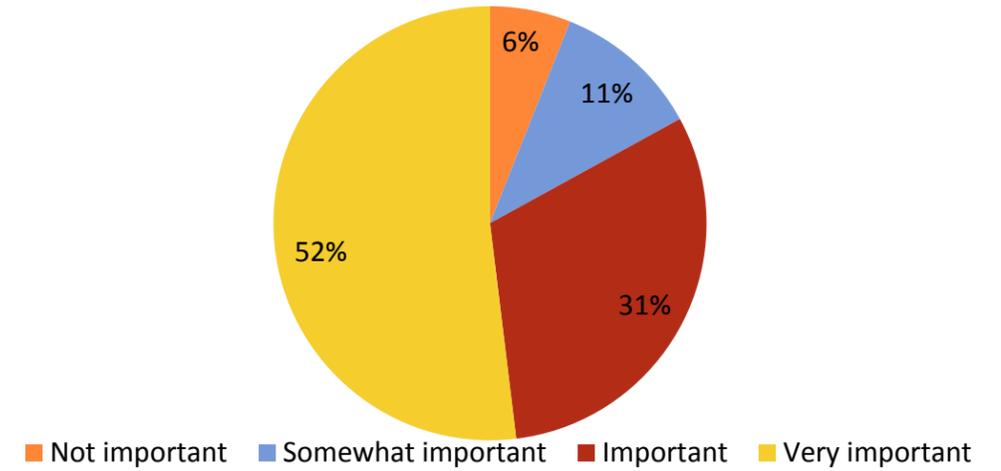
What should be the general pattern for most new development?  
Where will most people live and work?



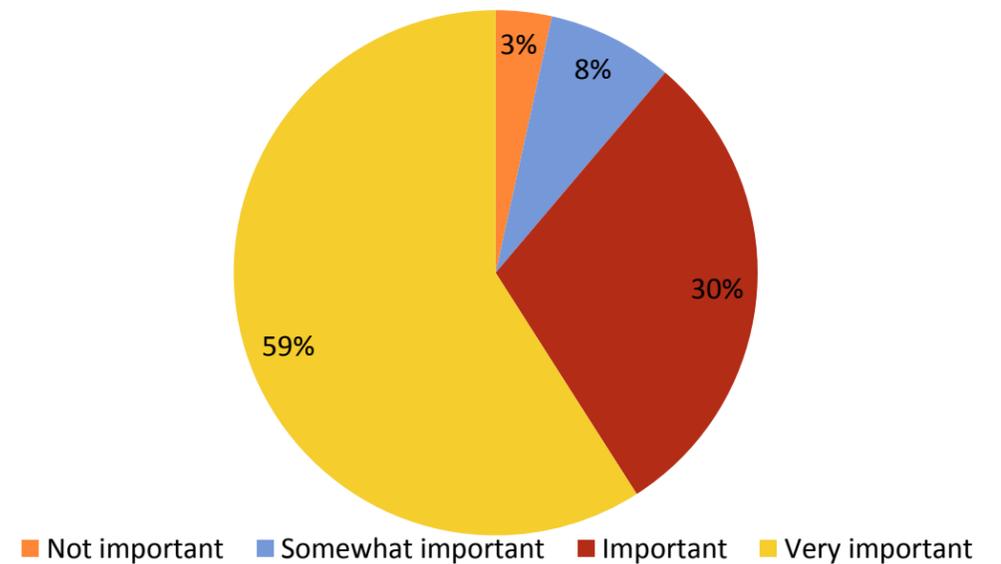
How important is the following idea to you?  
Keep housing reasonably priced



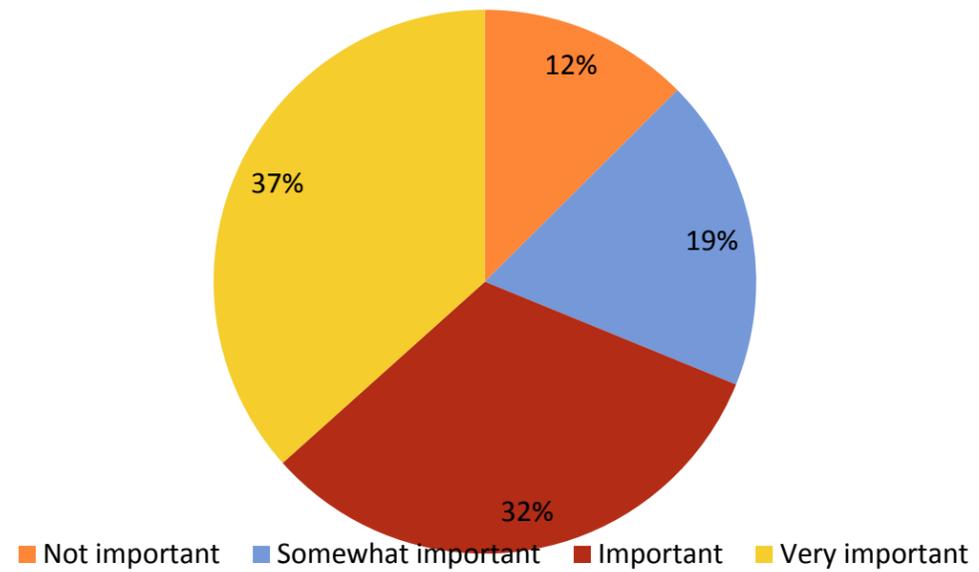
How important is the following idea to you?  
Alleviate traffic congestion



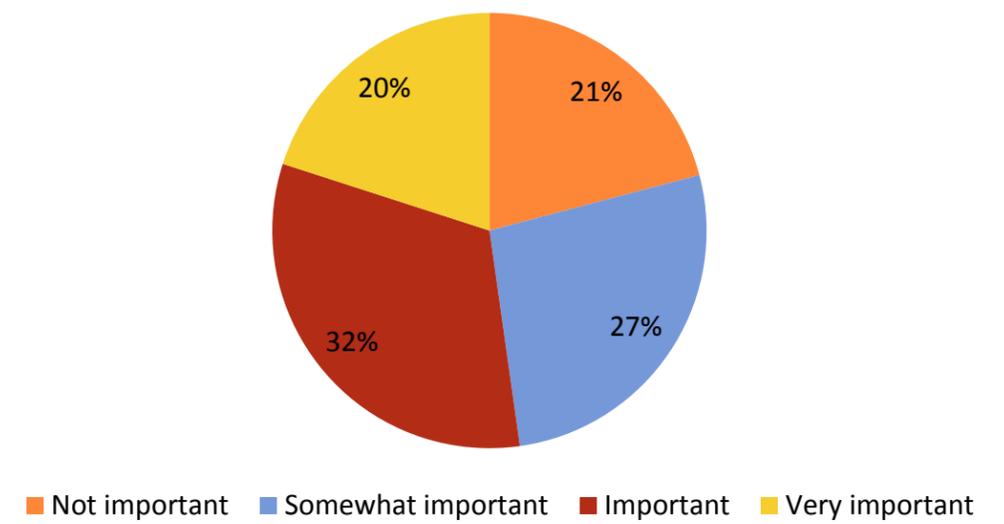
How important is the following idea to you?  
Improve base infrastructure - like major utilities, broadband, etc.



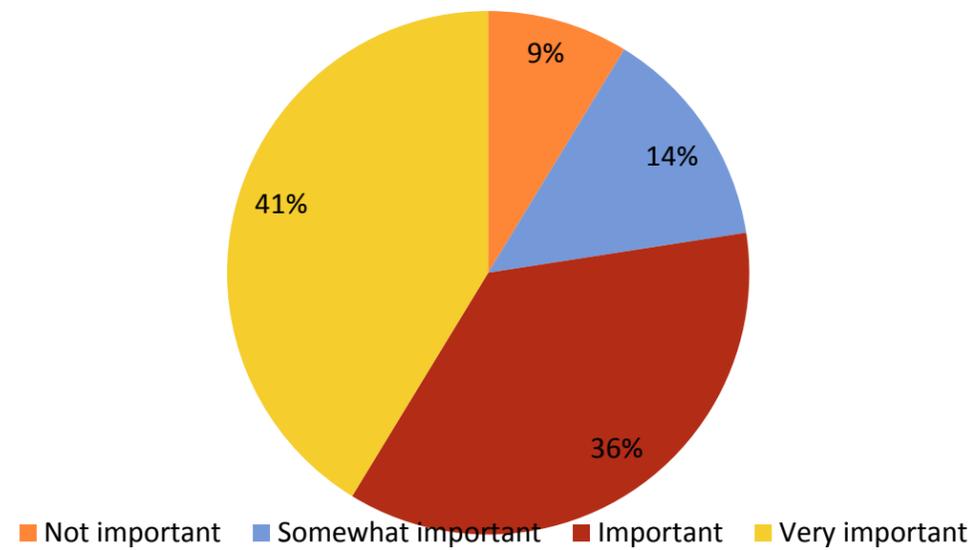
How important is the following idea to you?  
Provide more opportunities for bike/walk commutes



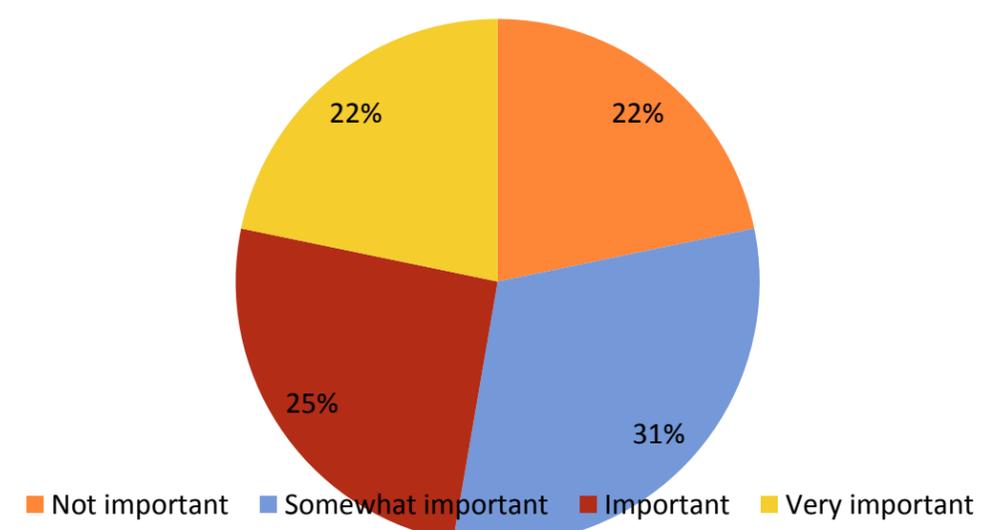
How important is the following idea to you?  
Build neighborhoods with larger yards



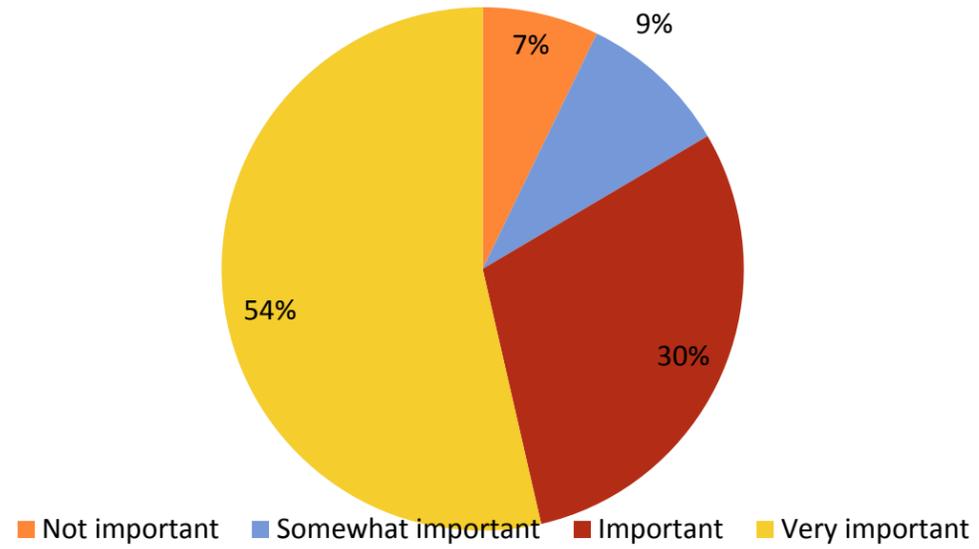
How important is the following idea to you?  
Reuse underutilized land and buildings (infill and redevelopment)



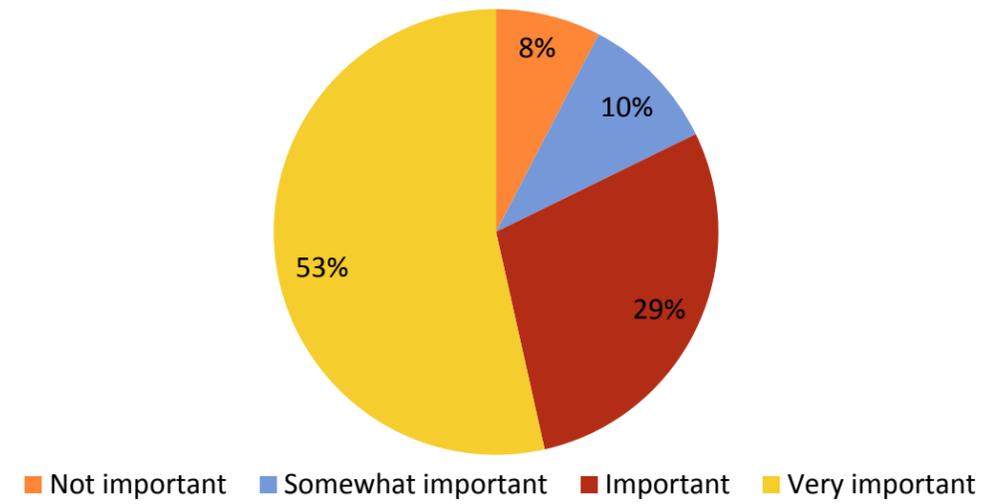
How important is the following idea to you?  
Provide convenient and reliable public transportation



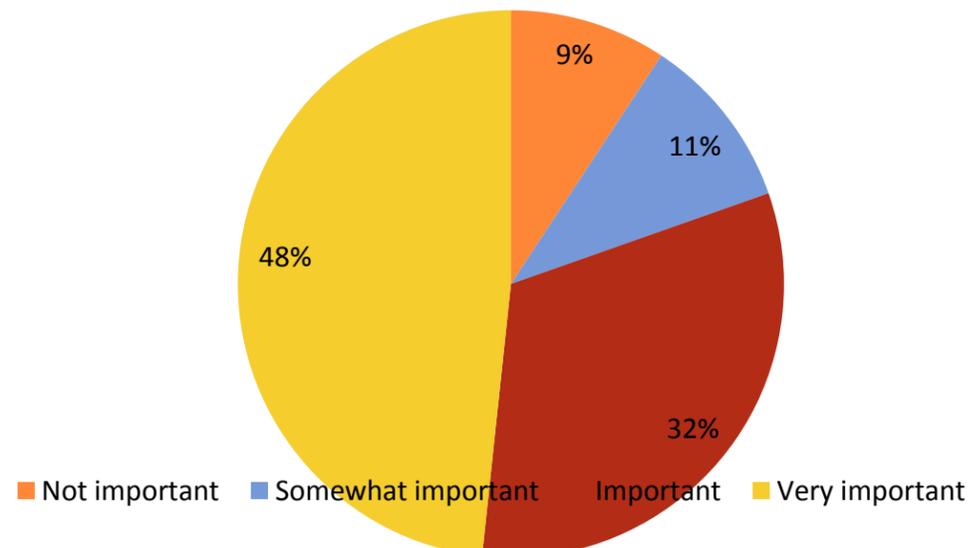
How important is the following idea to you?  
Retain viable agricultural land



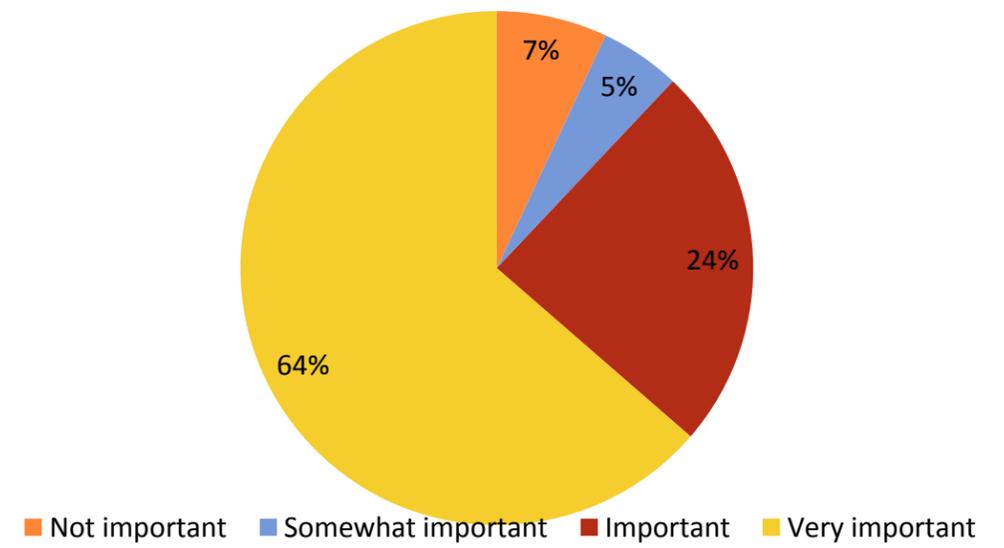
How important is the following idea to you?  
Maintain/expand strong downtowns for shopping and jobs



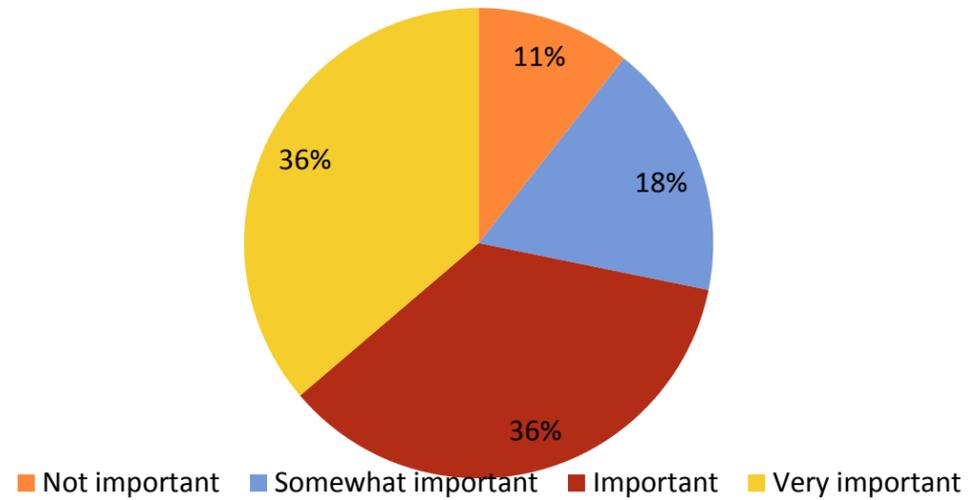
How important is the following idea to you?  
Enhance recreational opportunities



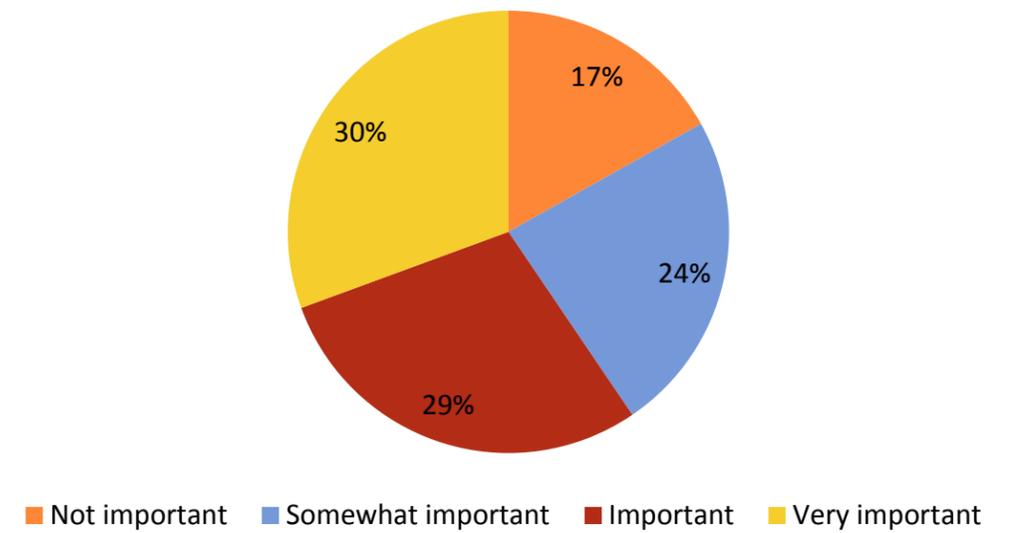
How important is the following idea to you?  
Preserve scenic beauty



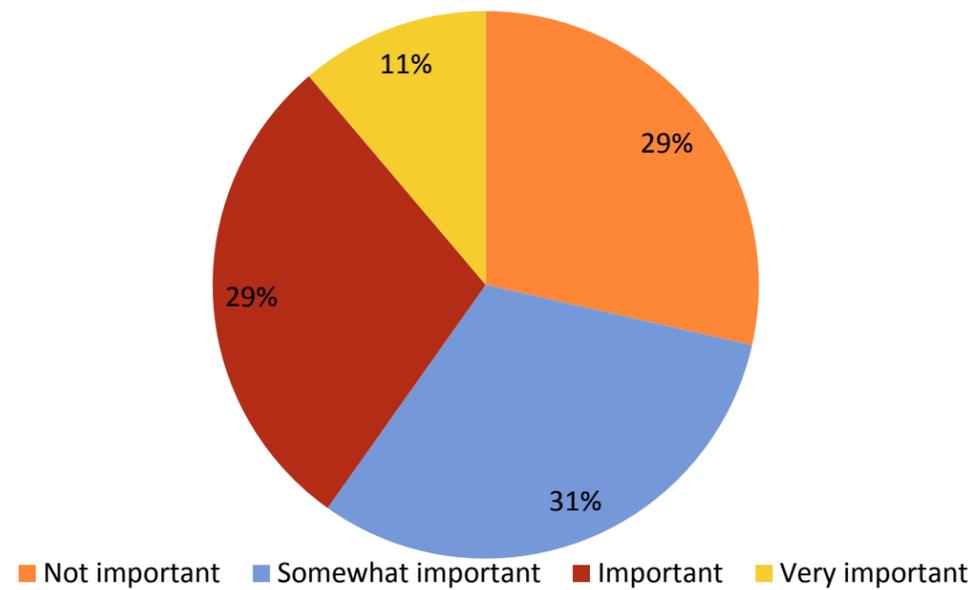
How important is the following idea to you?  
Have development grow next to existing development



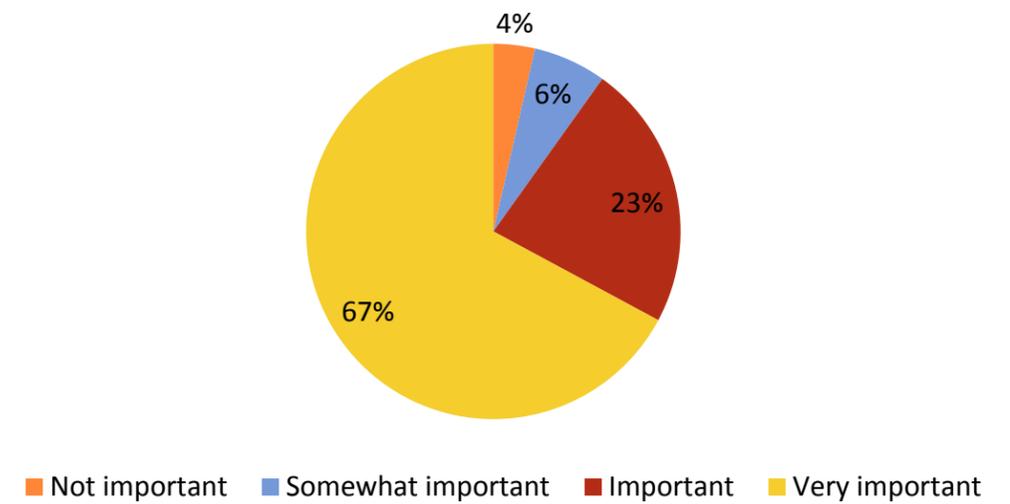
How important is the following idea to you?  
Expand trail network



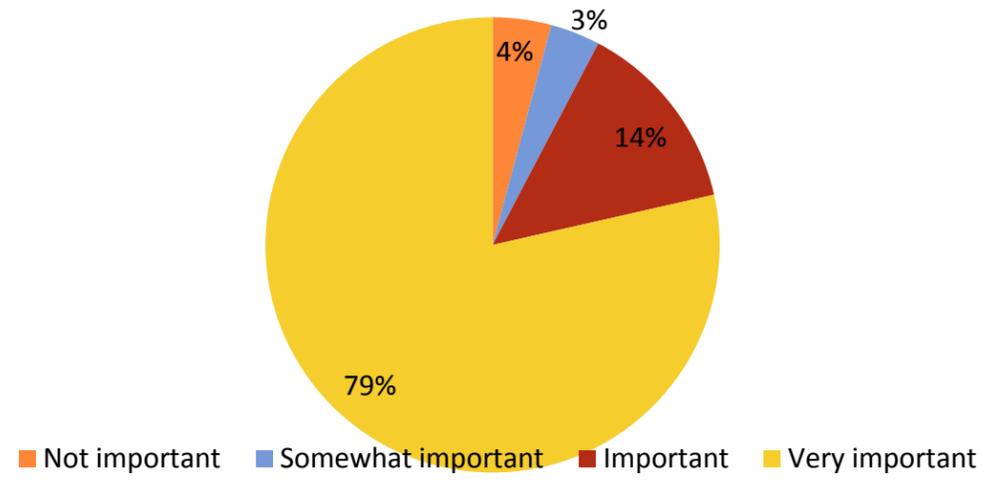
How important is the following idea to you?  
Have dispersed development



How important is the following idea to you?  
Coordination of local governments and university to address growth issues



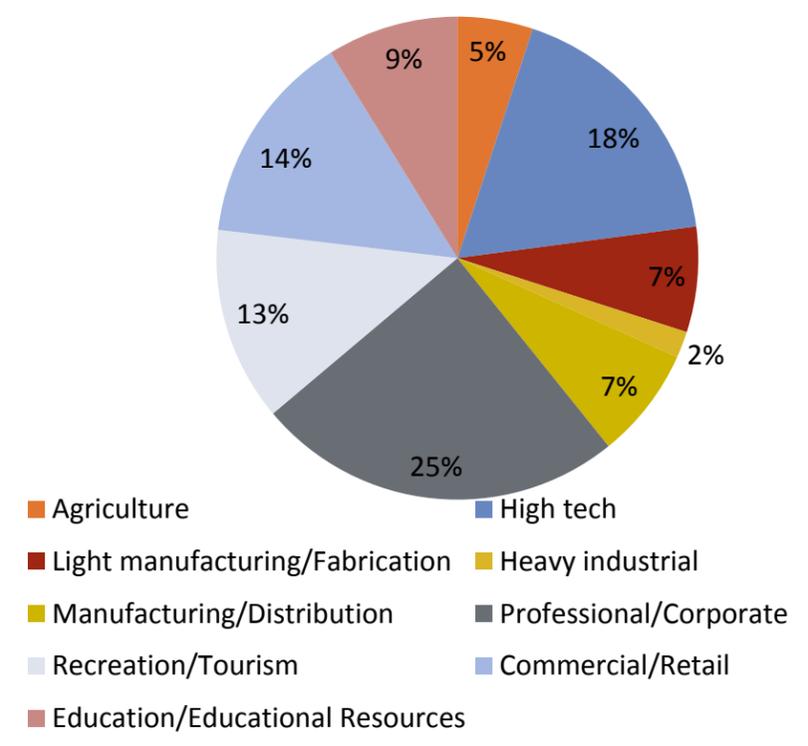
**How important is the following idea to you?  
Create high quality jobs**



**Town Hall Poll Results**

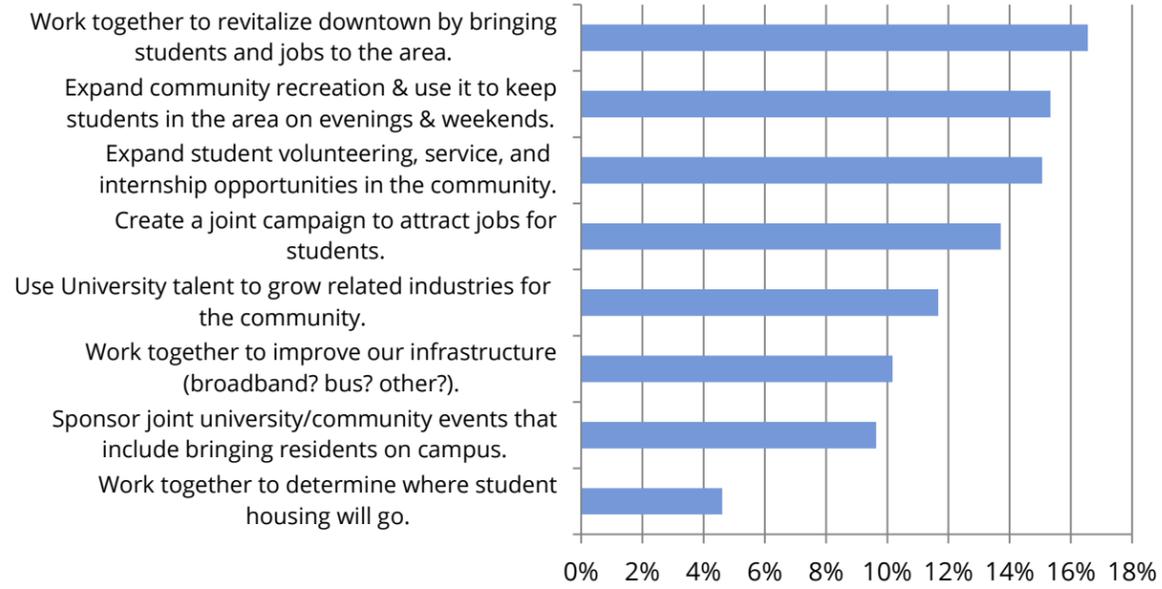
These polls were conducted during Madison County town hall meetings.

**Which type of job growth are you interested in pursuing in Madison County?**

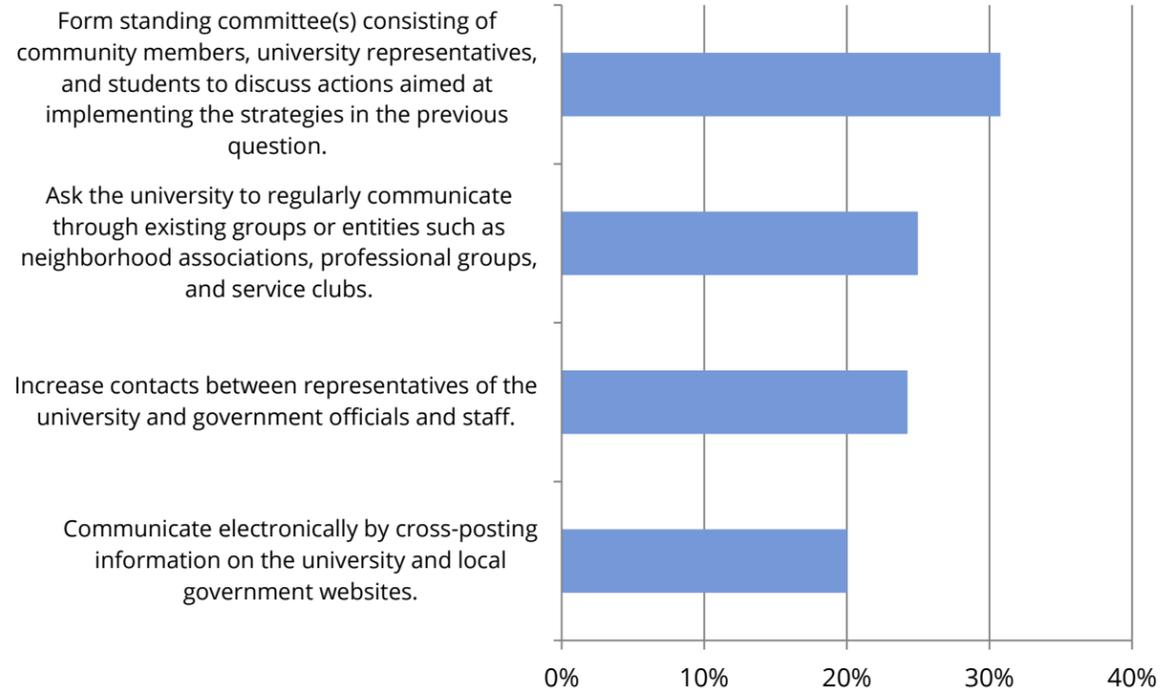


# ENVISION MADISON TOWN HALL POLL RESULTS

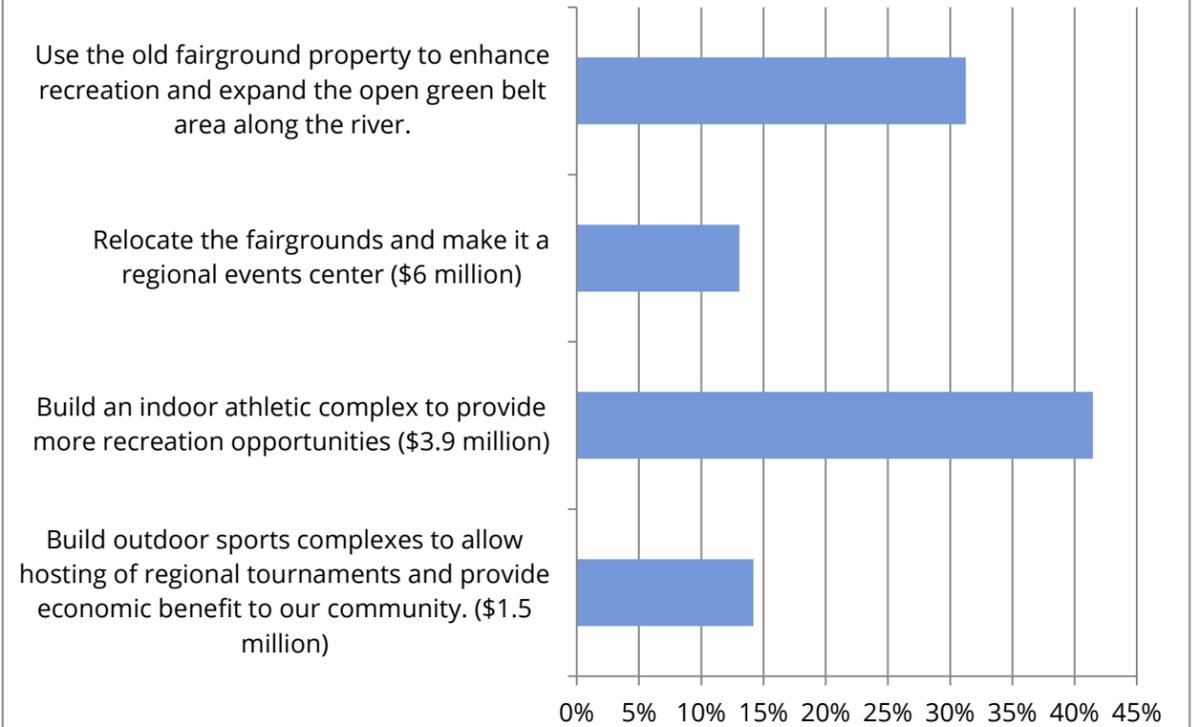
**If the community and University created a structure to address important issues and to propose strategies to improve the relationship, which three strategies would be most important to you?**



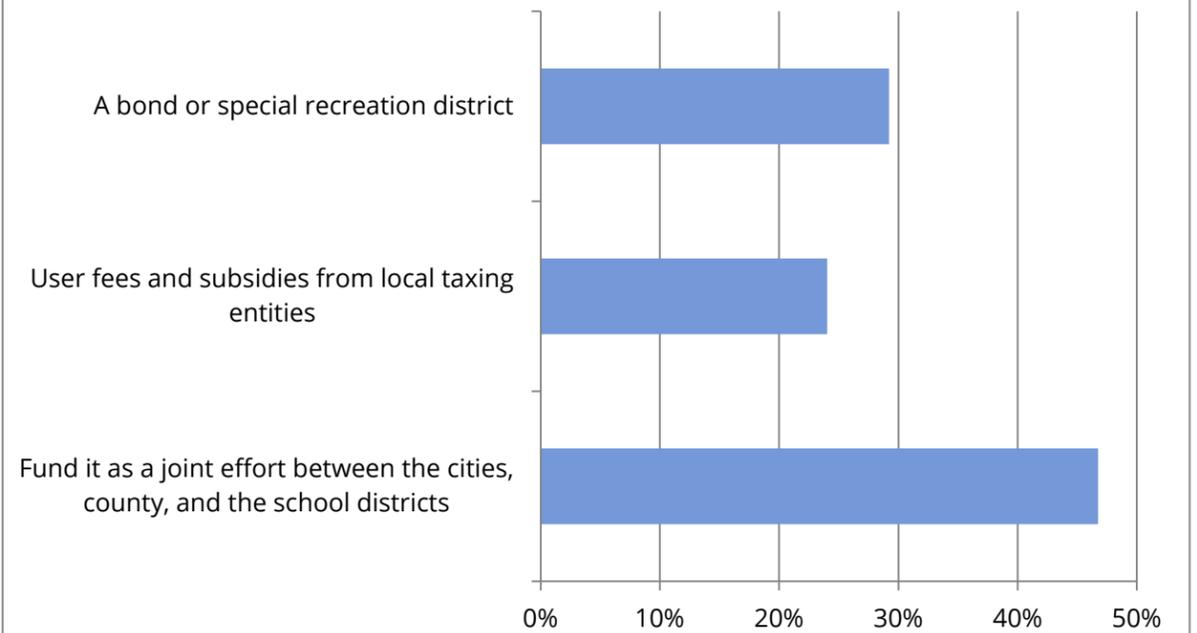
**As you think about improving the relationship between the community and BYU-I, rank the top three in order of effectiveness.**



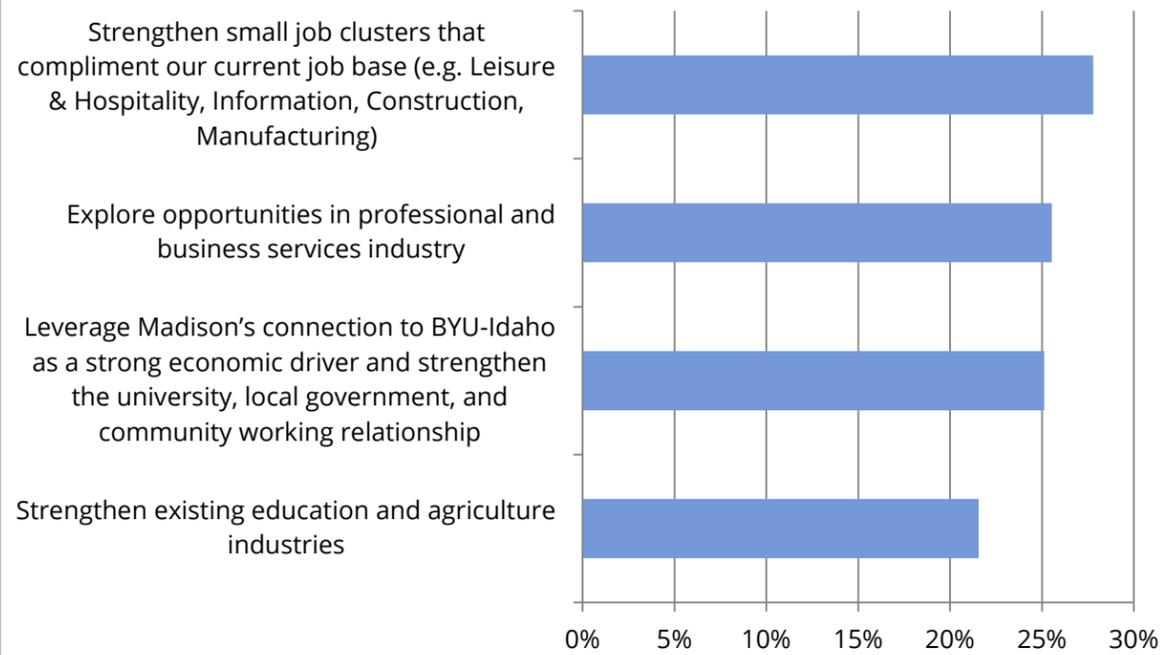
**Thinking about your current recreational opportunities and future recreational needs, what type of recreational facility is most important to you and your family?**



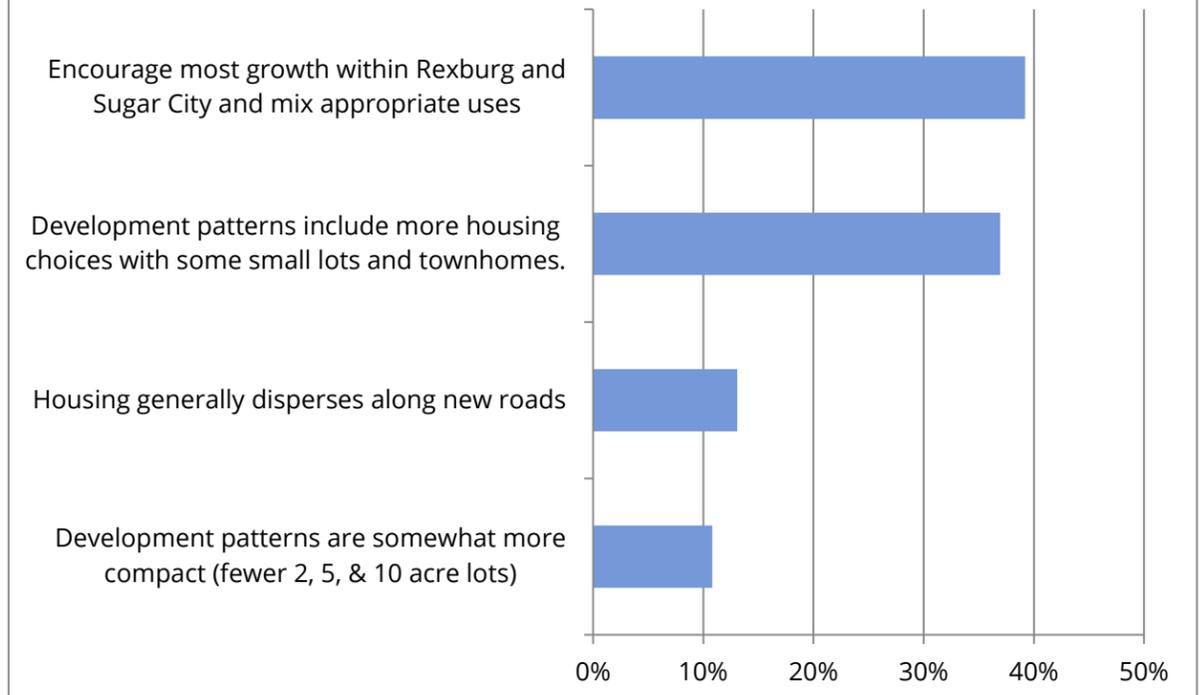
**In addition to grant money, which strategy do you most support to fund a new recreational facility?**



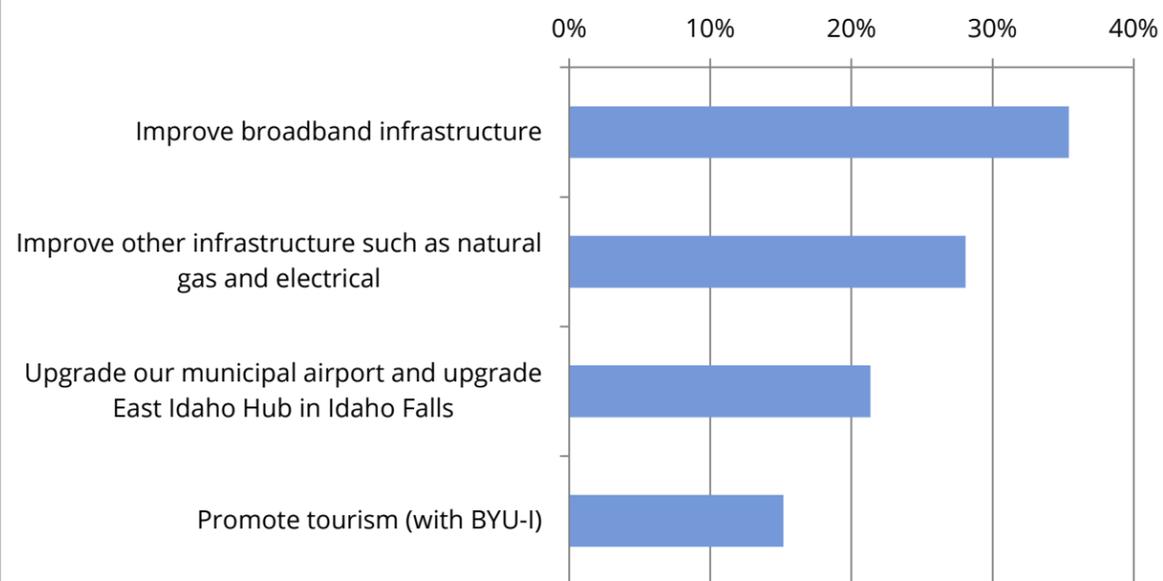
**There are a number of choices that we could make to attract more jobs to Madison County. Please rank the following choices by how important/effective you think they would be in creating good jobs in the community.**



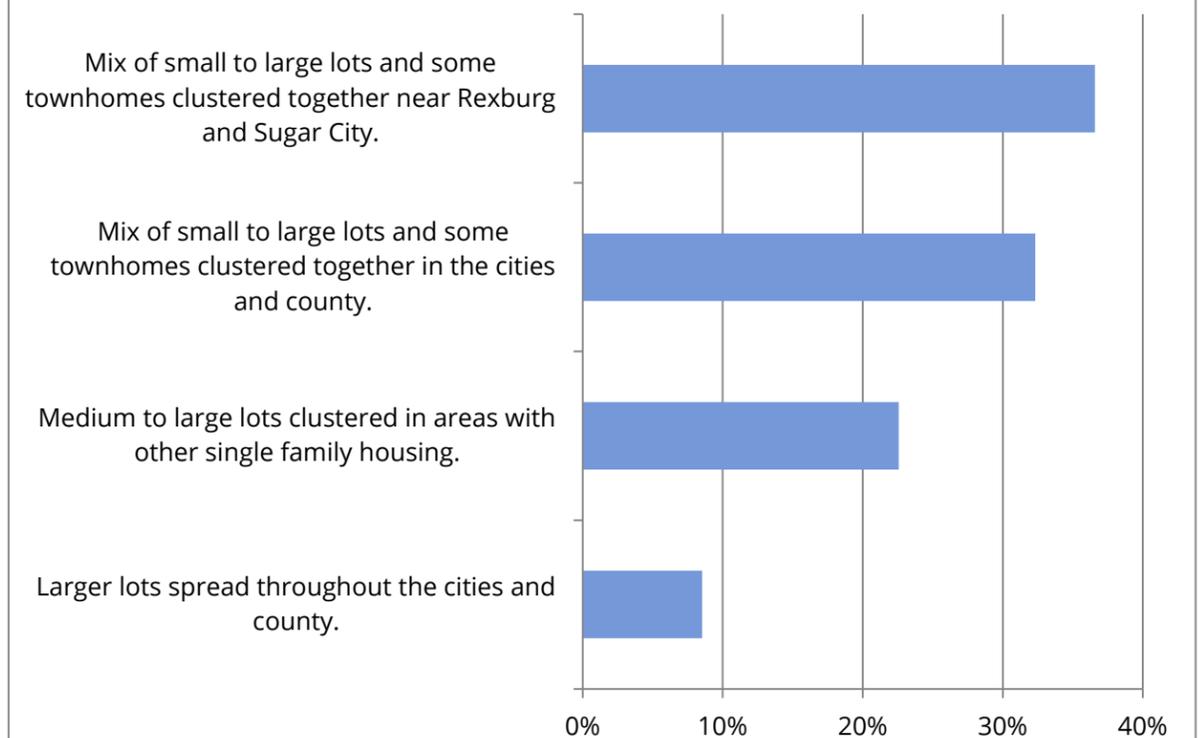
**There are many ways which a community can grow over time. Which of the following general growth patterns is most appropriate for your community?**



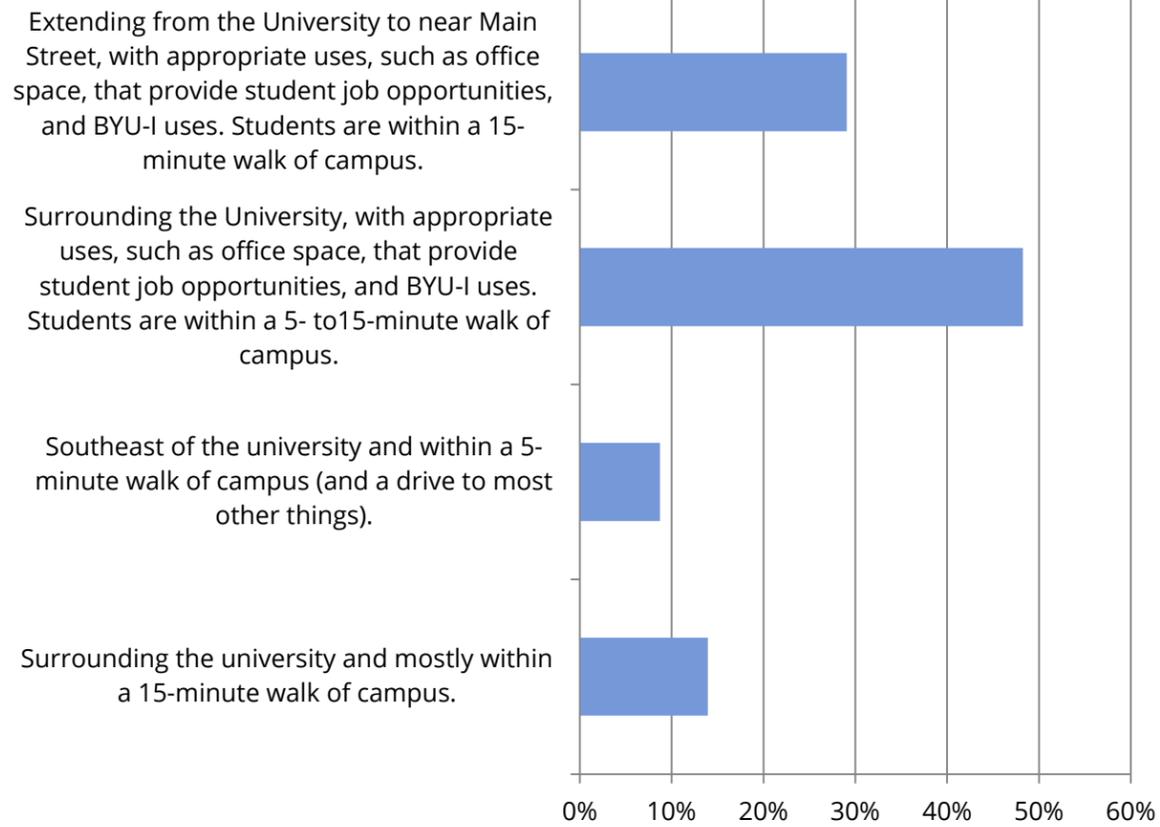
**There are a number of strategies that could be used to attract more jobs to Madison County. Choose the following strategy that you think would best help create good jobs in the community.**



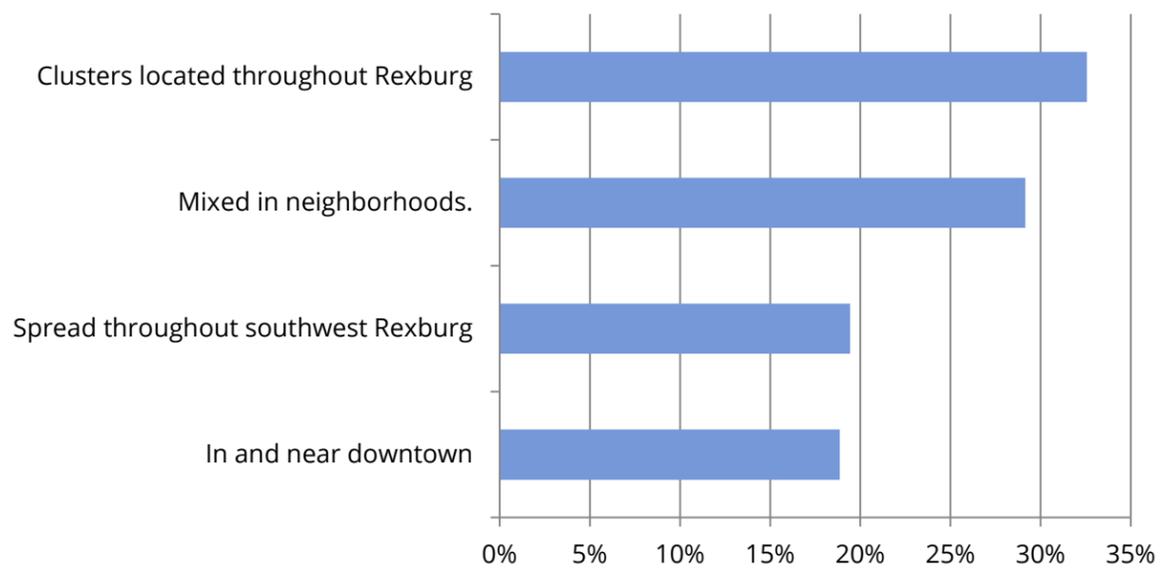
**In your opinion, what is the best development pattern for permanent resident housing in the community?**



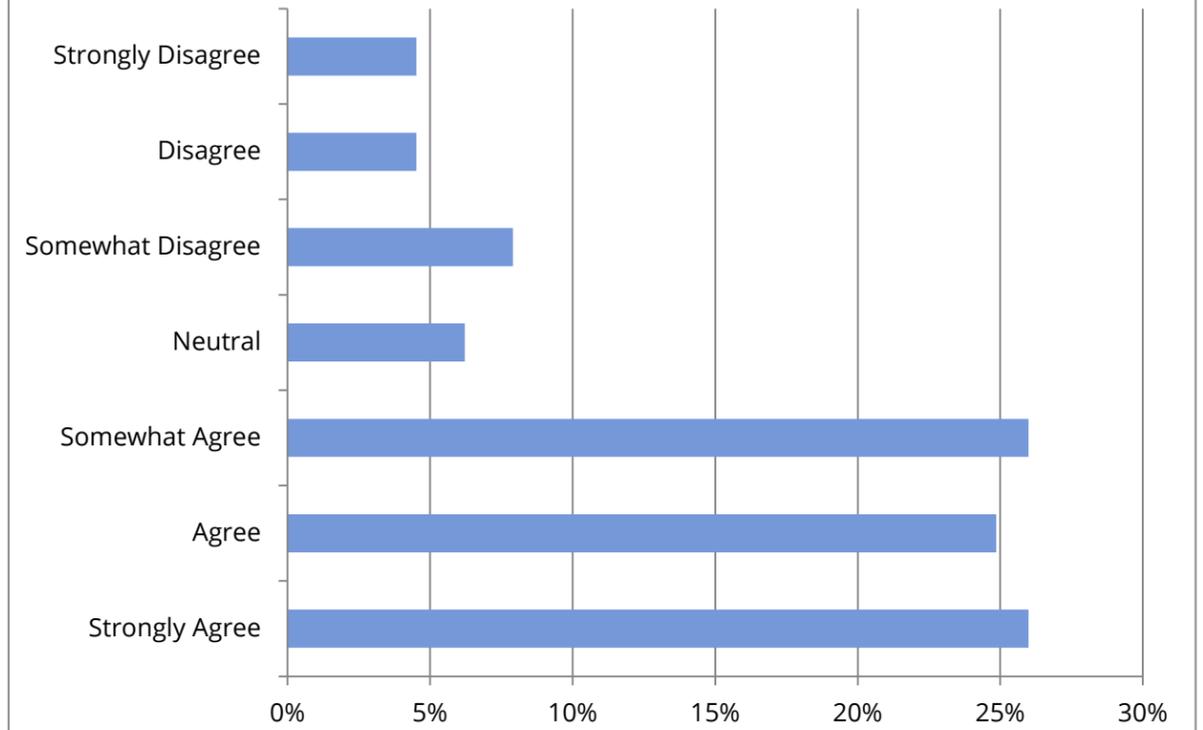
**In your opinion, where would single student housing best fit into the community?**



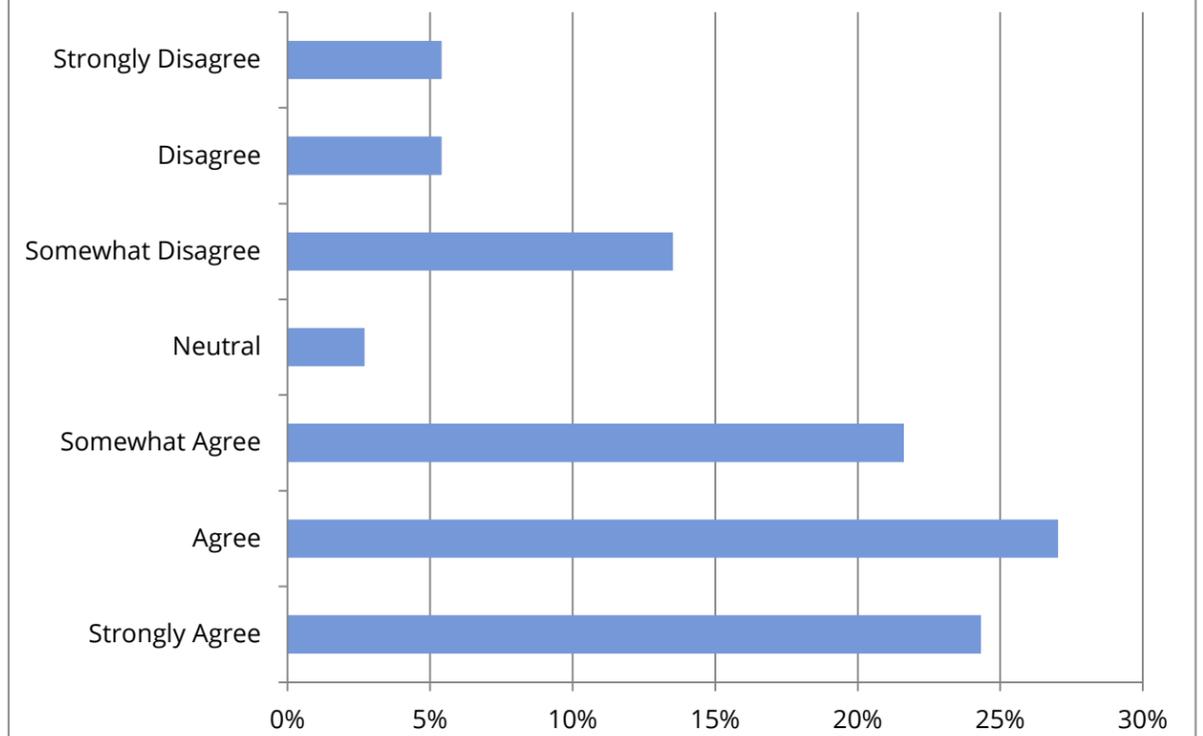
**In your opinion, where would married student housing best fit into the community?**



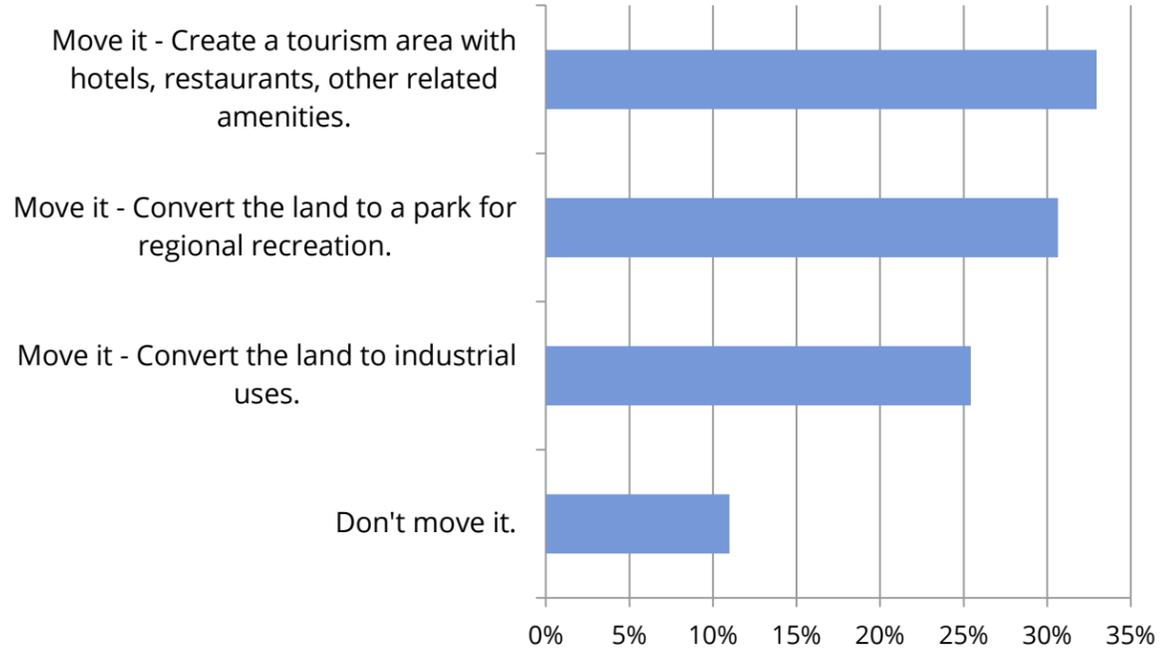
**The energy of BYU-Idaho's future growth should be focused to help restore Rexburg's historic downtown.**



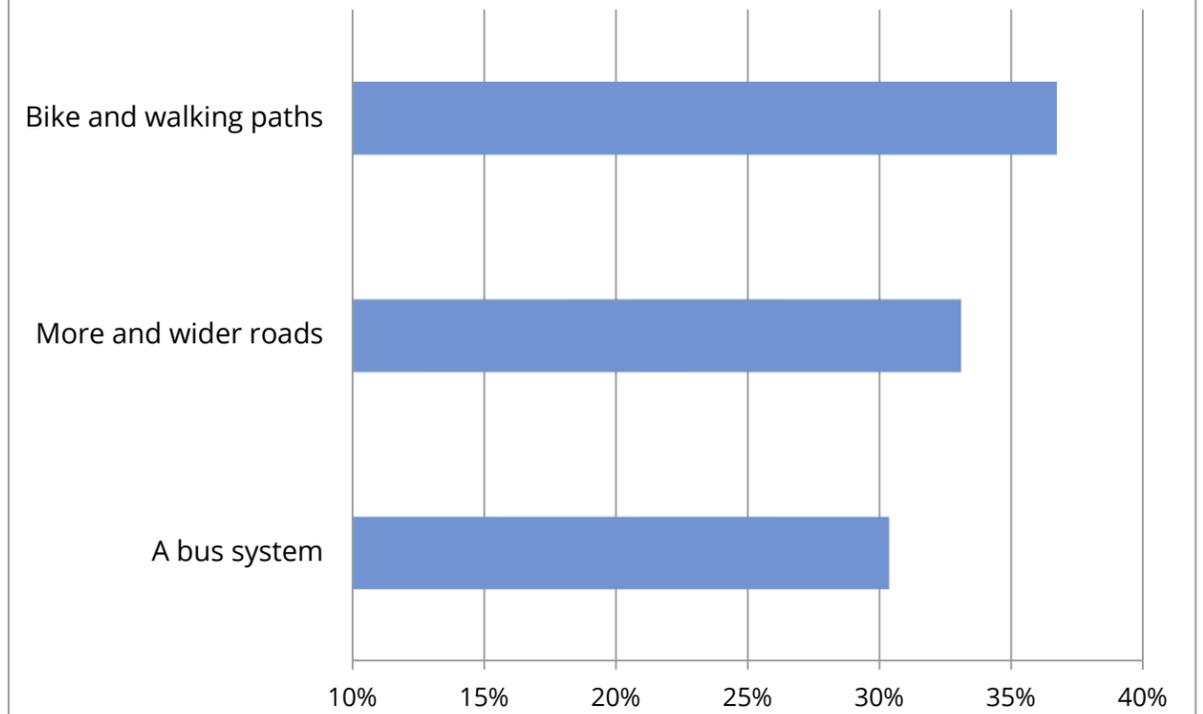
**Rexburg and BYU-Idaho should work together to reduce the cost of living for BYU-I students (and their parents).**



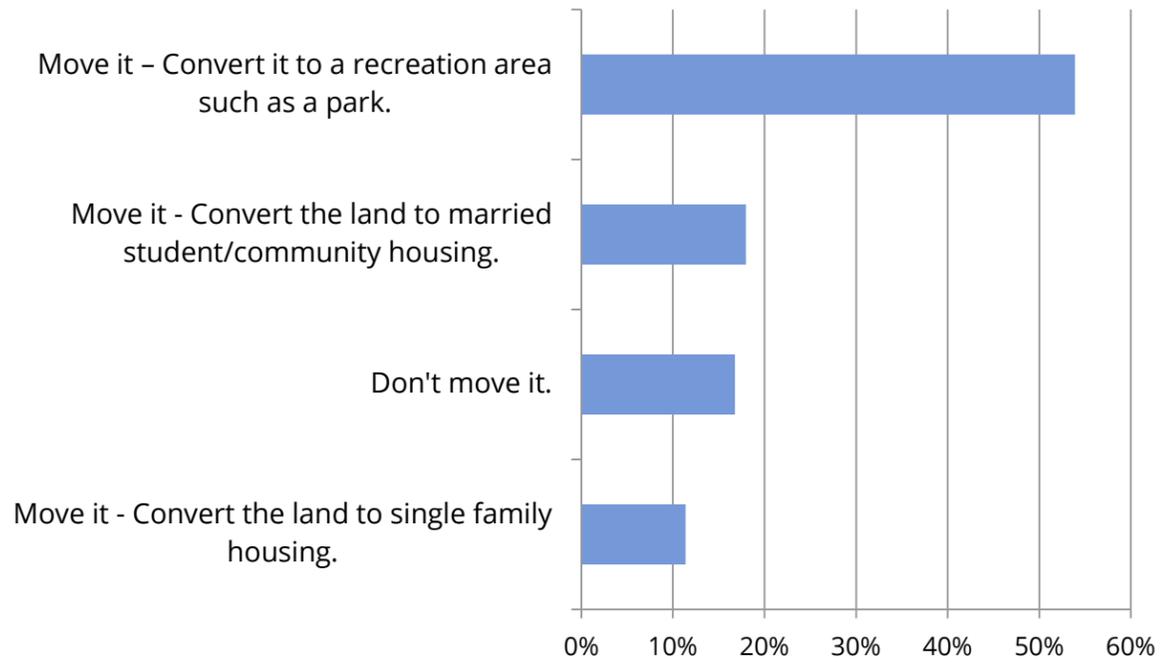
**If the current airport were moved, the vacant land could be developed in another way. How would you like to see the land at the airport used?**



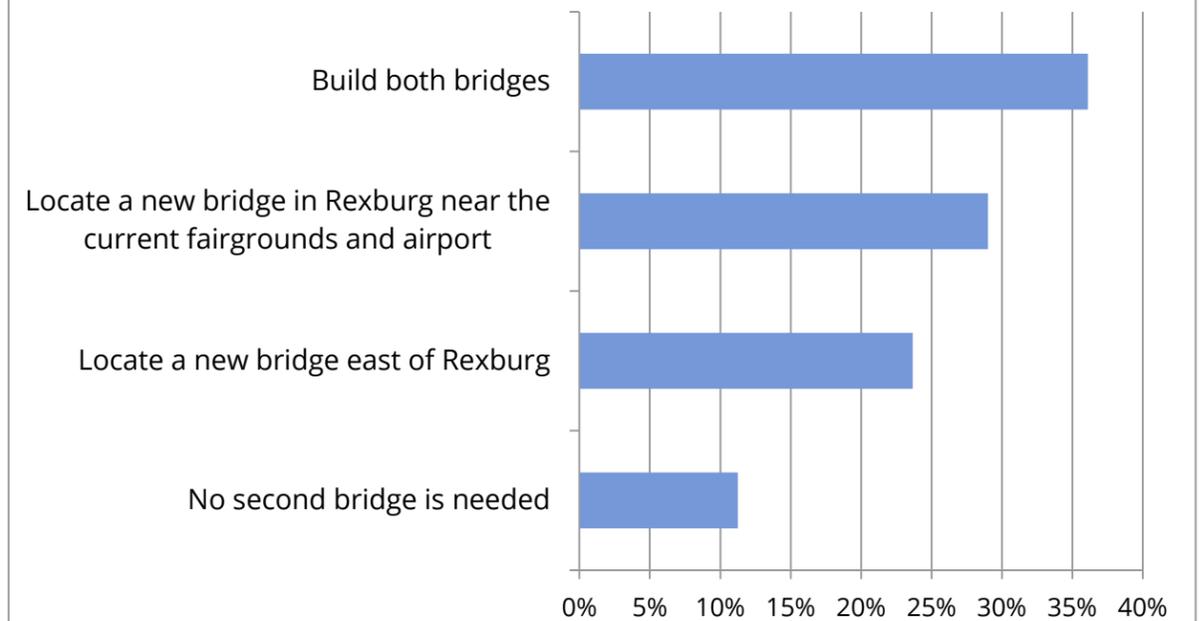
**Rank in order of preference which mode of transportation should be the highest priority for future public investment.**



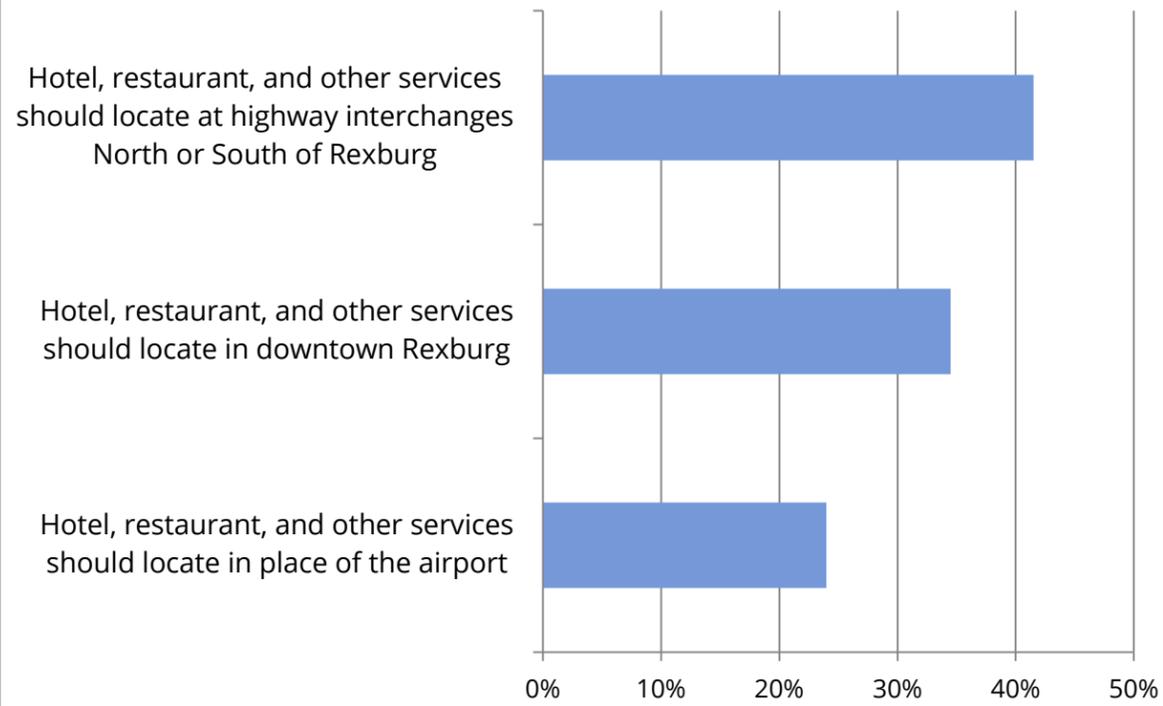
**If the current fairgrounds were moved the vacant land could be developed in another way. How would you like to see the land at the fairgrounds used?**



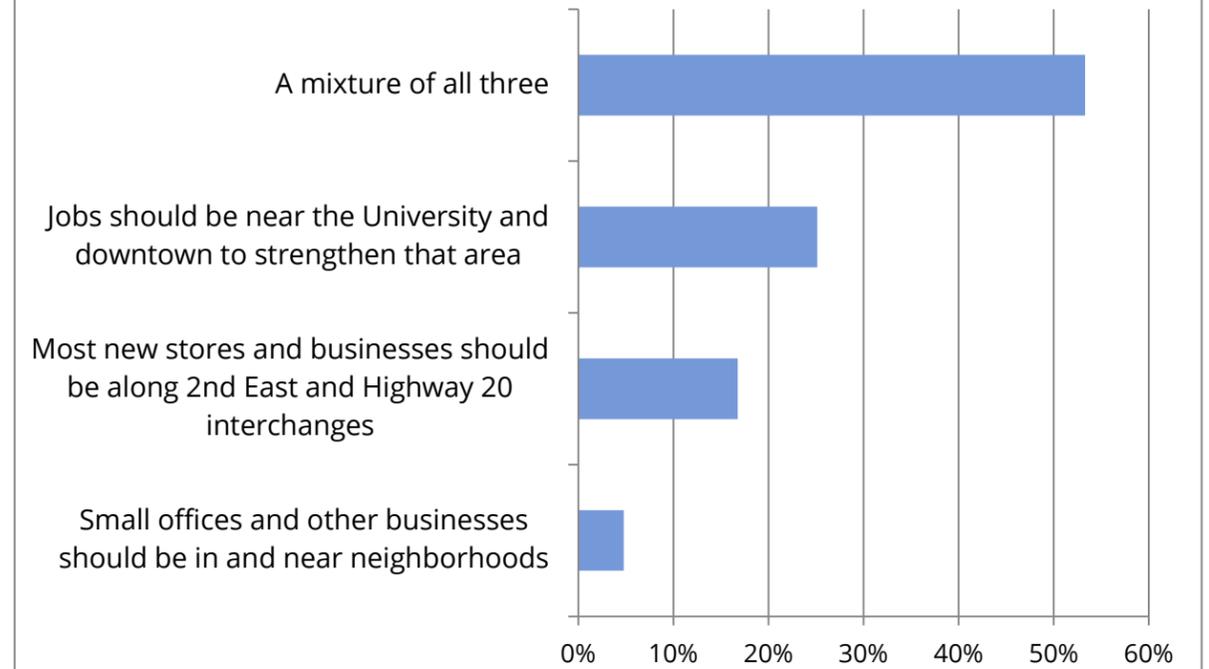
**One strategy for alleviating traffic congestion in Rexburg is to construct an additional bridge across the river as an alternative to 2nd East. Would you support construction of a bridge, and if so, where?**



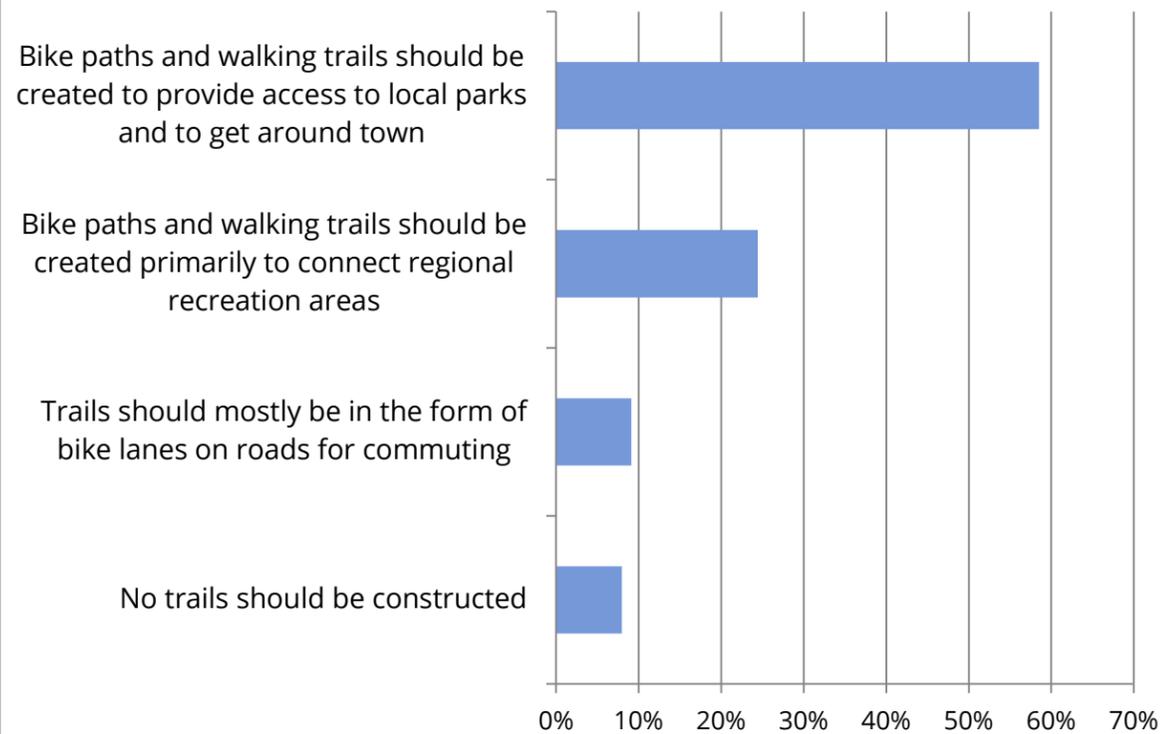
**Where would you like new tourist facilities like hotels, restaurants, and other services to be located?**



**When thinking about the jobs that we will need for our children and grandchildren, where would these jobs best fit into the community?**



**As we grow, how much emphasis should be placed on developing bike and walking trails in your community?**



# Appendix B

## Eastern Idaho Entrepreneurial Center Student Reports

These reports were prepared by students from the Eastern Idaho Entrepreneurial Center in behalf of the Envision Madison project.

# Envision Madison

*Best Practice Analysis*

July 18, 2013

Research Team: Lacie Stevenson, Cynphony Mackay, Daniel Kinghorn, David Forman, Derek Toone, Jake Hess



EASTERN IDAHO  
ENTREPRENEURIAL CENTER

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## EXECUTIVE SUMMARY

The scope and purpose of the project is defined and the methodology explained. The literature review provides several trends, both positive and negative, for town and gown relationships. The literature review also offers insight through case studies and survey data on the establishment of entrepreneurial centers, students working within the community, planning and zoning recommendations, local-based research, sporting and cultural events, payment in-lieu of taxes, and community outreach efforts.

The findings from the survey are analyzed and summarized. Trends point to the establishment of business development centers/incubators, students performing work in the community via internships and volunteer programs, and both community and university events that bring in more business through tourism dollars spent.

Recommendations are given according to the most effective trends found in the literature review and survey data. The following recommendations are organized from greatest to least effective trends for Rexburg, Idaho:

1. Entrepreneurial development centers.
2. Students contributing to the community through internships, service learning, and volunteer programs.
3. Planning and zoning.
4. Local purchases.
5. Musical and cultural events.

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## SCOPE & PURPOSE

Envision Madison and the community are preparing for increased student enrollment and economic growth. To prepare for that growth, extensive collaboration with Brigham Young University-Idaho (BYU-I) is required. The Eastern Idaho Entrepreneurial Center (E Center) and research team were hired to research effective trends between university and community relationships. To do this, the team focused on compiling a literature review consisting of previous studies and surveys pertaining to town and gown relationships and distributing a survey to university and community public relation representatives.

Key research questions included:

1. Which communities are applicable to Rexburg?
2. What are the most common trends among surveyed college towns?
3. Which trends are feasible for Rexburg?
4. How do communities and universities generally collaborate with each other?
5. How do universities strengthen the community (i.e. the economy, the social atmosphere, community growth)?
6. How do communities strengthen universities (i.e. shared resources, financial support)?

The survey contact list was made of university staff members that communicate directly with their respective communities and local government and was also made of community staff members that collaborate directly with their respective universities.

## METHODOLOGY

The research team recognized the importance of conducting a literature review before constructing and distributing a survey to aid in the understanding of town and gown relationships. The analysis of town and gown literature was given first priority to determine applicable studies or surveys previously done that apply to the project's scope and purpose.

To write the literature review, scholarly articles were collected from the Academic Search Premier (EBSCO) database from the David O. McKay Library. Twenty scholarly articles were read and ten were designated as applicable to the town and gown relationship between Rexburg and BYU-Idaho and analyzed for use in the literature review and guiding the framework of the survey. Five more sources were included for their informational value for a total of fifteen sources in the literature review.

Case studies applicable to BYU-I found in the literature review were expanded upon through phone interviews. Phone interviews were conducted with the following people:

1. Scott Ford, Executive Director of Community Investment, South Bend, IN
2. Jessica Sorenson, Contracting & Supplier Relationship Administrator, Brigham Young University-Idaho
3. Mark Welch, Director of Community Relations, Murray State University

All interviews with the previously mentioned persons are found in the appendix.

The survey was written in two main parts: community public representatives and university public representatives. The questions were the same in purpose, but were worded differently to receive all exhaustive perspectives of town and gown relationships. The questions were written to determine how communities and universities interact with each other, what future development plans they have, and what they do to develop the economy and how they work to meet each other's needs.

Candidates were selected based on the student enrollment and population of their community. Universities with a student enrollment of 35,000 people or less in communities of 100,000 people or less were compiled into a spreadsheet. The research team contacted 200 of these communities and distributed the survey to staff members who dealt directly with town and gown relationships. These departments include: chamber of commerce, planning and zoning, communications, and finance.

For the survey contacts that worked in the community, nine completed the survey. For the survey contacts that worked in the university, eighteen completed the survey for a total of 27 completed surveys. The complete survey and its answers can be found on page 32 of the appendix.

After analyzing the primary and secondary research, positive trends found for town and gown relationships were ranked in order of most effective to least effective trends applicable to Rexburg.

Recommendations were given according to compatibility with the Rexburg community. The most effective trends recommended are:

- Local business development initiatives;
- Students contributing to the community through internships and beneficial projects;
- Planning and zoning buffers between students and residents;
- And local purchases.

## LITERATURE REVIEW

Even the most cohesive relationships between university and community experience tension. Though there are several influencing factors that inhibit collaborative unity, ranging from property tax-exemption to building expansion and neighborhood deterioration, there are several valuable principles gleaned from case studies that give guidelines for what makes an operable and beneficial relationship. This literature review provides insight into which trends work and which ones don't in building and strengthening communities.

### Local Business Improvement Projects

Universities can reach out to communities through counseling and researching for businesses. For example, Michigan State University researches ways to create and develop local business ventures. Their main focus lies in connecting businesses to local resources and jumpstarting relationships with licensees and companies. MSU Technologies is a program that combs through university research to find ideas that have the potential to achieve commercial viability. If they find the project is feasible, the employees will work with the researchers to move that idea into the startup phase with local and regional development agencies, keeping the new businesses in Michigan. Most of this research is focused on renewable energies.<sup>1</sup>

Several initiatives similar to the Eastern Idaho Entrepreneurial Center (E Center) in Rexburg, Idaho are improving town and gown relationships nationwide. The E Center assists existing businesses and starter businesses similar to how Montana State University has provided over 10,000 hours of consulting to 40 local companies.<sup>2</sup>

In another example, the University of Central Florida's Center for Community Partnerships collaborated with local governments, law enforcement, community organizations, hospitals, and the public defender to review the Central Receiving Center for adults with mental illness and drug addictions. The six-month operation included site visits, interviews, data collection, analysis, and a final report to the Center's governing board. This provided the opportunity for students to gain real-world experience while giving back to the community.<sup>3</sup>

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<sup>1</sup> (Daley, 2009)

<sup>2</sup> (Daley, 2009)

<sup>3</sup> (Martin, 2005)

## Students and the Community

A university can contribute to the community through its students. There are learning opportunities for every university major within local businesses, programs, and establishments throughout the community. Communication students can manage and develop services in media outlets such as local newspapers, local radio stations, and even the local TV news.<sup>4</sup>

- Biology students can contribute to research conducted in clinics and labs;
- Health-science students can shadow nurses and doctors in emergency rooms;
- Education majors can be teacher's assistants at elementary schools;
- Culinary students can learn managerial skills at restaurants;
- Business majors can become assistant managers at retail developments.

Bringing in big projects from the community into the classroom provides valuable hands-on experience, internship opportunities, and respectable skills to prepare for careers. Northwestern University began an extensive project with one of their architecture classes to build mixed-used centers in the Jamaica Plain neighborhood of Boston. This complex project incorporated demographic studies, financial plans, and community needs. Not only did this provide work experience to students, but it also taught the components of collaboration among coworkers and built relationships between the university and the community.<sup>5</sup>

Not all work in the community needs to be for classroom credit; students and faculty can organize extra-curricular volunteer programs for leadership and teamwork experience to be used in resumes and professional portfolios. The College of William and Mary in Williamsburg, Virginia established a tutoring program for elementary school children in their community. One hundred students from the university were able to positively influence academic achievement in the community's elementary schools.<sup>6</sup>

## Planning and Zoning: The University of Cincinnati

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<sup>4</sup> (Taylor, 2002)

<sup>5</sup> (Martin, 2005)

<sup>6</sup> (Martin, 2005)

As student enrollment grows, so do the university's property holdings. When the university has neighborhoods and local businesses surrounding it, it has to either build skyscrapers or buy up local homes and stores to redevelop. The University of Cincinnati spent nearly a century buying up more and more land around it without considering the effects it would have on the community or planning ahead for future growth. The demand for student rentals and renting older homes increased and became a return-on investment business with great cash flows, but that later created more problems than it was worth. In short, Cincinnati built too many homes too fast for nearly a century.<sup>7</sup>

The suburbs boomed and an interstate system was built, further shrinking the urban housing stock. Thousands of families relocated to inner-city areas close to the university and new street grids consumed neighborhoods and parks. These unplanned zoning modifications made it impossible to walk between the two halves of campus. With over a half mile of streets, recreation fields, and older housing, this unorganized labyrinth made it difficult for both students and residents to navigate the community.<sup>8</sup>

Businesses that couldn't keep up with the ever-changing tastes and needs of more and more students, were forced to shut down and relocate to the suburbs. These businesses were replaced by fast food outlets and low-end retails and services. Older homes were diced up to accommodate three to four times the number of original occupants. Because of the lack of open land, new development meant demolition of neighborhoods and businesses. By 1990, the university was surrounded by an unhealthy and unattractive neighborhood.<sup>9</sup>

The four major problems identified from the University of Cincinnati were:

1. The building boom from the 60's - 80's consumed too much open space on campus;
2. Students preferred open, suite style apartments rather than the compact, dense layout;
3. The growth of research departments meant more labs built; and
4. There was no more land for housing students or developing.<sup>10</sup>

The University realized that these problems needed to be fixed quickly before the entire community fell apart. A planning and zoning committee was set up between town and gown with new limitations established. It was decided that the encroaching campus needed to be rebuilt with the land it already owned. Should more land be bought for the university, it needed to be bought for 30 to 50 years growth in the future, reducing the

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<sup>7</sup> (McGirr, 2003)

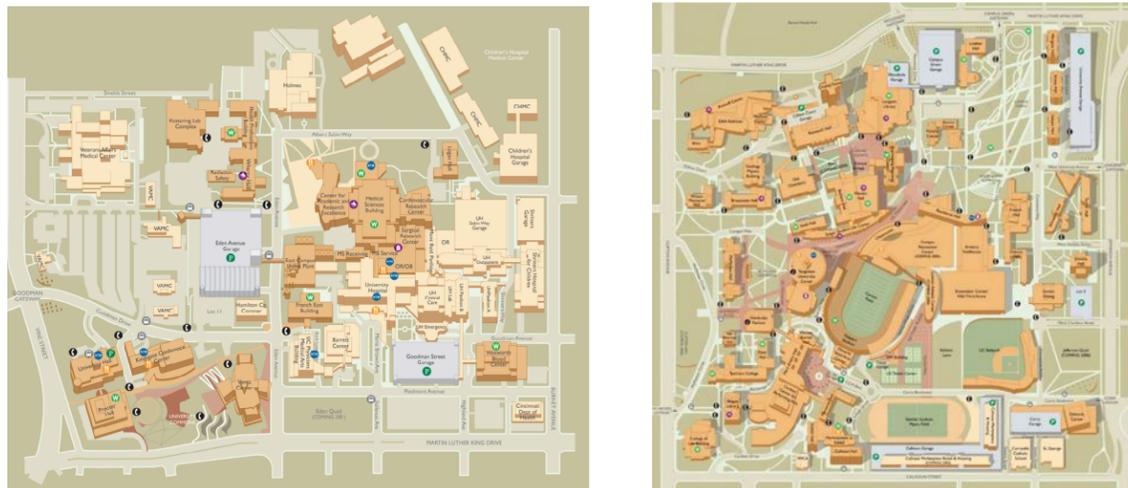
<sup>8</sup> (McGirr, 2003)

<sup>9</sup> (McGirr, 2003)

<sup>10</sup> (McGirr, 2003)

demolition of neighborhoods and frustrations in the community with a constantly changing road system.<sup>11</sup>

The university began fixing the land availability problem by building parking garages and turning the parking lots into more buildings and open space. They remodeled their current buildings to be taller rather than having several smaller buildings sprawled out.<sup>12</sup> The next problem to be fixed was the gateway system into the campus, which had caused more confusion than ease of transportation. Clear entry points were rebuilt and more signs were put up to increase navigability. This new street system conveyed a sense of permanence and a fixed relationship with their immediate neighbors, increasing the university's popularity with the community. The university was also able to pave the way towards establishing more credibility and securing more collaborative efforts for their needs<sup>13</sup>.



Ten principles that this case study offered were:

1. Don't expand into a neighborhood if it will destroy its economy and personal character.
2. The goals of the university and community must be reasonable and feasible and be pursued simultaneously. They must agree that university districts with associated communities have market fundamentals for housing, retail, small business locations, and commercial development.
3. University expansion goals may need to be contracted, leased, or partnered with private entities in surrounding neighborhoods, always keeping in mind the community's needs.

4. Universities need to be willing to recycle the space they already own before taking more from the community.
5. Universities need to be consistent in their partnership with the community.
6. Voting control of developmental identities need to be held by communities and business surrounding the university with the university taking a minor role in the voting.
7. Universities need to be willing to invest by funding and adding on capital to other investments of private capital.
8. Universities need to be willing to support employee assisted housing programs.
9. Relationships between the university and community need to be kept open with differences worked out in advance (the city is neither a good initiator of problems, nor a referee.)
10. Requests should be realistic and focus on policy support, assemblage procedures, and traffic engineering.<sup>14</sup>

#### Planning and Zoning: Noted Trends from Various Case Studies

Neighborhood residents are principally concerned with the presence and expansion of students.<sup>15</sup> Spillover effects include neighborhoods losing their character from lack of design coordination and unused properties in time of financial distress. When universities discover their budget is slimmer than they anticipated, many construction projects are put on hold, resulting in large, empty spaces and buildings. Neighborhoods don't like this because it expresses lack of planning and does not add value to the community.<sup>16</sup>

Victoria University at the University of Toronto acquired several properties over the years to accommodate possible future needs. While controlling the amount of development along the campus edge was its original goal, the university eventually established mixed-use centers and then leased the properties to the community. Now the university receives half of its endowment from real estate.<sup>17</sup>

Communities will be more likely to make trade-offs in properties during university expansion for the following reasons: cities want to improve their own public image architecturally, create positive impacts on the local economy by creating larger and

<sup>11</sup> (McGirr, 2003)

<sup>12</sup> (McGirr, 2003)

<sup>13</sup> (McGirr, 2003)

<sup>14</sup> (McGirr, 2003)

<sup>15</sup> (Eryilmaz, 2009)

<sup>16</sup> (Eryilmaz, 2009)

<sup>17</sup> (Kurtz, 2005)

more advanced buildings, or by attracting a younger and more qualified labor force to the area.<sup>18</sup>

A policy focus report was found that highlights various trends that work in collaborating planning and zoning, and trends that do not work. The summary of these results are seen in the following table:<sup>19</sup>

Table 1. Summary of key points in relationship with planning and zoning for University and Communities

City/Community Concerns	What Works	What Does Not Work
Social Equity	Efforts to stop neighborhood deterioration and resident displacement, and to generate job opportunities for local residents and businesses	Ignoring the neighborhood's social and economic context and issues that might affect local residents and businesses
Spillover Effects	Regulatory and non-regulatory planning mechanisms that balance the needs of the academic and local communities	Lack of planning by universities
Design	Planning and developing the campus in ways that blend the academic and local communities	Development that is out of character with the surrounding neighborhood

<sup>18</sup> (Eryilmaz, 2009)

<sup>19</sup> (Eryilmaz, 2009)

Planning Process	A joint planning process that involves the university, the community, and the city	Finalizing university land use and development plans internally
Leadership	Close involvement of the university president or other top-level leaders in developing and sustaining the commitment to community engagement	No formal mechanism for senior officials to work with the city and community, except on a non-negotiable basis
Tax-exempt Status	Recognition of the uneven distribution of tax burdens throughout the state	Long-running disputes and court cases between the universities and cities over development projects and tax-exempt status

A cause of friction in communities is the decrease in property value near student housing and the accompanying decrease in student/resident relationships.<sup>20</sup> People will be more interested in moving into a college town if residential areas are separate from student housing.<sup>21</sup> One way to implement separation of students and residents is by planning and developing a buffer between university and community. Universities and communities collaborating to build two or three blocks of stores, restaurants, entertainment centers, and similar establishments between students and residents can reduce unpleasant interactions.

An example of this buffer comes from South Bend, Indiana and the University of Notre Dame. Scott Ford<sup>22</sup> provided a brief history of the relationship between South Bend, IN and Notre Dame. Both the community and university grew to such a large state that an overlap of resident and student housing resulted. The university understood that they needed to devote resources to investing in the community rather than just focus on their students. To provide the community with an enjoyable overlap, the Northeast Neighborhood Revitalization Organization (NNRO) was created for the purpose of

<sup>20</sup> (Baker-Minkel 2004)

<sup>21</sup> (Baker-Minkel, 2004)

<sup>22</sup> Executive Director of Community Investment, South Bend, IN

planning, discussing, and coordinating the social, physical, and economic revitalization of the Northeast Neighborhood.

The largest project that the NNRO underwent was the Eddy Street Commons. This is a \$250 million development project meant to establish a college town lifestyle center. This consists of eight to nine stories of both residential and commercial buildings on the south side of campus.



### Internal Restructure

For business expansion and enriching the local economy, supplies and services can be purchased from the community rather than imported from non-local distributors. BYU-I currently has a mix of both local and non-local purchases with a greater emphasis on the latter. Reed's Dairy in Idaho Falls supplies primarily ice cream to the school and some other dairy products, but most other dairy foods come from different counties and states. Milk is driven up from Utah with produce from Salt Lake City. Miscellaneous food stuffs come from a national distribution warehouse in Boise, Idaho. Office supplies are a mix of local and non-local purchases as well.<sup>23</sup> By focusing more attention on local businesses and purchasing opportunities, businesses will grow, creating more jobs for students and bringing a broader diversity of goods and products.<sup>24</sup> Paradoxically, when communities have a broader range of goods and services, the university can increase local spending.<sup>25</sup>

An uncommon practice to increase local economic development comes from Murray State University. Mark Welch described an investment program in an interview that

<sup>23</sup> (J. Sorenson, personal communication, June 21, 2013)

<sup>24</sup> (Seninger, 1997)

<sup>25</sup> (Seninger, 1997)

involves forty partners who contribute \$1,000 into the town partnership fund.<sup>26</sup> From this investment, the partners receive some “perks,” but that money is used to reinvest in community businesses and programs.

### Events

College-level sporting events and cultural events that host well-known names, boost popularity and produce income from merchandise, memorabilia, and entrance fees for both local and out-of-town visitors. From 1996 to 1997, a survey was taken of student, employer, and visitor spending at the University of Montana and in the Missoula community.<sup>27</sup> The findings showed that sporting and cultural events benefit both community and university while improving their relationship. These events bring in more than 110,000 out of town visitors and \$28 million spent at local restaurants and local entertainment. Sporting event visitors were shown to be more likely to stay overnight, contributing even more money to the community than cultural event visitors.<sup>28</sup>

### Tax-Exempt Status

The tax-exempt status of universities decreases potential income for local governments. Universities are usually granted tax-exemption status from their states due to their educational purpose, giving them no legal obligation to contribute to city or local governments through investment income, payout requirements, or federal income tax.<sup>29</sup> A community can only contribute so much to sustain its population, and in towns similar to Rexburg, in which the majority of the population is students and the tax-exemption holds, the more properties bought, the more developmental community projects don't receive their full funding potential.<sup>30</sup>

To smooth out the wrinkles concerning taxes, universities can set up a voluntary payment plan to the community. The first to suggest this compensation was Boston and the city now benefits from one of the most generous voluntary in-lieu tax payments. Twenty-one educational establishments in Boston<sup>31</sup> pay in-lieu taxes along the general

<sup>26</sup> Director of Community Relations, Murray State University

<sup>27</sup> (Seninger, 1997)

<sup>28</sup> (Seninger, 1997)

<sup>29</sup> (Association of American Universities, 2013)

<sup>30</sup> (Martin, IRS, 2011)

<sup>31</sup> (Huckabee, 2011)

guideline of 25 percent of the standard property tax on new developments and 50 percent for current property holdings.<sup>32</sup> Another suggestion is to charge on-campus dorm students a fee similar to a property tax.<sup>33</sup>

### Managing Spillover Effects

When new properties are bought, residents need to be remembered and assisted in relocating. Northeastern University and the Boston community were concerned about resident displacement while purchasing more properties. Through collaboration with the Madison Park Development Corporation (MPDC) affordable housing was negotiated and constructed.<sup>34</sup> MPDC provided homeowners with a condominium association along with technical assistance and education for first-time homebuyers. This opportunity also promoted local business developments by giving neighborhood vendors priority.<sup>35</sup>

In developing new university buildings, collaborators need to be sure to consider integrating those buildings through design by following two new principles:

1. Communicating institutional values; and
2. Finding points of intersection with the local community.

Universities are no longer separated from the community by miles of farmland; they must now be mindful of how the university flows with the city and how it looks compared to the surrounding buildings. For example, the University of Illinois at Chicago, South Campus designed their university buildings to be “city buildings.” These buildings provide city services and retail stores mixed in with academic facilities and student residences.<sup>36</sup>

Balancing the interests of the university and the community is often tricky at best, which makes set regulations early in development vital. Ways to help minimize conflicting interests are through

1. District plans;
2. Land use regulations;
3. Design standards; and
4. Encourage town participation in the project planning.<sup>37</sup>

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<sup>32</sup> (Baker-Minkel, 2004)

<sup>33</sup> (Baker-Minkel, 2004)

<sup>34</sup> (Eryilmaz, 2009)

<sup>35</sup> (Eryilmaz, 2009)

<sup>36</sup> (Eryilmaz, 2009)

<sup>37</sup> (Eryilmaz, 2009)

Memorandums of Understanding, while not holding any legal recourse, manages interactions on specific projects and defines the roles in each party. Ambiguity is eliminated more effectively and progress and accountability may be tracked more easily.<sup>38</sup>

### Communities Contributing to the University

Case studies follow town and gown relationships from the perspective of the university more than they do the community since universities are more proactive in establishing positive relations rather than vice versa. Universities have several resources and opportunities to offer services; professors are experts in their fields and offer valuable counseling to local businesses. Additionally students can be used as an unlimited supply of free labor. Communities, on the other hand, are made of residents with full-time jobs and familial obligations that prevent them from contributing more to the university.<sup>39</sup> Not only are resources a barrier, but also so are perceptions of the university. It wasn't until the early 1990's that universities recognized the need to improve their interactions in the community.<sup>40</sup>

To better understand the expectations and wants of communities, a survey was taken among the residents of a college town.<sup>41</sup> Out of the 78 people that responded to the question, “What is ‘one thing’ you would like to see the university do?” 41% answered that they wanted to be invited onto campus more, 19% wanted more parking for the students, 11% suggested more collaboration on beneficial projects within the community, 5% opted for better management of student rentals, more children's outreach activities, updates to the campus, to pay more taxes, and for the university to stop buying houses.<sup>42</sup>

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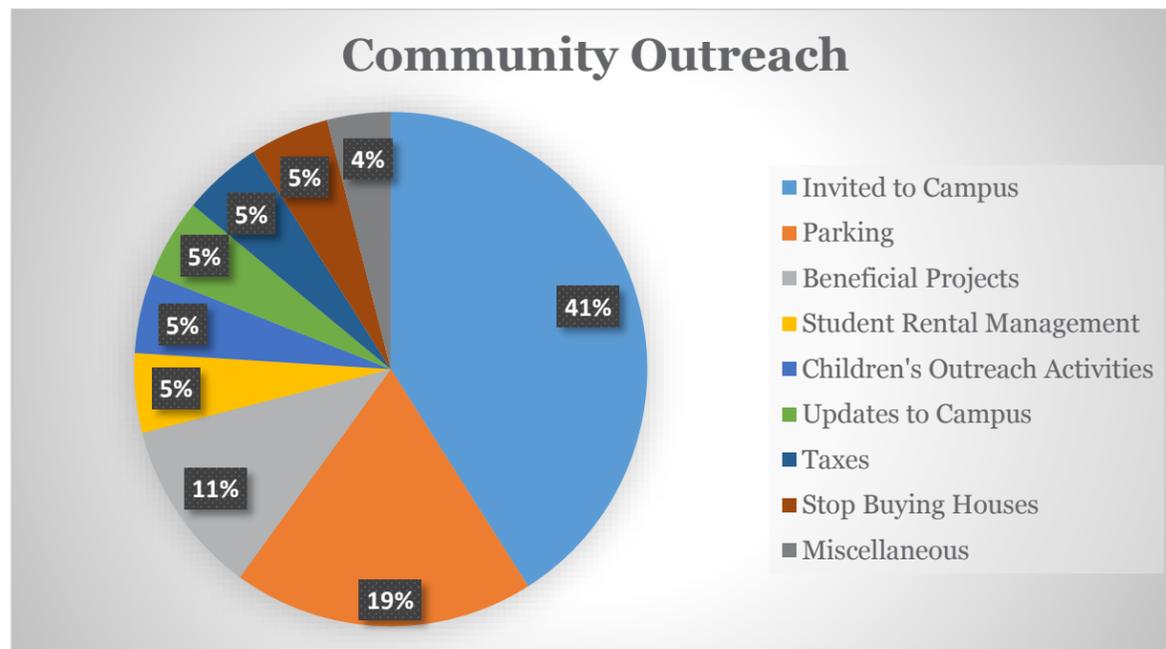
<sup>38</sup> (Eryilmaz, 2009)

<sup>39</sup> (Bruning, 2006)

<sup>40</sup> (Bruning, 2006)

<sup>41</sup> (Bruning, 2006)

<sup>42</sup> (Bruning, 2006)



Another correlation found was that residents that had attended a university event were more likely to regard the institution as an asset to the city than the residents that hadn't attended a university event.<sup>43</sup> To further invite the community onto campus, it is recommended that universities share their resources with the city such as offering meeting space or exercise facilities during off-peak times.<sup>44</sup>

A second example of communities reaching out to universities comes from the Farmville, Virginia town council. When Harlan L. Horton joined the council in 2001, he suggested establishing a town-university relations committee with Longwood University.<sup>45</sup> This partnership led to the collaboration of an active citizenship class offered to the students. The course focuses on students performing real work for the community, including:

1. Drafting letters of appeal;
2. Designing, writing, and editing informational brochures;
3. Designing billboards for the county;
4. Writing speeches for town council; and
5. Creating PowerPoint presentations for school boards and parent-teacher groups.<sup>46</sup>

Students are not the only ones that benefit from this class: professors from each curriculum rotate so that as many students and citizens as possible have the chance to

<sup>43</sup> (Bruning, 2006)  
<sup>44</sup> (Bruning, 2006)  
<sup>45</sup> (Booker, 2006)  
<sup>46</sup> (Booker, 2006)

learn how to build and strengthen local communities. This brings greater appreciation for the university and provides solutions to local issues and concerns.<sup>47</sup>

The town manager, Gerald J. Spates, knew that in order to teach these active citizens the importance of collaboration with city officials, they needed to establish face-to-face meetings. Spates began encouraging community officials to go into classrooms early in the course and continue visiting frequently through the rest of the semester to show that the community wanted to work with the students and to teach them how to best collaborate with the city.<sup>48</sup>

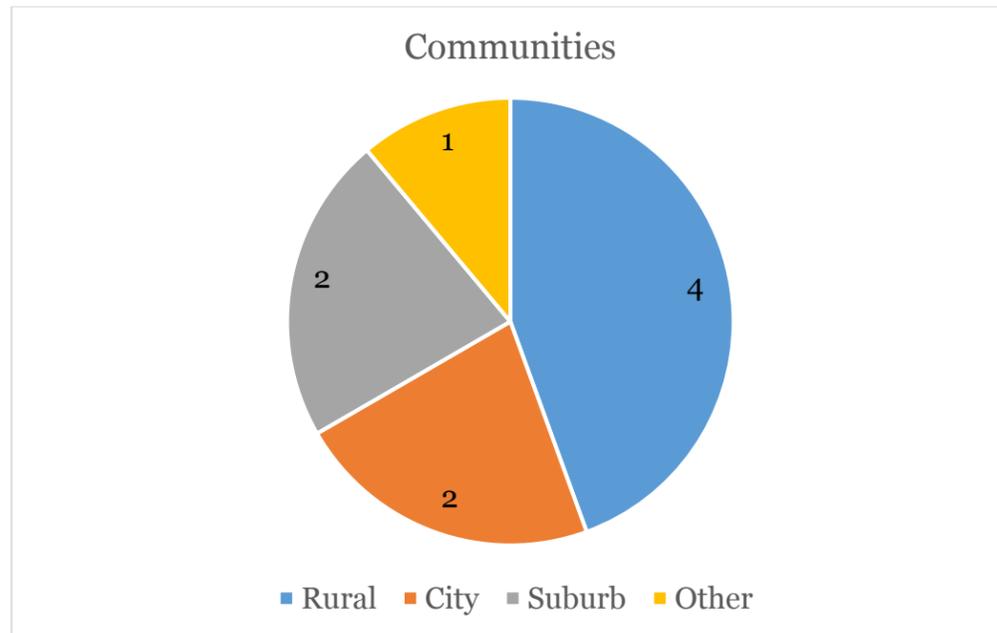
A key topic addressed by community officials was the importance of meeting problems head-on. Often, residents feel the need to complain about issues in letters to the editor in order to make their voices heard. While this raises awareness of problems in the community, it does nothing to fix it. Students are encouraged to schedule meetings with city leaders and collaborate on the best ways to improve city life for residents. Oftentimes, the root of the problem stems from miscommunication that could be easily solved. These principles of open communication further enhance the relations between university and community when expansion projects and events require effective collaboration.

<sup>47</sup> (Booker, 2006)  
<sup>48</sup> (Booker, 2006)

## SURVEY FINDINGS

The survey was emailed to 300 contacts. Contacts were comprised of members of the departments of Chamber of Commerce, Planning and Zoning, Public Relations, Public Affairs, and Communications. The results yielded twice as many university representative surveys as community representative surveys at eighteen respondents. The complete list of job titles can be found in the appendix.

There were seven respondents that defined their community as a college town while two respondents did not. Communities were defined as either rural (4 responses), city (2 responses), suburb (2 responses), or other (1 response).



Concerning the type of university, 8 were private and 9 were public. One of those universities was only made of graduate students, 4 were only undergraduate, and 12 were a combination of both. The average percentage of students in graduate programs was 28.82%. The average percentage of working students in the community was 18.57%. The average income of the communities surveyed was \$31,737 compared to Rexburg's \$25,705.

From these results, the communities surveyed were similar to Rexburg in student enrollment, population, and type of community (rural/suburb.) Some communities were more developed than others, providing a range of in-progress and successful trends.

Business segments that attracted the most students were as follows:

1. Grocery 3 responses
2. Clothing 0 responses
3. Restaurant 7 responses
4. Bar 3 responses
5. Recreational 1 response
6. Entertainment 1 response
7. Other 3 responses
  - a. Finance and M&A
  - b. Food Industry
  - c. Health care, because they have a lot of students that intern. Another one would be business administration students that work in the high-tech business.

Future plans for economic development were as follows:

1. Retail 5 responses
2. Housing 5 responses
3. Recreational 7 responses
4. Research 8 responses
5. Innovative 6 responses
6. Technological 9 responses
7. Other 10 responses

Ways that the community impacted the local economy were as follows:

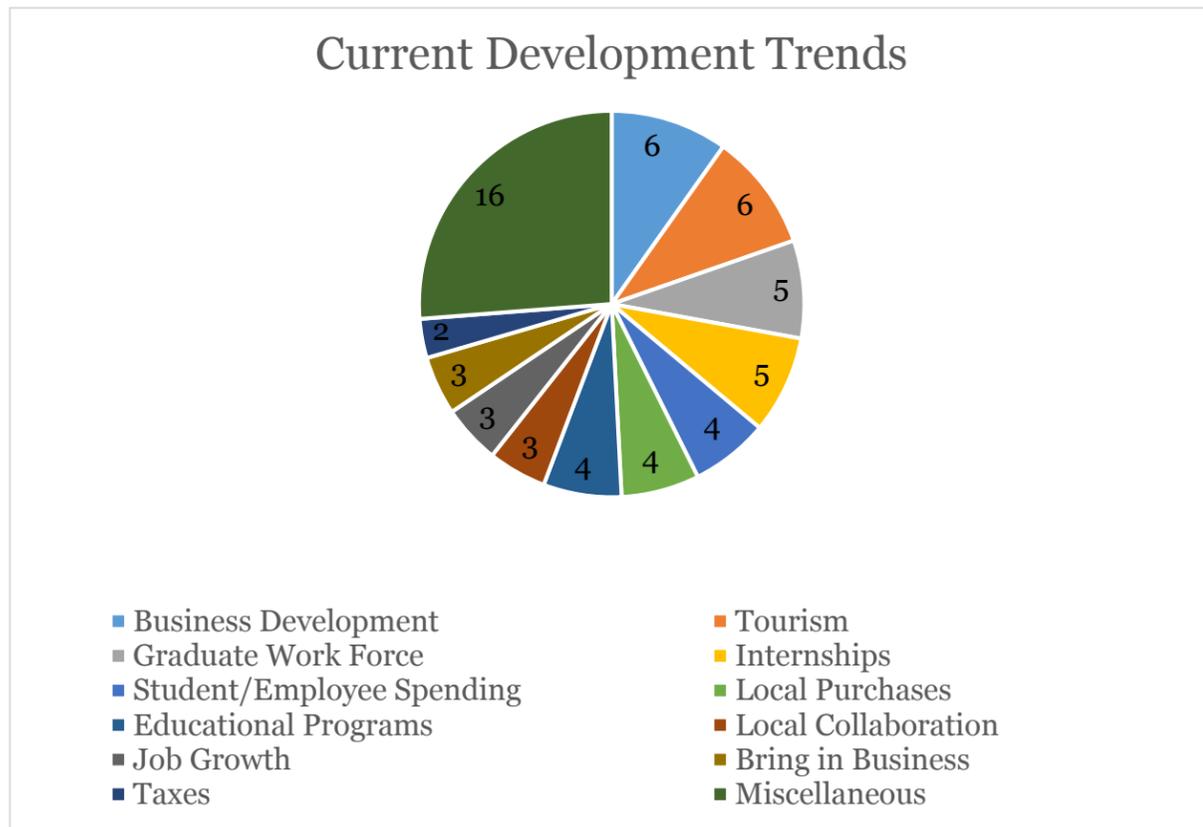
1. Job growth 5 responses
2. Business development 8 responses
3. Other 5 responses
  - a. California Borough has some local businesses, but is largely residential.
  - b. We have events that can bring up to 5,000 people to businesses.
  - c. Professional development center.
  - d. Cultural.
  - e. The community is agricultural and shapes the economy most in that respect.

Seventeen out of 18 respondents believed that community events and activities impacted the university and 9 out of 9 believed that university events and activities brought in business.

For question 9 (what are some ways you, as a university/community, find effective to strengthen the local economy?) several long response answers gave insight into current developmental trends.

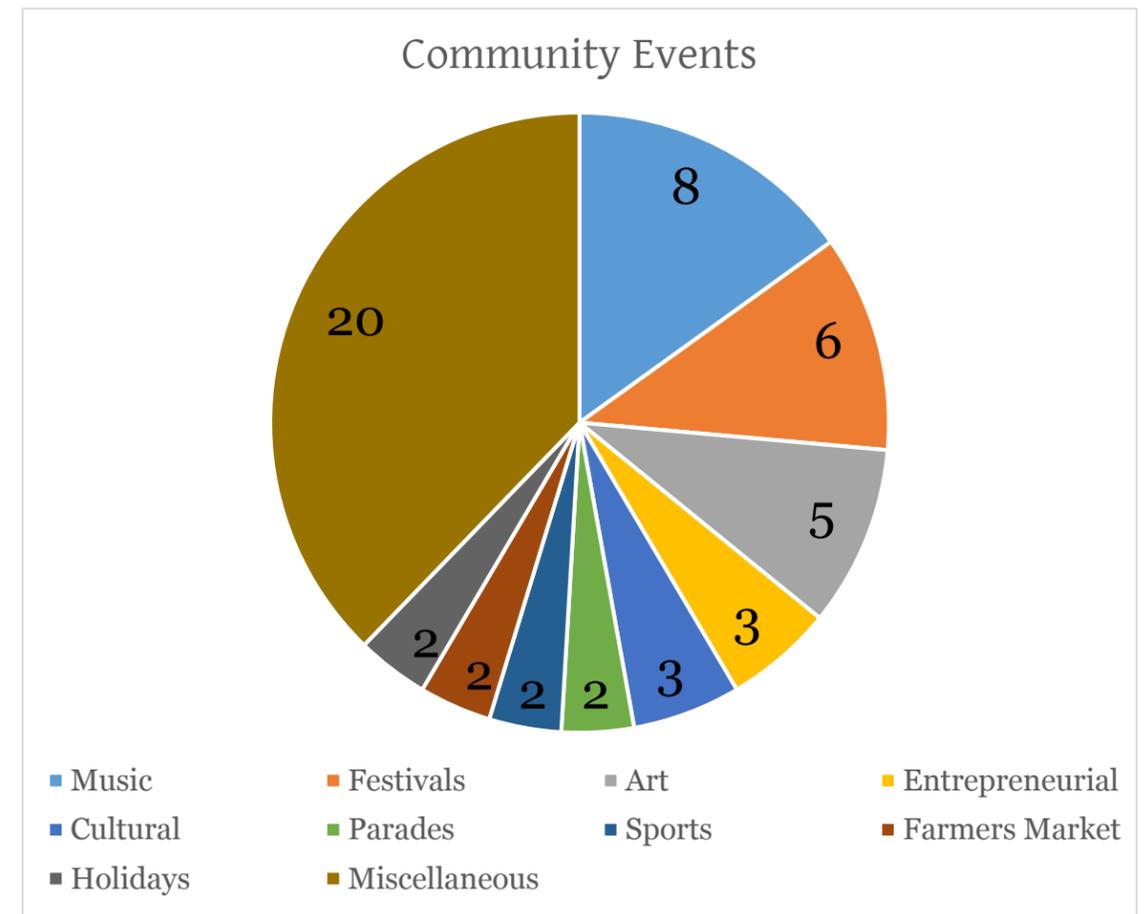
6 respondents invested in entrepreneurial/local business development centers

- 6 respondents host tourism events that bring in outside income
- 5 respondents prepare graduates for local jobs
- 5 respondents utilize local internship opportunities
- 4 respondents attribute student and faculty spending in the local community
- 4 respondents cite student and employee volunteering opportunities
- 4 respondents say the university buys locally from the economy
- 4 respondents establish educational programs in the community
- 3 respondents work with the Chamber of Commerce and local government
- 3 respondents invest in quality job growth
- 3 respondents bring outside business and industry to the community
- 2 respondents attribute taxes (Payroll, PILOT)
- 16 miscellaneous responses



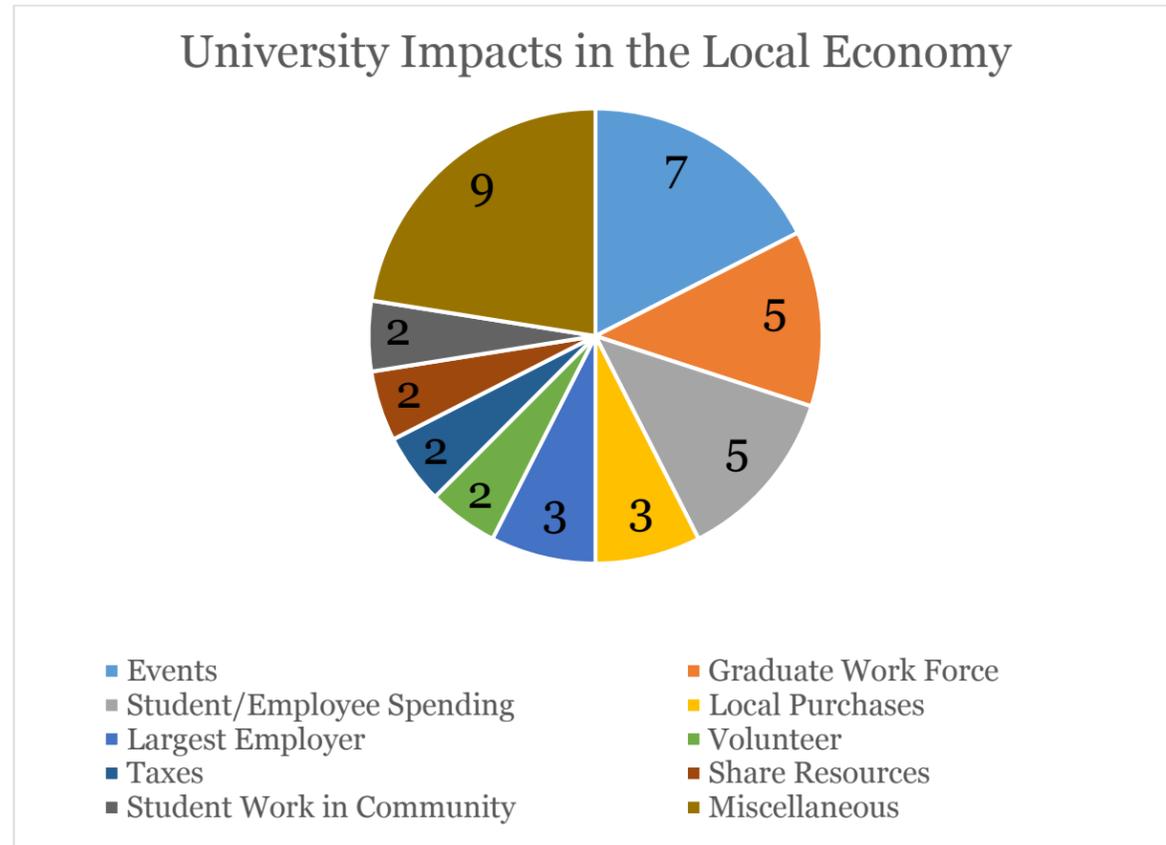
As to what types of events that the community hosts:

- 8 respondents offer music events
- 6 respondents offer festivals
- 5 respondents offer art events
- 3 respondents offer entrepreneurial events
- 3 respondents offer cultural events
- 2 respondents offer parades
- 2 respondents offer sporting events
- 2 respondents offer farmers markets
- 2 respondents offer holiday events
- 20 respondents offer miscellaneous events



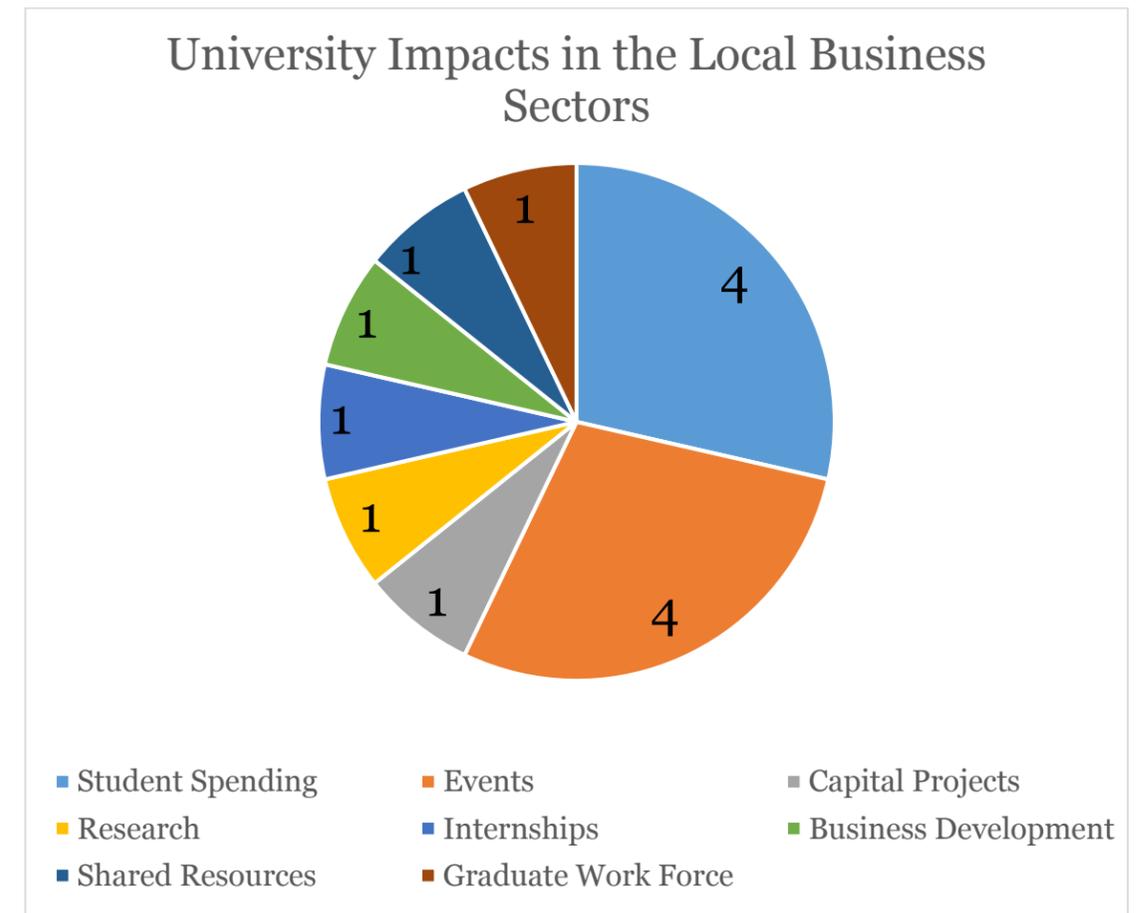
The university impacts the local economy through the following ways:

- 7 respondents hold events
- 5 respondents produce work force via students
- 5 respondents contribute student/employee spending
- 3 respondents contribute through local purchases
- 3 respondents are some of the largest employers in their respective area
- 2 respondents hold volunteer programs
- 2 respondents contribute through taxes (revenue, PILOT)
- 2 respondents share resources
- 2 respondents offer student work in the community (internships, service learning)
- 9 respondents contribute miscellaneous factors



The university impacts the local business sectors in the following ways:

- 4 respondents impact through student spending
- 4 respondents impact through events
- 1 respondent impacts through university capital projects
- 1 respondent impacts through research
- 1 respondent impacts through internships
- 1 respondent impacts through the business development incubator
- 1 respondent impacts through shared resources
- 1 respondent impacts through graduates joining the local work force



Two responses shared how the community impacts the university through providing utility, public safety, and recreational services.

The final section of the survey explored outside collaboration, references, and distributing the results of the survey.

Respondents that collaborate with members of the university/community for economic growth came to a total of 24, whereas 3 respondents do not collaborate.

Eleven contacts were left for further surveys and 16 respondents left their preferred email to receive the results of this study.

Current trends found in the survey include:

1. Restaurant establishments attract student spending;
2. The most frequently cited way to positively impact the local economy is through business development centers;
3. Internships in the community are a positive way for the university to impact the local economy; and
4. Music/cultural events bring in outside tourism and spending to the community.

## RECOMMENDATIONS

Based on the research gathered in the literature review and the findings of the survey, the following recommendations are made:

- The first recommendation is to invest in local business/entrepreneurial developmental centers. These centers provide consulting for local businesses as well opportunities for students to gain valuable work experience. The result of this is a strengthened economy and enhanced job growth for students. Business development centers were the most frequently cited economic development trend in the survey. The E Center heads an average of 100 projects per year since its start in 2006<sup>49</sup>. With a rapidly growing economy, the E Center could be expanded and broken up into various branches for future use. This investment can provide opportunities for students and businesses as Madison County continues growing.
- Students contributing to the community through internships, service learning, and volunteer programs benefit both the university and the community. More programs throughout the community should be implemented for student service, whether for classroom credit or not.
- As for planning and zoning in Rexburg, the city needs to ensure a way to meet both student and resident needs. Residents do not want to be constantly surrounded by students and students need their space to grow and pass the time with friends. From the survey, it is found that students are most attracted to restaurant establishments. Either a mixed use center similar to the Eddy Street Commons or a separation of housing through a shopping and eatery district is recommended.
- Local purchases can be increased throughout Madison County. Rather than importing resources from Utah or across the state, buy from local dairies, farms, and warehouses.
- Lastly, musical and cultural events are shown from the data to bring in outside tourism spending dollars. This also includes sporting events.

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<sup>49</sup> (idahocenter.org.2013)

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## APPENDIX A

### Case Study Interviews

#### Scott Ford, Executive Director of Community Investment, South Bend, Indiana

1. A coworker told me that Notre Dame and South Bend put together a buffer of businesses between students and residents, is that true?

Actually, almost the opposite. The university, being a catholic school founded in 1848, had French missionaries that wanted to locate the college in the wilderness to observe values before going into the world. Really, it operated like monastery until probably the mid-century when it became more of a university that attracted faculty and students. More faculty and more graduate students came and it became harder to expand beyond its boundaries. But unlike universities like Wisconsin or IU or Arbor or Berkeley, where the town grew up around the gown, this one was on parallel tracks. Both grew to such a large state that they overlapped. That being the case, the university recognized that quality of life is a huge component in attracting faculty and graduate students. The University understood that they needed to do more towards investing in the community. In response to this, they developed the Northeast Neighborhood Revitalization Organization (NNRO) for the purpose of planning, discussing, and coordinating the social, physical, and economic revitalization of the Northeast Neighborhood. It's represented by the two biggest hospitals in the community and other large companies in the city. That group was able to establish a vision in the South Bend neighborhood closest to Notre Dame. The NNRO is the strongest form of partnership between the city and the university. The biggest project they did was the Eddy Street Commons. This was a \$250 million development to establish a college town. It's definitely a lifestyle center now; 8-9 stories of residential and commercial buildings south of campus.

2. Coming from that historical aspect, could you tell me about any times in the past when town and gown had some disagreements, but were able to resolve them in planning and zoning?

SCUP is a good resource. If you want to look at NNRO, that's probably a great resource in terms of they were able to enact the university and community together and acted some zoning changes. They transformed everything by removing and putting in new

homes; they stabilized neighborhoods that were crumbling on the south side. Big projects are mainly worked through NNRO. That's where the notion of a shared vision is more important. It's a plan that was sponsored by town and gown and their plan preceded any zoning changes. Zoning just came after the established vision in how they represented and executed it . . . it's built pretty well.

#### Mark Welch, Director of Community Relations, Murray State University

1. How do you strengthen the local economy?

In addition to town/gown partnership, we have an office of regional outreach and that office has an annual appropriation that they spend mostly on increasing educational attainment in the eighteen county service areas, but the town and gown program is primarily working with our local county. The way town and gown works here isn't how every campus does it, but we have an excess of forty partners who contribute a thousand dollars into the town partnership fund. For that investment they get some perks, but we're using that money and reinvesting that money back into the community. We mostly do it by supporting quality of life issues. We are sponsors for a half marathon which supports hospice houses and probably the biggest thing we do now is we're underwriting all expenses of a community band and chorus. It's actually called the town/gown community band.

2. Do community events or activities impact the university?

Normal stuff, one pretty big one is our Fourth of July festivities called Freedom Fest. That involves campus and community folks. Probably another thing that affects campus would be industry recruitment of industry that affects the university. This is a case where it comes back the other way where something that's occurring in the business and industry community affects the university.

3. In what ways do the community and university impact the local economy?

We did study ten years ago that we're trying to update. We determined this would be 2003 dollars now, but we determined that the impact of one student in addition to tuition and fees on campus is about \$7,500 a year. The impact on just local residents were determined to be 240 million. Dollars multiply so a dollar spent gets reinvested and reinvested. So what our survey was able to determine was that there was an actual

dollar figure and impact figure that was slightly larger. 240 million was the impact. And what we've done is the survey determined for instance that students, faculty, and staff were spending 2003 nine or ten million dollars on food and beverages.

4. What businesses attract students?

Restaurants, of course. We just passed a package liquor; up until last summer, you couldn't purchase packaged liquor in Murray, KY. So that exploded, so those package liquor stores that sell alcohol are doing well. It's a combination of restaurants and clothing.

5. What are your plans for future economic development? (Retail, housing, Recreational, Research, innovative, technological)

Not directly, there have been some efforts to try to figure out a way to do mixed-use development around campus. But I'm not sure that in this climate the university has any resources to develop that. I know some universities get involved in direct economic development, but we're not able to do that right now.

6. Do you collaborate with representatives from the university to prepare for economic growth?

For the agriculture community? No, not directly we haven't. I'm in a close relationship with the Chamber of Commerce and with our local economic development corporation. Are you familiar with the main street program? That's pretty huge in KY. Main Street is a non-profit effort to develop downtown regions, historic corridors, and that kind of thing. I'm involved in that pretty heavily.

## Appendix B

### Survey Responses

1. What is your job title?

- a. Director, Center for Entrepreneurship and Market Capitalism
- b. Director of Public Relations
- c. Director of Community Relations
- d. Director, Institutional Effectiveness
- e. Associate Professor of Business, Ph.D. Program Director
- f. Director of Communications & Public Relations
- g. Director of Planning and Evaluation, Center for Community Outreach and Applied Research, East Tennessee State University
- h. Executive Director of Facilities and Special Projects
- i. External Relations Coordinator (works in communications office)
- j. Assistant Director of Business and Community Relations
- k. Vice President for Strategic Communications & Economic Development
- l. Associate Director of Communications and Marketing
- m. Public Relations
- n. Director of Marketing, Public Relations and Publications
- o. Vice President for Institutional Advancement
- p. VP
- q. Exec Director of Public Affairs
- r. Director of Community Relations
- s. Human Resource & Risk Manager
- t. Community & Economic Development Director
- u. Administrative Specialist
- v. City Recorder/City Administrator
- w. City Council
- x. Policy and Planning Manager for the Community Development Department
- y. Chamber of Commerce, Director of Communications
- z. The Vice President of the Chamber of Commerce
- aa. Administrator and Chief Financial Officer

2. Do you define your community as a college town?

- a. Yes 7 responses
- b. No 2 response

3. Which word best describes your community?
  - a. Rural 4 responses
  - b. City 2 responses
  - c. Suburb 2 responses
  - d. Other 1 response
4. Select the term that best describes your university.
  - a. Private 8 responses
  - b. Public 9 responses
  - c. Publicly Assisted 1 response
5. Select the term that best describes your students.
  - a. Undergraduate 4 responses
  - b. Graduate 1 response
  - c. Both 12 responses
  - d. Undergrad, Grad, & Theo 1 response
6. About what percentage of your students are in graduate programs?
  - a. Average value 28.82% 17 responses
7. About what percentage of workers in the community are students?
  - a. Average value 18.57% 7 responses
8. What is the average income of the community?
  - a. Household income average is about \$26,000
  - b. 33,000
  - c. Varies
  - d. 28,000
  - e. \$32,156
  - f. \$35,000
  - g. \$35,000
  - h. \$33,000
9. What are some ways you, as a university/community, find effective to strengthen the local economy?
  - a. We work directly with businesses to provide skills-based performance mastery to students based on skills and other needs that we get directly from industry. We help startups find capital, network, build relationships with advisors and investors, and provide individual and group mentoring as well as peer to peer learning.

- b. Our students, faculty and staff spend more than \$1million each year in the Village of Bluffton (population of 4,000 people) Payroll taxes. We are a supporting partner in the Bluffton Center for Entrepreneurs - we provide the staff to run this organization.
- c. We work closely with the local Chamber of Commerce, San Angelo Stock Show and Rodeo Association and many other non-profits and businesses to provide sponsorships, interns and volunteer assistance. Our hosting of conference tournaments and other events contributes to the local economy. A study in 2011 showed the following Economic Impacts of ASU: Output (\$ mill.) \$238; Household Income (\$ mill.) \$111; Jobs 2,387; Annual Workforce Contribution (\$ mill.) \$503.
- d. We participate in the economy by staff, faculty and students buying products and renting properties in the area. Also we are partnered with the city and the chamber of commerce here and work together well.
- e. I have previously published a paper that examines the direct, indirect, and induced economic impact of Alvernia University on the local and regional economies. The university's total spending on goods, services, payroll expenditures, capital investment, ancillary spending by students, visitors, and employees are analyzed using the IMPLAN input output model quantifying the direct, indirect, and induced economic impact on Berks County, Pennsylvania. Qualitative measures such as employee and student volunteer hours, institution sponsored sporting, and community events are analyzed. This paper supports Alvernia University's impact on the local and regional economic sustainability and growth.
- f. Equipping our students with skills needed in the local/regional workforce. Partnering with industry to provide training, certifications, etc. Working with local agencies, nonprofits and organizations to meet training needs and provide volunteer assistance (community service). Making payments in lieu of taxes to the municipality where we are located.
- g. Faculty and staff in many of our colleges (Medicine, Pharmacy, Business, Technology) work directly with government and business leaders in developing and growing projects that produce jobs and investment. Also, obtaining external funding (grants and contracts) creates jobs.
- h. We emphasize buying local whenever is possible, there is a town tour for first year students during orientation with lunches at the local eateries we support town initiatives and groups focusing on local commerce and bringing people into the downtown (Farmers Market, Downtown Development Commission, Taste of Madison, etc.) contribute to a shuttle connecting our campus as well as other local campuses to the downtown.
- i. We certainly are thinking about job opportunities when developing new programs. They put emphasis on areas of potential job growth. They also

partner with a lot of the high-tech companies in the area to set up internships and job placements. When they think about new focus they look at STEM (science, tech, engineering, mathematics) areas because they are areas of potential job growth. They have community education center, primarily offer English language learner programs (large Brazilian population) so the program is targeted there. There are also cultural programming, speakers lecturers, and they open these to the community.

- j. We have a career services center that helps set up students with jobs in the community.
- k. We produce graduates who are prepared intellectually to innovate, create jobs, educate, solve problems and provide critical leadership throughout Arkansas and our region.
- l. Students provide an able and active work force for local businesses to hire. Resident students make up approximately 20 percent of the population inside the city limits, so student spending is a tremendously important engine for the local economy. The university employs approximately 550 faculty and staff; direct spending by faculty and staff also contribute significantly to the local economy. The university increases the quality of the local and regional workforce through education -- graduates enter the workforce better prepared to meet the needs of employers, and our presence in the community and efforts to create partnerships through custom training initiatives and other programs allows us some flexibility to tailor the education we're delivering directly to the needs of employers. This allows employers to have productive employees earlier in their employment cycle. The university requires services to operate; our direct spending on things like cable television service for residence halls and any other operational costs benefit the local economy. We host events that draw people to the community from outside of the area, supporting tourism industries.
- m. Purchased storefront in downtown.
- n. Through collaborative programs with local governments. As a state school, we feel it is our obligation to give back to our community - be it educational, recreational, or instructional.
- o. Internships, faculty & staff serving on boards, students volunteering, access to facilities and select programs, special cultural events, just to name a few.
- p. Town and gown meetings.
- q. Capital construction projects, direct purchases, joint marketing projects.
- r. In addition to town and gown partnerships, we have an office of regional outreach. That office has an annual appropriation that they spend mostly on increasing educational attainment in eighteen county service areas. The

- town and gown program is primarily working with our local county. The way town and gown works here isn't how every campus does it, but we have an excess of forty partners who contribute a thousand dollars into town partnership. For that investment they get some perks, but we're using that money and reinvesting it back into the community. We mostly do it by supporting quality of life issues. We are sponsors for a half marathon which supports hospice houses. Probably the biggest thing we do now is underwriting all the expenses of a community band and chorus.
- s. Expand SR 904 to four lanes. Bring in additional industry to the Cheney Industrial Park.
  - t. Provide more support services for entrepreneurial development. Help existing manufacturers expand. Attract some number of new suitable employers to the community.
  - u. More jobs and educational programs.
  - v. #1. The university needs to be more aggressive in supporting local businesses #2. Local businesses to have better catering to the university and students. The university does a lot to keep kids on campus and provide everything on campus.
  - w. Good paying jobs.
  - x. Our local airport that our city supports and bought land for just became the busiest in the state. The city also actively participates in tourism group improvement programs that capture some of the revenues from hotels and other related businesses. It channels into outreach programs and we also do a lot with heritage tourism. There's an aggressive historic preservation system. It's economically healthy and an attractive place to be, so lots of people come to town to spend time there. We also have walking tours and we're coming out with a series of audio walking tours for smartphones that are still in beta testing. We're partnered with a downtown group and our historic preservation officer has worked with several interns from the university to collaborate on that kind of task.
  - y. The Chamber of Commerce has an economic development division. We work to attract new jobs to the community as well as expand local businesses that are here. Missouri Western State University has an internship program where students work in local businesses. We also have an incubator on-campus where small businesses can get space for cheap. In the science industry, if we have a small business that has a good idea, they can start their business at the incubator and grow from there. Some people at the incubator can get help from the university staff. The incubator works, it's got small staff and it works to attract people. Saint Joseph is huge in the animal health industry, so it attracts that field mainly. They might need lab space, share a receptionist . . . it may be they

need to get out of their garage but they can't have their own storefront, so the incubator staff works to help them grow. Soon, they outgrow the incubator. They particularly try to help small businesses in the animal health industry because there are so many national players in that market right here. They try to keep it local.

- z. We don't just serve the city of Joplin, but are a seven county region. Pretty much what we do is attend trade shows to bring in new industry, strengthen businesses to increase employment, brought in two regional medical centers here in town so probably the single largest industry is medical. We have a very diverse type of industry, not really any one preference. Medical care is a need all the time regardless, so we have a pretty good one.
- aa. Create an environment conducive to helping our business community. We have meetings with different, specific organization bodies that reach out to business community members. The business community will also routinely call in with the local government with questions or issues and those are researched and brought to the recognition of the governing body and they in turn try to develop policies to meet those needs or issues. It could be issues related to parking, traffic enforcement, fire permit fees, or costs that the business community has.

10. Do community events or activities impact the university?

- a. Yes 17 responses
- b. No 1 response

11. Do university events or activities bring in business?

- a. Yes 9 responses
- b. No 0 responses

12. What types of events does the community host?

- a. Meet-ups, networking events, pitch competitions, and practical entrepreneur events that provide for networking and peer to peer learning. We believe that there is a great deal of value in integrating the arts and entrepreneurship; we host and attend such events frequently.
- b. Homecoming parades, destination shopping cultural events weekends.
- c. The community hosts a number of events on campus including Chamber of Commerce luncheons, symphony performances, non-profit "walk" events, etc.
- d. A couple times a year we have large public events that bring around 4,000 people (4x our student population) to campus.
- e. Sporting, art, music, and more.

- f. Various festivals and conferences.
- g. Bottle Hill Day which is a town-wide festival downtown, Taste of Madison featuring local eateries, Farmers Market, May Day which is a town wide cleanup and a summer concert series downtown.
- h. The community will hold parades, the historical society does things that the history students will be involved in. The students are getting involved in many things that the town does. They try to contribute student and faculty resources to it. Speak to town manager.
- i. The community does things like Music on Main, several date nights, art walks, crazy days, and festivals.
- j. Arkansas State University and the city of Jonesboro work together to host a variety of local, regional and statewide events focused on multiple business sectors. These include small business development training, agriculture, technology training, educational leadership, and tourism development.
- k. Our university is in a very vibrant community that has a lot going on; we have active local theater, outdoor programs and sporting activities, a large high school with sporting, music, theater and other cultural events of its own, there is a symphony orchestra here, an incredibly active arts community, etc. For a small town, there are a ton of activities here.
- l. 4th of July events and other events with chamber of commerce.
- m. Art related events, festivals, extension classes, most of our concert/lecture programs are free and open to the public.
- n. All kinds, concerts, festivals, etc.
- o. Open forums for students' concerns.
- p. Festivals (jazz, dachshunds, wine, "buskers," holiday, Western culture), farmers market, rodeo.
- q. There's our Fourth of July festivities called the Freedom Fest. That involves campus and community folks. Probably another thing that affects campus would be the industry recruitment of industries that affect the university.

13. In what ways does the community impact the local economy?

- a. Job growth 5 responses
- b. Business development 8 responses
- c. Other 5 responses
  - i. California Borough has some local businesses, but is largely residential.
  - ii. We have events that can bring up to 5,000 people to businesses.
  - iii. Professional development center.
  - iv. Cultural.

- v. The Community is agricultural and shapes the economy most in that respect.

14. In what ways do you, as a university, impact the local economy?

- a. The typical Bellevue University student is a working adult who is gaining knowledge and performance skills to get a promotion or a better job. This is true in our graduate and doctoral programs. We have the largest MBA program in Nebraska as it was designed to provide the analytical and financial management skills to immediately improve your productivity. At our Entrepreneurship Center which is a not for credit Center, we provide hands on support and training to Entrepreneurs across all lines of business to help them be successful.
- b. The university impacts the economy in several ways outlined in a publication titled, "The Economic Impact of Alvernia University." Our university's total spending on goods, services, payroll expenditures, capital investment, ancillary spending by students, visitors, and employees all shows ways in which we impact the economy. Our commitment to service-learning and volunteer hours in our direct community show additional support.
- c. Cal U is the fifth-largest employer in Washington County, Pa. The University also is a cultural center for this largely rural region. The Cal U Convocation Center brings in audiences for concerts and other entertainment events, business and academic conferences, and athletic competitions; these attract customers to the town's restaurants and small businesses. Our Entrepreneurial Leadership Center helps students and staff prepare business plans and learn entrepreneurial skills.
- d. ETSU is the number one employer in Johnson City and of course the students have an impact through spending in the local community. The professional schools, particularly Medicine and Nursing, grow the local community by creating a local hub for medical services.
- e. We constitute about 18% of the local population during working hours and 15% of the local residential property and our campus is within walking distance from the downtown. Because of that, local restaurants and stores benefit from the convenience and added population. We also buy local when possible. We also pay voluntary taxes on our off campus residential properties and sponsor town events throughout the year. Contributions are also made to the ambulance squad. We also offer adult education and training.
- f. Campus community impacts with students shop and go to restaurants and shops and stores in the local area. They have a really good free transportation area on campus. There is a huge mall they go to through the

local transportation. Also they have an effort to grow the internship program in the local economy, and have every student do something. They try to set up the internship at local businesses, which benefit the student but also the local business. The biggest effort they are making to try and support the local economy is STEM areas it is 20% of the economy and they want to grow it to 25%.

- g. We have our career services center, and we also host events that we invite the community onto campus for.
- h. We increase the state's intellectual talent pool and per capita income capacity because lifetime earnings are 84 percent more for a bachelor's degree holder than a high school graduate. More university graduates also translates to more residents who are prepared intellectually to innovate, create jobs, educate, solve problems and provide critical leadership throughout Arkansas.
- i. Center on campus with big name speakers; that draws a lot of people into the community. Athletic events.
- j. Provide the services of our instructors and our resources to educate the community through events and lectures.
- k. Produce quality employees.
- l. Tax revenue.
- m. Camps and conferences, performing arts, enrollment recruitment and other events bring thousands into the community; CWU is the largest employer by a factor of 6, so payroll, benefits, retail activity, charity all are driven by employees and students. Capital construction activity is about 75 percent of the construction economy; direct purchases from a wide variety of vendors.
- n. We did a study about 10 years ago that we're trying to update, but we determined that the impact of one student is about 7500 dollars a year. The impact on just local spending determined to be about 240 million. Dollars multiply, so a dollar spent gets reinvested and reinvested.

15. How does the university impact the local business sectors?

- a. Students spend money in the community and capital projects at the university bring \$\$ to the local economy.
- b. With events, much like tourism in that retail, food, lodging, and fuel sales businesses may benefit.
- c. Hotel stays, restaurant, and shopping.
- d. These activities are the main events, speaking engagements, sporting events, and youth camps and programs. The biggest impact (small community 6,300) is lodging (but they are limited) but #2 is food and

restaurants. The university probably brings in 10-15k people per year. Maybe repeats but they are different times for different events.

- e. Student purchase power.
- f. The university is very aggressive in research. They bring in \$100 million in grants and a lot of folks that come in and out of the university for research and checking on research, and then papers being published. That research spins into business development.
- g. Internships in local businesses and the incubator up on campus.
- h. The university has a very good medical facility. There's nurses' training and other disciplines that hospitals use. They also are a key factor in law enforcement, they have a very specific school for it; a lot is driven through that. A lot of the university is general studies, but a very good relationship between businesses and the local universities in work force development. We go hand in hand to make sure that the students they are educating can be employees in the community. We were the first in the nation to be work force certified.
- i. There are vendors that service, whether it's food or there's a concert. There might be a vendor that sells t-shirts or whatever kind of souvenir to buy. I think there're some benefits to the local business community because of these entertainment sports events.

16. How does the community impact the university?

- a. The city provides valuable services to the university such as utilities, public safety, and recreational facilities.
- b. To be honest, in their situation, they are two self-sustaining entities. The university likes to be themselves. The community provides the public services and utility and safety services to the campus.

17. Which business segments attract the most students?

- a. Grocery 3 responses
- b. Clothing 0 responses
- c. Restaurant 7 responses
- d. Bar 3 responses
- e. Recreational 1 response
- f. Entertainment 1 response
- g. Other 3 responses
  - i. Finance and M&A
  - ii. Food industry
  - iii. Health care, because they have a lot of students that intern. Another one would be business administration students that work in the high-tech businesses

18. What are your plans for future economic development? (Check all that apply)

- a. Retail 5 responses
- b. Housing 5 responses
- c. Recreational 7 responses
- d. Research 8 responses
- e. Innovative 6 responses
- f. Technological 9 responses
- g. Other 10 responses

19. Do you collaborate with representatives from the university/community to prepare for economic growth?

- a. Yes 24 responses
- b. No 3 responses

20. Who do you contact?

Name	Email	Phone Number
Dr. Brian May	<a href="mailto:brian.may@angelo.edu">brian.may@angelo.edu</a>	325.942.2703
Dr. William Duncan	<a href="mailto:duncanw@etsu.edu">duncanw@etsu.edu</a>	423.439.9600
Jim Burnet	<a href="mailto:BurnetJ@rosenet.org">BurnetJ@rosenet.org</a>	
Bob Halpin-Town Manager	<a href="mailto:rhalpin@framinghamma.gov">rhalpin@framinghamma.gov</a>	508.532.5478
Allison Brecke	<a href="mailto:abrecke@bozeman.net">abrecke@bozeman.net</a>	406.582.2274
Barbie Lange	<a href="mailto:blange@ashlandoh.com">blange@ashlandoh.com</a>	419.281.4584
Guy McClure	<a href="mailto:Guy.McClure@athens.edu">Guy.McClure@athens.edu</a>	256.233.8296
Bill Biebuyck	<a href="mailto:Bill.biebuyck@clarke.edu">Bill.biebuyck@clarke.edu</a>	563.588.8147
George Clark	<a href="mailto:clarkg@cwu.edu">clarkg@cwu.edu</a>	509.963.2323
Matt Mattington		270.762.0330
Walt Banreger		406.994.2001

21. Would you like to receive the results of this study?

- a. Yes 16 responses
- b. No 11 responses

22. What is your preferred email so that we may email the results of our study to you?

- a. [skip.quint@bellevue.edu](mailto:skip.quint@bellevue.edu)
- b. [easelas@bastyr.edu](mailto:easelas@bastyr.edu)
- c. [tufan.tiglioglu@alvernia.edu](mailto:tufan.tiglioglu@alvernia.edu)
- d. [kindl@calu.edu](mailto:kindl@calu.edu)
- e. [mkopas@drew.edu](mailto:mkopas@drew.edu)
- f. [jhankins@asusystem.edu](mailto:jhankins@asusystem.edu)
- g. [jbartlett@bemidjistate.edu](mailto:jbartlett@bemidjistate.edu)
- h. [shannan@ashland.edu](mailto:shannan@ashland.edu)
- i. [Guy.McClure@athens.edu](mailto:Guy.McClure@athens.edu)
- j. [schactler@cwu.edu](mailto:schactler@cwu.edu)
- k. [mwelch@murraystate.edu](mailto:mwelch@murraystate.edu)
- l. [cmitchell@cityoflagrande.org](mailto:cmitchell@cityoflagrande.org)
- m. [Jbean@usmayors.org](mailto:Jbean@usmayors.org)
- n. [bailey@saintjoseph.com](mailto:bailey@saintjoseph.com)
- o. [tonya@joplincc.com](mailto:tonya@joplincc.com)
- p. [vcantillo@westlongbranch.org](mailto:vcantillo@westlongbranch.org)

# Envision Madison

*Agricultural Market Analysis*

Spring 2013

Research Team: Clint Kunz, David Hall, Greg Kusel, Mckenzie Stewart, and Brett Flora



## EXECUTIVE SUMMARY

The Eastern Idaho Entrepreneurial Center conducted a market analysis of agriculturally related companies in Madison and Fremont counties. The purpose of the research was to find opportunities of value-added growth in those counties.

### KEY FINDINGS

- Barley comprised companies are migrating from the Midwest to the West because of the region's reliable and consistent production of barley.<sup>1</sup>
- Since 2003, malt processing capacity in Idaho has more than doubled.<sup>2</sup>
- Madison and Fremont Counties produce and sell 5.5 percent of barley sold in the United States.<sup>3</sup>
- The two types of potatoes that are most common are fresh-pack potatoes and seed potatoes.
- Ames, Iowa teamed up with local Iowa State University to build a research park.

### ANALYSIS

The market trend for barley is on the rise. Furthermore, Idaho is forecasted to be the number one producing state in the US of barley- with most of the production coming from Eastern Idaho.

This area has agricultural advantages that can be utilized in order to build the local agriculture economy. They include but are not limited to: climate, land, and agriculture expertise.

### LIMITATIONS

The research team was unable to research all value-added opportunities relating to agriculture. Instead the team focused on companies that produced or used the following commodities: barley, potatoes, and wheat. Only a shallow review was conducted for cow/calf operations and alfalfa hay operations.

### RECOMMENDATION

Team up with local university to market comparative advantages to agricultural businesses.

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<sup>1</sup> (Little)

<sup>2</sup> (Barley Impact, 2013)

<sup>3</sup> (National Agricultural Statistics Service)

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## SCOPE & PURPOSE

The scope of this project included an industry analysis of agriculture in Madison and Fremont counties and a market analysis of different value-added options related to agriculture. The purpose of the project was to identify unique regional advantages; such as, expertise and research at BYU-I, and geographic features, in order to find companies that could potentially move into the area to build the local economy.

Key project questions included:

What are the key regional advantages of agriculture?

What agricultural entities in the area have opportunities for value-added changes?

What can be implemented in order to utilize the resources of the area?

How can the agriculture community work in accordance with the local university?

The purpose of the industry analysis was to identify aspects of agriculture in the Madison-Fremont area by developing a GIS map and analyzing county data, define regional advantages/disadvantages by surveying agriculture experts, and research existing value-added industries.

The market analysis served to look into specific opportunities of growth, create a list of options, distinguish threats and advantages, and list contact information according to areas of expertise.

The information presented in this deliverable will serve to help Envision Madison: Understand value-chain of the following commodities: potatoes, barley, wheat, hay/alfalfa, and cow-calf operations; network with agriculture experts; and plan and implement strategies to build the economy based off quantitative and qualitative data.

## METHODOLOGY

At the beginning of the project the team did secondary research in order to gather agricultural data connected to Madison and Fremont counties. That data came for the USDA website and the University of Idaho website and it was used to find levels of crop production, acres harvested, yield, cost of production, and sell price.

Next the team created a list of companies, farms, elevators, processors, and others, all connected to the identified agriculture sectors within Madison and Fremont counties by searching through Hoover's database. A survey was developed in Qualtrics, an online survey platform (Appendix A). Phone calls were made in order to survey companies on the list. The team surveyed 24 companies. The purpose of the survey was to identify company inputs, operations, and outputs.

The team then directed the research to gather information from non-local companies and agriculture experts. The team conducted 20 phone interviews and attended a wheat field day at BYU-Idaho (Appendix B). This was to determine what companies would be willing to re-locate to the Madison-Fremont area based on agricultural advantages.

The team also interviewed three economical experts located in the following communities, Ames Iowa, Manhattan Kansas, and Moscow Idaho. Those communities provided case study information.

Using data from the USDA website the team created value-chains for barley, potatoes, wheat, and hay/alfalfa. Connected to the barley, wheat, and potato chains is a list of companies and their location.

The team also created a Geographic Information System (GIS) map to show agricultural aspects of Madison and Fremont counties.

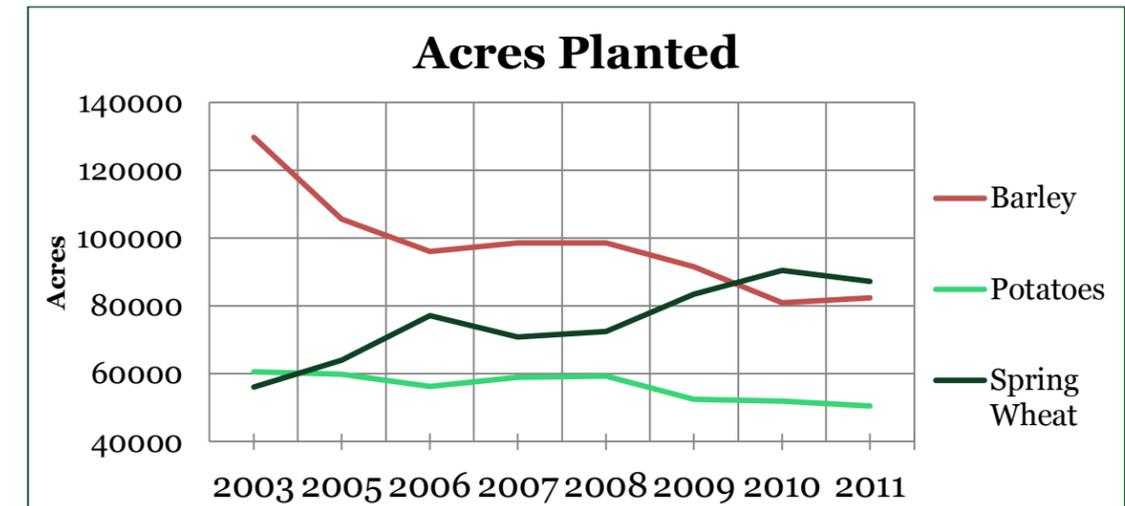
Sources:

- United States Department of Agriculture website and data
- Hoover's Dun and Bradstreet's Million Dollar Database
- Interviews
- University of Idaho – Agriculture Extension Agencies

## RESEARCH AND ANALYSIS

### HISTORICAL TRENDS

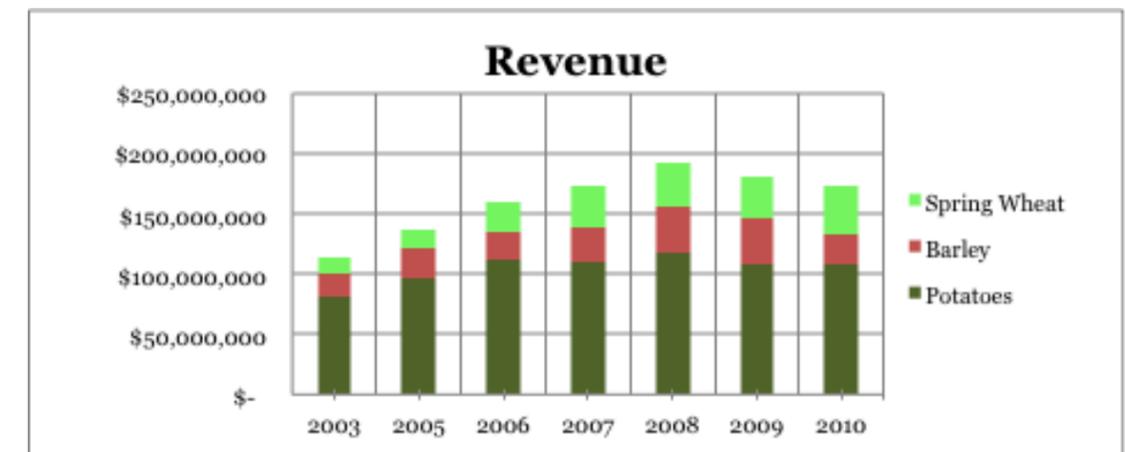
The following graphs represent historical amounts of acres planted for barley, potatoes, and spring wheat in Madison and Fremont Counties.



4

Barley and spring wheat trends correlate. This is because of crop rotation. Potatoes show a slow but consistent downward slope.

The following graphs represent historical revenue trends for potatoes, barley, and spring wheat. Potatoes are planted in less acreage and produce more revenue than barley and wheat combined. Also, note that potatoes cost more to produce.

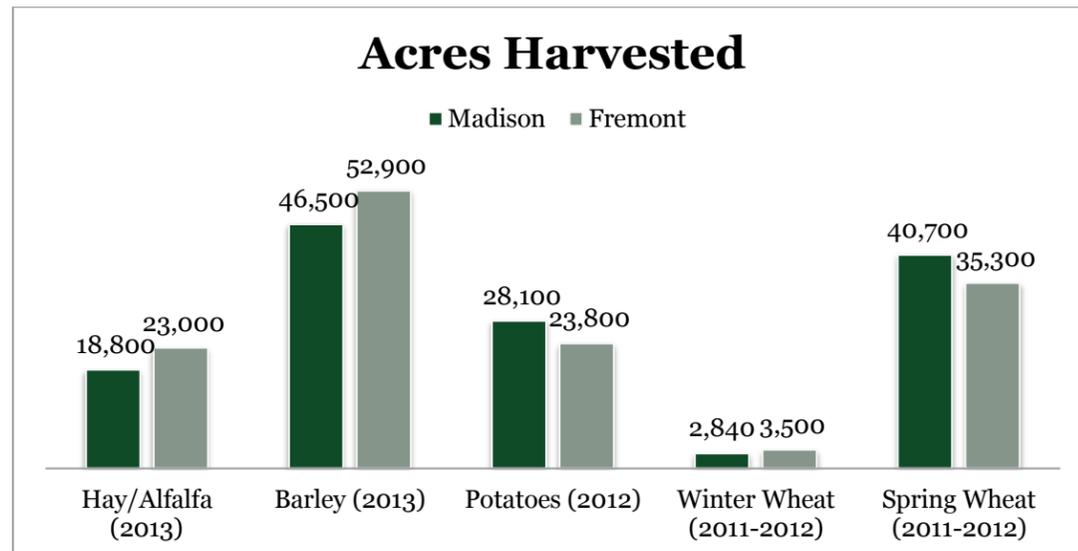


5

4 (National Agricultural Statistics Service)

## COUNTY CROP PRODUCTION

There are 217 crop producers in Madison and Fremont Counties.<sup>6</sup> Furthermore, there are 1,132 persons employed in agriculture, forestry, fishing and hunting, and mining.<sup>7</sup> The following graphs represent county crop harvesting. All information is based from most recent data from USDA. Crops represent all classes of specified commodity. According to data, Madison and Fremont Counties' crop harvesting is similar.



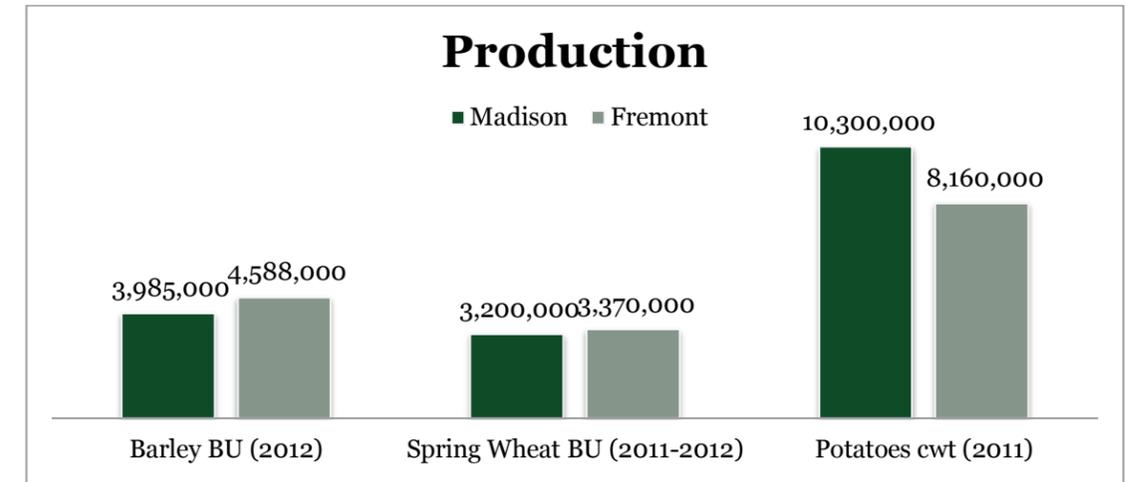
<sup>8</sup>The most recent data for crop production is outlined in the following chart. Crop production is directly correlated with the amount of acres harvested and yield per acre. Historical data shows an upward trend of yield per acre with potatoes, wheat, and barley. That means that the industry is becoming more efficient as a whole.

<sup>5</sup> (National Agricultural Statistics Service)

<sup>6</sup> (Hoovers)

<sup>7</sup> (American Fact Finder)

<sup>8</sup> (National Agricultural Statistics Service)



Barley, hay/alfalfa, potatoes, and wheat are Madison and Fremont counties' largest produced crops.

## COMPARATIVE ADVANTAGES

### LAND

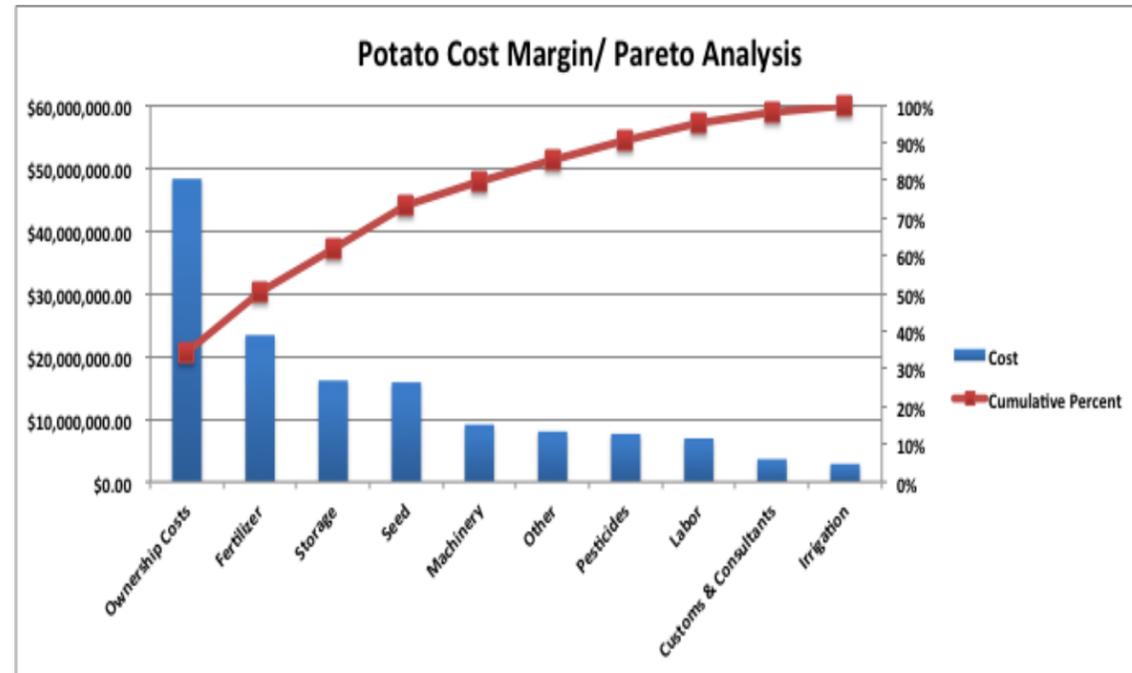
According to interviews the team conducted during a BYU-Idaho agriculture field day the following items are agricultural advantages of the area.

- Climate
- Irrigation
- Location

Five experts mentioned that the cool climate is an advantage of the area. According to Jared McGary, a BYU-Idaho professor, the cool climate helps potatoes stay fresh for longer.<sup>9</sup> Furthermore, Dwight Little of the barley commission stated that the cool climate helps barley production.<sup>10</sup> According to the following graph, more than 25% of potato production expense comes from storage. The cool weather in this part of the state helps cut down on storage costs.

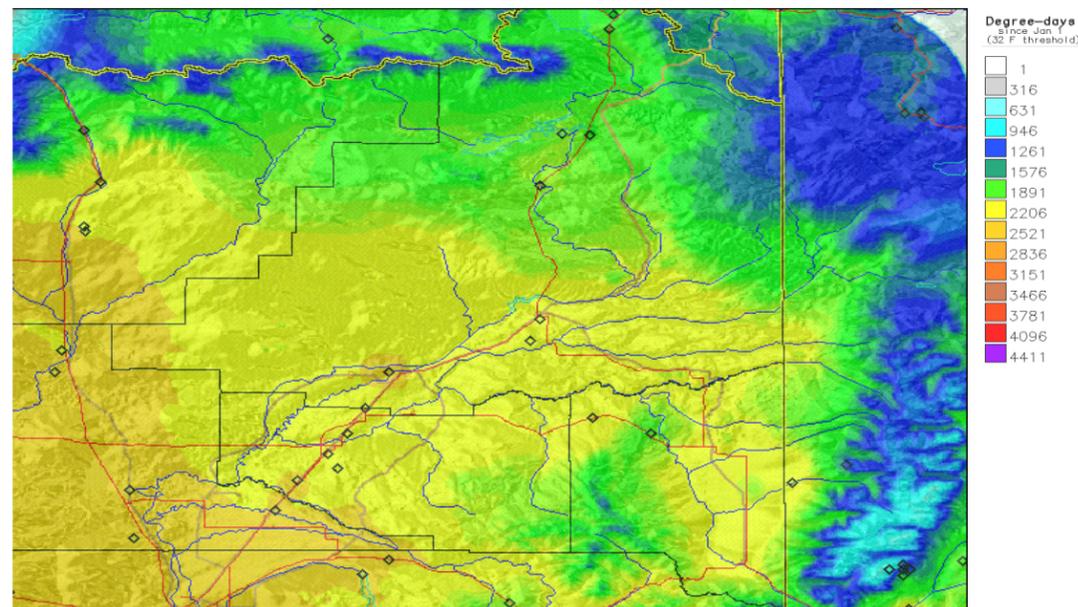
<sup>9</sup> (Williams, 2013)

<sup>10</sup> (Little, 2013)



11

The following map is a growing days map and it shows the difference in climate from Jefferson county to the north part of Fremont.



12

<sup>11</sup> (National Agricultural Statistics Service)

Four experts said that the availability of water and irrigation is an advantage. The graph above shows, in Idaho, the cost of irrigation is the least expensive cost. Therefore, Idaho has the advantage of having cheap accessible water. Two experts stated that location to the market was an advantage.<sup>13</sup> A list of companies and locations connected to barley, potatoes, and wheat is located in Appendix C.

#### UNIVERSITY

In order to understand the plans and procedures of the local university, the team interviewed one of BYU-Idaho's leaders in order to ask the following questions,

- What is BYU-Idaho doing to develop the agriculture program?

The University is putting time and money into building the agriculture programs and facilities. With board approval the University will build additions onto the livestock center and build more agriculture buildings on campus. The University is now offering an animal food science degree, a plant science degree, an agriculture economics degree, and an agribusiness degree. These are the most important degrees at BYU-Idaho. Siri is directly involved in agriculture research.<sup>14</sup>

The University has a vision of building their agricultural projects. Madison and Fremont Counties have expertise and resources in order to help BYU-Idaho and the local community.

- What does the university have to offer potential move-in agriculture companies?

The University can offer agricultural companies capable graduated students and research. Faculty members and students are currently working on agriculture related research projects.<sup>15</sup>

- Does the community officials and the university official's work together to build the agriculture economy?

As a University, I don't know if we've visited with city councilmen about what the University is trying to do with agriculture.<sup>16</sup>

<sup>12</sup> (Growing Degree-Days)

<sup>13</sup> (Experts, 2013)

<sup>14</sup> (Broadhead, 2013)

<sup>15</sup> (Broadhead, 2013)

<sup>16</sup> (Broadhead, 2013)

- In your opinion, what is the best strategy for developing this community in terms of agriculture?

In my opinion the city and county should work on making a marketing plan for bringing in agriculture businesses. They should explain what BYU-I is doing, share information about community, and focus on their comparative advantage. It is my hope that a dialogue will start between the city and University. I like the examples of Ames Iowa and Manhattan Kansas. We need to start a situation where the city and university work together to facilitate company growth.<sup>17</sup>

## BARLEY

### VALUE-CHAIN

The purpose of the value chain is to identify the value of the product at each stage in the production process. See Appendix C for the complete value chain.

According to USDA data in 2010, Idaho's cash receipts for barley comprise 25.5 percent of the United States' total barley cash receipts. Madison and Fremont counties barley cash receipts comprise 21.6 percent of total Idaho's barley receipts. Therefore, 21.6 percent of 25.5 percent is 5.5 percent. Madison and Fremont Counties produce and sell 5.5 percent of barley sold in the United States.<sup>18</sup>

According to USDA data in 2012, 99,400 acres of barley were harvest in Madison and Fremont counties. Furthermore, barley production was estimated at 8,573,000 Bushels (BU).<sup>19</sup> This means that the average yield was 86 BU per acre, including irrigated and non-irrigated crops. According to USDA data, the average price for barley in 2012 was \$5.13 a BU.<sup>20</sup> With over 8.5 million BU of production in 2012, approximately barley sales in 2012 were \$43.9 million for Madison and Fremont Counties.

Two elevators, Ririe Grain and Scoular Grain, reported adding a two percent mark-up after holding and shipping. A two percent mark-up adds \$879,000 dollars of value.

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<sup>17</sup> (Broadhead, 2013)

<sup>18</sup> (National Agricultural Statistics Service)

<sup>19</sup> (National Agricultural Statistics Service)

<sup>20</sup> (National Agricultural Statistics Service)

More value is added through malting plants, breweries, and other facilities.

### COMMODITY MOVEMENT

At least 70% of Idaho's barley is produced under irrigation, more than most other barley producing areas in the U.S.<sup>21</sup>

The following information comes from the Barley Commission of Idaho;

“Since 2003, malt processing capacity in Idaho has more than doubled. Three companies located in Idaho Falls and Pocatello operate malting facilities in Idaho: Anheuser Busch/ Bush Agricultural Resources, Inc., Grupo Modelo, and Great Western Malting, Co. Combined they produce around 28 million bushels of malt annually. Coors Brewing Company also maintains a presence in Idaho, contracting for Idaho barley and maintaining a grain handling facility and research farm in Burley.”<sup>22</sup>

50% of revenue is from the exporting U.S. grain internationally. In the case of barley, the crop is exported for a multitude of purposes such as food and beer production. The crop is volatile due to the fact that prices are driven by demand, which can change year to year. Domestic and global weather for example can increase or decrease revenues, production volumes, and prices. In 2012 the total revenue for grain crops was \$16.7 billion with barley capturing 4.7% of the market.<sup>23</sup>

### SURVEY

Dwight Little, a chairman of the barley commission, stated in a phone interview that during the last few years there has been a migration of companies working with barley relocate to this area (referring to Eastern Idaho) because this region produces consistent quality barley.<sup>24</sup>

The team surveyed five barley producers in Madison and Fremont counties. Those companies planted approximately 7,000 acres of barley in 2012. Seed was purchased from Anheuser Busch in Osgood, Idaho, Reinke Grain Elevator, and Trost Feed and Seed. Fertilizer, chemicals, and pesticides were purchased from Simplot, Valley-Wide Cooperative, CPS, and Helena. All five companies indicated that they irrigate. Irrigation equipment was purchased from Golden West. Farm

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<sup>21</sup> (Barley Impact, 2013)

<sup>22</sup> (Barley Impact, 2013)

<sup>23</sup> (World, Wheat, Barley, and Sorghum Farming)

<sup>24</sup> (Little, 2013)

equipment was purchased from Agri-Service, John Deere, Double L, Spudnik, and Agri-tech.<sup>25</sup>

#### CANDIDATE COMPANIES

The purpose of this section is to reflect on the information that has already been stated and report further findings in order to report companies that could potentially move into the area.

IBIS anticipates that the annual growth of Wheat, Barley, and Sorghum will increase by 6.1% between 2012 and 2017.<sup>26</sup>

Barley is used for food and other beverage production, but its primary usage is for malting purposes. The global demand for beer production has risen 33.5% over the past 10 years which has created more volume for U.S. malt production industry. Malt production exports are estimated to increase 10.4% per year. A possible option would have beer manufacturing plants moved to Idaho, but it is not a move that makes sense for these companies given that plants are strategically placed in large markets of their consumers.

According to Dwight Little, several microbreweries are moving to the region because of their high demand of quality malt.<sup>27</sup>

#### POTATO

##### VALUE-CHAIN

Kent Beesley from the Idaho potato commission stated that north of Madison County is where all the seed potatoes for the entire state are grown. That would include Fremont County. See Appendix C for the complete value chain.

According to a USDA survey in 2011, 51,900 acres of potatoes were harvested in Madison and Fremont Counties. That same year a survey was published that stated that potato production equaled 18.4 million hundred pound weight (cwt).<sup>28</sup> According to Farm Bureau's website in 2011 potatoes sold for an average price of \$7.70.<sup>29</sup> Therefore, in 2011 potato production created approximately \$142.1 million in revenues.

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<sup>25</sup> (Experts, 2013)

<sup>26</sup> (World, Wheat, Barley, and Sorghum Farming)

<sup>27</sup> (Little, 2013)

<sup>28</sup> (National Agricultural Statistics Service)

<sup>29</sup> (Bureau)

Jeff Walters, part-owner of Walter's produce and manager of the fresh pack plant, said that Walter's Produce, a fresh clean and pack plant, on average has noticed plants have \$3.50-\$4.50 in costs per cwt. Furthermore, Walter's Produce is looking for a 25-50 cent profit on every hundred pound sale.<sup>30</sup> According to that information, fresh pack plants mark-up crop production prices nearly 33 percent.

Two BYU-Idaho agriculture professors, Jared Williams and Stephen McGary, stated that Eastern Idaho specializes in fresh pack and Western Idaho specializes in other types of processing.<sup>31</sup>

#### COMMODITY MOVEMENT

According to an Idaho Marketplace Report, fresh-pack companies hold accounts in terms of retail and foodservice markets.

Retail: Walmart, Sam's Club, Foodland, Fry's, Safeway, Bashas', Costco, Albertson's LLC, Fresh and Easy, Trader Joes, WinCo Foods, Smart and Final, Sprouts, Super K-Mart, Acme, Bi-Rite, Fulmer's, Sack N Save, Dave's Markets.<sup>32</sup>

Foodservices: FSA, Sysco, American Foodservice/Reinhart, Central Produce, Liberty Fruit, Loffredo, Marrone's (Pittsburg), EVCO (Emporia), US Foods (Topeka).<sup>33</sup>

In the survey two potato processors located in Madison County, Sun-glo and Keith Wilcox and Sons, Inc., reported that they sell to a large list of companies and primarily those companies are grocery store chains. Like Wal-mart, Safeway, Sysco.<sup>34</sup>

According to the above information, the Idaho potato reaches every corner of the United States.

#### SURVEY

Through the phone survey eight companies responded that produce potatoes in Madison and/or Fremont counties. Six of those companies planted a total of 8,560 acres in 2012. Three different farmers bought seed from Val Schwendiman farms and other farmers bought potato seed from Teton Seed. Fertilizers, chemicals, and pesticides were purchased from Valley-Wide Cooperation,

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<sup>30</sup> (Walters, 2013)

<sup>31</sup> (Williams, 2013)

<sup>32</sup> (World, Potato, 2013)

<sup>33</sup> (World, Potato, 2013)

<sup>34</sup> (Experts, 2013)

Simplot, Helena, Crop Production Services, and UAP Northwest. All respondents said that they irrigate, and those irrigation parts came from Golden West Irrigation and Knudsen Irrigation. Farm equipment was purchased or leased from John Deere Implement, Spudnik, Agri-tech, Double L, and Pioneer Equipment. Seven respondents clarified that they store potatoes after harvest, and of those who responded they store on-farm.<sup>35</sup>

#### CANDIDATE COMPANIES

The following information shows the presence of potato processors in Idaho,

“There are 11 potato processors in Idaho; the largest of them with the longest history of involvement primarily in frozen potato product processing in Idaho are J.R. Simplot Company, McCain Foods and ConAgra Foods. The Idaho processing plants of these three companies represent approximately a quarter of the US fry plant capacity. Basic American Foods and Idaho Fresh Pack Corporation (Idahoan) dominate the dehydration sector.”<sup>36</sup>

Large corporations are present in Madison and Fremont counties. Therefore, entry into the market would be difficult for other companies.

#### WHEAT

##### VALUE-CHAIN

Idaho is one of the few places in the world where 5 classes of wheat can be grown. Soft white wheat, both spring and winter, is the predominate wheat in Idaho and is grown on nearly 60% of Idaho’s wheat acres.<sup>37</sup> See Appendix C for the complete value chain.

A representative of General Mills stated that there is a new class of wheat called, hard white winter wheat, which could be produced in Madison and Fremont counties.<sup>38</sup>

In 2011 more than 85,000 acres of spring wheat were planted in Madison and Fremont Counties.<sup>39</sup> That year spring wheat on average was sold for \$6.53. Total

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<sup>35</sup> (Experts, 2013)

<sup>36</sup> (Yuliya Bolotova, 2008)

<sup>37</sup> (Commission)

<sup>38</sup> (Experts, 2013)

<sup>39</sup> (National Agricultural Statistics Service)

revenues comprised of more than \$30 million in Madison and Fremont counties.<sup>40</sup>

As mentioned above, elevators reported of marking up prices on commodities by two percent.<sup>41</sup> Two percent of \$30 million is \$600 thousand.

Furthermore, other entities like flour mill and bakeries add value to wheat.

The following quotation depicts a value-added option that may alter the wheat market. In 2006, the wheat commission made this statement, “in the future wheat straw has the potential to be used for making ethanol and building products.”<sup>42</sup>

#### COMMODITY MOVEMENT

East Idaho produces 43% of total Idaho wheat production and because of location and limited access to barges, 83% of that production stays domestic.<sup>43</sup>

According to research published by the Idaho Wheat Commission, 49% of Idaho wheat production stays in domestic markets. Of that 49%, 96% is sent to the Pacific Northwest or the Southwest. Most wheat travels to various end users in California, Utah, and Colorado.<sup>44</sup>

In East Idaho, wheat is transported 50% by rail movement, 49% truck, and 1% barge.<sup>45</sup>

In 2004, 18% of wheat production in Idaho was kept in Idaho for animal feed, seed, or raw product for the local flour milling operation. Pendleton Flour Mill, LLC in Blackfoot, Idaho produces over 570 million pounds of flour each year from 12 million bushels of wheat, 9 million of which are sourced from Idaho.<sup>46</sup>

#### SURVEY

Through the survey ten companies responded to questions that produced wheat in 2012. Those companies planted 14,780 acres of wheat in 2012. According to those companies, they bought seed from General Mills, Ririe Green, and Reinke Grain Elevators. Furthermore, they bought fertilizer, chemicals, and pesticides from Simplot, Helena, CPS, Valley-Wide Cooperative, and UAP. Nine out of the

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<sup>40</sup> (National Agricultural Statistics Service)

<sup>41</sup> (Experts, 2013)

<sup>42</sup> (Commission)

<sup>43</sup> (Commission)

<sup>44</sup> (Commission)

<sup>45</sup> (Commission)

<sup>46</sup> (Commission)

ten companies irrigate and they purchase those products from Golden West and Knudsen. They buy farm equipment from John Deere, Agri-tech Spudnik, Agri-service, and Double L. Eight out of the ten companies store wheat after production. One of the companies said that they store their wheat at an off-farm location.<sup>47</sup>

#### CANDIDATE COMPANIES

Blaine Jacobson, an Idaho Wheat Commissioner, stated that the reason finished wheat products are not commonly finished here (referring to East Idaho) is because it is cheaper to transport wheat than it is a finished product. Generally there are finishing plants near large cities and populations.

A representative at General Mills stated that it would be possible for Madison and Fremont counties to sustain a small scale specialty mill.<sup>48</sup>

#### HAY/ALFALFA

##### VALUE-CHAIN

According to USDA county surveys in 2012, Madison and Fremont counties reported 41,800 acres of harvested hay, alfalfa, and 134,000 tons of production.<sup>49</sup> Currently the market price for one ton of hay/alfalfa is approximately \$225.<sup>50</sup> According to those numbers Madison and Fremont counties generated \$40.4 million.

The team was able to locate two processing plants in the area. According to those interviews, Larsen Farms processes the hay by steam compressing the one ton bales into 1300 lb. bales, and then they generally make a two and a half percent mark-up on original production price.<sup>51</sup> Torgeson Farms processes hay by compressing the hay and chopping one ton bales into one inch cubes. Torgeson generally sells processed goods for 20% more than production price.<sup>52</sup>

##### COMMODITY MOVEMENT

Will Ricks, a member of the Idaho hay and forage commission, said that most of the hay produced in Eastern Idaho goes to Magic Valley and the dairies in Twin

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<sup>47</sup> (Experts, 2013)

<sup>48</sup> (Experts, 2013)

<sup>49</sup> (NASS Quick Stats)

<sup>50</sup> (National Agricultural Statistics Service)

<sup>51</sup> (Experts, 2013)

<sup>52</sup> (Experts, 2013)

Falls. Ricks said that general hay processors would not typically move to this region.<sup>53</sup>

#### COW-CALF

##### VALUE-CHAIN

According to USDA Census data in 2007, total cattle operations in Madison and Fremont counties were 110. Calves sold measured in head were 6,344.<sup>54</sup> USDA data shows that for the year 2013 the average price per hundred-weight on beef cattle is \$122.96.<sup>55</sup> Assuming that each Idaho calf weighed 500 lbs. and that calves sold in 2007 reflect to some degree this year's sales, Idaho generated \$3.9 million in calf sales. The team contacted beef processing plants and learned that the University of Idaho charges \$2.79 per pound of cut and wrapped meat.<sup>56</sup> A family operation in Jerome charges \$1.90/lb. for a dressed steer.<sup>57</sup>

##### COMMODITY MOVEMENT

Carl Erb with the Blackfoot Livestock Auction said that the auction sells about 50,000 head of cattle each year. Most of the cattle are headed to Cargill in Fresno California and JBS in Tolleson Arizona.

#### FEASIBILITY

The team was able to research briefly the feasibility of company development in Madison and Fremont Counties. Two subjects were mentioned during the survey and interviewing process- labor and natural resources.

##### LABOR

During the surveying, two potato processing plants located in Madison County mentioned that they struggle with finding and hiring enough workers to fill the demanded labor. Both companies demand approximately 100 employees.<sup>58</sup> Furthermore, the team was able to interview Will Jensen, Regional Economist at the Idaho Department of Labor, and he stated the following,

“I too have heard some low-wage production jobs are difficult to fill. If enough higher paying jobs are available the low-wage jobs are undesirable to job seekers. It's also possible that some potential workers choose to

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<sup>53</sup> (Experts, 2013)

<sup>54</sup> (NASS Quick Stats)

<sup>55</sup> (National Agricultural Statistics Service)

<sup>56</sup> (Experts, 2013)

<sup>57</sup> (Experts, 2013)

<sup>58</sup> (Experts, 2013)

remain unemployed. At times they are better off without a job if they remain eligible for government assistance of some form (food stamps, unemployment benefits, disability, etc.). I feel this is especially the case for those who would need to pay for child care if they returned to work. It's unfortunate but is often a reality. This scenario is more likely to occur for unskilled workers.”<sup>59</sup>

According to data from the Idaho department of Labor there are 1,025 farming, fishing, and forestry occupations and 780 graders and sorters of agricultural products in eastern Idaho. The average wage for farming, fishing, and forestry occupations is \$9.31. The average wage for graders and sorters is \$8.23.<sup>60</sup>

#### NATURAL RESOURCES

The team came across information about a potential tire factory that was looking for a location in Idaho to build, but it could not move to Rexburg because there was not enough natural gas to supply to the company. The team then contacted Steve Zollinger, Rexburg city attorney, in order to ask him about this unknown tire factory. Paraphrasing him he stated the following information,

A tire manufacturing company was looking to build a new facility. Rexburg was denied the opportunity to write up a proposal for recruiting the company to come into the area. The natural gas supplier of Rexburg could not promise the tire factory a certain level of gas at the time. Now, that is not a problem because there is a new pump and line that is direct to Rexburg. Before, Idaho Falls used some of Rexburg's gas. Now, Rexburg is able to support any facility with gas.

#### CASE STUDIES

Because of the common characteristics that they share with Madison and Fremont counties the team researched the following cities and their relationship with close-by universities.

##### MOSCOW, IDAHO

Moscow has about 23,000 residents and 12,000 are students of the University of Idaho.<sup>61</sup>

Jeffrey Jones, an economic development contact, discussed with the team some of Moscow's plans for developing agriculture. (See Appendix B)

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<sup>59</sup> (Jensen, 2013)

<sup>60</sup> (Labor)

<sup>61</sup> (History)

According to Jones, a tremendous amount of research on agriculture comes from the University. Also, they are working on an import substitution strategy. The idea comes from the fact that raw materials are leaving the community to be processed and local companies are then purchasing those processed goods back. Therefore, the city did research on whether it would be feasible to create a commercial kitchen, which could be used by the community on an hourly basis to process certain foods. The study came back and concluded that the Moscow is still too small to do something of that magnitude.

##### MANHATTAN, KANSAS

Manhattan Kansas has more than 52,000 residents, including students of Kansas State University. Enrollment at KSU is 24,300.<sup>62</sup>

The team interviewed John Pagen, director of economic development of Manhattan Kansas, he mentioned a few things that KSU and Manhattan are doing to build agriculture. (See Appendix B)

KSU currently has the KS Wheat Innovation Center, a bioprocessing and industrial value added program, and they are starting do work with the national agricultural research laboratory.

When asked what worked/did not work in terms of agricultural development, Pagen said that primary research is the community and university's biggest strength, and that the hardest part is the actual implementation of ideas.

##### AMES, IOWA

According to census data, the Ames population is at 58,965, including student residents.<sup>63</sup> Iowa state university is located in Ames and has a student body enrollment of more than 31,000.<sup>64</sup> Ames is 30 miles from Des Moines Iowa.

Tiffany Coleman, director of business and economical development in Ames, was interviewed by a team member about the relationship between Ames and the university in growing the agricultural economy. When Coleman was asked if the city had a specific focus on agriculture in terms of development, Coleman talked about a few interesting things. (See Appendix B)

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<sup>62</sup> (KSU)

<sup>63</sup> (Ames, 2010)

<sup>64</sup> (ISU)

First, Ames and Des Moines were working on a corridor between the two cities to grow food production, biotech, and biotech pharmaceutical. The cities are in the process of marketing the corridor right now.

Second, ISU has a research park for biotech companies to set up satellite offices. Currently Conagra, Monsanto, and Duponts have offices at this research park. The companies research with the agriculture programs and recruit students.

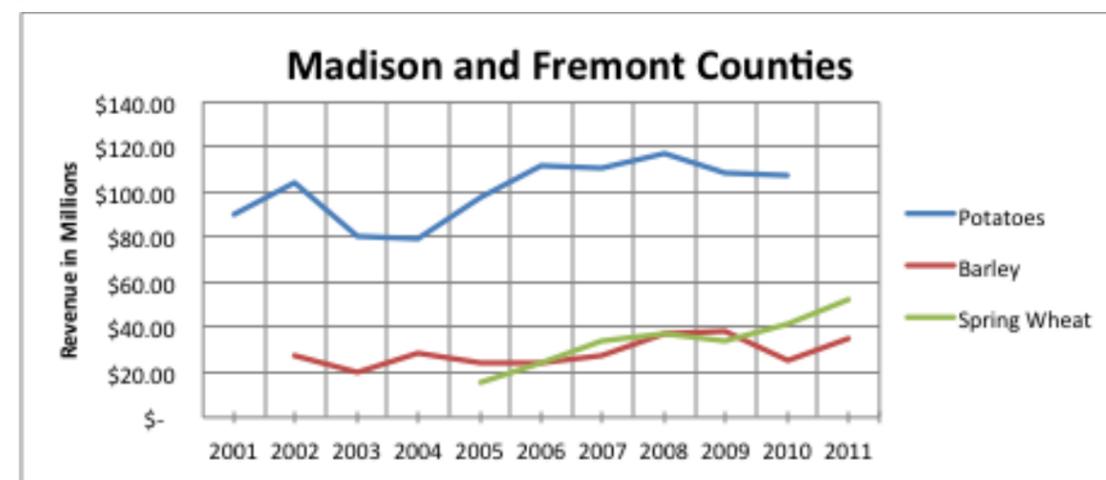
#### OTHER

Basic American Foods in Rexburg is the only place in the region that uses a wood boiler, and that demands all the lumber supply within a 300 mile radius.<sup>65</sup>

Iogen, an ethanol plant that uses wheat and barley straw, spent time and money in Eastern Idaho, specifically Shelly, researching and planning in order build a plant, but instead they ended up going to Canada.<sup>66</sup>

#### REGIONAL ADVANTAGES

#### COMMODITY TRENDS



<sup>67</sup>

According to the above graph, potatoes generate the most revenue in Madison and Fremont counties. The two types of potatoes that are most common are fresh-pack potatoes and seed potatoes.

<sup>65</sup> (Experts, 2013)

<sup>66</sup> (Experts, 2013)

<sup>67</sup> (National Agricultural Statistics Service)

Wheat revenue shows an increasing trend. However, value-added options connected to wheat are limited because of the lack of presence in the milling industry. Large populations attract finishing mills.

Barley is the third most revenue-generating crop in Madison and Fremont counties. The market trend for barley is on the rise. Furthermore, Idaho is forecasted to be the number one producing state in the US of barley- with most of the production coming from Eastern Idaho. Also, according to the barley commission, malting facilities are migrating from the Mid-west to Idaho.

#### AVAILABLE RESOURCES

The table on page 21 depicts the local advantage of available resources. The table shows companies categorized by their type and location. Companies are related to the potato value-chain. The advantage is that all companies are located within Madison or Fremont counties or Eastern Idaho.

Companies and Location				
Company Type	Madison/Fremont	Eastern Idaho	Idaho	Other
<b>Seed Providers</b>				
Mark Kuehl	X			
Grand Teton Organics	X			
Michael Steinmann	X			
Reynolds Brothers	X			
W & S	X			
PSG Alturas	X			
Southwinds Farms	X			
River Ranch Ent.	X			
Skyline Farms	X			
Howell Farms	X			
Val Schwendiman	X			
<b>Crop Treatment</b>				
Ag Concepts Corporation				
Agrium US		X		
Western Farm Service				
Simplot, J.R. Company		X		
Helena Chemical Company	X			
Valley Ag	X			
CPS		X		
UAP		X		
<b>Irrigation Equipment</b>				
Golden West	X			
Wayne Ferent	X			
Knudson	X			
<b>Farm Equipment Dealerships</b>				
John Deere Implement	X			
AgriTech Corporation	X			
Pioneer	X			
Agriservice	X			
<b>Potato Farm Equipment Manufacturers</b>				
Spudnik, LLC		X		
Double L		X		

(See Appendix C)

## CLIMATE

The cool consistent climate of Madison and Fremont counties is a regional advantage for certain crops. Professor Jared Williams said that the cool climate helps potatoes to stay fresh for longer period of time. Dwight Little from the barley commission said that the consistency of climate in Eastern Idaho attracts barley buyers because other states often have crop damage due to severe weather.

## BEST PRACTICE EXAMPLE

### AMES, IOWA

According to Tiffany Coleman of Ames Iowa, the city has seen positive impacts from partnering with Iowa State University. Companies involved in the ISU research park benefit from research results, and the community is benefited by employment opportunities.

The Ames and Des Moines food production corridor is in the marketing stage right now. As a development program, people go out and speak with businesses about their future and what is currently happening. This type of promotion builds brand recognition for the city.

The research park and corridor were created because of the agricultural strengths that exist. Simon Tripp, a senior director of the Battelle Memorial Institute, said to Iowa business developers, referring to the Midwest, “You are the Silicon Valley of ag biosciences... You have assets here that exist nowhere else in the world. You have a perfect storm of opportunities coming together, in terms of the big manufacturing companies, the powerhouse global multinationals in ag biosciences, some of the best research universities in the world, with tremendous resource assets, and of course the land.”<sup>68</sup>

## LOCAL UNIVERSITY PLANS

### BYU-IDAHO

According to Fenton Broadhead, Vice President of BYU-Idaho, the University is putting time and money into building the agriculture programs and facilities. With board approval the University will build additions onto the livestock center and build a large agriculture building on campus. The University is also offering wide range of new agricultural degrees, animal food science degree, a plant science degree, an agriculture economics degree, and an agriculture business degree.

<sup>68</sup> (Hicks)

## SUMMARY OF FINDINGS

This area has agricultural advantages that can be utilized in order to build the local agriculture economy. They include but are not limited to: climate, land, and agriculture expertise.

The research conducted for this project was centered on the top five major commodities produced in Madison and Fremont counties. With those commodities the team was able to identify that the market is effective and mature. Therefore, the team was unable to identify a value-added option that would be compliant with the area's demographics.

Land was identified by experts at the BYU-Idaho field day as being an advantage of the area. According to further research land is specifically an advantage for potatoes and barley.

According to experts the climate of this area is a comparative advantage. Cool climate helps in potato storage and barley production.

The agricultural expertise of Madison counties is connected to BYU-Idaho. In order to market to companies the advantages of being located near a university with a strong agriculture program it would be important build a strategy with BYU-Idaho. Fenton Broadhead stated, "It is my hope that a dialogue will start between the city and University. I like the examples of Ames Iowa and Manhattan Kansas. We need to start a situation where the city and University work together to facilitate company growth."<sup>69</sup>

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<sup>69</sup> (Broadhead, 2013)

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## APPENDIX A

Company	Name	Title	Phone number	How long have you been working in the industry?
Walters Produce	Melissa			
Arlenco Inc	Lane	Farmer		
Websters Mile High Farm			208.356.9598	
Basic American Foods	Joe	Plant Manager	208.356.3631	16
Crapo (Trucking)	David	Manager	208.624.3293 ex. 11	25
Dal Schwendiman Farms	Anne Schiwendiman	Wife		
Marsden Farms	Gary Marsden	Owner		40
Anitrace	Kyle Kunz	Field Engineer		1
Cornelison Farms	Rainy			
Cornelison Farms	Rainey	Dispatch	208-356-0396	
Bevan Jeppesen	Bevan	Owner	208.390.8240	30
Erikson L.L.C.			1-208-709-5576	since 1995
Walters	Jeff	Owner	208.458.4105	
Crapo Farms	Bruce	Owner	208.313.6303	43
Sun-glo	Bruce	Owner	208.313.6303	43
Mitch Hughes Inc	Mitch Hughes	Owner/president	(208)458-4670	40 years
Keith Wilcox & Sons, Inc.			1-208-356-7563	incorporated in 1948
Kim Wahlen Farms	Tanner Wahlen	Manager	2082212300	10 years
Neal Ward	Eli Ward	Farmer's Dad	2083565190	40 years
Richard Smith Farms	Richard Smith	Farmer	2083564912	40 years
Neville Farms Inc	Scott Neville	VP and secretary	208-356-4130	40 years

Statistic	Value
Total Responses	21

**2. Check one that relates most to the company.**

#	Answer	Response	%
1	Crop Production	12	55%
2	Animal Production	0	0%
3	Processing of the following agricultural commodities; potatoes, wheat, barley, hay/alfalfa, and cattle	4	18%
5	Manufacturing of agricultural inputs	0	0%
6	Other	5	23%
7	Agricultural Input Company (i.e.ag.chemicals,seed,etc.excluding farm equipment)	0	0%
9	Farm equipment distribution/retail	0	0%
11	Farm equipment manufacturing	1	5%
13	Value-add	0	0%
	Total	22	100%

Other
Fresh Pack
Transportation
Transporting Crops
Crop productin and livestock

**3. What year was the company established?**

#	Answer	Response	%
1	1850-1900	0	0%
2	1901-1950	3	21%
4	1951-2000	8	57%
5	2000+	3	21%
	Total	14	100%

**4. Approximately how many employees work for the company?**

#	Answer	Response	%
1	0-100	15	83%
2	101-200	2	11%
3	201-300	0	0%
4	301-400	1	6%
6	401-500	0	0%
7	501-600	0	0%
8	601-700	0	0%
9	701-800	0	0%
10	801-900	0	0%
11	901-1000	0	0%
12	1001+	0	0%
	Total	18	100%

**5. What crops did you produced in 2012?**

#	Answer	Response	%
2	Barley	5	42%
3	Wheat	10	83%
4	Potato	8	67%
5	Alfalfa/Hay	2	17%
6	Other	4	33%

Other
Mustard, Flax Seed
Canola
Corn
Sugar Beets

### 6. How many acres of each crop were planted last year? 2012.

#	Answer	Response	%
1	Barley	7	64%
2	Wheat	8	73%
3	Potato	6	55%
4	Alfalfa/Hay	2	18%
5	Other	3	27%

Barley	Wheat	Potato	Alfalfa/Hay	Other
60				
2300				
1550	600		350	
850	300	600		
2000	2000	3500		150
2500		1200	450	100
100	280	160		
	2000			
	2700	2300		1800
	5000			
	1900	800		

Statistic	Value
Min Value	1
Max Value	5
Total Responses	11

### 7. From whom did you buy seed in 2012?

Text Response
General Mills
Reinke Grain Elevator
Potato- Val Schwediman, Barley- Bush ag (asgood), Wheat- Ririe Green
potato- teton valley, ashton, special seed (1000 acres) Montana and North Dakota, Barley- Bush
corn- pioneer, barley-trost feed and seed, potato-steve co farms
Val Schwendiman
Teton Seed
Out of State in Oregon and local Elevator companies
They have their own seed program, also buy from Sidoway, Fosters, Swendiman's

Statistic	Value
Total Responses	9

### 8. Which of the following products did you apply to your crops in 2012?

#	Answer	Response	%
1	Fertilizer	11	100%
2	Chemicals	10	91%
5	Pesticides	8	73%

### 9. From whom did you buy those products?

#	Answer	Response	%
1	Fertilizer	9	100%
2	Chemicals	9	100%
3	Pesticides	8	89%

Fertilizer	Chemicals	Pesticides
Helena	Helena	Helena
Simplot	Simplot	
Valley Ag	Valley Ag	Valley Ag
Simplot, CPS, Valley Wide		
Simplot		
Helena	Helena	Helena
Simplot	Simplot	Simplot
Valley Wide Co-Op	Valley Wide Co-Op	Valley Wide Co-Op
UAP	UAP	UAP

### 10. Do you irrigate?

#	Answer	Response	%
1	Yes	10	91%
2	No	1	9%
	Total	11	100%

### 11. What equipment do you use to irrigate?

#	Answer	Response	%
1	Canal	1	10%
2	Hand-line	4	40%
3	Wheel-line	2	20%
4	Pivot	9	90%
5	Other	0	0%

### 12. What equipment do you use to harvest?

#	Answer	Response	%
1	Combine	10	91%
2	Tractor	4	36%
3	Auger	0	0%
4	Picker	1	9%
5	Other	2	18%

#### Other

potato stuff- (spudnik) blackfoot or america falls  
Grain Combine and Digger

### 13. Are there any additional inputs that we have not mentioned? If yes, please explain.

#	Answer	Response	%
1	Yes	1	13%
2	No	7	88%
	Total	8	100%

#### Yes

Crop insurance

### 14. Do you store any crops after harvest?

#	Answer	Response	%
1	Yes	9	75%
2	No	3	25%
	Total	12	100%

## 25. Who did you sell to in 2012?

### Text Response

all potatoes sold to a marketer and grain sold in idaho  
60 or 70 buyers, Wal-mart, Safeway, 5-guys, Cysco, etc.  
big list, primarily grocery store chains

Statistic	Value
Total Responses	3

## 27. Who did you sell your crops to in 2012?

#	Answer	Response	%
1	Barley		55%
2	Wheat		73%
3	Potato		64%
4	Alfalfa/Hay		18%
5	Other		27%

Barley	Wheat	Potato	Alfalfa/Hay	Other
Ririe. \$8.50				
Reinke Grain	Reinke Grain		Pocock	
Bush Ag	Ririe Green	Webster Potato, Sun-glo, Rigby Produce		
Bush	General Mill (newdale)			Canada (office here)
Bush		Sun-glo	Self	Self
General Mills	General Mills	Walker Produce		
	General Mills			
	General Mills	10% - McCain Processor. 90% Pleasant Valley Potato		Algamade Sugar Company (white sugar)
	Rire Grain, General Mills			
	General Mills	Rigby Produce, Lon-Pariel		

Statistic	Value
Min Value	1
Max Value	5
Total Responses	11

## 38. What does your company supply?

### Text Response

Bring potatoes in wash them, put them in bags and boxes, and ship them out to major corporations all over the county. We have no local buyers.

Trucking and transportation of potatoes

Potatoes, wheat, barley, alfalfa, cattle

Statistic	Value
Total Responses	3

### 39. Who are your suppliers?

Text Response
Local Farmers Reinke grain in Ashton, Centennial grain in Rexburg, Pasley grain in Roberts, Potato seed: clemensville, 1/3 comes from Montana (private individual)

Statistic	Value
Total Responses	2

### 40. Who do you sell to?

Text Response
Grocers and other local producers Sunglo- potatoes, Eagle produce in I.F. Reinke grain in Ashton, General mills, some to Pasley

Statistic	Value
Total Responses	2

### 42. Do you have any recommendations of people we should contact in order to find agricultural related needs in the area?

Text Response
Jeppesen, Summers, Ricks Crapos, Walters. Who should we talk to at Crapo for crop production? Bruce at potato shed 313-6303. Allen Bom, 652-3717 none Shaun is more over the crop production for Walter farms.

Statistic	Value
Total Responses	6

### 43. Other information.

Text Response
Basic is the only place that uses a wood boiler, and that demands all the lumber supply within a 300 mile radius. How many employees work with you? 40 Where do you get fuel? Barry oil, conrad and bishoff What do you haul? Landscap products, road salt, coal, grain, fertilizer, dairy feed(ddg's). Where does it go? fertilizer from pocatello into utah. Grain is hauled from rexburg to Utah (flower mill, grain distributors)Big J Milling in Brigham City, Cereal foods in Ogden 801-364-1529, Horizon 801-621-3540. none He has been audited by the IRS previously. All equipment is bought locally from the 3 counties (Jefferson, Madison, Fremont)

Statistic	Value
Total Responses	5

#### 44. From whom do you buy that equipment?

#	Answer	Response	%
1	Canal	0	0%
2	Hand-line	4	50%
3	Wheel-line	2	25%
4	Pivot	8	100%
5	Other	0	0%

Canal	Hand-line	Wheel-line	Pivot	Other
			Bought previously used	
	Came with rented ground		Golden West	
			Golden West	
			Golden West	
	Wayne Ferent and Golden West	Wany Ferent and Golden West	Wayne Ferent and Golden West	
	Knudson	Knudson	Knudson	
			Golden West	
	Golden West			

Statistic	Value
Min Value	2
Max Value	4
Total Responses	8

#### 45. From whom do you buy that equipment?

#	Answer	Response	%
1	Combine	8	89%
2	Tractor	4	44%
3	Auger	0	0%
4	Picker	1	11%
5	Other	1	11%

Combine	Tractor	Auger	Picker	Other
Bought used	Bought used			
Agri-service				
John Deere			LL manufacturing, Spudnik	
Agri-tech, Spudnik, LL	John Deere			
Spudnik				
Spudnik	John Deere (2 year lease)			
John Deere				
John Deere, Pioneer	John Deere			
				Farm sales (used)

Statistic	Value
Min Value	1
Max Value	5
Total Responses	9

**46. Do you store on-farm or off-farm? if off-farm, please explain where.**

#	Answer	Response	%
1	on-farm	7	88%
2	off-farm	1	13%
	Total	8	100%

**off-farm**

Potatoes are all on farm, Wheat is both on and off

**48. From whom did you buy those commodities in 2012?**

#	Answer	Response	%
1	Barley	1	33%
2	Wheat	1	33%
3	Potato	3	100%
4	Other	0	0%

Barley	Wheat	Potato	Other
in county	in county, some from teton county	in the counties	
		Local growers	
		mostly feemont county	

Statistic	Value
Min Value	1
Max Value	3
Total Responses	3

**49. From whom do you purchase that equipment?**

**Text Response**

all bought in idaho

Volm

madison and freemont

Statistic	Value
Total Responses	3

**52. Where are you located?**

#	Answer	Response	%
1	Madison/Fremont counties	12	75%
2	Idaho	1	6%
3	Outside of Idaho	3	19%
	Total	16	100%

**Outside of Idaho**

Brazil, Chile, Indonesia, South Korea, California

Teton City

some in Fremont and some in Jefferson, some in Madison

**54. Has your company considered locating or adding a subsidiary in Idaho?**

#	Answer	Response	%
1	Yes	3	100%
2	No	0	0%
	Total	3	100%

## APPENDIX B

### INTERVIEWS

#### BARLEY

##### COMMISSIONER INTERVIEW

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Dwight Little

Chairman Barley Commission

Phone: 208-390-0678

Email: littlefarming@hotmail.com

Most all barley that is produced in District 3 goes to 4 major players; Anheuser, Integrow, Great Western Malt, and Miller Coors. Anheuser Busch. Most of those are in Idaho Falls and they are malting facilities. They turn the barley into malt and then distribute it to breweries. Integrow- toil molester. Great western malt- There is a toil molester (sell to breweries) big exporter, service most nearby breweries. Miller Coors – Is located in Colorado. Grupo Modulo- They sold a large portion of their malting production to Cargill, and other than that they send a lot to Mexico, Corona. Feed barley is reject malt. We use to have a decent feed barley market, but now there are huge malting companies that have deep pockets, and producers go to them first. During the last few years there has been a migration of companies dealing with barley from the Midwest to this area, because this area produces consistent quality barley. Also, because corn and soy bean prices are high enough that farmers are cutting back on their barley production to produce corn or soy beans. Corn can also carry with it a disease that affects barley plants. Climate is a competitive advantage to this area. The dry easy weather coupled with controlled irrigation makes Idaho more consistent than the mid-west. North Dakota, Wisconsin, and Minnesota often have weather issues that hurt their crops. After plants malt the barley, that malt can be used for beer, candy flavoring, and bakeries. Research shows that barley is healthy and in some aspects it is better for health than oats. The commission is working with companies in Japan to recruit them to the area, they deal specifically with candy items and cereals. Microbreweries are moving into the area. The commission likes this because they use more malt in their beers. Soon Idaho will be ranked number one in barley production.

##### COMPANY CALLS

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Busch Agricultural Resources Inc. - \$6.40 (bushel = 48 pounds) purchase from local farmers.

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Ririe Grain and Feed – Elevator. They pay \$5.28 per bushel and sell for \$5.38 per bushel. Factors of influence on location include; Weather and water. There company could be benefited on a local level by acquiring more ground.

When asked if they would ever relocate, they said, Yes, however, location is adequate right now.

Scoular Grain- They pay \$11 per 100 (\$5.28 per bushel) and sell on a 2% mark up (\$5.38 per bushel). Malt will be contracted in the fall. Feed will go to major dairy areas and flower mills. Scoular is a co-operative and sells around the world including South America.

Integrow (Grupo Modelo)- John Zitce, manager, He said that one of the main benefits that Madison and Fremont counties have is the railroad tracks.

Great Western Malting Co.- Randy Ineiwirth, said the reason for their location of their malting plant in Pocatello is due, “to the most consistent barley producers in America [Idaho].” He also said that this area’s strengths are due to land size and the willingness of farmers.

#### WHEAT

##### COMMISSIONER INTERVIEW

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Blaine Jacobson

Idaho Wheat Commission

(208) 334-2353

Most of the wheat produced in Idaho has a domestic purpose. A lot of the eastern Idaho wheat moves to Ogden because it is a large milling area. General mills in Idaho Falls and Blackfoot will source some to Iowa. Pendleton Flour mill in Idaho actually sells a finish product. The reason finish wheat products are not commonly finished here is because it is cheaper to transport wheat than it is a finished product. There are finishing plants near large cities. Moulton mill and Pepperidge farms are in Utah and they both finish products. Pepperidge makes gold fish. If you want to get more information on where the commodity is headed then talk to elevators. Ririe elevators is a large operation. You can talk to Jerry Cramor at Ririe elevators.

Gordon Gallup, He said that wheat is grown in Eastern Idaho as a rotation crop and that it is a good crop for the short cool season. Utah mills have the advantage of major rail systems. There is only one flourmill in Idaho. There was talk about an ethanol plant moving to Burley, but they walked away. Soft white wheat is predominate in the area.

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## HAY

### COMPANY CALLS

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Don Harris – He keeps all of his hay for his cattle. He sells cattle at Idaho Falls stockyard. He also said people sell to a stockyard in Blackfoot and Scars feedlot.

Gary Ball – His crops are dry land and he won't harvest this year. He told me to contact Ryan Robinson, a hay broker in Idaho Falls. I spent ten minutes looking for his information and I didn't find anything.

Will Ricks – Most of the hay/alfalfa is going to magic valley, dairies in twin falls. It is also going to California and Washington for processing and shipment. Will said that general hay processors would generally not look into moving to this region. However, he was excited about the idea of ag. growth. He told me about a company in Canada that processes straw into fuels. He said that about five years ago they wanted to move to the Shelley area. Apparently they were close to moving here, but they had problems with the government. He gave me Carl Cooks contact information.

Carl Cooks – 351-1055. Carl is a large part of the straw and hay industry here in the area. Search Iogen, an ethanol plant that uses wheat and barley straw, in the post register. They spent a lot of time and money up here trying to come to the area, but they ended up going to Canada. Richard Larsen in Dubois processes hay. Ron Torgesen in Hamer processes hay.

Larsen Farms- 374-5660. They have the largest hay storage facility in the US. They double compress 1 ton bales of hay, they steam compression to 1300 lb. Export to china and use rail to Florida and New York. They percentage markup is not even 1 percent after costs. She said a 10 dollar profit per unit is the original idea. Transportation costs are 80-90 dollars per ton on rail and 150-180 on truck to New York.

Ron Torgeson Farm- 243-5438. According to Ron last year they were purchasing hay at about 190 on ton and selling their processed cubes at 250. Their processing includes chopping the hay and adding water. They make small hay cubes about 2 inches by 2 inch. He told me that he heard that hay was at about 210 right now, but that it is probably higher for premium dairy feed. He said that they truck their hay. Last year it cost about 3,000 dollars to ship 25 tons of hay to Iowa. The trucking system charges by the mile. Torgeson sells mostly to Jerome, Boise, and California; however, they'll place an order anywhere. Some people buy their cubes and put them in smaller bags in order to sell them on themselves of retailers for rodents. Most of the cubes are sold to horses.

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## BEEF

### COMPANY CALLS

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Carl Erb- Blackfoot Livestock Auction. Carl said that they run about 50,000 head of cattle through the company every year. There are no large slaughterhouses around Idaho, a few small family-owned companies, but most of the meat is going to Cargill, JBS, and Fresno California. The biggest cost to animal production is feed.

University of Idaho beef processing- According to the lady that answered the phone they sell cut and wrapped meat for about 2.79 lb.

Carl in Jerome- Is a family operation. They usually sell a dressed steer for \$1.90

## POTATO

### COMPANY CALLS

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Jeff Walters- It is hard to operate at a certain sale price for the potato industry. Walter's are looking for a .25-.50 profit off of hundred pound weight. Right now it is common for a fresh pack to have costs from 3.50-4.50 cwt and they usually buy from the producer at 7.70 cwt. The disadvantage Walter's has is location. They compete big with Colorado and Wisconsin. Wisconsin has better location.

Wilcox and Sons- I talked to a receptionist. Wilcox buys about 50% of their potatoes and they get the rest from their own production. On a fifty pound box the market tends to be anywhere from 11.50 to 17.00 cwt.

### COMMISSIONER INTERVIEW

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Kent Beesley, potato retail promoter, He said that Burbanks are grown in Eastern Idaho because of the cool climate. Seed potatoes are grown north of Madison for the entire state of Idaho. Part of the commissions purpose is to market the Idaho potato to retail stores all over the world. It is important to keep the Idaho potato brand in high recognition.

### TOWN AND GOWN RELATIONSHIP

Steve Zollinger, Rexburg city attorney - A tire manufacturing company was looking to build a new facility. Rexburg was denied the opportunity to write up a proposal for recruiting the company to come into the area. The natural gas supplier of Rexburg could not promise the tire factory a certain level of gas at the time. Now, that is not a problem because there is a new pump and line that is direct to Rexburg. Before, Idaho Falls used some of Rexburg's gas. Now, Rexburg is able to support any facility with gas.

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Fenton Broadhead, BYU-Idaho Academic Vice President- The University is putting time and money into building the ag. programs and facilities. With board approval the University will build additions onto the livestock center and build more ag. buildings on campus. The University is now offering an animal food science degree, a plant science degree, an ag. econ degree, and an agribusiness degree. These are the most important degrees at BYU-Idaho. Siri is directly involved in ag. research. The University can offer ag. companies capable graduated students and research. Jared Williams and Greg Blazer are faculties members that are working on ag. related research projects right now. As a University I don't know if we've visited with city councilmen about what the University is trying to do with agriculture. In my opinion the city and county should work on making a marketing plan for bringing in ag. businesses. They should explain what BYU-I is doing, share information about community, and focus on their comparative advantage. It is my hope that a dialogue will start between the city and University. I like the examples of Ames Iowa and Manhattan Kansas. We need to start a situation where the city and University work together to facilitate company growth.

Will Jensen, Regional Economist at Idaho Department of Labor, I too have heard some low-wage production jobs are difficult to fill. If enough higher paying jobs are available the low-wage jobs are undesirable to job seekers. It's also possible that some potential workers choose to remain unemployed. At times they are better off without a job if they remain eligible for government assistance of some form (food stamps, unemployment benefits, disability, etc.). I feel this is especially the case for those who would need to pay for child care if they returned to work. It's unfortunate but is often a reality. This scenario is more likely to occur for unskilled workers. We do keep some statistics about wage data by occupation. Here is a link to that information for the eastern Idaho nonmetropolitan counties (<http://tinyurl.com/ppt27ea>). If employers are offering wages below what a competing business offers, they will have some difficulty in attracting workers. Over time the labor market will force these employers to make accommodations by either raising the wage/benefits they offer or converting to a mechanized means of production.

Jared Williams, Applied Plant Science Professor at BYU-Idaho, Jared talked about the comparative advantages that Madison and Fremont have over other parts of the state. He said that an advantage of barley production in the area is the cool climate. He said that the soil type here is loess. Potatoes advantage is that land is cheaper and because land is cheaper farmers can have better margins on their costs. He also said that fresh potatoes are more common on the Eastern

part of the state because the cooler climate helps the potatoes last longer. Fresh-pack plants need their potatoes to look good year-round. Most of the potato processers are on the other side of the state because the production is higher due to the yields. The south part of the state has higher yields in all commodities because they have a higher growing season. He said that the southern part of the state has older irrigation rights and therefore they have the advantage on irrigation. He agreed that Idaho Falls has the advantage over Madison with respect to transportation because of the interstate.

Stephen McGary, Ag Economics Professor at BYU-Idaho, said that yield per acre is a great tool to use in order to know comparative advantages. He said that soil types are the main reason for different yields. Also, that the length of the growing season is important to look at. The western part of the state is processers and the eastern part is fresh potatoes. He didn't completely agree that an advantage of this area is cheaper land. The value of land is based from possible profit. He said that by looking at the coefficient of variance of historical prices, one could see the level of risk in planting certain crops.

#### TOWN AND GOWN EXAMPLES

**Ames, IA-** Tiffany Coleman, Ames Econ. Development Center: Dir. Business & Economics

- How developed is the agricultural (in terms of value added or research from the university) economy in your area?

She would say that the economy is pretty strongly developed. Whether it is raising livestock, or plant genetics, energy, vaccines, they have a lot of agricultural business obviously reaches beyond IA.

- Have you had a specific focus on agriculture in terms of development?
  - If so what did you do?

Yes. They actually focus in on it even more right now. They are very close to Des Moines. They are only 20-30 minutes apart. They are actually working on a corridor between Ames and Des Moines. That is food related, growing food, biotech, especially biotech pharmaceutical but also more so on the growing food side. They are working on marketing this corridor right now. They have partnered for a long time on this topic. They are formalizing the market efforts right now. They also have ISU research park, this is full of biotech type companies (Conagra, the Monsanto, the Duponts---satellite offices). Some of this is to recruit talents out of university, but also the companies are working in ag. With the university. This research park is basically full. Another example is they also have federal labs

that do research. If there is an epidemic that breaks out there is a federal agency that manages information for animal zoonotic disease breakouts for livestock/poultry. They also federal research facility and partnerships.

- What worked/did not work in terms of agricultural development?

Hard question to answer because she hasn't been in the position for a long time. Hasn't heard of any negatives of things that didn't work. She guesses that one of the things they are getting into now is supporting the businesses that are in the community but also developing a workforce for those looking for jobs but also the interns coming out of ISU. The strategies that are working back are the partnerships with the university, the partnerships with the corridor (this is getting stronger and stronger and going to continue to see positives), they are also think what has worked is a strong existing business program. As a development program they go out and speak with businesses about their future and what is happening. These are all very positive aspects.

- What was your relationship with the universities agricultural college in developing agriculture in the community?

What is really positive between the university and the community is the vitality and people are always coming up with new ideas. The community is made up of people that work at the university. She hasn't seen a lot of friction b/w the community and university. Then the negative might be between the two entities is they have all of these students that come to Ames, and they don't realize that there are jobs and opportunities in Ames and that they don't have to leave and go home. And these jobs are with very progressive and on the bridge type companies. The students don't realize the opportunity that these companies are looking for people to work in their businesses, but the students don't know who is here. The problem is also they are spending to attract a work force.

- In your opinion, what is the best strategy for developing a community, like yours, in terms of agriculture?

What works best? Still has to go back to a high level. She thinks a lot of is developing and maintaining and constantly interacting with your relationships and trying to be flexible with the evolving relationships in agricultural development and university and city and county.

Just to give me an idea, there is also University of Iowa in Iowa City and they also have a corridor concept as well, but it is not as closely linked to agricultural industry, it is more focused on medical/ pharmaceutical sciences as well. There

are so many companies though in Ames that work directly with the university for research and development. The Ames-Des Moines corridor she can really see where there are a lot of potential connections b/w the two towns. There are certain types of businesses that want to be close to university but also want the amenities of the bigger town. If the community has an opportunity to get a processor, sometimes takes 1 or 2 other businesses/processors to attract the other businesses and then one by one they will come, it will be a synergy and then it will take up speed. Ames has evolved in the last 10-15 years. She is welcome to more calls in the future

**Moscow, ID-** Jeffry Jones, City of Moscow, Economic Development Contact

- How developed is the agricultural (in terms of value added or research from the university) economy in your area?

It is fairly well developed; from the standpoint is a big part of the economic base of Latah County. The low quotational index for the economy for Latah and Whitman counties. Then together, they have a low quotational index of 3.15 (national average is 1). Much more specialized in the area than compared to the US as a whole. The two primary products in the area are wheat and barley. That is what the majority, but they also have specialty crops like garbanzo beans which are made into hummus. The University of Idaho, school of ag. Is headquartered there. There is a tremendous amount of research that comes out. In terms of processing they feel like they can do more in terms of developing that section. They do have some manufacturing for specialty breads and cheese, but it is usually fairly small scale. They want to put more emphasis in that in terms of economic development strategy in terms of import substitution strategy. So folks don't have to go out and import the products, they want to have them locally grown, and are fresh. One of the great things about agriculture is it has a high level of responding. When you are farmer/producer you are buying a lot of your inputs locally, but you are exporting products when it is grown but then you are importing money. It is a win-win situation.

- Have you had a specific focus on agriculture in terms of development?
  - If so what did you do?

Well, they have just finished a study looking at that within the region to determine what opportunities exist. To determine if they have enough producers/markets in the area to build more commercial kitchens the area which people could use on an hourly basis. The study came back to say now is not the time. Because they to build on what you already good at and build on the

specialization. A lot of the things they were looking at was could we have a butcher facility to meet federal regulations for butchering livestock, perhaps a mobile truck. Whether or not they should allocate or focus on more mill development in order to create more opportunities for grinding a product and manufacturing more bread. The study said that Moscow (24k people) is still a little small to jump on something of that magnitude. And without being very sure of the market the emphasis is to support local entrepreneurs in the region that are already doing the value added products. This would be a good start so people have greater access with using commercial kitchens. More specifically, they are looking at a facility owned by Latah County on fairground sight. Pullman, is pretty much the same (population). They have more high tech jobs because of Slitcher engineering and a bigger school. On the Idaho side there are more restaurants and a lot has to do with the differences in the taxation and the WA minimum wage is much higher. There is a significant amount of agriculture in both counties. Last time he looked was 30% of land base in Latah was in some form of agriculture.

- What worked/did not work in terms of agricultural development?

Right now, the farmers have done really well in the area. They have seen increased interest and increased growth of number of organic acres in the areas. And also specialty crops like garbanzos in the area. Evaluating if they can produce a hummus product locally. With regards to specific focus, they have the university generating a lot of research. They also have farmers/coops that are very astute and are able to augment and change their practices very quickly. In the area they only have a generic overall goal of creating more value-added product in the area. But everybody is still trying to figure out how to do that. Prior to 2002, sales of agriculture generated 2-3 million dollars in sales in the county. The number fell in 2002 to 2.7. Then it stormed back even through the recession. Then of course export market for food is big in Moscow too. There was really no threshold number to indicate when the quad county region was ready for the center with the commercial kitchen or any value added agriculture. Many were hoping for that result. The issue came down to can you operate something like that without public subsidy. The consultants said something like that would require a significant public subsidy to make it work. The community would welcome a corporate processor as long as it was not a threat to resource base, primarily water. They have a lot of young people in the region, that would make finding a workforce relatively easy. As forestry declined many have been trying to find their way into other sectors. A lot of people in their market are underemployed, there are a lot of people living in the surrounding more, smaller

towns that are not students that would commute. There is a manufacturing facility in Genessee that does manufacture agricultural product (lentils).

- What was your relationship with the universities agricultural college in developing agriculture in the community?

They have a good working relationship with the university and they meet monthly. So the first thing is communication. They have an urban/renewal agency that works b/w the university and the community to assist in helping them in their long term planning and development of 4 acres they just purchased. Specifically, with regards to agriculture, U of I has a research facility in Caldwell and a commercial kitchen that is funded by private partners. They would love to have them up there, but they don't have the private funding in Moscow. There is nothing specific he can say that they tried that didn't work to improve the relationship. The biggest challenge is they are so isolated from a transportation facility. Normally, they would have trucks that would transfer the goods in/out of town. This a much more limiting factor for this town.

- In your opinion, what is the best strategy for developing a community, like yours, in terms of agriculture?

One thing to add too is that because they're small and whenever they focus on one aspect of Town and Gown for agricultural. It is better to improve across all sectors. There are town leadership meetings monthly but also a quad meeting for counties to discuss economic development and the improvement of relationships of the community. Bring all sectors to work B/w. University and community. Have all departments within the college engage the community (architecture, engineering, etc.)

**Manhattan, KS**– John Pagen, Chamber of Commerce Economic Development Director

- How developed is the agricultural (in terms of value added or research from the university) economy in your area?

It is pretty well developed, he has a business background. Manhattan ag. Economy is pretty well refined, but there will always be more. They have the KS Wheat Innovation Center. They also have 2 milling facilities and then a bivap-Bioprocessing and industrial value added program which is the one that researches different applications for biological products. Like plastic forks out or wheat. Pretty well developed. They are just starting with the national agricultural research laboratory. This will also help with the development of the ag. Economy.

They are studying the prevention and antidote of zoonotic diseases. They have a lot of research for animal (veterinary sciences). Also center for grain and animal health research for insects. In 2011, Forbes ranked Manhattan as the #1 community in the US for jobs and careers. They were lower than that because of the oil boom communities in the Dakotas. The research in agriculture drives that job and career.

- Have you had a specific focus on agriculture in terms of development?
  - If so what did you do?

Yes. Particularly with the MVAP arrival. We call it in core competence, the thing they are really good at. Right now, they are working with a lot of food safety. Because of the work at K-State. This is home to AIB (food safety). A funny thing about them, when Twinkie starts full production, AIB will be there to evaluate the process in terms of safety and protocol. They send people all over the world to do food research and consulting. Food and plant sciences are definitely the core they go. The engineering department is also doing really well. In recent years they have put in Garmin, and General Electric Aviation. They showed interest in Manhattan and they selected them after rigorous selection. They have a company they work with to make extrusion equipment, and this for is for Frito lay, chips, dog food where you pour a solution then heat, then pressure, then cut it. Kansas has a very large presence in extrusion equipment production. They work with a company very closely to increase their relationship. Companies like that work well in the community because they are called a trader sector. They export goods and import money which is how you work well in creating wealth. Where restaurants (corporate) drain wealth in the community, because every night the money is wired back to the community.

- What worked/did not work in terms of agricultural development?

What works well here is primary research because they are a university community, creating ideas. The challenge is always the tech transfer. Getting it from being an idea on a chalk board to the shelf, this is where everything falls apart. This community is really big on research, primary research is their biggest strength. Some products thinking to be slam dunks fail others have the opposite reaction. This is a challenge, but it is a challenge everywhere. Manhattan is unusual because of Fort Riley and that really helps the economy too. They are 56,000 people and they do retail sales over a \$1 billion and normal towns this size do 400-600 million. They also have a lot of counties around that come to this area to shop. A challenge that we will have in ID is that a lot of national companies, look at distance very differently than we do. These companies think

of big cities as 2 hrs. 20 miles in ID/KS is easy in NYC is a nightmare. Towns like Manhattan and mine have a very difficult time getting some companies because our populations are so spread out, but these sight consultants can fathom the distance and its relationship with time. Rural areas struggle with this. A personal observation is that you would always live in a college town. But the sports bring a lot of money, and help the bottom line especially if it successful. There are many benefits because there is a lot in the college town.

- What was your relationship with the universities agricultural college in developing agriculture in the community?

Manhattan has one of the best town-gown relationships in the country and is known for that. The Princeton review, Manhattan was ranked #2 in the country for town and gown relationships. For being a small community you have to work together. Right now they also have good people that work well together. When they bring faculty in, K-state will have top faculty. The Chamber will give them a tour. They always have very open channels with communication with each other and they have also enjoyed a level of trust with each other. The Chamber will show potential faculty the community positive light. There are no turf wars. They are glad to help them and they are glad to help us.

- In your opinion, what is the best strategy for developing a community, like yours, in terms of agriculture?

He would find out, and do interviews with people, and find out what makes the town tick and what things are you really good at. But there are things in agriculture and talk to the people involved. Talk to champions of the community and ask for their advice and ask for their strategy because people love to chime in. No strangers in the community. Keep meetings tight and concise, they never have meetings to have meetings. People really appreciate short meetings because you are respecting their time. Use the leverage of why they like the community to strengthen the community's core competencies. SBIR grant find out who in your community has gotten these and be a champion of them and work with them. This will take a while. By doing these things you will start to get closer to that. One key event can trigger a lot of things.

APPENDIX C

VALUE-CHAIN

POTATO

<b>Companies and Location</b>				
<b>Company Type</b>	<b>Madison/Fremont</b>	<b>Eastern Idaho</b>	<b>Idaho</b>	<b>Other</b>
<b>Seed Providers</b>				
Mark Kuehl	X			
Grand Teton Organics	X			
Michael Steinmann	X			
Reynolds Brothers	X			
W & S	X			
PSG Alturas	X			
Southwinds Farms	X			
River Ranch Ent.	X			
Skyline Farms	X			
Howell Farms	X			
Val Schwendiman	X			
<b>Crop Treatment</b>				
Ag Concepts Corporation				
Agrium US		X		
Western Farm Service				
Simplot, J.R. Company		X		
Helena Chemical Company	X			
Valley Ag	X			
CPS		X		
UAP		X		
<b>Irrigation Equipment</b>				
Golden West	X			
Wayne Ferent	X			
Knudson	X			
<b>Farm Equipment Dealerships</b>				
		X		

John Deere Implement	X			
Agritech Corporation	X			
Pioneer	X			
Agriservice	X			
<b>Potato Farm Equipment Manufacturers</b>				
Spudnik, LLC		X		
Double L		X		
<b>Fresh-Pack Processers</b>				
Keith Wilcox and Sons, Inc.	X			
Walter's Produce	X			
Sun-Glo	X			
Rigby Produce		X		
Bench Mark Potato Co.	X			
<b>Potato Processers</b>				
Basic American Foods	X			
ConAgra Foods Lamb Weston			X	
Dickinson Frozen Foods, Inc.			X	
Idahoan Foods, LLC		X		
Idaho Supreme Potatoes, Inc.		X		
Simplot, J.R. Company		X		
McCain Foods USA, Inc.				X
Nonpareil Corpotation		X		
Great American Appetizers, Inc.			X	
Idaho Pacific Corporation		X		
Frito-Lay			X	
Green Giant Co			X	

BARLEY

<b>Companies and Location</b>				
<b>Companies</b>	<b>Madison/Fremont</b>	<b>Eastern Idaho</b>	<b>Idaho</b>	<b>Other</b>
<b>Seed Providers and Elevators</b>				
Reinke Grain		X		
Ririe Grain		X		
Centennial Grain	X			
AgriSource			X	
Arco Feed				
Big D Ranch			X	
CLD Pacific Grain			X	
Johnson Grain		X		
McNabb Grain		X		
Primeland			X	
Snake River Seed		X		
Wendell Elevator			X	
<b>Crop Treatment</b>				
Ag Concepts Corporation			X	
Agrium US		X		
Western Farm Service				X
Simplot, J.R. Company		X		
Helena Chemical Company	X			
Valley Ag	X			
CPS		X		
UAP		X		
<b>Irrigation Equipment</b>				
Golden West	X			
Wayne Ferent	X			
Knudson	X			
<b>Farm Equipment Dealerships</b>				
John Deere Implement	X			
Agritech Corporation	X			

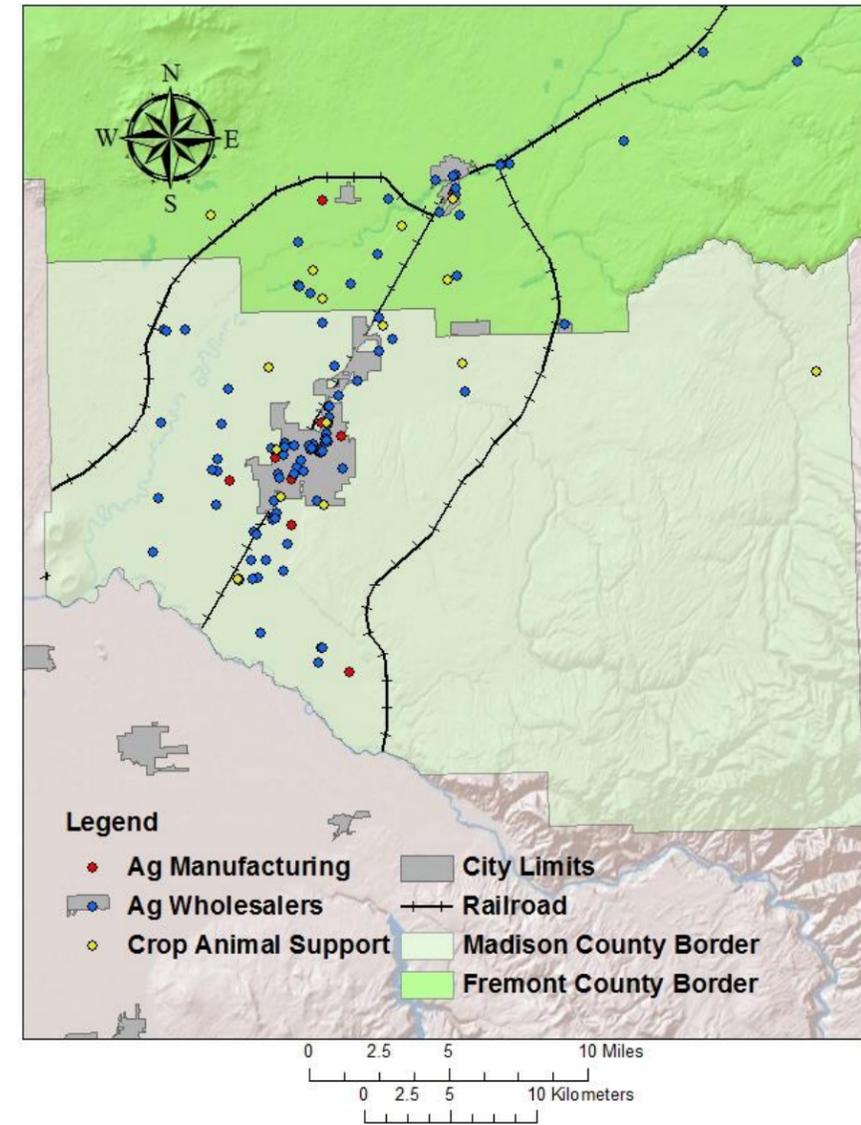
Pioneer	X			
Agriservice	X			
<b>Malters</b>				
Integrow Malt, LLC		X		
Anheuser Busch		X		
Cargill				X
Great Western Malt		X		
Miller Coors		X		
<b>Mills</b>				
Idaho Milling & Grain		X		
Pendleton Flour Mills, LLC		X		
General Mills, Inc.		X		
Hydroblend, Inc.			X	
Pepperidge Farms				X
All Grain Mills				X
Cherubim Food Provisions				X

WHEAT

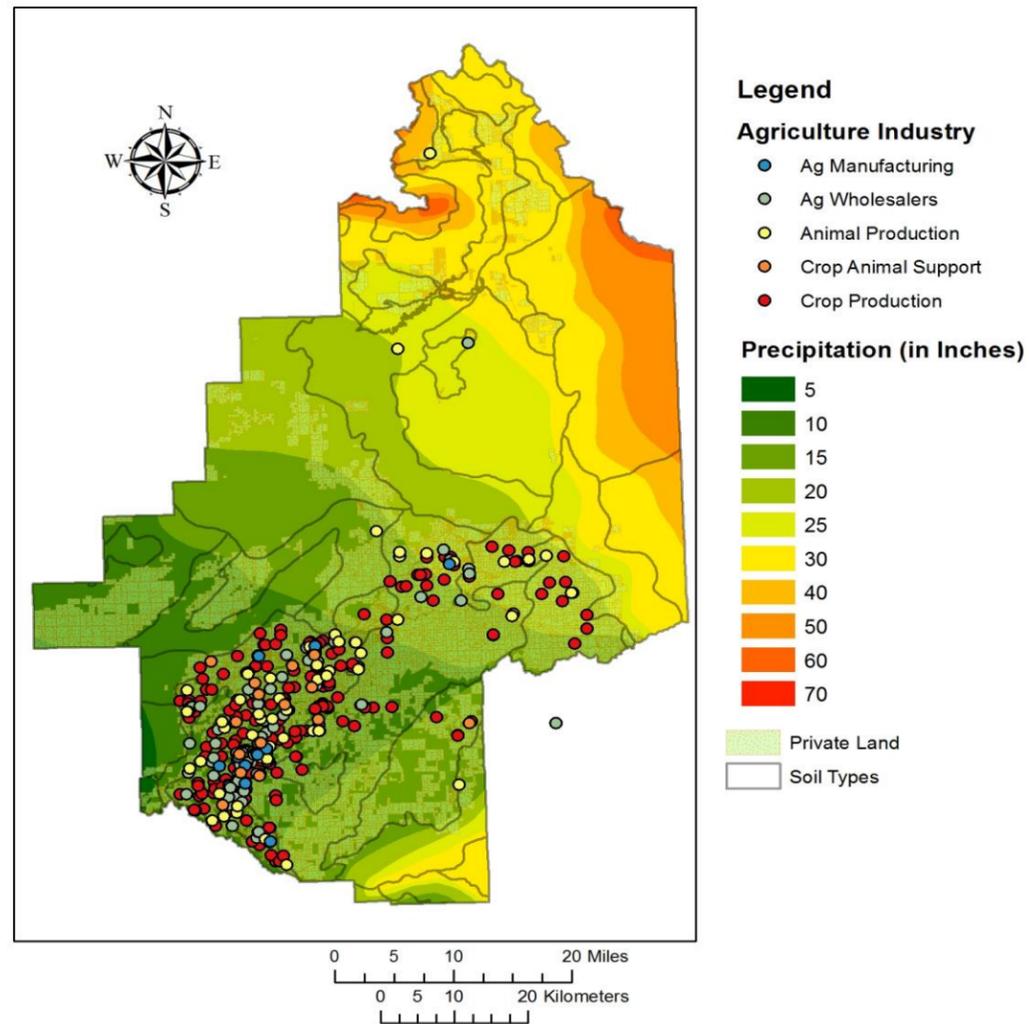
<b>Companies and Location</b>				
<b>Companies</b>	<b>Madison/Fremont</b>	<b>Eastern Idaho</b>	<b>Idaho</b>	<b>Other</b>
<b>Seed Providers and Elevators</b>				
Reinke Grain		X		
Ririe Grain		X		
Centennial Grain	X			
AgriSource			X	
Arco Feed				
Big D Ranch			X	
CLD Pacific Grain			X	
Johnson Grain		X		
McNabb Grain		X		
Primeland			X	
Snake River Seed		X		
Wendell Elevator			X	
<b>Crop Treatment</b>				
Ag Concepts			X	

Corporation				
Agrium US		X		
Western Farm Service				X
Simplot, J.R. Company		X		
Helena Chemical Company	X			
Valley Ag	X			
CPS		X		
UAP		X		
<b>Irrigation Equipment</b>				
Golden West	X			
Wayne Ferent	X			
Knudson	X			
<b>Farm Equipment Dealerships</b>				
John Deere Implement	X			
AgriTech Corporation	X			
Pioneer	X			
Agriservice	X			
<b>Mills</b>				
Idaho Milling & Grain		X		
Pendleton Flour Mills, LLC		X		
General Mills, Inc.		X		
Hydroblend, Inc.			X	
Pepperidge Farms				X
All Grain Mills				X
Cherubim Food Provisions				X

APPENDIX D  
GIS MAPS



Shapefiles from DIVA-GIS and TIGER.gov



# Envision Madison

## *Market Analysis*

[18 July 2013]

Research Team: Grace Hansen, Cortney Burlingame, Shane Jacobson, Michael Heylen, Patrick Van Hoose



EXECUTIVE SUMMARY

Throughout the course of the project, the team discovered how vital the industry was to Southeast Idaho, specifically Madison, Teton and Fremont counties. The team also explored the influences of the many supporting industries that sustain the recreation businesses of the area.

The main focus of the project was to create an Excel spreadsheet with a list of all recreation industries for Madison, Teton and Fremont counties. The team realized that it was necessary to include supporting industries in the list, not only because without them the recreation industry would not be able to thrive, but also because there is a significant overlap between recreation and supporting industries. For example, although many hotels can only exist because of the recreation sites nearby, the sites would not be visited as frequently if tourists had to camp instead of being able to rent a room. The supporting and recreation industries are indisputably linked, and so both were necessary not only to create a working list that would be valuable to both tourists and business owners, but also to create a complete GIS map, which was the other portion of the project.

Using the GIS map as a guide, the team discovered several holes in the recreation industry in the various counties. For example, in Madison County there are 45 restaurants and only 4 hotels. In Fremont County, there are 201 top fishing sites, but only 11 supply shops. Numbers such as these seem to leave room for growth or progression in the industry.

The team created the map to support interaction between GIS and the completed Madison, Teton and Fremont Excel spreadsheet in order to provide the most information available in the most accessible format possible. The map will pinpoint each location on the list, and provide descriptive information about the site as well as information regarding nearby supporting industries.

Overall, this project turned the recreation industries of Madison, Teton and Fremont counties and consolidated them into one exhaustive list that could be used as a final product as well as a stepping stone for further research into each site, category or county.

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## SCOPE & PURPOSE

The Eastern Idaho Entrepreneurial Center (E Center) completed a market analysis for the recreation division of the Envision Madison project, which created a baseline of recreational sites and attractions located within Idaho's Madison, Fremont, and Teton counties. Research included discovering both the strengths and weaknesses of the area's recreational industry while also pinpointing potential growth markets. Recreation, for the purposes of this research was defined as activities or services offered for leisure-time enjoyment. The team researched what draws tourists to the region as well as what factors would be applicable in increasing interest in the area. After collecting and conducting research, the team compiled a comprehensive list of current recreation opportunities in Madison, Fremont, and Teton counties and recommended future additions to the region.

### Market Analysis

#### I. Discover local recreation businesses and sites

- A. Recreation market size and breadth
- B. Area companies strengths and weaknesses
  - i. Consumer satisfaction
  - ii. Potential for already established businesses to grow
  - iii. Untapped potential markets

#### II. Define tourists needs

- A. Understand the current tourist trends
  - i. Demographic/geographic/psychographic
  - ii. Destination locations
  - iii. Length of visit
  - iv. Seasonality
- B. Analyze what tourist needs
  - i. The needs that are being met
  - ii. Unfulfilled needs that could be met

#### III. Recommendations

---

## METHODOLOGY

Creating an exhaustive baseline of the recreation industry in Madison, Fremont and Teton county included the research team both finding and contacting relevant businesses and sites in the area. Working on a county-by-county basis, the team discovered and categorized the various aspects of the recreation industry. After completing a comprehensive list, the team then began researching the industries that support recreation opportunities, and identifying their locations throughout the counties. This information was then given to Stephen Hulbert, a GIS mapping intern, who created a guide up loadable to Google Earth that is symbolically coordinated by industry and linked to the Excel list of the recreation spots in Madison, Teton and Fremont counties.

### RECREATION INDUSTRY CATEGORIES

The research team built an Excel sheet listing all of relevant locations within the following categories for Madison, Teton and Fremont counties. The spreadsheet was then linked with its GIS counterpart to create a user-friendly map of the recreation industry.

- Hotels
- Restaurants
- Public Parks
- Sports Arenas
- Ski Resorts
- Rivers and Lakes
- Movie Theatres
- Arts/Humanities
- Family Recreation (Arcades, Bowling Alleys, Etc.)
- Golf Courses
- Swimming
- Camping
- Hunting
- Events
- Historical Sites

## INDIVIDUAL SITE INFORMATION

For each site listed, the research team contacted the business or conducted secondary research via Hoover's internet database, the company's specific website or Idaho Yellowpages to find the following information and then included it on the spreadsheet. 505 locations are included on the spreadsheet as a whole, and the research team reached over a fifth of those places by phone.

- Description
- Location
- Contact information
- Open season
- Number of visitors per year

## SUPPORTING INDUSTRY INFORMATION

For the recreation industry as a whole, the team found that gas stations such as Maverick and Shell are vital to its sustainability and functionality. Within the specific categories, research was conducted to discover how many of the industries support each other and which outside sources are necessary to increase the potential for growth and create a stable business or attraction. The supporting industries received their own category on the spreadsheet, along with information about their proximity and relevance to surrounding recreation sites. The majority of this information was gathered through internet databases such as Hoover's and Manta targeting specific industries using NAICS or SIC codes. Other information was found by using previous recreation lists created by the counties of Madison, Teton and Fremont; Idaho yellowpages; information from similar projects gathered by E Center interns; and, various independent websites of the companies included on the spreadsheet.

## GIS MAPPING

GIS mapping intern Stephen Hulbert transferred and linked the completed Excel spreadsheet to his mapping software to create an interactive interface that is both tourist and business friendly.

## MARKET ANALYSIS

### RECREATION INDUSTRY

The main concentration of this project was compiling a list of recreation sites within Madison, Teton and Fremont counties in Idaho. Originally, the team was focused on recreation sites only, with any supporting industry data emphasized with less significance. However, as the project progressed it became clear that to fully understand the recreation industry, it was necessary to exhaustively identify the many industries that support it.

The team immediately discovered that within the three counties covered by the scope, several key elements were missing. For example, although Grand Targhee and Kelly Canyon ski resorts are close by, they don't fall into the specific geographic locations specified<sup>1</sup>. Also, there are no stores that are specifically designed for outdoor recreation, for example, Sportsman's Warehouse, in a location closer than Bonneville County. Aside from these obvious gaps in the industry, the team discovered that Teton, Madison, and Fremont counties seem to have a well-rounded and growing recreation industry.

To discover more, the team researched tourist trends in the area and found that the majority of tourists in Southeast Idaho fall into one of three categories. They are generally either

- United States citizens visiting their children who attend BYU-Idaho
- International tourists passing through on their way to national parks, such as Yellowstone and Yosemite
- Idaho or mountain west residents visiting an area within 500 miles of their home<sup>2</sup>

The team also discovered that with the growth of Madison County, specifically BYU-Idaho, the opportunities for the recreation industry to grow will continue to increase since the majority of recreation enthusiasts either fall into the category of couples who are retired or adults between the ages of 21-35. Since one of the top three most common tourists in Madison county are either students or

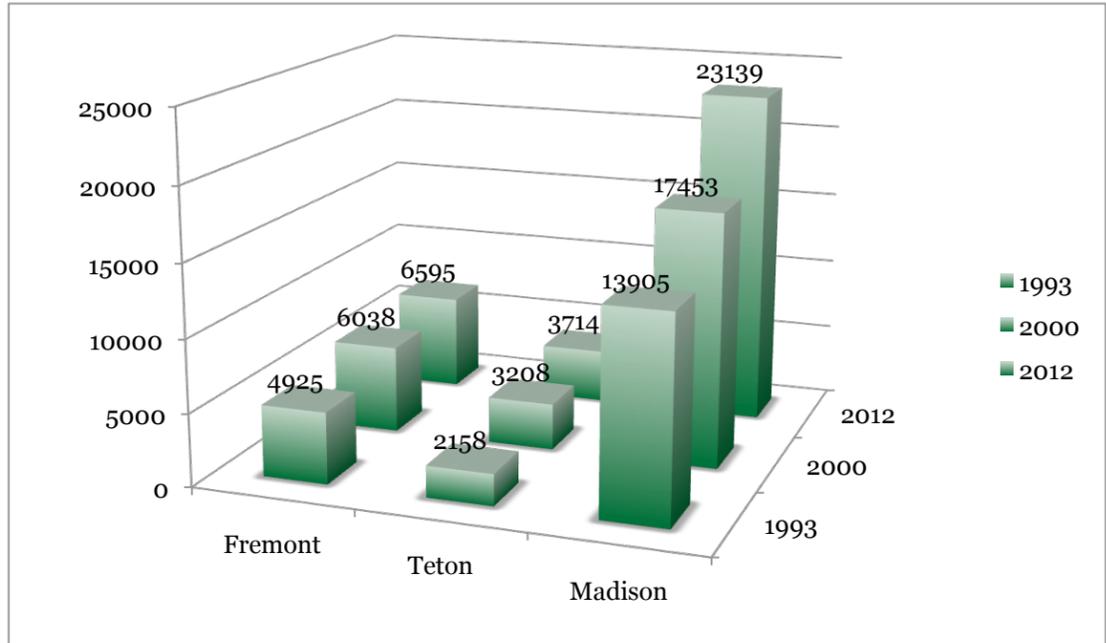
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<sup>1</sup> (Yellowpages, 2013)

<sup>2</sup> (Yellowstone Business Partnership, 2008)

families of students, the categories of recreation enthusiasts mesh well with the type of tourist Madison county tends to draw. <sup>3</sup>

Traffic counts throughout Madison, Teton and Fremont counties have grown significantly over the past 20 years and continue to increase. The team outlined the growth of a central city in each county during the busiest month—July— and discovered the following:



<sup>4</sup> This chart depicts the traffic in all the counties increasing, with Madison county’s traffic numbers jumping by 75% between 2000 and 2012.

**GIS MAPPING**

The mapping portion of the project was essential in delivering a final product that is valuable for both businesses and tourists. A map was created that allows a user to find recreation sites and sort them by category, location, number of visitors per year, or any of the options provided on the Excel Spreadsheet. This map is linked with both the spreadsheet and Google maps, and includes a description of each location, including how close the nearest supporting industry spots like gas stations, hospitals and restaurants are located. The team also broke down the industries in the counties into three categories—recreation, supporting and both.

<sup>3</sup> (Outdoor Recreation Economy, 2012)  
<sup>4</sup> (Idaho Transportation Department, 2013)

Industries that are included in both are hotels and restaurants. The charts below show the business breakdown for each county, and which of each specific business falls into the larger categories. Fishing has been left out of the recreation portion of Figures 1, 3 and 5 to avoid skewing the numbers heavily toward the recreation side.

**TETON**

Figure #1

This graph shows the number of businesses that fall into each of the three specified categories for Teton County.

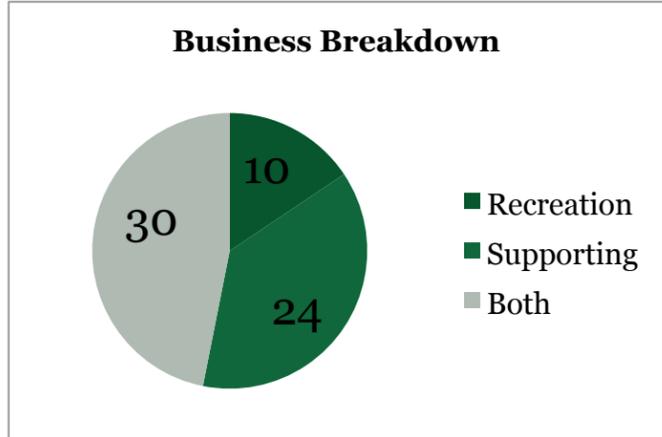
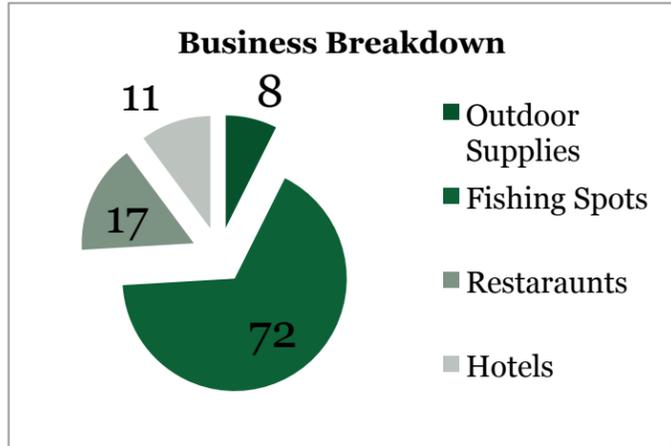


Figure #2

This graph depicts the large margin of difference between the number of fishing spots in Teton County and the number of outdoor suppliers. It also shows the number of hotels and restaurants as a basis for comparison.



FREMONT

Figure #3

This graph outlines the number of entries that fall into each of the three specified categories for Fremont County.

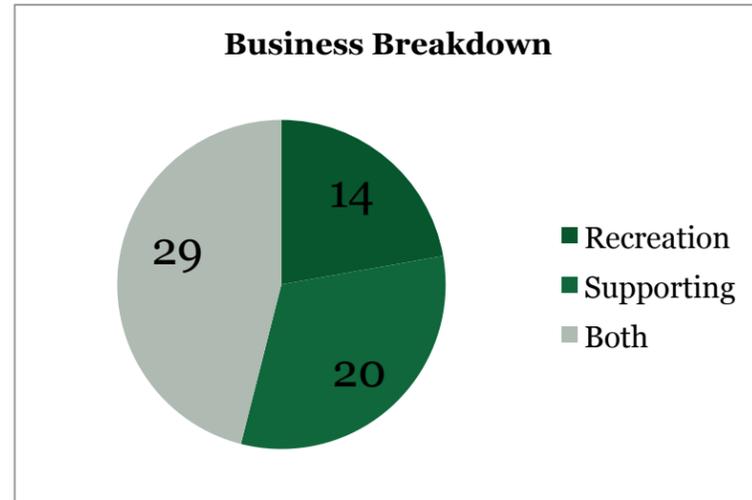
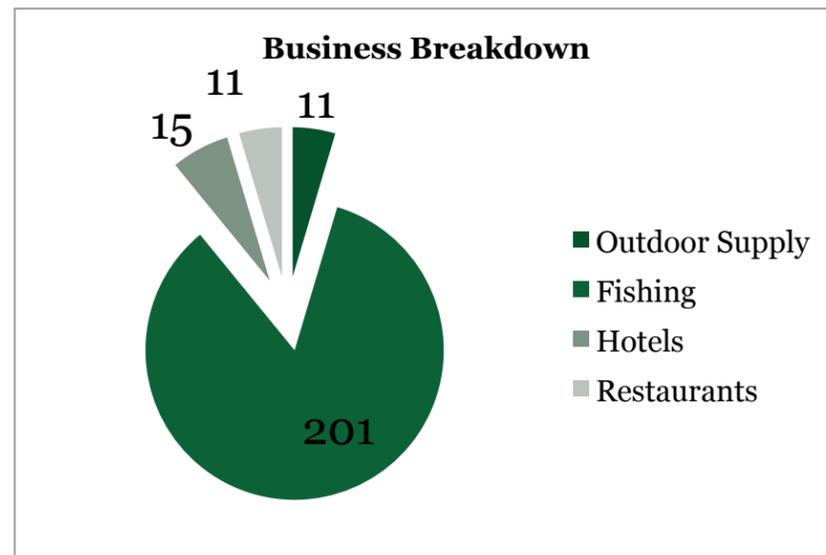


Figure #4

This graph shows the discrepancy between the number of fishing sites—201—and the number of outdoor suppliers—11—in Fremont County. It also depicts the number of hotels and restaurants as a basis of comparison.



MADISON

Figure #5

This graph depicts the number of entries that fall into each of the three specified categories for Madison County.

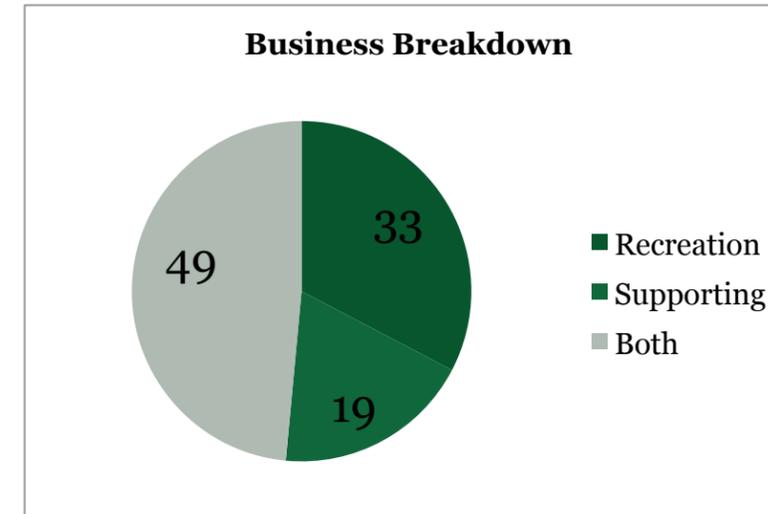
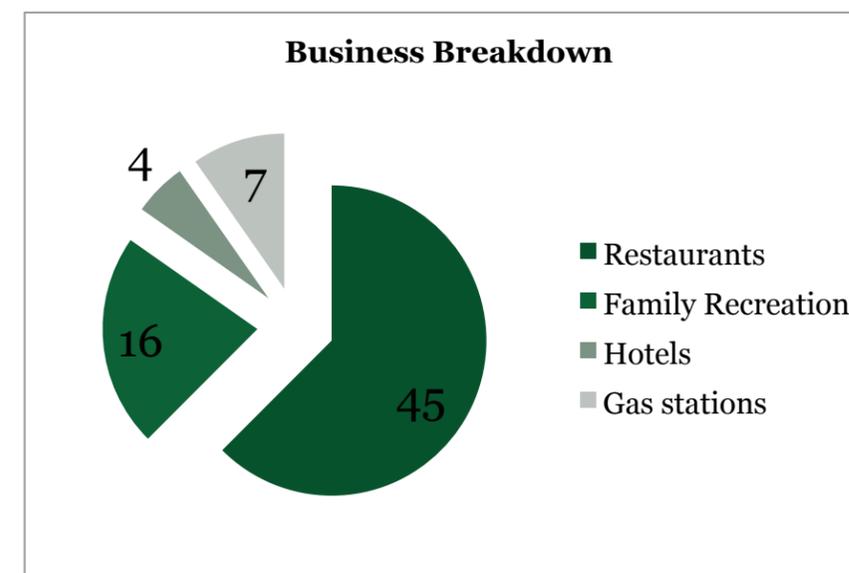


Figure #6

This graph illustrates the vast difference in the number of restaurants in Madison County compared to any other single category on the list. In the case of this chart, family recreation includes movie theatres, museums, bowling alleys, arcades, swimming pools and golf courses.



## SUMMARY OF FINDINGS

The recreation industry in Madison, Teton and Fremont counties seems to be stable in the sense that many of the attractions are natural and therefore the popularity of which is not entirely dictated by business trends. However, there has also been a significant increase in the number of visitors who come through the area since 2000.

The three targeted counties seem to be growing, judging from population and traffic reports—however, the research indicates that more supporting industries for outdoor recreational activities could flourish. Hiking, camping, fishing and hunting are the biggest tourist draws for the area, but there are very few major stores that cater specifically to these activities. Madison County differs from Teton and Fremont significantly, both in recreation and supporting industry numbers. Not only Madison the most populated and most visited county, but it is also catering to a clientele that is made up mostly of BYU-Idaho students, as opposed to Fremont and Teton, whose recreation destinations are most often visited by people traveling within 500 miles of their homes.

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## APPENDIX

## INTERVIEW QUESTIONS

"What is your peak visitor season?"

"Where do your visitors usually come from?"

"How many patrons do you serve annually?"

"Do you plan on expanding in the future? If so, what are your plans or goals?"

"What industries support your business? What kind of interactions do you have with your suppliers?"

# Envision Madison

## *Call Center Profile Analysis*

Spring 2013

Research Team: Mick Burnell, Melanie Queen, Riley Hunter, Skyler Poteat, Will Lumsden, and Brannan Hoover.



## EXECUTIVE SUMMARY

Call centers have three areas they look at before deciding to move into a new location. The first area is building requirements. They need buildings 10,000 square feet or more to accommodate from 100-400 employees. They prefer to lease existing buildings and need them to have adequate parking. Furthermore, call centers require metrics from the following topics as well:

- Infrastructure
- Population
- Labor force

Reliable providers that can keep call centers online during high traffic times and that won't shut down during bad weather are vital to their success. Also population requirements need to be from 100,000-400,000 people within a 20-30 minute driving distance. A high saturation in customer service related fields is a red flag (1-4%) because they have to compete with other companies for the best employees. A high unemployment rate is needed to provide a labor force they can use and a high under employment rate is desired because they then can get better workers at lower wages.

Employee educational requirements are a high school diploma or a GED. Some companies like the use of foreign languages but want their workers to be accent free. The higher the training needs the less likely they will hire a college student, the less training needs the more they like college students because they work at lower wages. Outbound call centers typically have higher training costs because of the rigors of the job. The better training they provide the more likely employees will stay longer, inbound call centers can handle the higher turnover because they have less training costs and college students bring a higher turnover. The Affordable Care Act (ACA) will play a big role in the future of all businesses, but will make call centers need more part-time employees that have insurance because ACA will raise the cost of employees and bring labor wages up. Linda Martin (economic development professional) talked about this as well as Jeff Neiswanger (Call center owner).

Rexburg has an abundant labor force, from a previous study the team has found that there are 5,750 unemployed people when school is on track. College students provide a cheap labor force and there are 55-69% of students that speak Spanish fluently, while another 6-13% of students speak French. There are other languages students on campus offer as well, like:

- Portuguese
- Chinese
- German
- Japanese
- Taiwanese
- Korean
- American Sign Language
- German
- Tagalog
- Afrikaans
- Zulu
- Italian
- Portuguese

Chinese Currently there are two buildings that fit the description needed for call centers, but Rexburg does not fit the population requirements for call centers. Call Centers want a 100,000-400,000 population within a 20-30min. drive of their location.

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## SCOPE & PURPOSE

The Eastern Idaho Entrepreneurial Center will complete a compatibility profile for Envision Madison to determine whether or not Rexburg, Idaho is a suitable environment for call centers. The scope of the research contains:

- 1.) The needs of call centers
- 2.) What Rexburg has to offer the call centers
- 3.) Information about the existing call centers in Rexburg.

With this information, the research team will prepare a profile that lists the attributes of call centers that are likely to come to Rexburg.

## METHODOLOGY

The research team started out utilizing IBISWorld and Bizminer to understand the industry. To identify the top businesses, the team used Hoovers to understand and look at growth rates and identify companies in the industry which are classified as telemarketing, marketing research, and even customer service. The team then made call lists and called 250 call centers with 8 call centers that were willing to talk to the team and answer the questions. The research team and the supervisor came up with these questions because it was what the labor department has information on. The team knew that this is where many companies go to see if they are a good fit for that state or city. The last question came from one of the call centers. The team asked the following questions:

- What do you look for when opening a new location?
- Is there a population requirement?
- Do you look at unemployment rates?
- What employee skills do you need?
- What size of building would you need? Do you lease or build it?
- Do you use college kids? Why? Why not?
- Do you look for economic grants or incentives?

Surveying local companies, the team was able to find out what has contributed to these companies' success and in what aspects they have struggled. The team asked what challenges they faced and what benefits they received by being located in Rexburg.

A survey of students attending BYU-Idaho was distributed to help understand what skills and other qualifications the students have to offer call centers. The team has also looked at what the city outside of the college offers by contacting Will Jensen, the Idaho State Labor Representative.

The research team contacted Linda Martin who is part of Grow Idaho Falls, an organization that assists in the development of economic growth of Idaho Falls, Idaho. She has helped bring call centers to Idaho Falls, and was able to give us good insight into what call centers have looked for when considering moving into a location, as well as what this area has to offer.

The team also interviewed site locators and third party call centers looking to expand. Site locators narrowed down what criteria call centers use when they determine whether or not a new location would suit their operations. The questions asked to the call centers were the same questions that the team asked site locators. The team contacted 10 site locators.

The team analyzed the survey to understand what BYU-Idaho's students offer call centers by inferring the data onto the student population.

## RESEARCH FINDINGS

One call centers mentioned the use of a score card to match locations to its specified criteria. Others use third parties known as site selectors or site locators. After discussing scorecards with call centers and interviewing site selectors, it was apparent that there are three main things that are evaluated when analyzing new locations. The following are the three things analyzed:

- Buildings requirements
- City requirements
- Labor Force

The survey of students has identified skills that are prominent amongst BYU-I students and their availability and qualifications as employees. Lastly, the research has touched on other needed aspects like the availability of such resources and the communities' employees and their qualifications as well.

## BUILDING REQUIREMENTS

Call centers require a large, clear space so they can fit 200+ employees in cubicles with room for offices, restrooms, and a break room. All but one company stated they would lease, rather than buy a facility, however, with the economy the way it is, some say that constructing a building could be just as cost effective.

According to Jeff Neiswanger, who used to own six different call centers and has operated them for over 20 years, he requires a 10,000 sq. ft. building to lease for his operations. He would need 50-60 full-time employees for their operations. If he were to open a new facility, he would look at having more Part-time employees because of ACA (Affordable Care Act), but still looking at the same size of building.<sup>1</sup>

Linda Martin and Jeff Beatty (Site Locator) mentioned that call center companies prefer to be surrounded by other amenities such as fast food restaurants, and adequate parking for employees. They also prefer a location that is easy for employees to get to work safely and on time.

According to Jeff at Alorica (a market research company), it has about 40 locations around the U.S. Each of its facilities house 500 employees. Because of the size of its employee force, Jeff said that one of the main things they look for is the space that is available for a facility. Alorica prefers to lease a facility already existing in the area that has the capability of being added on to if it needs to

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<sup>1</sup> (Neiswanger, 2013)

expand. It generally needs about 40,000 square feet of floor space to house 500 employees.<sup>2</sup>

Currently Rexburg has two buildings that fit these descriptions that were found on Eagle Landing's website. Almost all of Rexburg's amenities are located on Main street between 2<sup>nd</sup> west and 2<sup>nd</sup> east and North of main street on 2<sup>nd</sup> east down to 7<sup>th</sup> south.

## CITY REQUIREMENTS

It is important for the call centers to have enough employees available to keep a skilled labor force, while maintaining a low wage. This is common among the industry. Cities with a low cost of living help provide the ability to pay a low wage to workers. Part of the worker availability is the desire for a high underemployment rate in which they can have better workers and pay them less. This helps them provide better services at a less price. The saturation rate of customer service related jobs is also important to watch for.

According to Jeff Neiswanger, he looks for a city with an unemployment rate of 12% or higher, and considers the city's move in/move out rates, as well. The lower the move out rate the better because people are staying in the same location for longer, this helps prevent higher turnover rates and allows for employees to stay employed longer.<sup>3</sup>

Call centers population requirements range from 100,000-400,000 people within a 20-30 minute drive. Cities with higher populations provide many workers.

According to Tracey Bosman from Biggins Lacy Shapiro and Company, there is a minimum labor pool, 250,000 within a 20 min drive before a call center will consider moving to a new location. They prefer to have more than one provider of fiber optics, so they don't have to rely on one provider. Call centers are not interested in moving to a college town, however, they would consider it as there is a deep labor force it can pull from. It looks for an unlimited power supply to keep it running during high traffic times and not have to worry about power outages.<sup>4</sup>

Within the population call centers look at demographics to help them understand what available employees there are, call centers like younger people, especially when they have a family, and they like employees that don't mind getting paid less because they like where they live.

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<sup>2</sup> (Jeff, 2013)

<sup>3</sup> (Neiswanger, 2013)

<sup>4</sup> (Bosman, Biggins Lacy Shapiro and Company, 2013)

According to Linda Martin (an economic development professional from Idaho Falls), call centers look for areas with a relatively low cost of living. They also consider education level, and demographics. Call centers typically prefer ages between 19 and 25 mainly because they are tech savvy. It is important for a city to have an underemployment rate of 11-14%. The South East Idaho area is attractive to call centers because marriage trends are at a younger age theoretically providing employees who are more mature and responsible. People that share this demographic are generally willing to remain at a lower level of employment in order to be around family, and they are more likely to stay employed longer. Call centers seek employees who commit to staying between 5 to 7 years.<sup>5</sup>

The last part to the city requirements is the infrastructure, call centers like all businesses need to stay open to make money, but they need fiber optics that support high levels of call traffic. Their businesses can't be interrupted by constant dropping of service. One site locator has mentioned that SONET rings are important to call centers because of their ability to keep internet services running even when cut.

According to Jerry Szatan at Szatan Associates, they like to see unemployment rates that can support extra workers, but also the skills that will match their needs. Jerry mentioned the need for a SONET ring which is a technology that the city employs to lower the chance of disruption to internet and telephone lines.<sup>6</sup>

It is important to note that it was mentioned in an article that grants or an incentive to establish a business does have an impact on whether companies choose a location. Stream did this when opening a location in Nova Scotia<sup>7</sup>.

“Incentives were a major factor in swaying the decision by Stream, which specializes in outsourced customer relationship management. The Boston-based firm had been considering Glace Bay as far back as November of last year. Stream, however, said that it wanted guarantees of federal funding before committing to the Nova Scotia site.”

During the fall season of 2011, the Idaho Department of Labor (Idaho DOL) - performed a survey of college students concerning employment. In conclusion, the DOL determined that the unemployment rate, when incorporating the college student, ranges from 6.1% to 23.6% for Madison County. That means there are 5,750 employees ready for hire during a semester.<sup>8</sup>

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<sup>5</sup> (Martin, 2013)

<sup>6</sup> (Szatan, 2013)

<sup>7</sup> (Lyne)

<sup>8</sup> (Labor)

Will Jensen from the Idaho Department of Labor provided the following table.

Occupation	% of the Total Jobs in Industry
Customer Service Representatives	51.9%
Telemarketers	18.3%
First-Line Supervisors of Office and Administrative Support Workers	3.4%
Switchboard Operators, Including Answering Service	2.3%
Sales Representatives, Services, All Other	2.2%
Bill and Account Collectors	1.6%
General and Operations Managers	1.2%
First-Line Supervisors of Non-Retail Sales Workers	1.2%
Order Clerks	1.1%

This table represents different job interests that people in Rexburg have mentioned to the department of labor. Respondents were able to choose multiple job interest and therefore this table cannot be a sum of job interest for Rexburg, but does give a good list to refer to when looking at what jobs people in Rexburg are looking for.

### EMPLOYEE REQUIREMENTS

Potential employees are generally required to have a High School level of education or a GED. Spanish speaking skills are a plus, especially if doesn't inhibit their ability to speak English. Because turnover is high, fewer training hours are preferred, making inbound service call centers a better fit for a fast pace constant changing environment of a college town. Outbound call centers generally require higher volumes of training and don't thrive in these environments.

According to Jeff at Alorica, it seeks out areas that have a large supply of people who don't have more than a high school education, typically because these types of workers can be hired for a lower wage. Alorica is willing to pay between \$9.00 and \$9.50 per hour. College towns are a good fit for Alorica in this regard, because college students are willing to work for lower pay. Alorica also has needs for Spanish and Canadian French speakers.<sup>9</sup>

According to Adam at Go Answer, they want people with at least a high school education, and perhaps an associate's degree. They like to employ stay-at-home moms and females because they are easier to talk to and generally demonstrate

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<sup>9</sup> (Jeff, 2013)

more patience than males. They prefer people with neutral accents, but they do look for people fluent in Spanish. Go Answer does hire college students but finds it a challenge to work around student schedules.<sup>10</sup>

According to Linda Martin the Affordable Care Act means that the cost to provide employee benefits are rising and the ability to hire part-time help that has insurance through the university is a help to call centers. <sup>11</sup> BYU-Idaho requires students to buy their insurance unless they have insurance from a parent or through their employer.

According to Jeff Neiswanger, He hires people with a GED or higher education because these types of workers have verbal and computer skills with clean background checks. He does hire college students; however, they are a lower quality of his employees because they are not as dependable as some of the full-time employees. ACA does play a big role and he would be more willing to employ college students part-time because they do not have to be insured. He also looks for employees with Spanish Speaking abilities. <sup>12</sup>

According to Jerry Szatan at Szatan Associates, call centers need Spanish speaking employees. It has hired college students for clients with low training requirements. It prefers areas with students who are married so while their spouse is in school they can work at the call center. Lower skilled call centers are generally the telemarketer survey call centers and catalogers. These types of call centers are generally okay with high turnover because it doesn't cost them much to train new hires. However the "smaller" highly skilled call centers have a higher cost to train new hires and will want to find places where workers are likely to stick around, allowing them to keep their training costs down. <sup>13</sup>

According to Larissa at Voice Curve in Portland Oregon, it runs its business virtually. This means that it sends headsets to employees, who are located in states all over the nation. It employs many college students at the University of Idaho, and at other universities in Washington. Spanish speakers are a huge benefit to the company. Starting wages are \$9.00 per hour or \$10.00 per hour if they speak Spanish. There is a one-week training from 7:00 a.m. through 3:00 p.m. which presents somewhat of a challenge with employing college students because students have difficulty with being able to work their class schedules with that first week training. But if the students can make it through training, then things run pretty smoothly afterwards. Voice Curve will soon be changing their name to Full Creative. <sup>14</sup>

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<sup>10</sup> (Adam, 2013)

<sup>11</sup> (Martin, 2013)

<sup>12</sup> (Neiswanger, 2013)

<sup>13</sup> (Szatan, 2013)

<sup>14</sup> (Larissa, 2013)

## PREVIOUS CALL CENTER IN REXBURG INSIGHT

According to Western Watts formally known as Opinionology, the reason they relocated is because they had a hard time keeping students motivated, a large portion of employees that they hired, left after a month or two. It was hard to find people to work during the 7-week summer break and the other breaks, which lead to 7 weeks of wasted time. <sup>15</sup>

27-41% of students said they would stay during off tracks if they had a job.

## STUDENT SURVEY RESULTS

44%-58% % of students at BYU-Idaho don't have jobs. Out of them, 76-90% of those students would like to find a job in Rexburg. 61-75% of the students said it was difficult to find a job in Rexburg. 45-59% of the students said they would be willing to work at a call center while attending school in Rexburg. Out of those students willing to work at a call center, 77-91% said the reason they are willing is because they need a job. About 41-55% of the students stay during breaks mainly because they have a job or they are married. Only about 27-41% of the students would stay in Rexburg during breaks and off-track semesters if they had a job at a call center. Foreign language skills of students surveyed include, Spanish, French, Chinese, Hmong, Korean, Tagalog, Portuguese, German, Japanese, Taiwanese, and American Sign Language. About 68-83% of the students surveyed are comfortable in customer service skills including dealing with angry customers. <sup>16</sup>

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<sup>15</sup> (Western Watts, 2013)

<sup>16</sup> (Survey, 2013)

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## APPENDIX

## CALL CENTER QUESTIONS

1. Is there a population requirement?
2. What about number of Employees that are available for work? (Is there an unemployment rate that is acceptable?)
3. What are the requirements for the workforce (i.e. education, language skills, and hours of availability)?
4. Facility size and requirements of the facility such as equipment etc.? (Would you most likely lease an existing facility or build your own?)
5. Do you look for economic incentives such as grants, tax supplements etc.? Do you require these types of incentives?
6. What has sold you on moving to a given location in the past? (Is there some type of case study that you could share?)

## BYU-IDAHO OFFICIAL SURVEY QUESTIONS

1. How many are students are unemployed?
2. Can International students be employed outside of the school?
3. Do you think more call centers would benefit the need for student jobs in Rexburg, Idaho? If so why?
4. How many students are unemployed and do not want a job while in school?
5. How many students stay here during breaks?
6. How many jobs are available at the school for students? Is there a chance of more jobs at the school available in the future?

## STUDENT SURVEY QUESTIONS

1. Do you currently have a job?  
Yes  
No

Display This Question: If Do you currently have a job? No Is Selected

Would you have a job if you could find one in Rexburg?

- Yes  
No

2. How would you describe finding a job in Rexburg?  
Very Difficult  
Difficult  
Somewhat Difficult  
Neutral  
Somewhat Easy  
Easy  
Very Easy

3. Would you be willing to work at a call center while attending BYU-Idaho?

Work at a call center could include the following: Incoming calls, outgoing calls, and customer service. You may need to read or memorize a script. You might be selling products to customers (outgoing calls) or taking orders from customers, listening to customer needs and billing customers for products (incoming calls).

- Yes
- No

Display This Question: If you would be willing to work at a call center while atten... Yes Is Selected

Why would you be willing to work at a call center in Rexburg? (Select all that apply)

- I need a job.
- I feel I would be a god fit for a call center
- I enjoy talking to others
- I think a call center would pay more than other jobs in Rexburg
- Other: (Please Specify)

Display This Question: If you would be willing to work at a call center while atten... No Is Selected

If it paid well enough, would you consider working at a call center?

- Yes
- No

Display This Question: If it paid well enough, would you consider working at a c... Yes Is Selected

At what pay level listed below would you be willing to work at a call center?

- \$7.25 - \$8.00
- \$8.00 - \$9.00
- \$9.00 - \$10.00
- More than \$10.00
- I would not work at a call center

Display This Question: If it paid well enough, would you consider working at a c... No Is Selected

What is your track at BYU-Idaho?

- Fall/Winter
- Winter/Spring
- Fall/Spring
- Fast Grad

4. Do you stay in Rexburg during your off-track semester?

- Yes
- No

Display This Question: If Do you stay in Rexburg during your off-track semester? Yes Is Selected

Why do you stay during your off-track semester?

- I have a job.
- I am married.
- I am a local resident.
- Other: (Please Specify)

5. Do you stay in Rexburg during the 7-week break?

- Yes
- No

Display This Question: If Do you stay in Rexburg during the 7-week break? Yes Is Selected

Why do you stay during the 7-week break?

- I have a job.
- I am married.
- I am a local resident.
- Other: (Please Specify)

6. If you had a job at a call center in Rexburg, would you stay during your off-track or 7-week break? (Select all that apply)

- No
- Yes, during my off-track
- Yes, during the 7-week break
- Yes, both my off-track and the 7-week break

7. What is your native language?

- English
- Spanish
- French
- Other (Please Specify):

8. Do you speak other languages?

- Yes
- No

If No Is Selected, Then Skip the next question

What other languages do you speak? (Check all that apply)

- English
- Spanish
- French
- Other (Please Specify):

Display This Question: If what other languages do you speak? (Check all that apply) Spanish Is Selected

How proficient are you in Spanish?

- Basic
- Conversational
- Fluent

Display This Question: If what other languages do you speak? (Check all that apply) French Is Selected

How proficient are you in French?

- Basic
- Conversational
- Fluent

Display This Question: If what other languages do you speak? (Check all that apply) Other (Please Specify): Is Selected

How proficient are you in other?

- Basic
- Conversational
- Fluent

9. How comfortable are you:

- Talking to others on the phone?
- Answering questions about services, products, or billing over the phone?
- Answering phone calls?
- Reading from a script without adding your own opinion?
- Writing a professional email?

These are the choices:

- Very Comfortable
- Comfortable
- Neutral
- Uncomfortable
- Very Uncomfortable

10. Do you enjoy talking to people about any of the following? (Check all that apply)

- Products
- Services
- Billing

11. Are you able to read from a script without adding your own opinion?

- Yes
- No

12. Which of the products from Microsoft Office do you have experience with? (Check all that apply)

- Word
- Excel
- PowerPoint
- Outlook
- Access
- Publisher
- None of the above

13. Do you have experience with customer service?

- Yes
- No

Display This Question: If Do you have experience with customer service? Yes Is Selected

How many years of customer service experience do you have?

- Less than a year
- 1-2 years
- 3-4 years
- 5 or more years

Display This Question: If Do you have experience with customer service? Yes Is Selected

Have you ever dealt with an angry customer?

- Yes
- No

14. Do you have experience with any of the following? (Check all that apply)

- Pest Control Sales
- Door to Door Sales
- Telemarketing
- Mission

15. Would you like to work from home?

- Yes
- No

Display This Question: If would you like to work from home? Yes Is Selected  
Why do you like to work from home?

- I am a mother
- Convenience
- Other

16. Age
- 17-18
  - 19-21
  - 22-23
  - 24-25
  - 26+

17. Married Status- This question is optional. This is just to understand which students are looking for jobs while at school.

- Single
- Married
- Divorced
- Widowed

18. Ethnicity
- White
  - Native American
  - Hispanic/ Latino
  - African descent
  - Indian
  - Other

19. What college are you in at BYU-Idaho?
- College of Agriculture and Life Sciences
  - College of Business and Communications
  - College of Education and Human Development
  - College of Language and Letters
  - College of Physical Sciences and Engineering
  - College of Performing and Visual Arts
  - College of Foundations and Interdisciplinary Studies

Student Survey Results

**Initial Report**

Last Modified: 06/27/2013

**1. Do you currently have a job?**

#	Answer	Response	%
1	Yes	110	51%
2	No	105	49%
	Total	215	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.49
Variance	0.25
Standard Deviation	0.50
Total Responses	215

**2. Would you have a job if you could find one in Rexburg?**

#	Answer	Response	%
1	Yes	85	83%
2	No	17	17%
	Total	102	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.17
Variance	0.14
Standard Deviation	0.37
Total Responses	102

### 3. How would you describe finding a job in Rexburg?

#	Answer	Response	%
1	Very Difficult	68	32%
2	Difficult	77	36%
3	Somewhat Difficult	36	17%
4	Neutral	24	11%
5	Somewhat Easy	0	0%
6	Easy	3	1%
7	Very Easy	3	1%
	Total	211	100%

Statistic	Value
Min Value	1
Max Value	7
Mean	2.20
Variance	1.50
Standard Deviation	1.22
Total Responses	211

### 4. Married Status- This question is optional. This is just to understand which students are looking for jobs while at school.

#	Answer	Response	%
1	Single	128	64%
2	Married	69	35%
3	Divorced	2	1%
4	Widowed	0	0%
	Total	199	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.37
Variance	0.25
Standard Deviation	0.50
Total Responses	199

**5. Would you be willing to work at a call center while attending BYU-Idaho? Work at a call center could include the following: Incoming calls, outgoing calls, and customer service. You may need to read or memorize a script. You might be selling products to customers (outgoing calls) or taking orders from customers, listening to customer needs and billing customers for products (incoming calls).**

#	Answer	Response	%
1	Yes	109	52%
2	No	101	48%
	Total	210	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.48
Variance	0.25
Standard Deviation	0.50
Total Responses	210

## 6. Why would you be willing to work at a call center in Rexburg? (Select all that apply)

#	Answer	Response	%
1	I need a job.	91	84%
2	I feel I would be a good fit for a call center	16	15%
3	I enjoy talking to others	31	29%
4	I think a call center would pay more than other jobs in Rexburg	13	12%
5	Other: (Please Specify)	17	16%

### Other: (Please Specify)

If I was desperate, yes.
i hate my overnight job, but it pays well
I already have worked for a customer service department that takes incoming calls, emails, live chat and makes outgoing calls.
I want to be able to tell my kids I did what it took to get through college without loans.
I would just need a job, something to earn money
I have a good sense of customer service and have been a secretary before.
good way to practice communication/"people skills"
flexible hours
I don't think the call center jobs in Rexburg pay enough to support students
I would need more money
I have experience making/receiving calls.
I did some secretarial work a couple of times and I liked answer the phone and helping others.
I only have a summer job and will need one when i return to school
flexible schedule
I already work at one
you guys wrote god fit should be good fit option 2
Summer work!

Statistic	Value
Min Value	1
Max Value	5
Total Responses	108

## 7. If it paid well enough, would you consider working at a call center?

#	Answer	Response	%
1	Yes	66	65%
2	No	35	35%
	Total	101	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.35
Variance	0.23
Standard Deviation	0.48
Total Responses	101

### 8. At what pay level listed below would you be willing to work at a call center?

#	Answer	Response	%
1	\$7.25 - \$8.00	0	0%
2	\$8.00 - \$9.00	6	9%
3	\$9.00 - \$10.00	28	43%
4	More than \$10.00	30	46%
5	I would not work at a call center	1	2%
	Total	65	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	3.40
Variance	0.46
Standard Deviation	0.68
Total Responses	65

### 9. What is your track at BYU-Idaho?

#	Answer	Response	%
1	Fall/Winter	4	11%
2	Winter/Spring	15	43%
3	Fall/Spring	14	40%
4	Fast Grad	2	6%
	Total	35	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	2.40
Variance	0.60
Standard Deviation	0.77
Total Responses	35

### 10. Do you stay in Rexburg during your off-track semester?

#	Answer	Response	%
1	Yes	102	49%
2	No	106	51%
	Total	208	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.51
Variance	0.25
Standard Deviation	0.50
Total Responses	208

### 11. Why do you stay during your off-track semester?

#	Answer	Response	%
1	I have a job.	49	48%
2	I am married.	53	52%
3	I am a local resident.	16	16%
4	Other: (Please Specify)	30	29%

### Other: (Please Specify)

Internship
Want to
I hate going home
This is my first year, I don't know...
Live too far away to go home.
This is home now. My parent's house just isn't.
I want to work
I still take classes
No jobs really in my home town.
why leave
I may be able to pick up work locally
I like it here.
fast-grad
Take classes
I choose not to go home
i'm on fast grad
Higher chance of finding a job here than at home
Don't want to live with parents
too hard to move back and forth
I have no reason to be going home.
It's too expensive to go home.
I only stay if I have job.
expensive to travel
i take continueing ed classes
fast track
To earn money for school
Online classes
I don't have money to fly home
I take classes to advance in school.
Fast Grad

Statistic	Value
Min Value	1
Max Value	4
Total Responses	102

### 12. Do you stay in Rexburg during the 7-week break?

#	Answer	Response	%
1	Yes	86	41%
2	No	122	59%
	Total	208	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.59
Variance	0.24
Standard Deviation	0.49
Total Responses	208

### 13. Why do you stay during the 7-week break?

#	Answer	Response	%
1	I have a job.	39	46%
2	I am married.	42	50%
3	I am a local resident.	17	20%
4	Other: (Please Specify)	20	24%

Other: (Please Specify)
want to
I hate going home
I have a higher likelihood of being hired here than at home.
I live too far away.
The social life during the break is my favorite. Smaller crowds, nobody has homework, etc.
why leave? costs money to travel
I have to.
I had a job at that time
Moving is a bother
Too hard to move back and forth
I have no reason to go home.
Too expensive to go home.
International student
If I get a job (in the past)
expensive to travel
I don't like being rushed to leave during finals week.
don't want to have to travel far
my wife is on track in the fall, i might as well work as long as i can
I need to work and have a contact

Statistic	Value
Min Value	1
Max Value	4
Total Responses	84

**14. If you had a job at a call center in Rexburg, would you stay during your off-track or 7-week break? (Select all that apply)**

#	Answer	Response	%
1	No	89	44%
2	Yes, during my off-track	24	12%
3	Yes, during the 7-week break	21	10%
4	Yes, both my off-track and the 7-week break	70	34%
	Total	204	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	2.35
Variance	1.80
Standard Deviation	1.34
Total Responses	204

**15. What is your native language?**

#	Answer	Response	%
1	English	200	97%
2	Spanish	2	1%
3	French	0	0%
4	Other (Please Specify):	5	2%
	Total	207	100%

Other (Please Specify):
Chinese
Hmong
Korean
Tagalog

Statistic	Value
Min Value	1
Max Value	4
Mean	1.08
Variance	0.22
Standard Deviation	0.47
Total Responses	207

**16. Do you speak other languages?**

#	Answer	Response	%
1	Yes	63	30%
2	No	144	70%
	Total	207	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.70
Variance	0.21
Standard Deviation	0.46
Total Responses	207

### 17. What other languages do you speak? (Check all that apply)

#	Answer	Response	%
1	English	16	25%
2	Spanish	39	62%
3	French	4	6%
4	Other (Please Specify):	20	32%
5	Other (Please Specify):	2	3%

Other (Please Specify):	Other (Please Specify):
Portugues	
Chinese	
German	
Japanese	American Sign Language
Taiwanese	
Korean	
Chinese	
ASL	
portuguese	
A little of Korean	
American Sign Language	
German	
Tagalog	
German	
Sign Language	
Afrikaans	Zulu
Italian	
portuguese	
portuguese	
Chinese	

Statistic	Value
Min Value	1
Max Value	5
Total Responses	63

### 18. How proficient are you in Spanish?

#	Answer	Response	%
1	Basic	2	5%
2	Conversational	10	26%
3	Fluent	27	69%
	Total	39	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	2.64
Variance	0.34
Standard Deviation	0.58
Total Responses	39

### 19. How proficient are you in French?

#	Answer	Response	%
1	Basic	0	0%
2	Conversational	3	75%
3	Fluent	1	25%
	Total	4	100%

Statistic	Value
Min Value	2
Max Value	3
Mean	2.25
Variance	0.25
Standard Deviation	0.50
Total Responses	4

**20. How proficient are you in  
 \${q://QID21/ChoiceTextEntryValue/4}?**

#	Answer	Response	%
1	Basic	2	10%
2	Conversational	12	60%
3	Fluent	6	30%
	Total	20	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	2.20
Variance	0.38
Standard Deviation	0.62
Total Responses	20

**21. How proficient are you in  
 \${q://QID21/ChoiceTextEntryValue/5}?**

#	Answer	Response	%
1	Basic	1	50%
2	Conversational	0	0%
3	Fluent	1	50%
	Total	2	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	2.00
Variance	2.00
Standard Deviation	1.41
Total Responses	2

## 22. How comfortable are you:

#	Question	Very Comfortable	Comfortable	Neutral	Uncomfortable	Very Uncomfortable	Total Responses	Mean
1	Talking to others on the phone?	63	84	29	17	10	203	2.15
2	Answering questions about services, products, or billing over the phone?	40	84	57	15	6	202	2.32
3	Answering phone calls?	73	88	24	12	5	202	1.95
4	Reading from a script without adding your own opinion?	66	60	38	25	13	202	2.30
5	Writing a professional email?	63	69	52	14	4	202	2.14

Statistic	Talking to others on the phone?	Answering questions about services, products, or billing over the phone?	Answering phone calls?	Reading from a script without adding your own opinion?	Writing a professional email?
Min Value	1	1	1	1	1
Max Value	5	5	5	5	5
Mean	2.15	2.32	1.95	2.30	2.14
Variance	1.22	0.95	0.94	1.51	1.01
Standard Deviation	1.10	0.97	0.97	1.23	1.00
Total Responses	203	202	202	202	202

## 23. Do you enjoy talking to people about any of the following? (Check all that apply)

#	Answer	Response	%
1	Products	94	75%
2	Services	102	81%
3	Billing	37	29%

Statistic	Value
Min Value	1
Max Value	3
Total Responses	126

## 24. Are you able to read from a script without adding your own opinion?

#	Answer	Response	%
1	Yes	177	89%
2	No	23	12%
	Total	200	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.12
Variance	0.10
Standard Deviation	0.32
Total Responses	200

### 25. Do you have experience with customer service?

#	Answer	Response	%
1	Yes	153	75%
2	No	50	25%
	Total	203	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.25
Variance	0.19
Standard Deviation	0.43
Total Responses	203

### 26. How many years of customer service experience do you have?

#	Answer	Response	%
1	Less than a year	23	15%
2	1-2 years	62	41%
3	3-4 years	43	28%
4	5 or more years	24	16%
	Total	152	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	2.45
Variance	0.87
Standard Deviation	0.93
Total Responses	152

### 27. Have you ever dealt with an angry customer?

#	Answer	Response	%
1	Yes	147	97%
2	No	5	3%
	Total	152	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.03
Variance	0.03
Standard Deviation	0.18
Total Responses	152

### 28. Do you have experience with any of the following? (Check all that apply)

#	Answer	Response	%
1	Pest Control Sales	8	7%
2	Door to Door Sales	19	17%
3	Telemarketing	29	26%
4	Mission	90	82%

Statistic	Value
Min Value	1
Max Value	4
Total Responses	110

### 29. Would you like to work from home?

#	Answer	Response	%
1	Yes	138	69%
2	No	62	31%
	Total	200	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.31
Variance	0.21
Standard Deviation	0.46
Total Responses	200

### 30. Why do you like to work from home?

#	Answer	Response	%
1	I am a mother	7	5%
2	Convenience	125	91%
3	Other	6	4%
	Total	138	100%

Other
Lack of vehicle
I'm a student with a lot of homework
I am not a mother yet, but I am married and will probably be a mother within the next few years.
I don't have a car
I freelance from home
Full-time student

Statistic	Value
Min Value	1
Max Value	3
Mean	1.99
Variance	0.09
Standard Deviation	0.31
Total Responses	138

### 31. Age

#	Answer	Response	%
1	17-18	7	3%
2	19-21	77	38%
3	22-23	64	32%
4	24-25	37	18%
5	26+	16	8%
	Total	201	100%

Statistic	Value
Min Value	1
Max Value	5
Mean	2.89
Variance	1.02
Standard Deviation	1.01
Total Responses	201

### 32. Which of the products from Microsoft Office do you have experience with? (Check all that apply)

#	Answer	Response	%
1	Word	199	100%
2	Excel	168	84%
3	PowerPoint	186	93%
4	Outlook	92	46%
5	Access	14	7%
6	Publisher	47	24%

Statistic	Value
Min Value	1
Max Value	6
Total Responses	200

### 33. Ethnicity

#	Answer	Response	%
1	White	177	89%
2	Native American	0	0%
3	Hispanic/Latino	11	6%
4	African descent	2	1%
5	Indian	0	0%
6	Other	9	5%
	Total	199	100%

Statistic	Value
Min Value	1
Max Value	6
Mean	1.37
Variance	1.31
Standard Deviation	1.15
Total Responses	199

### 34. What college are you in at BYU-Idaho?

#	Answer	Response	%
1	College of Agriculture and Life Sciences	36	18%
2	College of Business and Communication	66	33%
3	College of Education and Human Development	31	15%
4	College of Language and Letters	21	10%
5	College of Physical Sciences and Engineering	23	11%
6	College of Performing and Visual Arts	16	8%
7	College of Foundations and Interdisciplinary Studies	8	4%
	Total	201	100%

# Appendix C

## Task Force Reports

These reports were prepared by Envision Madison task forces to analyze Madison County and create recommendations for the future of the county.

Statistic	Value
Min Value	1
Max Value	7
Mean	3.04
Variance	2.97
Standard Deviation	1.72
Total Responses	201

# University/ Community Task Force Report

## *Envision Madison*

### Introduction

As part of the Envision Madison process residents indicated that the relationship and communication between the community and Brigham Young University Idaho (BYU-I) was critical for the future. Overall, people feel that the relationship between BYU-I and the Region is strong and positive. Residents indicated several benefits that the community gains from its association with BYU-I. They are:

- Provides focus on importance of education in the community
- Contributes to strong values of community
- Provides economic engine
- Creates pipeline for well-educated workforce
- Increases culture, arts, activities

Additionally, there were some concerns about the university's effect on the community. These are as follows:

- Increased traffic congestion
- Safety for large pedestrian population
- Need for community involvement in University decisions that impact community
- Need to plan for increased student growth

In an effort to strengthen the relationship and address these concerns, the Envision Madison Executive Committee created a task force made up of community leaders and BYU-I staff. The goal of this taskforce was to explore the concerns that people have raised and suggest mutually beneficial principles and activities that would strengthen the relationship and address the above concerns.

### Task Force Members

Members of the task force are:

- Richard Woodland, Rexburg City Mayor (Co-chair)
- Phil Packer, BYU-Idaho Liaison with the City of Rexburg (Co-chair)
- Wayne Clark, BYU-Idaho Operations Managing Director
- Wynn Hill, BYU-Idaho Student Well Being Managing Director
- Sally Smith, Rexburg City Council
- Todd Smith, Madison County Commission
- Melanie Davenport, Citizen

### Findings

The task force looked at current programs and efforts and long term strategies to strengthen the relationship between the community and BYU-I. In the short term there are many things that are currently being done and that could potentially be expanded. For the long term, the task force outlined strategies that could strengthen the relationship.

### Current Programs and Efforts

What opportunities exist for student/faculty volunteering and service to the community? Are there opportunities for expansion of these to be continued and/or expanded? BYU-Idaho has always been committed to being a good citizen of the community, and volunteering and serving in the community is a vital part of that commitment. For example, the university's Student Activities Program has a robust service component that provides students with a variety of opportunities to render service in the local area. Additionally, there are currently some 60 full-time BYU-Idaho employees who serve voluntarily on a number of councils, boards, and committees in the community.

BYU-Idaho welcomes a discussion about expanding volunteering and service opportunities in the community. The university also recognizes it is one organization of many within the community and would not to be perceived as driving such an effort.

How do the university and community "partner" to create student based employment opportunities? Such partnerships are already under way, including the Southeast Idaho Research Institute (SIRI) and the Eastern Idaho Entrepreneurial Center (E Center). Both initiatives are focused on how to create student jobs in the community. Other examples include the BYU-Idaho Recycling Center, which has created student jobs that support the City of Rexburg; and the BYU-Idaho Department of Health, Recreation, and Human Performance's paramedic program, which has partnered with the Rexburg Fire Department. The university is always open to exploring additional opportunities to create student jobs in the community.

How does the university contribute to infrastructure development? BYU-Idaho is a strong contributor to infrastructure development. For example, the university has been a major proponent of the Pedestrian Emphasis Zone. By keeping new housing projects close to campus, developments are able to utilize existing infrastructure such as roads, sewer, and water.

Additionally, BYU-Idaho supported the construction of University Boulevard by providing a right of way through university property. The university helped cover the cost of the expansion of the 7th South and the traffic signals at the intersection of 7th South and 2nd East. BYU-Idaho also provides water to the City of Rexburg through a university-owned well.

How does the City/County include the university as a partner in the overall economic development for the region? BYU-Idaho will continue the partnerships it has established with SIRI and the Eastern Idaho Entrepreneurial Center, as these organizations work to find economic development opportunities. The university is also fully committed to continue

collaborating with Rexburg, Madison County, and the Chamber of Commerce to look for additional ways to bring new industry to the area.

BYU-Idaho recognizes the development that is happening in the community because of the university, and that the university cannot grow more quickly than the community can handle.

What are some approaches that might improve university-community communication?

Communication with the community is a top priority for BYU-Idaho. In recent months, the university has worked to refine and streamline this process by reducing the number of contact points with the City of Rexburg. Our designated liaison with the city, who is in regular contact with university leadership, attends key city meetings such as City Council and Planning and Zoning. The university also has a representative who sits on the Chamber of Commerce board, attends their monthly meetings, and participates in committees and events.

The university also maintains productive working relationships with local media outlets in order to release news and information of interest to the local community.

What are opportunities for community members to use campus facilities? Can those opportunities be expanded?

Campus facilities are open to community members in a variety of ways. Each semester, local residents attend the Center Stage performing arts series and performances by the Department of Music, Theater, and Dance. Local high schools hold their graduation ceremonies in the BYU-Idaho Center auditorium. During select times of the day, the tracks at the BYU-Idaho Center and the stadium are open to use by community patrons. Also, services provided in the Manwaring Center, including the University Store, the Crossroads food court, and Catering Services are all open to the community.

BYU-Idaho is always happy to consider additional ways to open campus facilities to the community. It is important to recognize, however, that BYU-Idaho's first priority is to fulfill its mission as a university by meeting the needs of students. A request will always be weighed against the impact on the university's ability to serve students.

## Recommendations

- **Continue the with current programs and efforts**

There are many programs and efforts that address the needs of students and community members. These programs are outlined above. The relationship between the community and the University is stronger than it has been. However, that relationship has fluctuated over time. There is a recognition that if the current programs and efforts are not fostered, many of them could weaken over time due to lack of support.

- **Form one or more standing committees consisting of community members and university representatives (including students) to discuss actions aimed at implementing the strategies outlined below.**

A committee consisting of community members, university representatives, and students would be well equipped to coordinate and foster cultural activities for both residents and students. Examples of some of the strategies that they could help advance and promote include:

- Seeking ways to expand recreation in the community and to make sure students are informed of its availability
- Many students leave the region on the weekends for entertainment and recreation opportunities in other areas. Providing activities that would allow them to stay in the region on the weekends would help them feel more a part of the community.
- According to a study of other similar university communities, students from the Eastern Idaho Entrepreneurial Center (E-Center) found that holding events that are jointly sponsored by the university and community significantly improved the relationship between students and community residents.
- The E-Center study also found that bringing residents on campus for events helped to foster a good relationship
- Madison County and BYU-Idaho share a rich history of working together and supporting one another. One such example happened when the school was almost moved to a different city when the residents worked to keep it. Helping people understand the history of the university and the community could give them a better sense of their importance to and dependence on one another.

An administrative group made up of city officials and university administration could help to expand and support some of the existing programs that are already available in the community. The nature of this group would also lend itself to addressing other strategies that could improve the region's economy and provide more job opportunities for students and residents. Examples of some of the strategies that they could help advance and promote include:

- Expand student volunteering and service opportunities in the community as a way to give students work experience and provide local businesses with additional resources.
- Create a joint campaign to attract jobs for community members and students.
- Provide internship opportunities for students in the community.
- Work together to improve our infrastructure. The primary infrastructure improvement that would improve the university and the community is a broadband network. The city has completed studies to determine the cost and feasibility of broadband. It appears that working together would reduce the cost burden and provide a benefit to the community's economy and the university's on-line course offerings.
- Work together to revitalize downtown by bringing students and jobs to the area. Having more people live in or near downtown provides the area with a larger

customer base. This could allow more jobs such as restaurants, retail, and entertainment to locate in downtown Rexburg. Increasing the number of businesses would bring vibrancy to the area and not only provide jobs and entertainment for students but also for residents.

### **Conclusion**

While the relationship and coordination between the BYU-Idaho and the community is currently good, there is recognition that, if not fostered, it could subside. The task force recommends that current programs and efforts should continue and be improved. It is also recommended that the other strategies outlined above should be used as a way to further strengthen the relationship.

## **Envision Madison**

### **Recreation Task Force**

04/17/2014

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#### **Formation**

After the first of the public forum meetings in 2013 with Madison County residents, the Envision Madison Executive Board decided to form 3 separate task forces, one of which was the Recreation and Tourism Task Force. Over time, it was decided to have this committee only focus on recreation and the committee was later named to the Envision Madison Recreation Task Force. The original appointed members of the task force were Lori Woodland, Ron Feik, and Matthew Nielson. These members made efforts to appoint additional members that would allow us to seek input from a broad spectrum of stakeholders, including mothers, athletic directors, sports league representatives, local business owners, and others involved in recreation throughout our County. For a list of the task force members, please see the appendix in the back of this report.

#### **Goals**

- Bring together representatives of the different recreational associations to provide better coordination of public events and facility use
- Identify and promote future and existing recreational events in our community
- Ensure the public has input on what, when, how, and where to build or upgrade recreational facilities

#### **Current Events Identified in Madison County**

##### **Running:**

- Teton Dam Marathon
- Rush Triathlon
- Color in Motion 5 K
- Main Street Mile (2014)
- Youth Triathlon-River Rock
- Hurdle for Hope
- Relay for Life

##### **Tournaments:**

- Girls Basketball Tournament
- Madison Baseball tournament
- State Jr. Golf Tournament
- Wrestling Tournaments- Fall and Spring

- School-Madison Madness Basketball Tournament
- Golf Tournaments-McDonalds, Erickson, Chamber, NRF, Dare, etc.

#### **Dancing & Concerts:**

- Idaho International Summerfest
- Idaho International Street Festival
- Ball Room Dancing Competitions
- Concerts-Turkey Choir
- Other Tabernacle Concert events
- Other Concerts at Romance or in parks
- Dance Competitions, studios
- Upper Valley Idol
- Rexburg Unplugged
- Dancing with the Rexburg Stars
- Upper Valley Idol

#### **Other Events:**

- Snow fest
- Cube- Cyclo Cross Event
- Bike Races-Rexburg
- Cable Factory events
- School Hosted Events: Wrestling, Basketball, Madison Invitational, etc
- Madison County Fair
- Legacy Flight Museum Air Show
- Car Shows-Taylors, etc.
- 4th of July Parade and Day in the Park- Rexburg
- Commerce
- Mountain Man Rendezvous
- Celebrate Youth
- Geo-Caching events
- Volleyball Tournaments

#### **Events to Consider, as Identified by the Task Force**

- Soccer Tournaments
- Softball Tournaments
- Tennis Tournaments
- Shooting contests

- Rodeo Events
- Obstacle Course Races-Mud Run, etc.
- Coordination of events in conjunction with BYU-I and City of Rexburg when semesters begin or end
  - Pageant – Coordinate with City of Rexburg and BYU-I and hold during week after school gets out in July (Provide groups a spiritual opportunity that can be coupled with Recreation in our County)
- Volleyball Tournaments
- 100 Mile Criterion Bike Race across Madison County
- Equestrian Races

#### **Reports**

One of the first tasks of the task force members was to assign individuals to meet with the various recreational/sports organizations in town to determine their current facility usage and needs, other organizational needs, and tournament/event needs. The results of those meetings are summarized below.

#### **Soccer:**

- Soccer is growing fast and is the most widely participated sport in our County
- The County lacks an outdoor soccer complex large enough to host competitive soccer tournaments
  - 10 full size fields in close proximity were suggested for a large tournament
- An indoor soccer field would provide year-round soccer play
- Existing soccer groups are City Rec League (Youth Age 5-14) , AYSO (Youth under 10), Upper Valley Soccer (Youth Age 10+), and Boys and Girls High school teams
- No adult leagues exist (Indoor facility may increase play by adults), other than those offered through the University
- Various coaches mentioned that they are “making do” with the current outdoor fields and that scheduling can be an issue at times with overlap of other sports

#### **Baseball/Softball:**

- Current leagues in Rexburg include Madison Baseball, City Recreation Tee Ball, Co-Ed Softball, and organized high school baseball and women’s softball
  - Madison Baseball holds over 125 games per season, which include a very successful tournament that occurs in late June each year
- Facilities are a major concern for baseball in our County.
  - There are many facilities, but many are not in good shape and there are currently no complexes in the County
  - Some are used for dual purposes, such as soccer or football and access can be a problem during the season

- The group recognizes that building a baseball/softball complex should be a major priority to accommodate the needs of baseball/softball within our community
  - The Committee has explored the option of repurposing the current Community Fields into a baseball/softball quad and would like to work with the School District and City to see if this is a feasible option in the future. These efforts are currently in process now, but nothing has been determined to this point regarding this matter.

#### **Basketball:**

- Some Committee members reported a concern that public gyms are underutilized for public usage
  - A Sugar-Salem Representative reported that their gyms are frequently used by the public, but that they do not currently allow private leagues to operate within the schools beyond practice.
  - Schools get priority use of the gyms for their students, as they should
  - Both school district representatives reported that gym usage in the winter is very high by their students, which does not allow for much usage by the public
- All agreed that the current inventory of gyms are sufficient in our area and that a new Recreation Center with more gym space did not seem like a priority.
  - It was noted that many basketball courts exist privately in the area with the many local churches and the University

#### **Rodeo:**

- The indoor arena and fairgrounds is used extensively for roping, 4H, rodeo, and other outdoor events.
  - The current fairgrounds location is land-locked and lacks parking and other amenities to accommodate large rodeo events and the trailers that come with those events.
  - The track also needs repair
- It was suggested that the public look seriously at moving the fairgrounds outside the city limits where they can expand their operations and accommodate larger venues
- If relocated, the Committee believed a new facility could act as an event center and fairgrounds, and that our neighboring Counties should be included in the discussion
  - If relocated, the group felt that the existing location should be preserved as open green space for recreation, that some buildings may be able to be converted into new indoor recreation uses, and that some mixed use could be incorporated into the redevelopment of the old fairgrounds property

#### **Football:**

- There are no spaces currently designated specifically for football practice or games, other than the football stadiums for our local high school teams
  - Many practices occur on private green space, such as churches
- The group felt that outdoor fields designated specifically for football may not be necessary, but greater accessibility and coordination of scheduling could help
  - One challenge is not having lines painted for practice and games
- An indoor athletic complex or turf field could allow for clinics or practices during the late fall to late spring months, and help enhance the football experience for our local youth and participants

#### **Tennis:**

- There is growing interest in tennis
  - City Recreation programs have grown in recent years
- Numbers- 60+ involved in City Rec program, 40+ in High School program, and 40+ young adults in clubs, with a growing number of adults traveling to Idaho Falls to play in the winter. The University also provides courts for their students to access and play on
- An indoor tennis facility could allow for year round play and would likely increase participation in the sport within the County

#### **Wrestling:**

- Tournaments in Fall & Spring attract competition from as far away as Boise, Jackson Hole WY, and Northern Utah
- The current facilities in the County are sufficient to host wrestling tournaments

#### **Key Takeaways and Conclusions**

The task force identified the following key takeaways from our meetings, and sought to provide options for these takeaways. They also sought to provide a means of collecting public input regarding these takeaways so that we can prioritize future recommendations to our local governing bodies and citizens. Our ultimate goal is to determine what the public would like to see in terms of development of venues and recreational opportunities within Madison County and establish a timeline for such development. Once we know what the public wants, we can better establish cost estimates and explore the various funding options.

### Public Awareness:

One concern that the task force recognized is the lack of awareness in the community of current events and publicly available facilities. There are many great events and recreational opportunities already occurring in our community now that many people are unaware of. As we go forward and plan new events, the task force believed that we can do a better job of communicating those events occurring. Creating a centrally managed electronic means of informing people of recreational opportunities is an integral part of ensuring success for the current and any future events in Madison County.

Several solutions to this problem were explored. One was to consider using social media, such as Facebook or twitter and somehow coordinate the efforts of the various organizations putting on events in our community. Another solution was to create an application that is free to users where they can choose what events they want notifications for and how they want to be notified. This could include private or public events. We could look to local public entities to fund the creation of such an application, and consider charging a subscription fee annually along with a per post fee to those desiring to push their events. This would create easy access and awareness to the public of all different kinds of recreational events.

The Facebook page that has been created in order to create more public awareness is called **Envision Madison-Recreation**.

### Complexes:

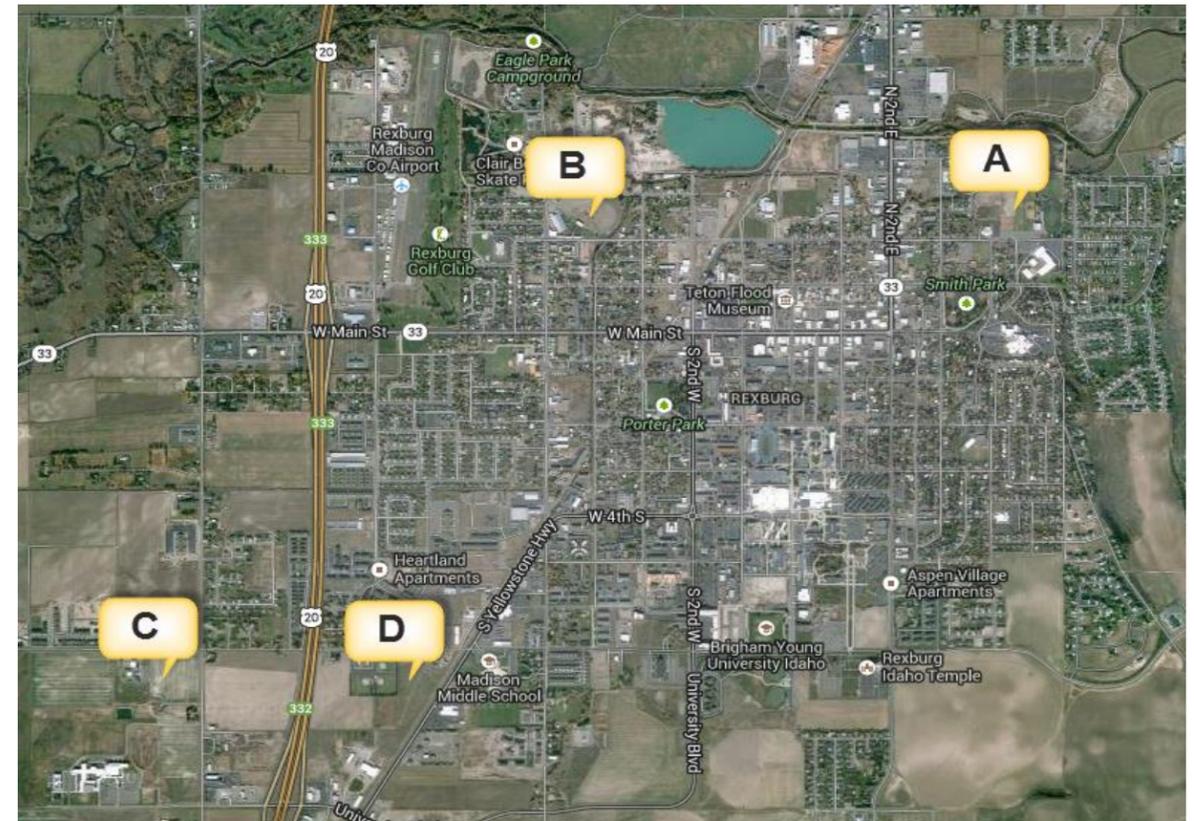
The task force suggested that we consider building sports complexes in the future. There are many advantages that come with building complexes rather than individual fields. A few of these advantages are below:

- They improve tournaments and the ability to attract tournaments
- Allow for a better social experience for the athlete/family participants
- Fields can be maintained at a lower cost and at the same quality level
  - In some cases, Madison County has a high level of inventory, but it is spread out and the site conditions vary from one venue to the next
  - It was suggested that local leaders consider repurposing some of the inventory and reinvesting into complexes that are built at a higher quality level

### Four-Plex Softball/Baseball Field (outdoor)

A four-plex softball/baseball field (outdoor) would enhance our ability to offer tournaments, which have economic and social benefits to our community. The task force members felt that providing a complex of fields in one central location would also provide better utilization of these types of venues at a lower cost. If necessary, it was suggested that re-purposing other venues throughout the County that are not currently utilized as they could for various reasons, should be considered.

If it was suggested that we build a 4-Plex Softball/Baseball Field in the near future, where should it be built?



- A. Community Fields Area- Barney Dairy Rd.
- B. Where the existing fairgrounds are-Assumes they would be relocated
- C. Near Madison High School- 12<sup>th</sup> West
- D. Along Yellowstone Highway- Near 7<sup>th</sup> South & Rexburg Stake Center

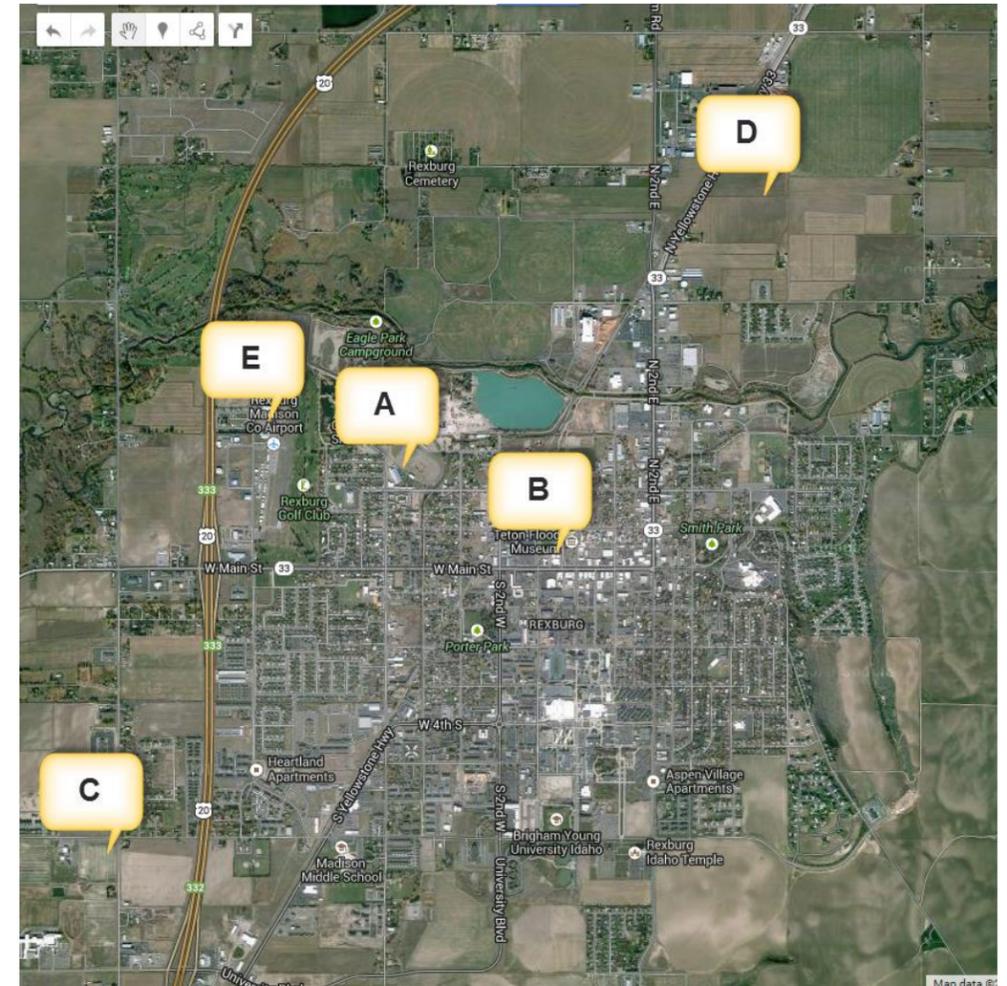
## Indoor Recreation

Madison County severely lacks opportunities for indoor recreation. The County is in need of an indoor facility that will accommodate the year-round participation of sports that we typically only play seasonally because of our severe and long winters. The task force discussed heavily a recreation center, which could include anything from basketball/volleyball courts to an indoor swimming pool with a common area/kitchen for gathering community groups. They also discussed the concept of an athletic complex, which typically includes an indoor turf area that can be utilized by multiple sports, such as football, soccer, and even baseball along with possible tennis courts and a gathering area/kitchen for community groups. An athletic complex is substantially cheaper to build than a recreation center, and the task force members felt that it would better meet the immediate needs of our local sports organizations and high school teams.

### Why Indoor Facilities?

- Our local athletic directors recognize the need for an athletic complex, not just more gyms
- Would allow practice on a turf type field by high school teams in winter, the play of soccer and flag football year-round, and the ability to hold sports camps for all outdoor sports during the winter.
- Our local sports teams are at a serious disadvantage because we do not have access to indoor facilities and cannot access outdoor fields until late Spring

If it was suggested that we build an Athletic Complex, Where should it be built?



- A. Current Fairgrounds location
- B. In the downtown area
- C. Along the Highway (Close to the new Madison High School)
- D. Somewhere between Sugar City and Rexburg
- E. Current Airport Location-Airport Road

## Preservation and Expansion of Open Green Belt Area along the River for Recreation Purposes

In order to expand and preserve the open green belt area along the Teton River in Rexburg, the task force recommended that the public consider the following:

- Moving the Fairgrounds
- Acquiring, with public funds, the property along the river from Riverside Park to Airport Road
- Creating a trail system along the river from 2<sup>nd</sup> East to Golf Course and eventually to Beaver Dick Park
- Creating another river crossing at 5<sup>th</sup> West to accommodate access to the open space on both sides of the river
  - Preserving green space around the river

One question the task force would ask, is should public monies be spent to acquire property along the river from Riverside Park to Airport Road?



## New Fairgrounds

The task force believed that the public should strongly consider moving the fairgrounds to a new location because the current fairgrounds location is land-locked and lacks parking and other amenities that would allow it to accommodate larger rodeos and other events. It was recommended that if moved, we consider moving the fairgrounds outside city limits and rebuilding them as an Event Center/Fairgrounds Facility. If this was done, it would be necessary to coordinate these efforts with neighboring counties if possible. It was also suggested that we choose a location that has adequate room and a freeway presence. If the fairgrounds were relocated, the old arena could be repurposed as a possible indoor arena or athletic complex that would be supported with user fees. A small portion of the old fairgrounds along 2<sup>nd</sup> North could also be redeveloped to another use.

If it was suggested to move the Fairgrounds, where would you build a new Fairgrounds /Event Center?



A. Along Highway 33 West of Rexburg

B. Along Highway 20 north of the 2<sup>nd</sup> East Rexburg exit

- C. Along Highway 20 between the Main Street and 2<sup>nd</sup> East Rexburg exits
- D. Along Highway 20 near the future location of the Thornton Interchange

**Funding Sources**

The task force explored various options to fund the future growth of recreation and recreation venues in Madison County. They did not recommend any specific method at this time, because they first want to establish what venues the citizens would like to see and the timeline for the construction of such venues. It was noted that it will be important to establish the cost estimates for recommended facilities prior to determining the funding sources. In general, the following are normally available as possible funding sources:

- Recreation District
- Urban Renewal District (Tax Increment Financing)
- City/County general fund monies (generally from sales tax or property taxes)
- Impact fees
- General Obligation Bonds
- Grants

**Seeking Input**

The task force realized the significance in trying to determine the general needs and desires of the public at large. It is a very difficult task to please each member of our community individually, but we recognize that many of our residents would likely support what the public would like to see as a whole. In an effort to achieve our goal of seeking the input of the public, we have issued a recreation survey that is available for all community members to complete. A link for the survey will be provided below after we review each of the survey questions. Thus far, we have received 81 preliminary responses so that we might begin to better understand and cater to the needs and wants of the public regarding the future of recreation and recreational venues. We have included below each question, the preliminary results of the survey, and encourage all to take the survey in an effort to capture what our community would like as a whole.

**How would you rank the importance of the following prospective recreational events? \***

	1-Least Important	2	3	4-Most Important
Baseball Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Basketball Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soccer Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Softball Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tennis Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volleyball Tournaments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Results:

Sample Size: 81

Importance	Baseball	Basketball	Soccer	Softball	Tennis	Volleyball
(Most) 4	38.3%	27.2%	33.3%	16.0%	8.6%	11.1%
3	28.4%	35.8%	27.2%	32.1%	19.8%	25.9%
2	17.3%	19.8%	19.8%	27.2%	35.8%	30.9%
(Least) 1	16.0%	17.3%	19.8%	24.7%	35.8%	32.1%

Of the following recreational facilities, rate how well you believe each to be utilized. \*

	Not Familiar	1-Underutilized	2	3	4-Effectively Utilized
Madison County Fairgrounds	<input type="radio"/>				
Madison High School	<input type="radio"/>				
Madison Junior High	<input type="radio"/>				
Madison Middle School	<input type="radio"/>				
Sugar Salem High School	<input type="radio"/>				
Sugar City Junior High	<input type="radio"/>				
Sugar City Middle School	<input type="radio"/>				

Results:

Effectively Utilized	Fair Grounds	Madison High School	Madison Jr. High	Madison Mid. School	Sugar High School	Sugar Jr. High	Sugar Mid. School
(Most) 4	7.4%	18.5%	18.5%	11.1%	7.4%	7.4%	6.2%
3	16.0%	33.3%	29.6%	22.2%	8.6%	3.7%	4.9%
2	34.6%	23.5%	30.9%	33.3%	16.0%	17.3%	14.8%
(Least) 1	34.6%	13.6%	8.6%	16.0%	9.9%	12.3%	13.6%
Not Familiar	7.4%	11.1%	12.3%	17.3%	58.0%	59.3%	60.5%

	Not Familiar	1-Underutilized	2	3	4-Effectively Utilized
Community Park	<input type="radio"/>				
Eagle Park	<input type="radio"/>				
Evergreen/Kiwanis Park	<input type="radio"/>				
Hidden Valley Park	<input type="radio"/>				
Nature Park	<input type="radio"/>				
Porter Park	<input type="radio"/>				
Rexburg Rapids	<input type="radio"/>				
Riverside Park (excluding Rexburg Rapids)	<input type="radio"/>				
Smith Park (Rexburg)	<input type="radio"/>				

Results:

Effectively Utilized	Community Park	Eagle Park	Evergreen /Kiwanis Park	Hidden Valley Park	Nature Park
(Most) 4	12.3%	0	4.9%	2.5%	16.0%
3	4.9%	7.4%	23.5%	3.7%	34.6%
2	21.0%	23.5%	16.0%	16.0%	29.6%
(Least) 1	12.3%	21.0%	9.9%	29.6%	16.0%
Not Familiar	49.4%	48.1%	45.7%	48.1%	3.7%

Effectively Utilized	Porter Park	Rexburg Rapids	Riverside Park	Smith Park
(Most) 4	60.5%	39.5%	8.6%	55.6%
3	21.0%	21.0%	18.5%	27.2%
2	9.9%	21.0%	21.0%	11.1%
(Least) 1	6.2%	13.6%	29.6%	3.7%
Not Familiar	2.5%	4.9%	22.2%	2.5%

	Not Familiar	1-Underutilized	2	3	4-Effectively Utilized
Beaver Dick Park	<input type="radio"/>				
Heritage Park	<input type="radio"/>				
Lyle H. Moon Park	<input type="radio"/>				
Smith Park	<input type="radio"/>				
Thomas C. Neibaur Park	<input type="radio"/>				
Twin Bridges	<input type="radio"/>				

Results:

Effectively Utilized	Beaver Dick Park	Heritage Park	Lyle H. Moon Park	Smith Park (Sugar)	Thomas C. Neibaur Park	Twin Bridges
(Most) 4	11.1%	1.2%	2.5%	17.3%	1.2%	3.7%
3	25.9%	11.1%	0	13.6%	0	9.9%
2	32.1%	17.3%	18.5%	17.3%	17.3%	22.2%
(Least) 1	16.0%	8.6%	11.1%	16.0%	14.8%	21.0%
Not Familiar	14.8%	61.7%	67.9%	35.8%	66.7%	43.2%

Would you be interested in learning more about the creation of a Recreation District tax levy to fund the construction of new recreational facilities? \*

Yes

No

58.0% of people said Yes and 42.0% said No

On a scale of 1 to 10, how important are each of the following recreation venues to you? \*

	1-Least Important	2	3	4	5	6	7	8	9	10-Most Important
Fairgrounds/Event Center	<input type="radio"/>									
4 Plex-Softball/Baseball Complex (Outdoor)	<input type="radio"/>									
Athletic Complex (Indoor)	<input type="radio"/>									
Soccer Complex (Outdoor)	<input type="radio"/>									
Swimming Pool (Indoor)	<input type="radio"/>									

Results: (Results reflect different venues than those in the question)

Priority	Baseball Complex	Indoor Athletic Complex	Fairgrounds /Events Center	Soccer Complex	Indoor Swimming Pool
(Highest) 10	14.8%	35.8%	12.3%	13.6%	48.1%
9	11.1%	18.5%	6.2%	9.9%	9.9%
8	13.6%	6.2%	17.3%	16.0%	8.6%
7	9.9%	7.4%	16.0%	9.9%	4.9%
6	3.7%	6.2%	9.9%	8.6%	4.9%
5	11.1%	11.1%	9.9%	11.1%	11.1%
4	3.7%	0	4.9%	2.5%	0
3	6.2%	3.7%	4.9%	7.4%	3.7%
2	8.6%	3.7%	6.2%	4.9%	1.2%
(Lowest) 1	17.3%	7.4%	12.3%	16.0%	7.4%

**When would you like to see the following recreational facilities built? \***

	Within 5 Years	Within 10 Years	Within 15 Years	Within 20 Years	Within 30 Years
Fairgrounds/Event Center	<input type="radio"/>				
4 Plex-Softball/Baseball Complex (Outdoor)	<input type="radio"/>				
Athletic Complex (Indoor)	<input type="radio"/>				
Soccer Complex (Outdoor)	<input type="radio"/>				
Swimming Pool (Indoor)	<input type="radio"/>				

Results: (Results reflect different venues than those in the question)

Time Period	Baseball Complex	Indoor Athletic Complex	Fairgrounds /Events Center	Soccer Complex	Indoor Swimming Pool
Within 5 Years	37.0%	53.1%	27.2%	34.6%	63.0%
Within 10 Years	27.2%	16.0%	38.3%	28.4%	12.3%
Within 15 Years	14.8%	12.3%	13.6%	13.6%	8.6%
Within 20 Years	6.2%	6.2%	6.2%	8.6%	4.9%
Within 30 Years	14.8%	12.3%	14.8%	14.8%	11.1%

**Link to Survey:**

[Envision Madison Recreation Task Force Survey](#)

[https://docs.google.com/forms/d/1pi2hg1HcQi\\_kZNqeNlkaNlIxea1MKo8XUyXaASn0XgY/viewform](https://docs.google.com/forms/d/1pi2hg1HcQi_kZNqeNlkaNlIxea1MKo8XUyXaASn0XgY/viewform)

Committee Members/Major Contributors

- Robert Yeatman
- Ron Feik (Co-Chair)
- Brian George (Co-Chair)
- Lori Woodland (Co-Chair)
- Donna Benfield
- Sarah Jane Kesler
- Marc Gee
- Erick Wills
- Randall Porter
- Aaron Peterson (Co-Chair)
- Members of the BYUI-Student Representative Council
- Arielle Green
- Rochelle Matthews
- Matt Nielson
- Aaron Trappett

## Inventory

In an effort to understand what facilities we are lacking, we performed a county wide inventory, with the results as shown below. We have highlighted the major athletic programs and summarized our findings below. If you wish to see the details of the studies, please see those reports in the appendix.

Row Labels	Sum of Quantity
<b>Baseball Field</b>	<b>14</b>
Rexburg	9
Community Park	4
Madison High School	1
Porter Park	1
Smith Park	2
The Zone	1
Sugar City	5
Heritage Park	1
Smith Park	2
Sugar Salem High School	2
<b>Basketball</b>	<b>14</b>
Rexburg	12
Burton Elementary School	2
Lincoln Elementary School	1
Madison High School	3
Madison Junior High School	1
Madison Middle School	3
South Fork Elementary School	1
The Zone	1
Sugar City	2
Neibaur Park	1
Smith Park	1

Row Labels	Sum of Quantity
Batting Cages	2
BMX/Skatepark	2
Bowling	1
Camp Area	96
Dirt/Mountain Bike	3
Fairgrounds	1
Fishing	7
<b>Football</b>	<b>4</b>
Rexburg	3
Madison High School	2
Madison Junior High School	1
Sugar City	1
Sugar Salem High School	1
Frisbee Golf	1
Golf	2
<b>Green Space-No Specific Use Designated</b>	<b>10</b>
Rexburg	7
Eagle Park	1
<b>Evergreen/Kiwanis Park</b>	<b>1</b>
Hibbard Elementary School	1
Hidden Valley	1
Park Street Park	1
Porter Park	1
Riverside Park	1
Sugar City	3
Heritage Park	1
Lyle H. Moon Park	1
Neibaur Park	1

Row Labels	Sum of Quantity
Gun Range	14
Hiking	3
Lacrosse Field	2
Lazer Tag	1
Miniature Golf	2
Picnic Areas	34
Playground	14
Racquetball Court	2
Rock Climbing	2
Rodeo Grounds	1
<b>Soccer</b>	<b>21</b>
Rexburg	18
Burton Elementary School	1
Evergreen/Kiwanis Park	2
Hibbard Elementary School	1
Kennedy Elementary School	2
Madison High School	2
Madison Junior High School	1
Madison Middle School	2
Nature Park	2
South Fork Elementary School	1
The Zone	1
Adams Elementary	3
Sugar City	3
Central Elementary School	1
Heritage Park	1
Kershaw Middle School	1
Softball	2
Rexburg	1
The Zone	1
Sugar City	1
Sugar Salem High School	1

Row Labels	Sum of Quantity
<b>Swimming Pool</b>	<b>4</b>
Newdale	1
Green Canyon Hot Springs	1
Rexburg	3
Porter Park	1
Riverside Park	1
Wakeside Lake & RV Park/Cable Factory	1
2245 South 2000 West	1
Private	1
Not Lighted	1
Outdoor	1
(blank)	1
<b>Tennis Court</b>	<b>17</b>
Rexburg	11
Madison Junior High School	6
Porter Park	2
Smith Park	2
The Zone	1
Sugar City	6
Neibaur Park	2
Smith Park	2
Sugar Salem High School	2
Trail Pathway-Walk/Bike	9
Volleyball Court (Excludes School Gyms)	3
Weightlifting Facility	4
<b>Undeveloped-No Specific Use Designated</b>	<b>2</b>
Rexburg	2
Community Park	1
Riverside Park	1
Roller Skating Rink	1
<b>Grand Total</b>	<b>295</b>

Inventory of Recreational Venues										
City of Rexburg	Example Park	Riverside	Smith	Porter	Eagle	Nature	Evergreen/ Kiwanis	Hidden Valley	Park Street	Rotary
Address	30 W 5th S	50 W 2 N	E Main 3 E	2 W 2 S	4 W N St.	5th W 3 N	W Main St.	47 Mill Race	515 Park	
Archery-Indoor	2	0	0	0	0	0	0	0	0	0
Archery-Outdoor	0	0	0	0	0	0	0	0	0	0
Baseball Fields	3L	0	2	0	0	0	0	0	0	0
Basketball Courts Indoor	4	0	0	0	0	0	0	0	0	0
Basketball Outdoor	0	0	1	1	0	0	0	0	0	0
Bowling	1	0	0	0	0	0	0	0	0	0
Number of Lanes	8	0	0	0	0	0	0	0	0	0
Biking/BMX	2	0	0	0	1	4	0	0	0	0
Dirt or Cement	Dirt	Mix	0	0	Dirt	Mix	Mix	Grass	Grass	Grass
Camp Area	1	0	0	0	24	0	0	0	0	0
Fire Pit	10	0	0	0	24	0	0	0	0	0
Camp Address	5972 Silver	0	0	0	as above	0	0	0	0	0
Rock Climbing	0	0	0	0	0	0	0	0	0	0
Fishing	3	0	0	0	1	3	0	0	0	0
Football	1L	0	0	0	0	0	0	0	0	0
Golf	2	0	0	0	0	0	0	0	0	0
Gun Range Indoor	2	0	0	0	0	0	0	0	0	0
Gun Range Outdoor	2L	0	0	0	0	0	0	0	0	0
Hiking	4	0	0	0	0	0	0	0	0	0
Jogging	3	0	0	1	1	4	0	0	0	0
Paint Balling Indoor	1	0	0	0	0	0	0	0	0	0
Paint Balling Outdoor	1L	0	0	0	0	0	0	0	0	0
Picnic Areas	11	0	2 + various	2 + various	5 areas + 1	11	2	0	0	0
Picnic Tables	11	0	4	9	24	various	various	2	0	0
Playground	3	0	3	3	0	1	2	2	3	1

Play Equipment	8	0	3	4	0	3	2	2	3	1
Racquetball Courts	6	0	0	0	0	0	0	0	0	0
Rodeo Grounds	1L	0	0	0	0	0	0	0	0	0
Roller Skating Rink	0	0	0	0	0	1	0	0	0	0
Skate Board Park	0	0	0	0	0	1	0	0	0	0
Skiing - Down	0	0	0	0	0	0	0	0	0	0
Skiing - Xentry	1	0	0	0	0	0	0	0	0	0
Soccer Indoor	1	0	0	0	0	0	0	0	0	0
Soccer Outdoor	1L	0	0	0	0	2	2/4 goals	0	0	0
Swimming Pool Indoor	2	0	0	0	0	0	0	0	0	0
Swimming Pool Outdoor	2L	4	0	0	0	0	0	0	0	0
Badminton Area	0	0	0	0	0	0	0	0	0	0
Tennis Court Indoor	0	0	0	0	0	0	0	0	0	0
Tennis Court Outdoor	4L	0	2	2	0	0	0	0	0	0
Volleyball Court	1	1	0	0	0	0	0	0	0	0
Lacross Field	1L	0	0	0	0	0	0	0	0	0
Lacross Goals	2	0	0	0	0	0	0	0	0	0
Walking Paths	14	0	1	1	1	3	0	0	0	0
Weightlifting Facility	2	0	0	0	0	0	0	0	0	0
Bathrooms	17	4L	1L	0	2+	1	0	0	0	0
Fairgrounds	1	0	0	0	1	0	0	0	0	0
Disk Golf		0	0	0	0	1	0	0	0	0
Carousel		0	0	1L	0	0	0	0	0	0

## Inventory of Recreational Venues

Madison County	Example Park	Twin Bridges	Beaver Dick	Fair Grounds	Municipal Golf Course	Teton Lakes Golf			
Address	30 W 5th S	S 600 E	HW 33	134 E Main	S Airport Rd	722 N 12 W			
Archery-Indoor	2	0	0	0	0	0			
Archery-Outdoor	0	0	0	0	0	0			
Baseball Fields	3L	0	0	0	0	0			
Basketball Courts Indoor	4	0	0	0	0	0			
Basketball Outdoor	0	0	0	0	0	0			
Bowling	1	0	0	0	0	0			
Number of Lanes	8	0	0	0	0	0			
Biking/BMX	2	0	0	0	0	0			
Dirt or Cement	Dirt	0	Dirt	Dirt	0	0			
Camp Area	1	27	9	0	0	0			
Fire Pit	10	27	17	0	0	0			
Camp Address	5972 Silver	As Above	As Above	0	0	0			
Rock Climbing	0	0	0	0	0	0			
Fishing	3	Abundant	Abundant	0	0	0			
Football	1L	0	0	0	0	0			
Golf	2	0	0	0	9 Holes	27 Holes			
Gun Range Indoor	2	0	0	0	0	0			
Gun Range Outdoor	2L	0	0	0	0	0			
Hiking	4	0	0	0	0	0			
Jogging	3	0	0	0	0	0			
Paint Balling Indoor	1	0	0	0	0	0			
Paint Balling Outdoor	1L	0	0	0	0	0			
Picnic Areas	11	6 shelters	4 shelters	0	0	0			
Picnic Tables	11	27 (1/camp)	18	0	0	0			
Playground	3	0	0	0	0	0			

Play Equipment	8	0	2	0	0	0			
Racquetball Courts	6	0	0	0	0	0			
Rodeo Grounds	1L	0	0	1L	0	0			
Roller Skating Rink	0	0	0	0	0	0			
Skate Board Park	0	0	0	0	0	0			
Skiing - Down	0	0	0	0	0	0			
Skiing - Xentry	1	0	0	0	0	0			
Soccer Indoor	1	0	0	0	0	0			
Soccer Outdoor	1L	0	0	0	0	0			
Swimming Pool Indoor	2	0	0	0	0	0			
Swimming Pool Outdoor	2L	0	0	0	0	0			
Badminton Area	0	0	0	0	0	0			
Tennis Court Indoor	0	0	0	0	0	0			
Tennis Court Outdoor	4L	0	0	0	0	0			
Volleyball Court	1	0	1	0	0	0			
Lacross Field	1L	0	0	0	0	0			
Lacross Goals	2	0	0	0	0	0			
Walking Paths	14	Various	7	0	0	0			
Weightlifting Facility	2	0	0	0	0	0			
Bathrooms	17	5	4	0	3 portable	1			
Fairgrounds	1	0	0	1L	0	0			

# Inventory of Recreational Venues

Sugar City	Example Park	Heritage Park	Smith Park	Neibaur Park	Moon Park				
Address	30 W 5th S								
Archery-Indoor	2	0	0	0	0				
Archery-Outdoor	0	0	0	0	0				
Baseball Fields	3L	1	2	0	0				
Basketball Courts Indoor	4	0	0	0	0				
Basketball Outdoor	0	0	1	1	0				
Bowling	1	0	0	0	0				
Number of Lanes	8	0	0	0	0				
Biking/BMX	2	0	0	0	0				
Dirt or Cement	Dirt	0	0	0	0				
Camp Area	1	0	0	0	0				
Fire Pit	10	0	0	0	0				
Camp Address	5972 Silver	0	0	0	0				
Rock Climbing	0	0	0	0	0				
Fishing	3	0	0	0	0				
Football	1L	0	0	0	0				
Golf	2	0	0	0	0				
Gun Range Indoor	2	0	0	0	0				
Gun Range Outdoor	2L	0	0	0	0				
Hiking	4	0	0	0	0				
Jogging	3	0	0	0	0				
Paint Balling Indoor	1	0	0	0	0				
Paint Balling Outdoor	1L	0	0	0	0				
Picnic Areas	11	1	0	1	1				
Picnic Tables	11	0	0	0	0				
Playground	3	1	1	1	0				

Play Equipment	8	3	2	3	0				
Racquetball Courts	6	0	0	0	0				
Rodeo Grounds	1L	0	0	0	0				
Roller Skating Rink	0	0	0	0	0				
Skate Board Park	0	0	0	0	0				
Skiing - Down	0	0	0	0	0				
Skiing - Xentry	1	0	0	0	0				
Soccer Indoor	1	0	0	0	0				
Soccer Outdoor	1L	1	0	0	0				
Swimming Pool Indoor	2	0	0	0	0				
Swimming Pool Outdoor	2L	0	0	0	0				
Badminton Area	0	0	0	0	0				
Tennis Court Indoor	0	0	0	0	0				
Tennis Court Outdoor	4L	0	2	2	0				
Volleyball Court	1	0	0	0	0				
Lacross Field	1L	0	0	0	0				
Lacross Goals	2	0	0	0	0				
Walking Paths	14	0	0	0	0				
Weightlifting Facility	2	0	0	0	0				
Bathrooms	17	0	1	0	0				
Fairgrounds	1	0	0	0	0				

# Inventory of Recreational Venues

Privately Owned	Example Park	The Zone	Green Canyon	Hwy 33 Gun Club	Heise Hot Springs	Kelly Canyon	Fat Cats	Rainbow Lake	The Craze	World Gym	Anytime Fitness	The Ridge
Address	30 W 5th S	275	2432 N		5116 Kelly	5488 Kelly	475 N 2 E	2245 S 2000	30 College			
Archery-Indoor	2	0	0	0	0	0	0	0	0			
Archery-Outdoor	0	0	0	0	0	0	0	0	0			
Baseball Fields	3L	0	0	0	0	0	0	0	0			
Basketball Courts Indoor	4	1	0	0	0	0	0	0	0			
Basketball Outdoor	0	0	0	0	0	0	0	0	0			
Bowling	1	0	0	0	0	0	1	0	0			
Number of Lanes	8	0	0	0	0	0	1	0	0			
Biking/BMX	2	0	Nearby	0	0	0	0	0	0			
Dirt or Cement	Dirt	0	Dirt	0	0	0	0	0	0			
Camp Area	1	0	10 (RV)	0	1	0	0	25 (RV)	0			
Fire Pit	10	0	10	0	1	0	0	0	0			
Camp Address	5972 Silver	0	As Above	0	As Above	0	0	As Above	0			
Rock Climbing	0	0	0	0	0	0	0	0	0			
Fishing	3	0	Abundant	0	Abundant	0	0	Abundant	0			
Football	1L	0	0	0	0	0	0	0	0			
Golf	2	0	0	0	9h	0	0	0	Mini: 9h			
Gun Range Indoor	2	0	0	0	0	0	0	0	0			
Gun Range Outdoor	2L	0	0	14	0	0	0	0	0			
Hiking	4	0	Nearby	0	Nearby	0	0	0	0			
Jogging	3	0	0	0	Nearby	0	0	0	0			
Paint Balling Indoor	1	0	0	0	0	0	0	0	0			
Paint Balling Outdoor	1L	0	0	0	0	0	0	0	0			
Picnic Areas	11	0	10 shelters	0	0	0	0	0	0			
Picnic Tables	11	0	10	0	4 or 5 per	0	0	2 or 3 per	0			
Playground	3	0	0	0	0	0	0	0	0			

Play Equipment	8	0	0	0	0	0	0	0	indoor			
Racquetball Courts	6	0	0	0	0	0	0	0	0	1		
Rodeo Grounds	1L	0	0	0	0	0	0	0	0			
Roller Skating Rink	0	0	0	0	0	0	0	0	0			
Skate Board Park	0	0	0	0	0	0	0	0	0			
Skiing - Down	0	0	0	0	0	1	0	0	0			
Skiing - Xentry	1	0	0	0	0	1	0	0	0			
Soccer Indoor	1	1	0	0	0	0	0	0	0			
Soccer Outdoor	1L	0	0	0	0	0	0	0	0			
Swimming Pool Indoor	2	0	1L	0	0	0	0	0	0			
Swimming Pool Outdoor	2L	0	0	0	2	0	0	0	0			
Badminton Area	0	0	0	0	0	0	0	0	0			
Tennis Court Indoor	0	0	0	0	0	0	0	0	0			
Tennis Court Outdoor	4L	0	0	0	0	0	0	0	0			
Volleyball Court	1	1	0	0	0	0	0	0	0			
Lacross Field	1L	0	0	0	0	0	0	0	0			
Lacross Goals	2	0	0	0	0	0	0	0	0			
Walking Paths	14	0	0	0	0	0	0	0	0			
Weightlifting Facility	2	Slight	0	0	0	0	0	0	0	1	1	1
Bathrooms	17	1	1 indoor	0	1	1	1	2 + portable	1			
Fairgrounds	1	0	0	0	0	0	0	0	0			
Theaters	0	0	0	0	0	0	6	0	0			
Arcades	0	0	0	0	0	0	1	0	1			
Pizzeria	0	0	0	0	1	0	1	0	1			
Lazer Tag	0	0	0	0	0	0	0	0	1			
Restaurant	0	0	0	0	0	1	0	0	0			
Billiards	0	0	0	0	0	0	1	0	0			

## Inventory of Recreational Venues

Madison School District	Example Park	Madison High	Central High	Madison Jr. High	Madison Middle	Adams Elementary	Burton Elementary	Hibbard Elementary	Kennedy Elementary	Lincoln Elementary	South Fork Elementary
Address	30 W 5th S										
Archery-Indoor	2	0	0	0	0	0	0	0	0	0	0
Archery-Outdoor	0	0	0	0	0	0	0	0	0	0	0
Baseball Fields	3L	1	0	0	0	0	0	0	0	0	0
Basketball Courts Indoor	4	1	0	0	0	0	0	0	0	0	0
Basketball Outdoor	0	2	0	1	3	0	1	0	0	1	1
Bowling	1	0	0	0	0	0	0	0	0	0	0
Number of Lanes	8	0	0	0	0	0	0	0	0	0	0
Biking/BMX	2	0	0	0	0	0	0	0	0	0	0
Dirt or Cement	Dirt	0	0	0	0	0	0	0	0	0	0
Camp Area	1	0	0	0	0	0	0	0	0	0	0
Fire Pit	10	0	0	0	0	0	0	0	0	0	0
Camp Address	5972 Silver	0	0	0	0	0	0	0	0	0	0
Rock Climbing	0	0	0	0	0	0	0	0	0	0	0
Fishing	3	0	0	0	0	0	0	0	0	0	0
Football	1L	0	0	1	0	0	0	0	0	0	0
Golf	2	0	0	0	0	0	0	0	0	0	0
Gun Range Indoor	2	0	0	0	0	0	0	0	0	0	0
Gun Range Outdoor	2L	0	0	0	0	0	0	0	0	0	0
Hiking	4	0	0	0	0	0	0	0	0	0	0
Jogging	3	0	0	1	0	0	0	0	0	0	0
Paint Balling Indoor	1	0	0	0	0	0	0	0	0	0	0
Paint Balling Outdoor	1L	0	0	0	0	0	0	0	0	0	0
Picnic Areas	11	0	0	0	0	0	0	0	0	0	0
Picnic Tables	11	0	0	0	0	0	0	0	0	0	0
Playground	3	0	0	1	1	0	1	1	1	1	1

Play Equipment	8	0	0	3	3	0	3	3	3	3	3
Racquetball Courts	6	0	0	0	0	0	0	0	0	0	0
Rodeo Grounds	1L	0	0	0	0	0	0	0	0	0	0
Roller Skating Rink	0	0	0	0	0	0	0	0	0	0	0
Skate Board Park	0	0	0	0	0	0	0	0	0	0	0
Skiing - Down	0	0	0	0	0	0	0	0	0	0	0
Skiing - Xentry	1	0	0	0	0	0	0	0	0	0	0
Soccer Indoor	1	0	0	0	0	0	0	0	0	0	0
Soccer Outdoor	1L	2	0	2	2	3	1	0	2	1	1
Swimming Pool Indoor	2	0	0	0	0	0	0	0	0	0	0
Swimming Pool Outdoor	2L	0	0	0	0	0	0	0	0	0	0
Badminton Area	0	0	0	0	0	0	0	0	0	0	0
Tennis Court Indoor	0	0	0	0	0	0	0	0	0	0	0
Tennis Court Outdoor	4L	0	0	6	0	0	0	0	0	0	0
Volleyball Court	1	0	0	0	0	0	0	0	0	0	0
Lacross Field	1L	0	0	0	0	0	0	0	0	0	0
Lacross Goals	2	0	0	0	0	0	0	0	0	0	0
Walking Paths	14	0	0	0	0	0	0	0	0	0	0
Weightlifting Facility	2	0	0	0	0	0	0	0	0	0	0
Bathrooms	17	0	0	0	0	0	0	0	0	0	0
Fairgrounds	1	0	0	0	0	0	0	0	0	0	0

## Inventory of Recreational Venues

Sugar Salem School District	Example Park	SSHS	SSJHS	Kershaw Middle	Central Elementary				
Address	30 W 5th S								
Archery-Indoor	2	0	0	0	0				
Archery-Outdoor	0	0	0	0	0				
Baseball Fields	3L	2	0	0	0				
Basketball Courts Indoor	4	1	0	0	0				
Basketball Outdoor	0	0	0	1	1				
Bowling	1	0	0	0	0				
Number of Lanes	8	0	0	0	0				
Biking/BMX	2	0	0	0	0				
Dirt or Cement	Dirt	0	0	0	0				
Camp Area	1	0	0	0	0				
Fire Pit	10	0	0	0	0				
Camp Address	5972 Silver	0	0	0	0				
Rock Climbing	0	0	0	0	0				
Fishing	3	0	0	0	0				
Football	1L	0	0	0	0				
Golf	2	0	0	0	0				
Gun Range Indoor	2	0	0	0	0				
Gun Range Outdoor	2L	0	0	0	0				
Hiking	4	0	0	0	0				
Jogging	3	0	0	0	0				
Paint Balling Indoor	1	0	0	0	0				
Paint Balling Outdoor	1L	0	0	0	0				
Picnic Areas	11	0	0	0	0				
Picnic Tables	11	0	0	0	0				
Playground	3	0	0	3	3				

Play Equipment	8	0	0	6	6				
Racquetball Courts	6	0	0	0	0				
Rodeo Grounds	1L	0	0	0	0				
Roller Skating Rink	0	0	0	0	0				
Skate Board Park	0	0	0	0	0				
Skiing - Down	0	0	0	0	0				
Skiing - Xentry	1	0	0	0	0				
Soccer Indoor	1	0	0	0	0				
Soccer Outdoor	1L	1	0	6	6				
Swimming Pool Indoor	2	0	0	0	0				
Swimming Pool Outdoor	2L	0	0	0	0				
Badminton Area	0	0	0	0	0				
Tennis Court Indoor	0	0	0	0	0				
Tennis Court Outdoor	4L	2	0	0	0				
Volleyball Court	1	0	0	0	0				
Lacross Field	1L	0	0	0	0				
Lacross Goals	2	0	0	0	0				
Walking Paths	14	0	0	1	1				
Weightlifting Facility	2	0	0	0	0				
Bathrooms	17	0	0	0	0				
Fairgrounds	1	0	0	0	0				

# The Madison County Jobs Task Force Report

## Part of Envision Madison 2013-15

### Introduction

Starting in September 2013, the task force started meeting, under the direction of the Envision Madison Executive Committee, every other week to discuss the goals set by the board of Envision Madison for the task force. Discussions included what types of qualitative and quantitative data would be helpful to address the goals of increasing jobs and the quality of those jobs in Madison County. The specific data was then sought out. The data was reviewed at subsequent meetings this report contains a summary of the discussions, analysis, and recommendations of the taskforce.

As part of the Envision Madison, the Jobs Task Force addresses one of three themes that resulted from the Values Study, workshops, and online survey that were not spatial in nature. The three themes are:

1. The relationship between the University and the community
2. Economic growth in the recreation and tourism industry
3. Overall job growth

The goal of the Jobs Task Force is to explore Madison County's capability to increase the number of available jobs in the area and how. The three subjects within job creation and the information that the Task Force would gather in each are:

1. Industry Sectors –
  - a. What industries currently provide jobs in the area?
  - b. What industries could or should be expanded?
  - c. Based on feedback the three industries that should be explored are: industrial, retail, and agriculture.
  - d. Which Sectors are better at providing a living wage?
2. Workforce –
  - a. What is the current workforce profile?
  - b. How might this change over the next 30 years?
  - c. What industries are complimentary to the current and expected profile?
3. Infrastructure & Policy –
  - a. Identify the infrastructure needs of different industries and how they compare to the current infrastructure.
  - b. Identify what the future infrastructure needs might be for the County.
  - c. Identify policies that are helpful to growing business and attracting business and those that may be hindering to growth and attraction.

### Task Force Members

Jake Mecham	Co-Chair
Scott Dixon	Co-Chair
Carlos Aponte	Envision Madison Executive Committee Member
Scott Johnson	
Will Jenson	
Phil Kunz	
Kelly McCandless	
Corey Smith	
Robert Tietjen	
Johnny Watson	

## Where Are We Now And How Do We Compare?

Between 2000 and 2012 Madison County was the Idaho's 4<sup>th</sup> fastest growing county. During that time the population grew by 36% - adding almost 10,000 residents. Much of the growth was spurred by the transition of the two year Ricks College to the four year Brigham Young University-Idaho. The neighboring Jefferson and Teton Counties were also in the top five fastest growing counties in the state of Idaho.

Data from the Idaho Department of Labor Statistics shows that in 2012 Madison County had an employment count of 10,616. The employment count comes from the Quarterly Census of Employment and Wages program data. Census data shows a total population of 37,456 for Madison County as of 2012.

### Madison County Employment Types

#### Sustainable, Persistent Career Jobs

Defined as: Low skill to high skill careers, these jobs employ Madison County residents year round.

#### Apprentice Jobs

Defined as: Short-term, professionally oriented employment. These include both internships and professional trades as well as project-specific jobs.

#### Flexible-Short Term Jobs

Defined as: requiring less skill or education, these are non-career and short-term.

## Location Quotient Data

Location quotients are often used to quickly highlight the differences in employment concentrations between two or more communities. This approach takes the percentage of total employment one particular industry has in one region and divides it by the same industry's percentage of total employment in another region. If the resulting ratio is less than one, the area represented in the numerator might be importing products industry being compared; thus creating a gap or "leakage" in the local economy, i.e. a need to grow that particular industry.

Location quotients below 1.0 can also be the result of lower local demand for products in that industry. At times lower location quotients can be explained by neighboring counties satisfying local demands on a regional level. Car dealerships and other forms of retail trade are good examples of industries that often have low location quotients in rural counties, as these sectors tend to agglomerate in more urban settings. Location quotients greater than 1.0 can indicate areas of strength, specialization and exporting industries. In all cases, good qualitative data is useful to explain location quotient results.

The location quotient data used and referenced in this report was obtained from the Idaho Department of Labor. Since Madison County was used as the base county, its location quotient is equal to 1.0 for all industries compared.

By using Madison County as the base for location quotient comparisons, other counties with similar characteristics can highlight what industries Madison County is lacking. There are a number of counties in the western United States that could be used as models for what Madison County's economy could look like.

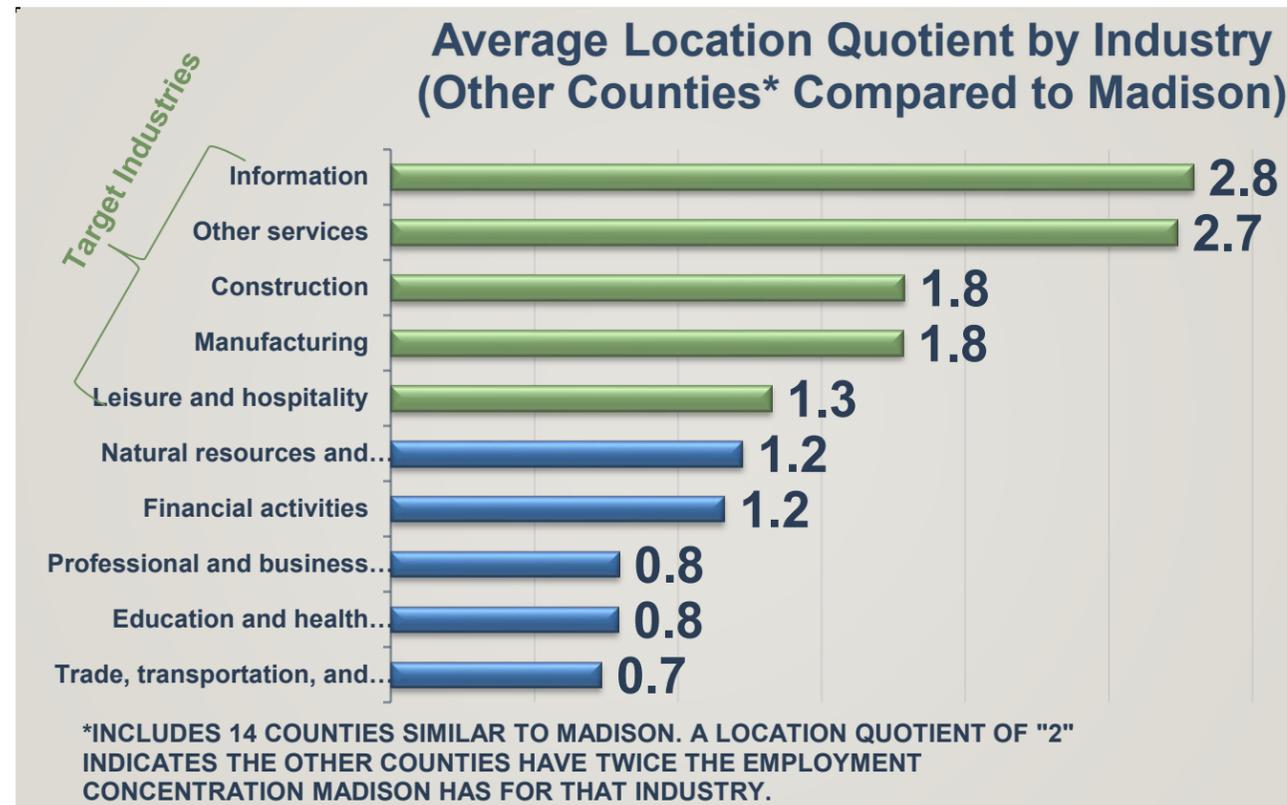
Multiple counties were selected and compared to model what Madison County might look like after decades of future growth. Many of these communities are anchored by universities and are in close proximity to National Parks. Many are also close to major transportation routes like Interstate 15 and U.S. Highway 20.

### Comparison Counties

- |                             |                             |                                |
|-----------------------------|-----------------------------|--------------------------------|
| 1. Jefferson County, Idaho  | 6. Cache County, Utah       | 11. Jackson County, Oregon     |
| 2. Bonneville County, Idaho | 7. Utah County, Utah        | 12. Polk County, Oregon        |
| 3. Bannock County, Idaho    | 8. Iron County, Utah        | 13. Spokane County, Washington |
| 4. Ada County, Idaho        | 9. Gallatin County, Montana | 14. Whitman County, Washington |
| 5. Latah County, Idaho      | 10. Albany County, Wyoming  |                                |

When Madison County was compared to these other counties some consistent shortfalls were revealed. Madison County was used as the denominator or base area as location quotients were calculated for the 14 comparison counties in the study. Next, the comparison counties' location quotients for each industry were averaged to create a single location quotient. This average location quotient revealed how much more or less concentrated the other counties were in specific industry employment when compared to Madison County. Based on these results, five target industries were identified for closer inspection.

The five target industries had employment concentrations, or local quotients, of at least 1.3 times and up to 2.8 times higher than Madison County. The target industries include: leisure and hospitality, manufacturing, construction, other services, and information. If Madison County's economic makeup was changed to match the average of the comparison counties, nearly 1,600 jobs would be added to the 5 target industries.

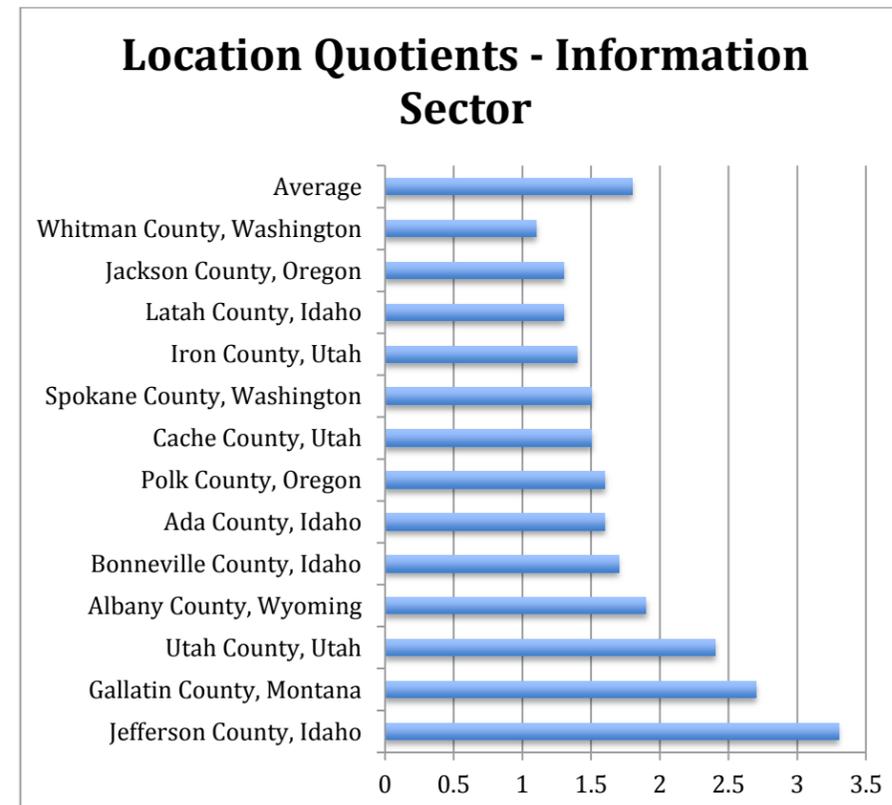


### Location Quotient by Industry

#### Information Industry Sector

The Information Industry represented 0.6% of the total County employment for 2012, or 71 out of 10,616 jobs. Although the location quotient for comparison counties is very high, Madison County might not need these jobs locally. Many information related jobs can be fulfilled regionally and can be utilized through technology.

Some of the comparison counties were remarkably more concentrated with information sector jobs than Madison County. For example, Utah County, Utah, was 8.5 times more concentrated than Madison County. Only Jefferson County, Idaho and Polk County, Oregon had less information sector jobs than Madison County. On average the Comparison counties were 2.8 times more concentrated.



#### NAICS Definition Information Sector

The main components of this sector are: publishing, including traditional and software as well as internet; motion picture; sound recording; broadcasting, including traditional over the air and exclusively on the internet; telecommunications; web search; data processing and information services.

**Other Services**

The Other Services Industry Sector represented 1.3% of the total county employment for 2012, or 138 out of 10,616 jobs. The breakdown of the Other Services Sector consist of only three primary categories that have enough data compiled to be represented in this report. They are the Other Services Expect Public Administration, Repair And Maintenance and Personal And Laundry Services.

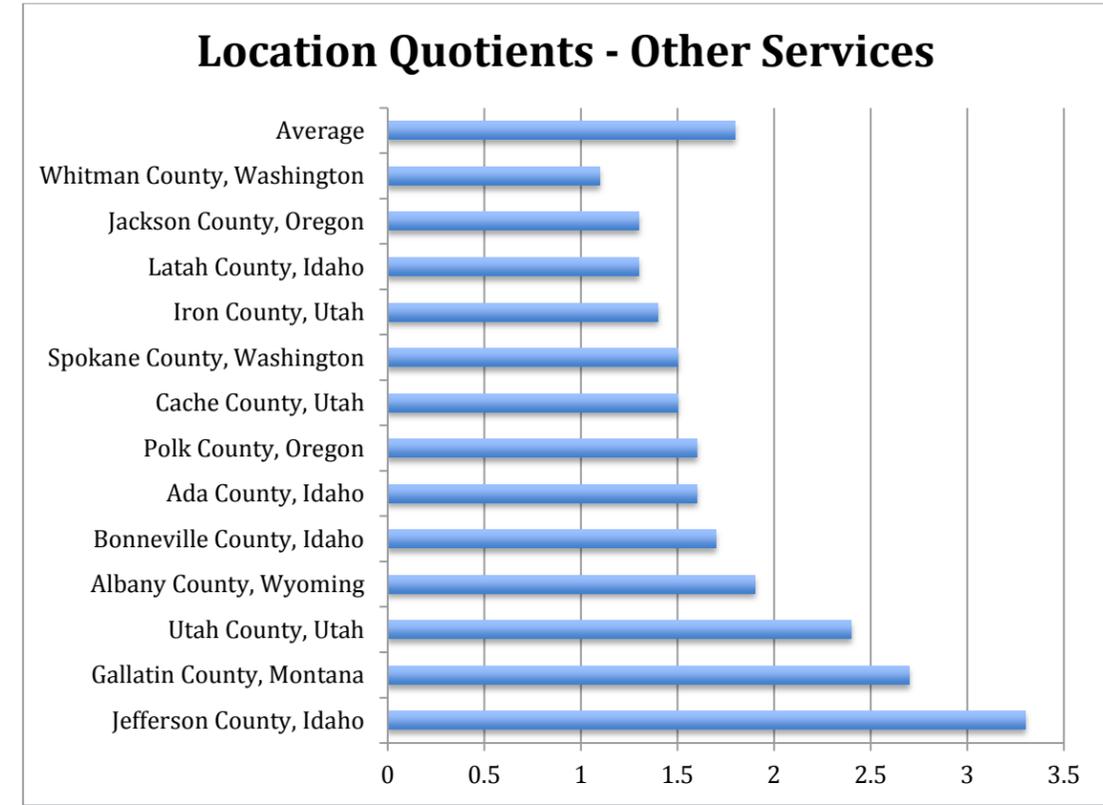
The Other Services Expect Public Administration category is difficult to decipher. Reasonable comparative data to understand the composition of that category could not be obtained, though the numbers showed that Madison County has an average of 2.7 times less people employed in the category than do the counties compared.

The second category of Repair and Maintenance was an average of 2.3 times less prevalent in Madison County than in the other counties in this study. Though the numbers would seem to suggest an opportunity, there may be many underlying reasons as to why a repair or maintenance employer might not find much opportunity in Madison County. Some reasons might be the general nature of self-sufficiency that seems to exist amount the residents, the possibility that repair and maintenance is happening at facilities that are not represented in the statistics as such (examples being dealerships or retail businesses that are represented in the retail or trade sectors), and the possibility that many repair and maintenance needs are met at locations nearby, but outside the county.

The Personal and Laundry Services Sector within Madison County is shows a similar quotient to the other counties in this report. There does not appear to be either a deficiency or opportunity within this category.

**NAICS Definition  
Other Services  
Sector**

Establishments in this sector are primarily engaged in activities such as equipment and machinery repairing, promoting or administrating religious activities, grant making, advocacy, and providing dry-cleaning and laundry serviced, personal care services, death care services, pet care services, photofinishing serviced, temporary parking services, and dating services.



## Construction

The construction industry represented 3.4% of the total county employment for 2012, or 364 out of 10,616 jobs. The location quotient data shows that the construction industry is much less concentrated in Madison County than in comparable counties. However, the City of Rexburg Monthly Building Permit Valuations show a different picture with over \$43 million in permits issued.

Brigham Young University-Idaho reports occupancy among their university “approved single student” housing, which all unmarried students under 30 must live, to be 77.16% as of Winter Semester 2015.

With all of the construction-taking place, it is hard to imagine that the data shows a low concentration of Madison County jobs in the industry. This can be explained by the lack of construction employers within Madison County. Most of the projects are being built by employers whose offices reside outside of the county (and state), with many of the construction employees coming from outside the county as well.

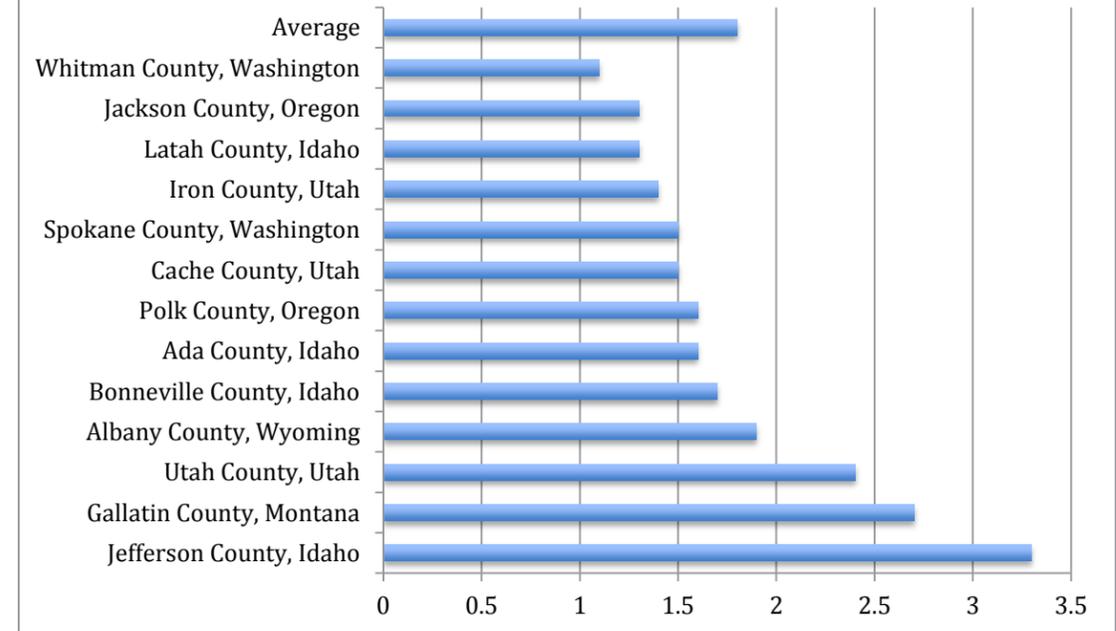
Bonneville County showed more favorable data for the Construction Sector. It is the Task Force’s opinion that constructability is more easily accomplished in this market as a function of the population as well as the ease with which material is found, purchased, and delivered. Thus, the price per square foot of construction in Madison County proves to be higher than in Bonneville County. Furthermore, Cache County, Utah and Gallatin County, Montana showed a healthier environment as well.

As overall complications go and in summary, the issues Madison County faces are to improve government interactions, add infrastructure to ease delivery of material, reach a population strata that spurs growth, and provide jobs for individuals to have an income that facilitates construction purchases.

## NAICS Definition Construction Sector

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

## Location Quotients - Constuction



## Manufacturing

The Manufacturing Industry represented 6.87% of the total county employment for 2012, or 729 out of 10,616 jobs. According to the location quotient information Madison County has almost half the concentration of manufacturing jobs, as do the comparable counties. Of particular mention is the fabricated metal product-manufacturing category.

This category is on average 8.5 times less prevalent in Madison County as compared to the other selected counties. The Task Force researched the possible reasons why the fabricated metal product-manufacturing category is so low. With fabricated metal products being vital to the agriculture industry, it would seem that there would be an opportunity to bring an agriculture industry related fabricated metal product facility to Madison County. Three reasons are a relatively small skilled labor force, lack of reasonable transportation access, and a relatively high cost of land.

A metal manufacturing industry workforce would consist primarily of welders and assembly line workers. Though these skills would seem to exist in sufficient number within our county, there may not be enough of such a labor force to staff a facility if one were to come to the county. These workers would likely have to move into the county from elsewhere or travel from neighboring counties.

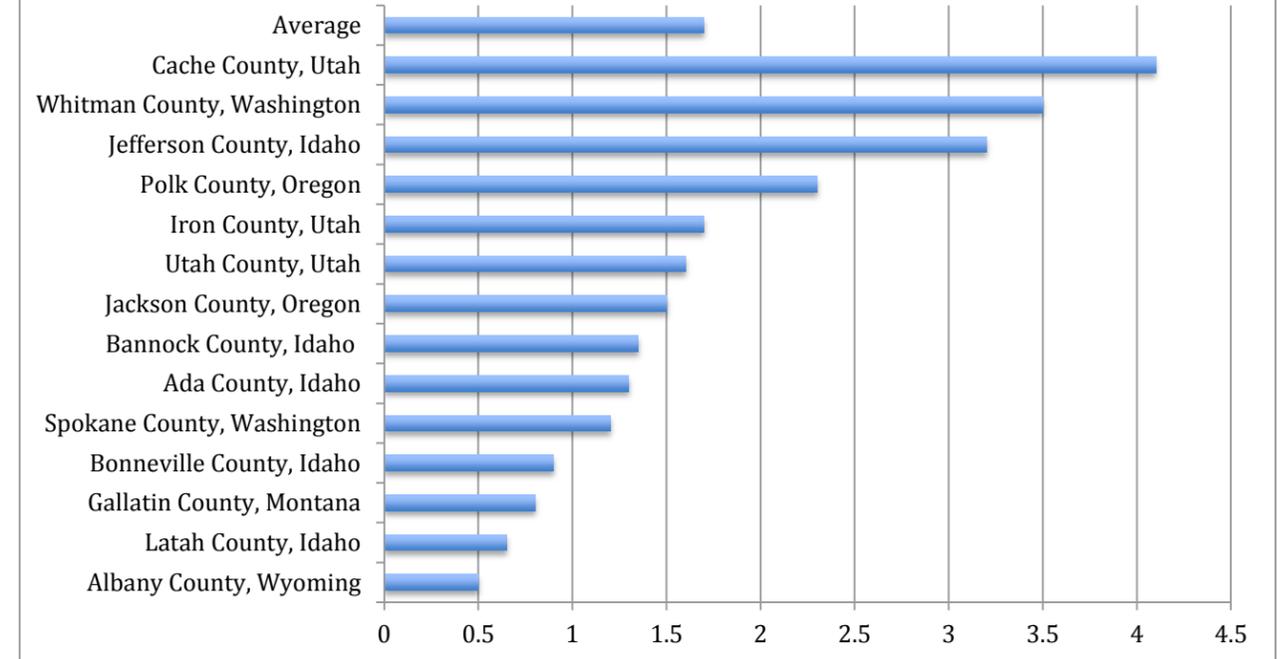
The lack of reasonable transportation access appears to be a significant factor in fabricated metal manufacturing. Interesting to note is that such a manufacturing company recently opened a new facility in Bonneville County. The location chosen for the facility had much to do with easy access to a railway and some to do with easy highway access. In Madison County the lack of available properties bordering a railway is apparent. The main rail access cuts right through the city of Rexburg and thus eliminates many of the appropriately sized property possibilities in and around the city. Elsewhere in the county much of the properties that border both rail and highway access are already developed and used by produce shipping operations.

This leads to the third main reason for inability to attract a fabricated metal manufacturing facility. As is the case with many other businesses, the relatively high property prices coupled with a lack of available properties as compared to neighboring counties seems to send such facilities to the neighboring counties. It is interesting to note that there are a number of fabricated metal manufacturing facilities that have been established in Jefferson County in the last decade as property prices are typically much lower there than in Madison County.

### NAICS Definition Manufacturing Sector

The manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products; the assembling of components into new products; the assembling of component parts of manufactured.

## Location Quotients - Manufacturing



## Tourism and Hospitality

Rexburg, Idaho is situated in an enviable position between the Teton and Big Hole Mountain Ranges, in the shadow of Yellowstone and Teton National Parks, and surrounded by world-class hunting and fishing grounds. With Sun Valley to the west and Jackson Hole, Wyoming to the east, Rexburg is the natural starting point for an Eastern Idaho Adventure.

Rexburg is the county seat of Madison County, and should take the lead in attracting tourists to the region; this region includes Bonneville, Clark, Fremont, Jefferson, Madison and Teton Counties. U.S. Highways 20 and 33 pass through Rexburg bringing 1.4 million visitors through Yellowstone's West Gate in 2009 alone. This report estimates that there is a potential \$265 million in tourist money that could be captured by local area businesses.

The Idaho Department of Tourism references a study by Longwoods USA to calculate the number of visitors to Idaho, and their average expenditures per trip. (We infer the following data from this study.) It was estimated by Longwoods USA that there were 31.7 million visitors to Idaho in 2009.

These visitor trips were divided into two categories, overnight trips and day trips. This number comes to 20.51 visits per-resident.

As stated above, there were 31.7 million visitors to Idaho in 2009; this translates to 20.51 visits per-resident per year. The tables below estimate the average amount of money spent by visitors to Idaho on a typical day and overnight trip (the average overnight trip is 2 to 3 days).

The typical overnight visitor spends \$131 on their vacation, while the average day trip visitor spends \$48. This translates to \$265,554,978 in potential tourist dollars to be captured. This money represents a significant growth potential for local businesses, with local hotels and motels standing to capture a large share of the \$50.2 million estimated to be spent on hospitality.

## Analysis

The Task Force recommends that the target industries of: Information, Construction, and Manufacturing be emphasized and grown. There is also a opportunity in Professional Services, notably where partnerships can be made with Brigham Young University-Idaho. In addition apprenticeships or internships and the hiring of recent graduates of the University could augment Madison County's workforce.

### Strengths

- Strong demand for Educational Industry jobs
  - BYU-Idaho- It is important to acknowledge that the University has been the driving force for Madison County's growth in the past couple of decades, and will likely continue to be in at least the next decade.
- Workforce
  - Madison County has an educated population, with people who are committed, hard working, and ethical.
- America's Family Community
  - There is a desire for many former residents of Madison County to return to the attractive environment, safety, and family values embraced by the community.
- Demand for Healthcare Industry jobs.
- Low taxes.
- Recreation access.

### Weaknesses

- High Real Estate Costs
- Poor Manufacturing & Technology Infrastructure
- Low Retention of Talent
- Proximity to National Parks for Heavy Manufacturers

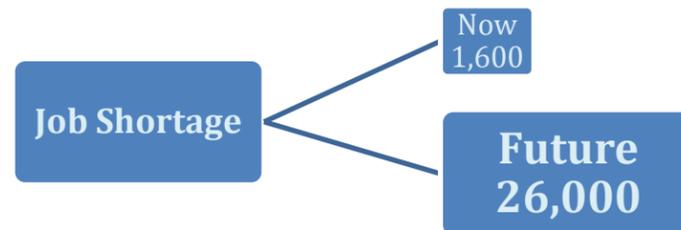
Hindrances to growth became apparent as the data is analyzed. The most common, through all industries studied, is the high cost of real estate. It became increasingly apparent that many businesses have been purposefully located just beyond the border of Madison County simply because the cost of land was significantly less in the neighboring counties. It is interesting to note that the public perception of higher taxes as mentioned earlier does not seem to be a real factor in the location of these businesses. The primary factor in locating a business outside of Madison County continues to be the cost of land.

It is also important to note that due to higher prices in residential real estate (relative to neighboring countries), many employees who work within Madison County, and especially new employees choose to live in adjoining counties such as Fremont or Jefferson County. This results in employees working in Madison County, but contributing to the outside economies through taxes, consumer spending, etc.

Another threat to future growth in most industry sectors is the lack of adequate broadband access. Many companies desiring to start-up in, or relocate to, Madison County have been disappointed with the access to broadband, and in some cases, chosen other locations with more favorable broadband access.

### Madison County in 2050

What will Madison County look like in 2050? The information gathered by the Task Force provides insight on the industries that are currently lacking within Madison County.



Madison County is frequently compared to Gallatin County, Montana due to its proximity to Yellowstone National Park, access to major transportation routes and proximity to its University. The largest city in Gallatin County is Bozeman. The U.S. Census Bureau estimated Gallatin's 2012 population at 92,614. In 1975 Gallatin County had a population of 37,901- close to Madison's current population of 37,456. If the 144 percent growth observed in Gallatin between 1975 and 2012 was applied to Madison, the county will have over 91,000 residents by 2050.

In 2012 Madison County had an employment-to-population ratio of 28 percent, while Gallatin's was 40 percent. If Madison's future employment-to-population ratio is anything like the current ratio in Gallatin County, Madison will have a total employment of 36,638 by 2050.

Even though Gallatin County and Madison County share many similar characteristics, it's difficult to predict that Madison County will develop the same industries and economy that Gallatin has today. But if the other 13 comparison counties are combined some rationalizations can be made to show what Madison County's economy could look like.

After applying the new employment to population ratio and current comparison counties' employment concentrations, it's possible to see what Madison's economy could look like by 2050. The county could add over 26,000 jobs with only nominal growth in trade, transportation and utility employment. The greatest growth in percentage terms would come from Information jobs, followed by Other Services,



Construction and Manufacturing.

A lot could change between now and 2050. The Task Force believes that Madison County's economy will grow stronger by providing quality employment and high wages for its future workforce.

### Madison County 2050 Employment Forecast

Industry	Madison 2012	2050 Employment projection	Change	Percent Change
Base Industry Total	10,616	36,638	26,022	245%
Natural Resources and Mining	321	499	178	55%
Construction	365	2,223	11,869	514%
Manufacturing	72	3,874	3,145	431%
Trade, Transportation and Utilities	3,446	8,512	5,066	147%
Information	71	961	890	1254%
Financial Services	474	2,054	1,580	333%
Professional and Other Business Services	1,511	5,386	387	256%
Education and Health Services	2,409	7,204	4,795	199%
Leisure and Hospitality	1,151	4,496	3,345	191%
Other Services	138	1,398	1,260	913%
Unclassified	2	3	1	51%

### Recommendations

The task force recommends that Madison County and its residents should be educated in the need for a sustainable jobs base. It seems that the panacea for quick economic growth is to increase the Retail Sector. It is important to note that retail growth follows other industry sector growth within a healthy economy. There must first be a sizable working resident population within an area for retail to then thrive. Thus, we assert that the on-going career type jobs should be the focus of growth, which will then allow retail growth to follow. For example, retailers such as Home Depot, Costco, Target, and others have set population and income requirements that must be met before they even considering building a store.

# Appendix D

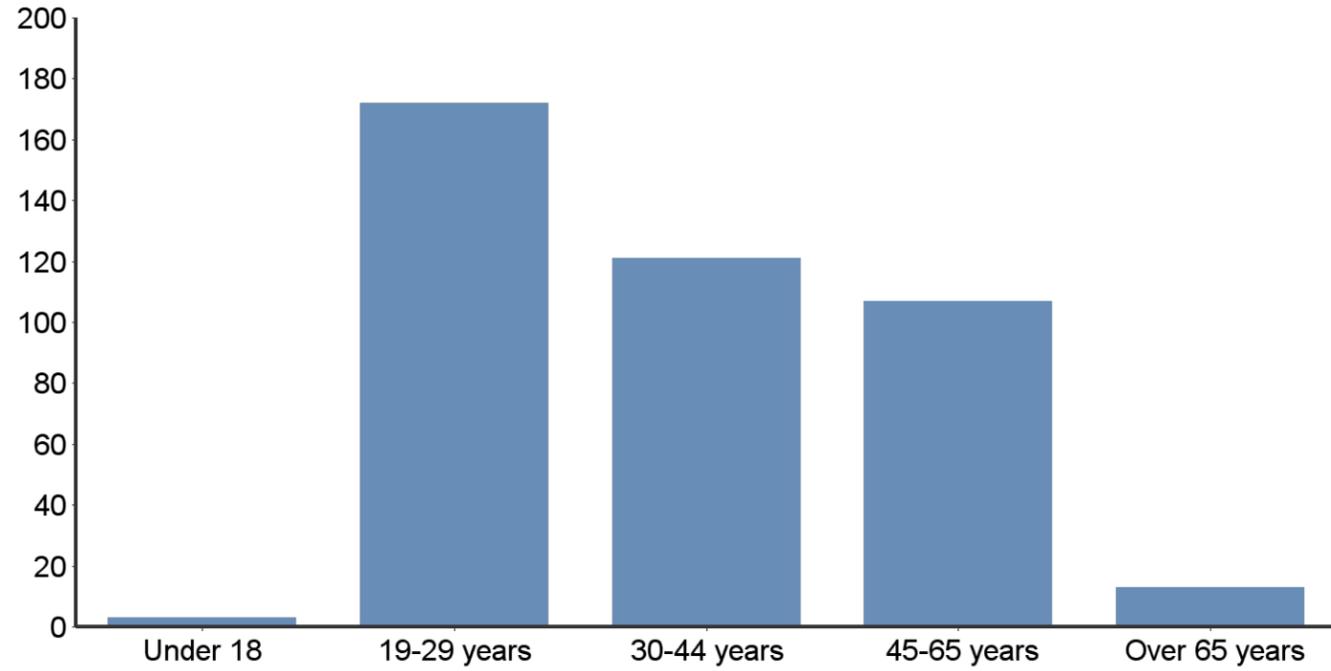
## Final Survey Results

It is the opinion of the Jobs Task Force that the five target industries addressed in this report (Information, Manufacturing, Construction, and Professional Services) provide the best base of jobs to grow Madison County's economy. Outside the five industries highlighted in this report, the Natural Resources and Mining (where agriculture is represented) and Education & Health Services industries also provide an excellent base for an economy. However, we see a smaller potential for citizens and local government to influence job growth within these sectors within the constraints of the current Agriculture and Education & Health industries within Madison County.

### Specific Recommendations

1. Strengthen existing industries
2. Develop target industries
  - a. Leisure & Hospitality
  - b. Information
  - c. Construction
  - d. Manufacturing
  - e. Other Services
3. Explore opportunities in the Professional and Business Services Industry
4. Leverage Madison's connection to BYU-Idaho as a strong economic driver and strengthen the University, local governments, and community's working relationships.
5. Identify and reduce infrastructure and policy barriers
6. Focus on retaining talent

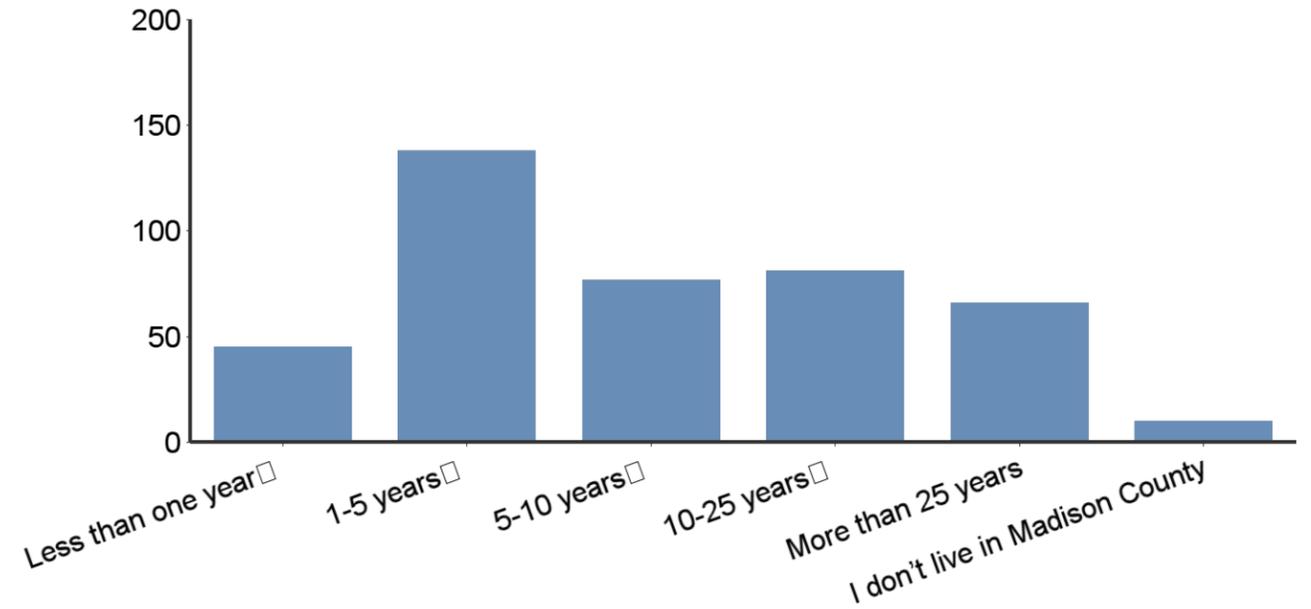
How old are you?



#	Answer	Bar	Response	%
1	Under 18		3	0.72%
2	19-29 years		172	41.35%
3	30-44 years		121	29.09%
4	45-65 years		107	25.72%
5	Over 65 years		13	3.13%
	Total		416	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	5	2.89	0.81	0.90	416	416

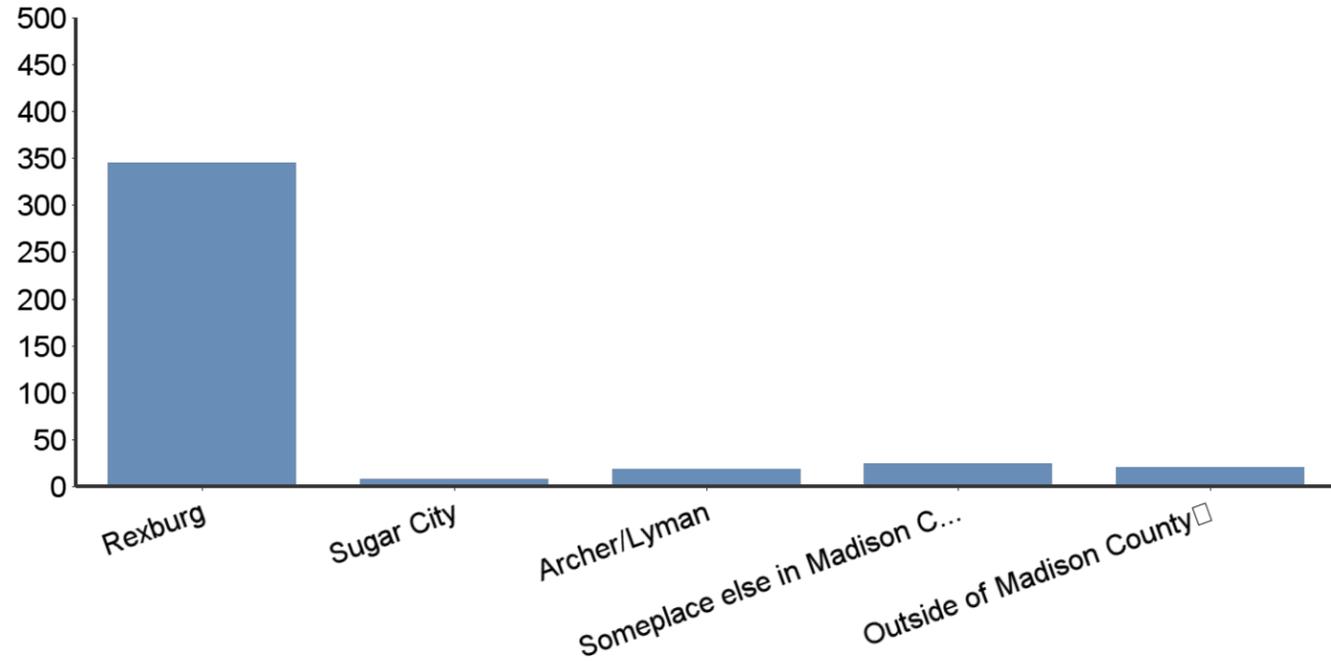
How long have you lived in Madison County?



#	Answer	Bar	Response	%
1	Less than one year		45	10.79%
2	1-5 years		138	33.09%
3	5-10 years		77	18.47%
4	10-25 years		81	19.42%
5	More than 25 years		66	15.83%
6	I don't live in Madison County		10	2.40%
	Total		417	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	6	3.04	1.81	1.34	417	417

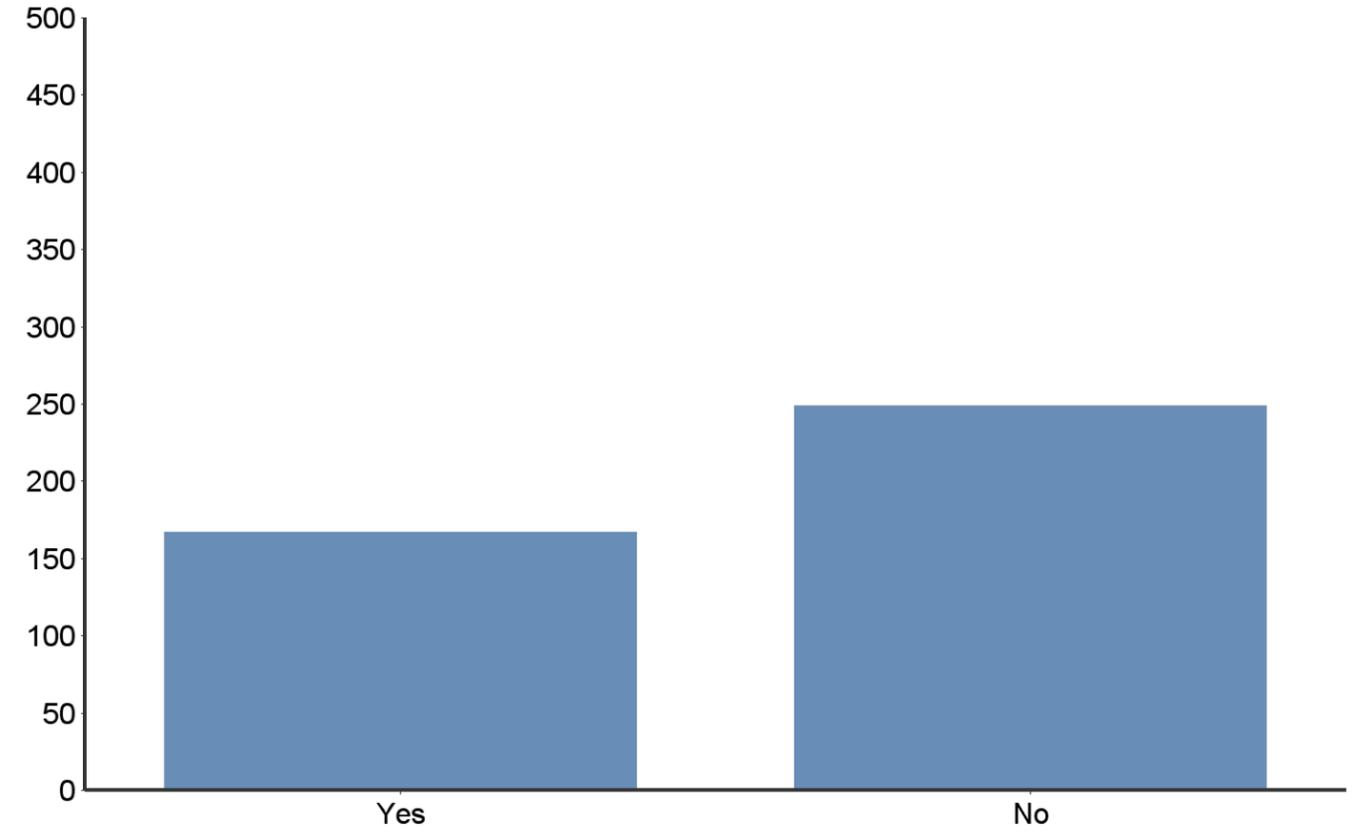
**In which of the following cities/areas do you currently reside?**



#	Answer	Bar	Response	%
1	Rexburg	<div style="width: 82.73%;"></div>	345	82.73%
2	Sugar City	<div style="width: 1.92%;"></div>	8	1.92%
3	Archer/Lyman	<div style="width: 4.56%;"></div>	19	4.56%
4	Someplace else in Madison County	<div style="width: 5.76%;"></div>	24	5.76%
5	Outside of Madison County	<div style="width: 5.04%;"></div>	21	5.04%
	Total		417	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	5	1.48	1.29	1.14	417	417

**Are you currently a student at BYU-I?**

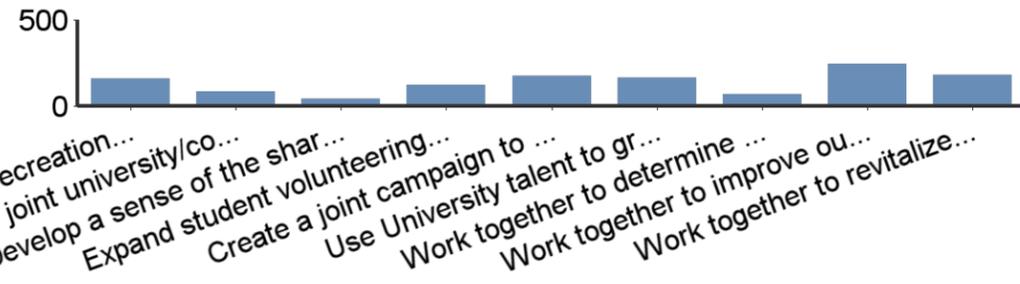


#	Answer	Bar	Response	%
1	Yes	<div style="width: 40.14%;"></div>	167	40.14%
2	No	<div style="width: 59.86%;"></div>	249	59.86%
	Total		416	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	2	1.60	0.24	0.49	416	416

One of the goals of the Envision Madison Task forces is to explore and suggest mutually beneficial principles and activities that would strengthen the University and the community.

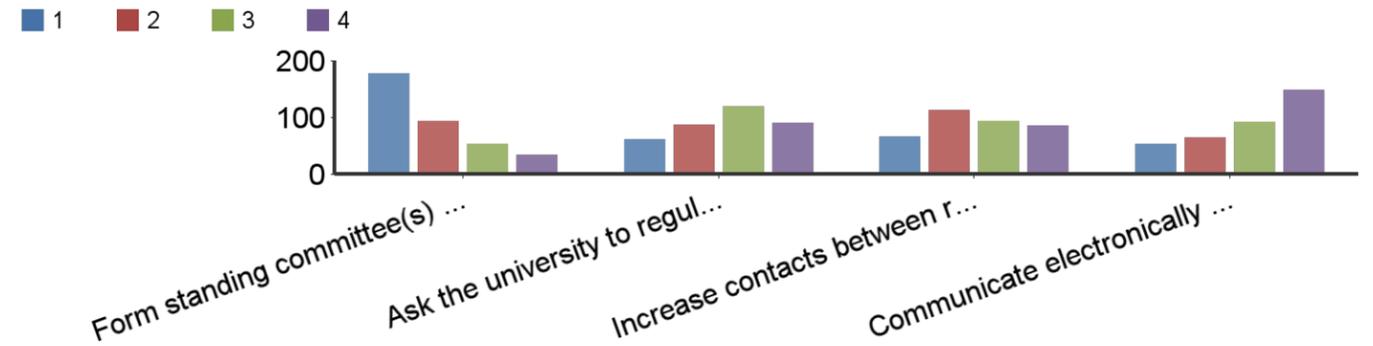
If the community and University created a structure to address important issues and to propose strategies to improve the relationship, which three strategies would be most important to you?



#	Answer	Bar	Response	%
1	Expand community recreation & use it to keep students in the area on evenings & weekends.		162	38.85%
2	Sponsor joint university/community events that include bringing residents on campus.		86	20.62%
3	Develop a sense of the shared history of the university and the community.		43	10.31%
4	Expand student volunteering, service, and internship opportunities in the community.		120	28.78%
5	Create a joint campaign to attract jobs for students.		177	42.45%
6	Use University talent to grow related industries for the community.		167	40.05%
7	Work together to determine where student housing will go.		71	17.03%
8	Work together to improve our infrastructure (broadband? bus? other?).		243	58.27%
9	Work together to revitalize downtown by bringing students and jobs to the area.		182	43.65%
	Total		1251	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	9	5.52	7.09	2.66	1251	417

As you think about improving the relationship between the community and BYU-I, drag to rank the top three in order of effectiveness.



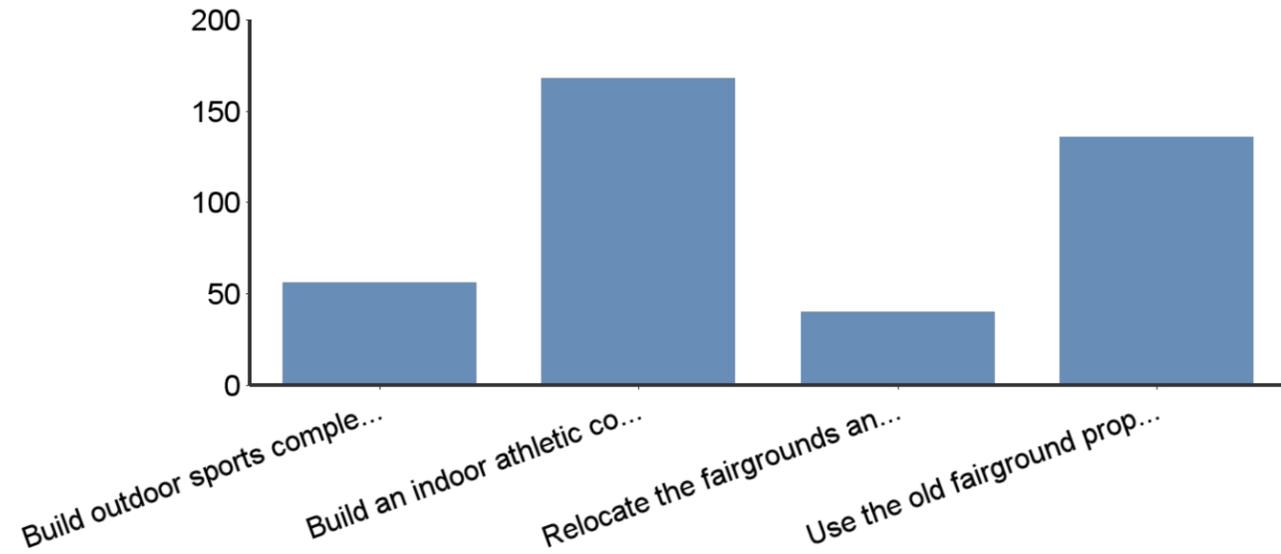
#	Answer	1	2	3	4	Responses	Mean
1	Form standing committee(s) consisting of community members, university representatives, and students to discuss actions aimed at implementing the strategies in the previous question.	177	93	53	34	357	1.84
2	Ask the university to regularly communicate through existing groups or entities such as neighborhood associations, professional groups, and service clubs.	61	87	119	90	357	2.67
3	Increase contacts between representatives of the university and government officials and staff.	66	113	93	85	357	2.55
4	Communicate electronically by cross-posting information on the university and local government websites.	53	64	92	148	357	2.94
	Total	357	357	357	357	-	-

Statistic	Form standing committee(s) consisting of community members, university representatives, and students to discuss actions aimed at implementing the strategies in the previous question.	Ask the university to regularly communicate through existing groups or entities such as neighborhood associations, professional groups, and service clubs.	Increase contacts between representatives of the university and government officials and staff.	Communicate electronically by cross-posting information on the university and local government websites.
Min Value	1	1	1	1
Max Value	4	4	4	4
Mean	1.84	2.67	2.55	2.94
Variance	1	1.07	1.1	1.19
Standard Deviation	1	1.03	1.05	1.09
Total Responses	357	357	357	357

Another goal set by the Envision Madison task forces was:

- Identify and promote future and existing recreational opportunities in our community.
- Ensure the public has input on what, when, how, and where to build or upgrade recreational facilities.

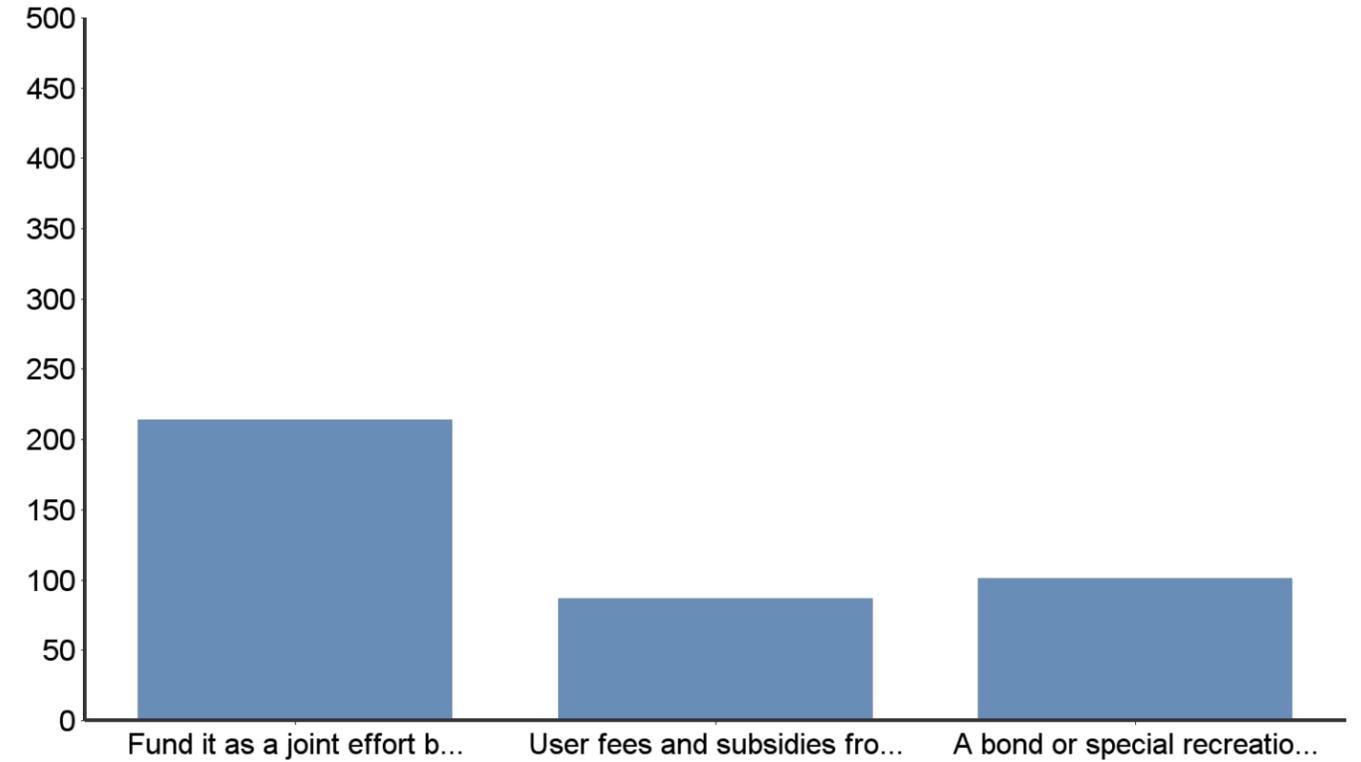
Thinking about your current recreational opportunities and future recreational needs, what type of facility is most important to you and your family?



#	Answer	Bar	Response	%
1	Build outdoor sports complexes to allow hosting of regional tournaments and provide economic benefit to our community. (\$1.5 million)		56	14.00%
2	Build an indoor athletic complex to provide more recreation opportunities (\$4 million)		168	42.00%
3	Relocate the fairgrounds and make the new one a regional events center (\$6 million)		40	10.00%
4	Use the old fairground property to enhance recreation and expand the open green belt area along the river.		136	34.00%
	Total		400	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.64	1.19	1.09	400	400

In addition to grant money, which strategy do you most support to fund a new recreational facility?



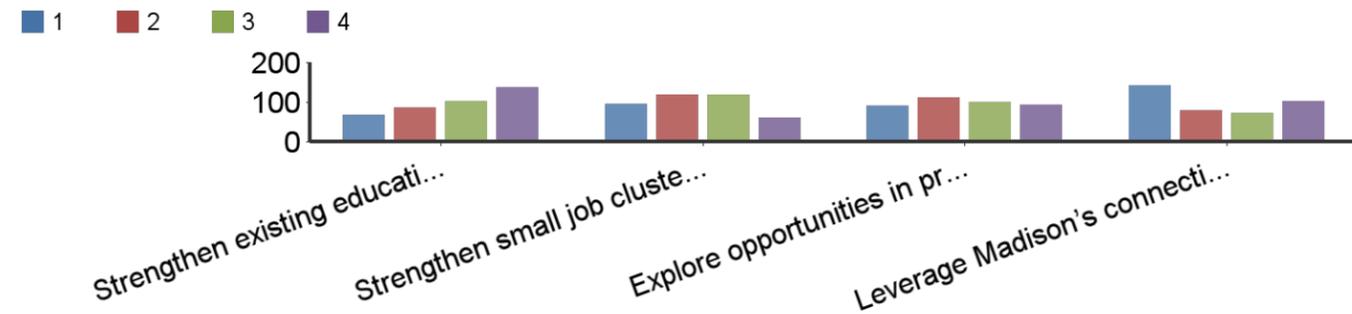
#	Answer	Bar	Response	%
1	Fund it as a joint effort between the cities, county, and the school districts		214	53.23%
2	User fees and subsidies from local taxing entities		87	21.64%
3	A bond or special recreation district		101	25.12%
	Total		402	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	3	1.72	0.71	0.84	402	402

The third focus of the task force is jobs:

- Explore Madison County's **capability** to increase the number of available jobs in the area.
- Explore **strategies** to increase the number of available jobs.

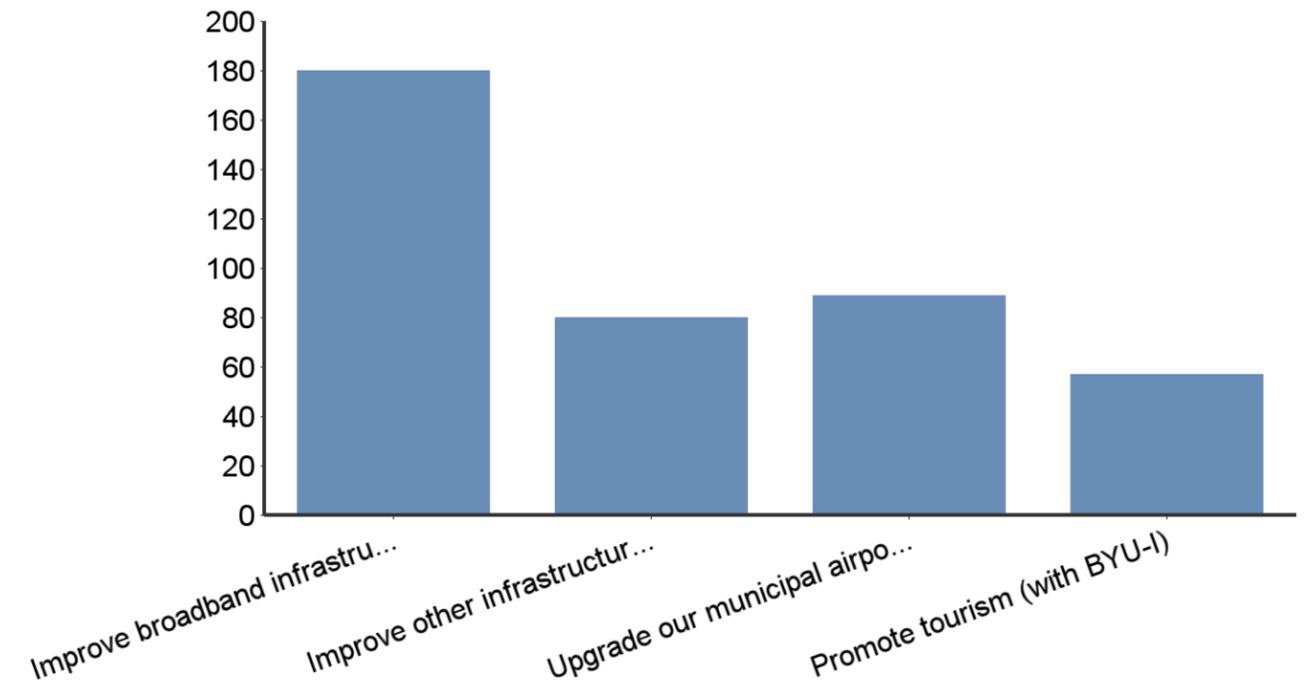
There are a number of choices that we could make to attract more jobs to Madison County. Please drag to **rank** the following choices by how important/effective you think they would be in creating good jobs in the community.



#	Answer	1	2	3	4	Responses	Mean
1	Strengthen existing education and agriculture industries	67	87	103	138	395	2.79
2	Strengthen small job clusters that complement our current job base (e.g. Leisure & Hospitality, Information, Construction, Manufacturing, Medical/Healthcare)	96	119	119	61	395	2.37
3	Explore opportunities in professional and business services industry	90	111	100	94	395	2.50
4	Leverage Madison's connection to BYU-Idaho as a strong economic driver and strengthen the university, local government, and community working relationship	142	78	73	102	395	2.34
	Total	395	395	395	395	-	-

Statistic	Strengthen existing education and agriculture industries	Strengthen small job clusters that complement our current job base (e.g. Leisure & Hospitality, Information, Construction, Manufacturing, Medical/Healthcare)	Explore opportunities in professional and business services industry	Leverage Madison's connection to BYU-Idaho as a strong economic driver and strengthen the university, local government, and community working relationship
Min Value	1	1	1	1
Max Value	4	4	4	4
Mean	2.79	2.37	2.5	2.34
Variance	1.21	1.03	1.18	1.46
Standard Deviation	1.1	1.01	1.09	1.21
Total Responses	395	395	395	395

There are a number of strategies that could be used to attract more jobs to Madison County. Choose the following strategy that you think would best help create good jobs in the community.

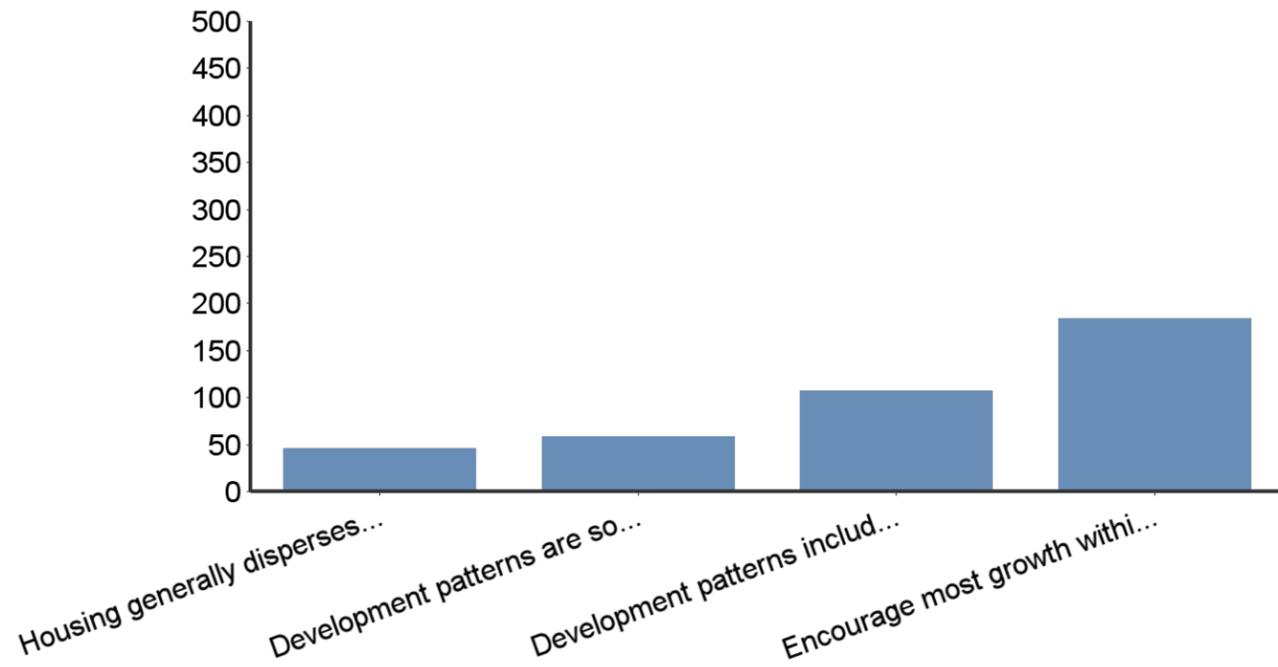


#	Answer	Bar	Response	%
1	Improve broadband infrastructure	<div style="width: 44.33%;"></div>	180	44.33%
2	Improve other infrastructure such as natural gas and electrical	<div style="width: 19.70%;"></div>	80	19.70%
3	Upgrade our municipal airport and upgrade East Idaho Hub in Idaho Falls	<div style="width: 21.92%;"></div>	89	21.92%
4	Promote tourism (with BYU-I)	<div style="width: 14.04%;"></div>	57	14.04%
	Total		406	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.06	1.22	1.11	406	406

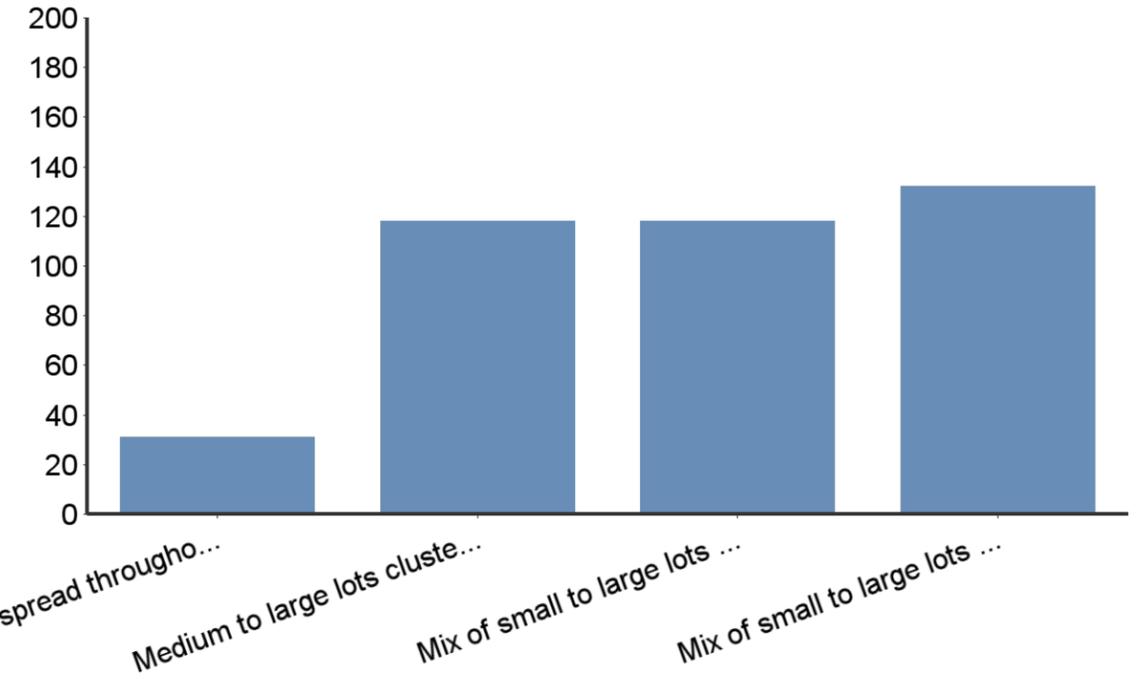
There are many ways which a community can grow over time. Which of the following general growth patterns is most appropriate for your community?

In your opinion, what is the best development pattern for permanent resident housing in the community?



#	Answer	Bar	Response	%
1	Housing generally disperses along new roads	<div style="width: 11.65%;"></div>	46	11.65%
2	Development patterns are somewhat more compact (fewer 2, 5, & 10 acre lots)	<div style="width: 14.68%;"></div>	58	14.68%
3	Development patterns include more housing choices with some small lots and townhomes.	<div style="width: 27.09%;"></div>	107	27.09%
4	Encourage most growth within Rexburg and Sugar City and mix appropriate uses	<div style="width: 46.58%;"></div>	184	46.58%
Total			395	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	3.09	1.07	1.04	395	395

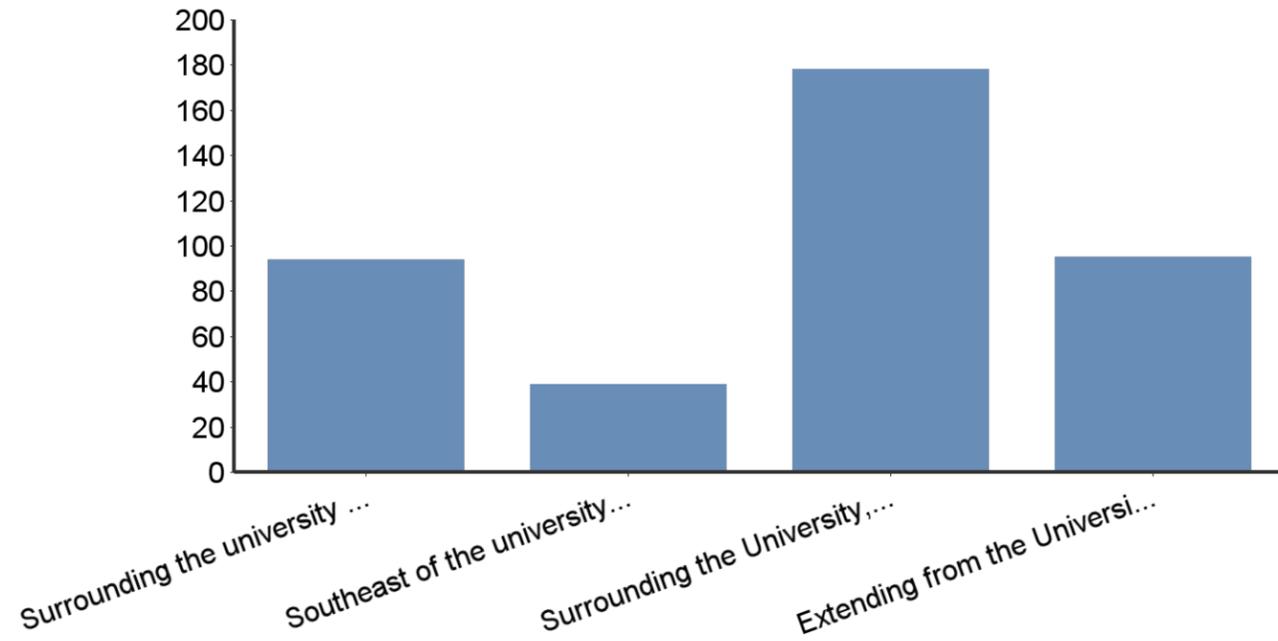


#	Answer	Bar	Response	%
1	Larger lots spread throughout the cities and county.	<div style="width: 7.77%;"></div>	31	7.77%
2	Medium to large lots clustered in areas with other single family housing.	<div style="width: 29.57%;"></div>	118	29.57%
3	Mix of small to large lots and some townhomes clustered together in the cities and county.	<div style="width: 29.57%;"></div>	118	29.57%
4	Mix of small to large lots and some townhomes clustered together near Rexburg and Sugar City.	<div style="width: 33.08%;"></div>	132	33.08%
Total			399	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.88	0.93	0.96	399	399

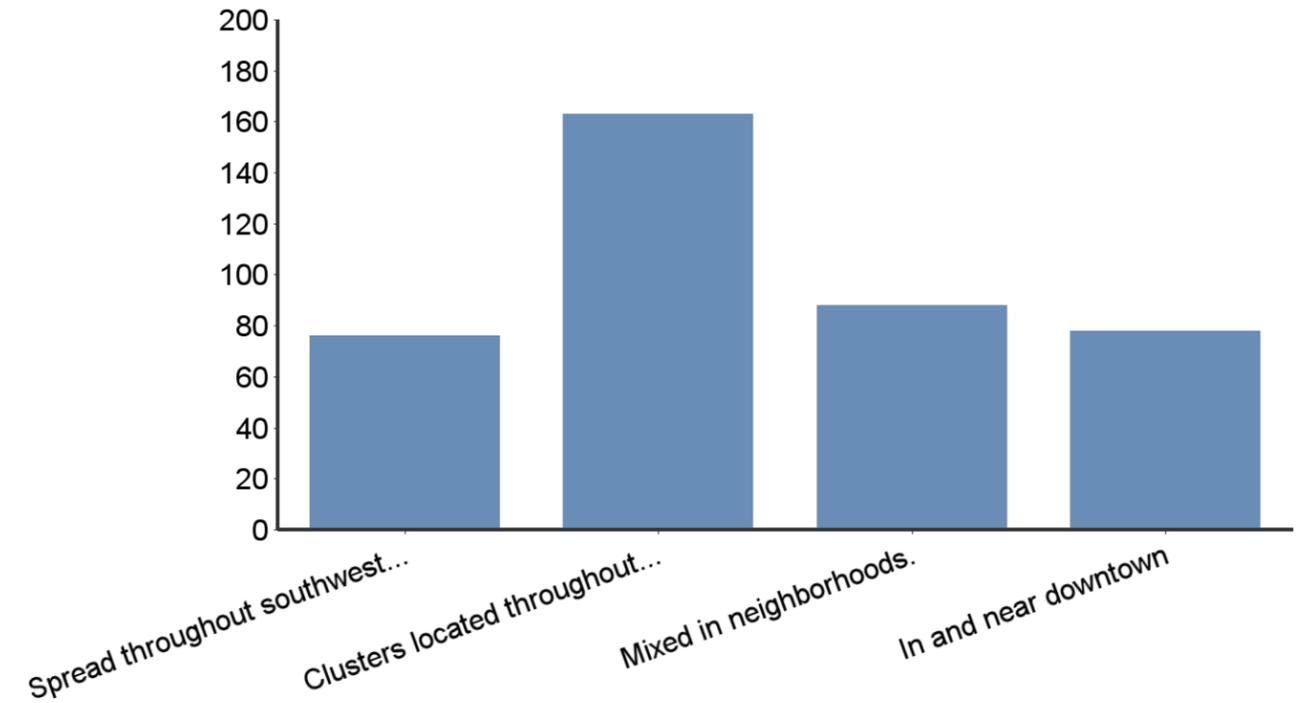
In your opinion, where would single student housing best fit into the community?

In your opinion, where would married student housing best fit into the community?



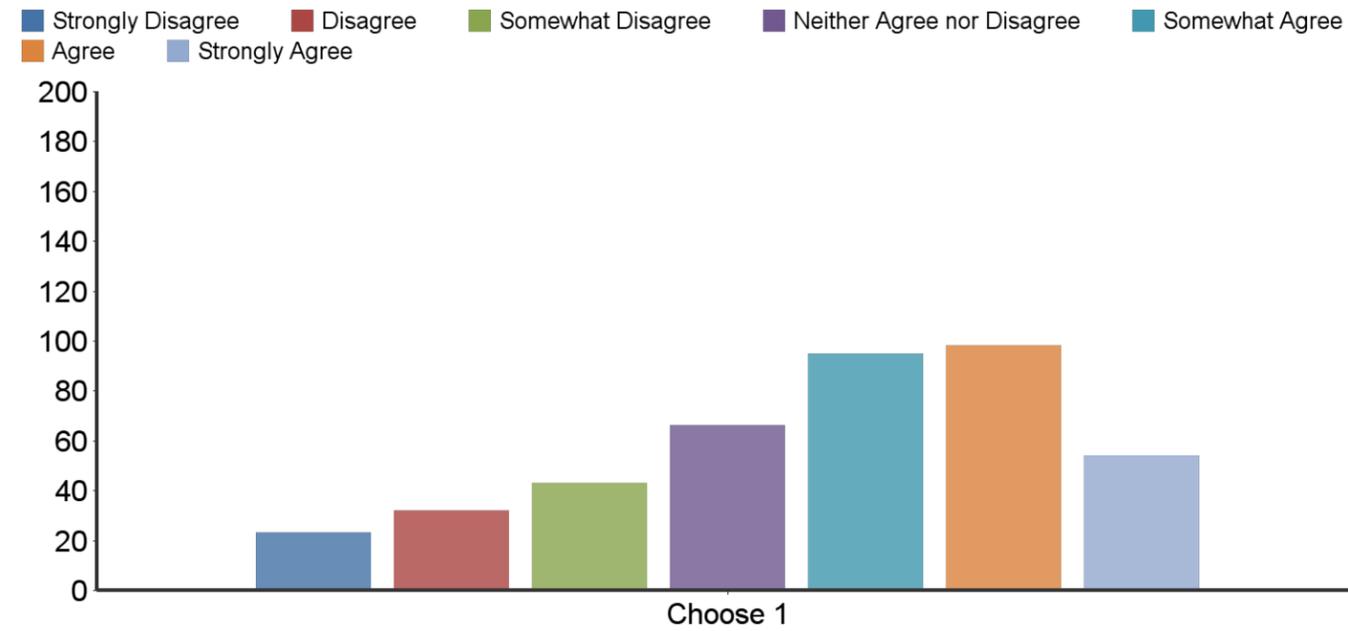
#	Answer	Bar	Response	%
1	Surrounding the university and mostly within a 15-minute walk of campus.	<div style="width: 23.15%;"></div>	94	23.15%
2	Southeast of the university and within a 5-minute walk of campus (and a drive to most other things).	<div style="width: 9.61%;"></div>	39	9.61%
3	Surrounding the University, with appropriate uses, such as office space, that provide student job opportunities, and BYU-I uses. Students are within a 5- to 15-minute walk of campus.	<div style="width: 43.84%;"></div>	178	43.84%
4	Extending from the University to near Main Street, with appropriate uses, such as office space, that provide student job opportunities, and BYU-I uses. Students are within a 15-minute walk of campus.	<div style="width: 23.40%;"></div>	95	23.40%
	Total		406	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.67	1.15	1.07	406	406



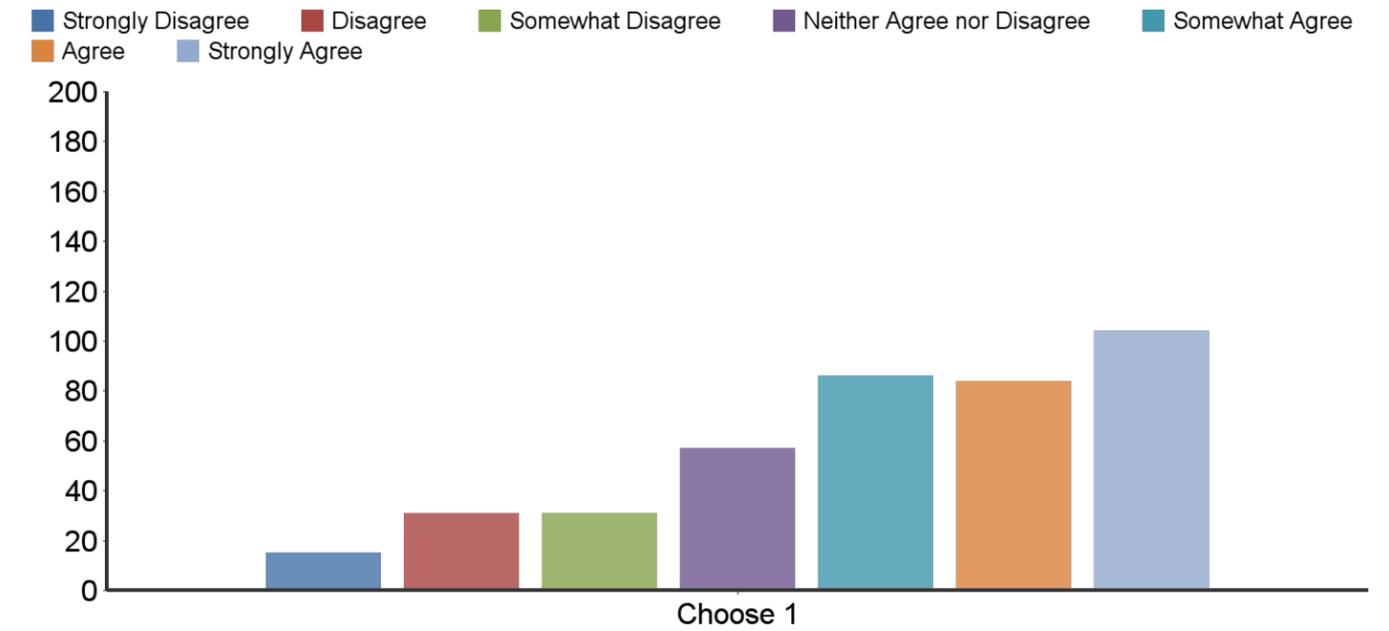
#	Answer	Bar	Response	%
1	Spread throughout southwest Rexburg	<div style="width: 18.77%;"></div>	76	18.77%
2	Clusters located throughout Rexburg	<div style="width: 40.25%;"></div>	163	40.25%
3	Mixed in neighborhoods.	<div style="width: 21.73%;"></div>	88	21.73%
4	In and near downtown	<div style="width: 19.26%;"></div>	78	19.26%
	Total		405	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.41	1.01	1.00	405	405



#	Question	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree	Response	Average Value
1	Choose 1	23	32	43	66	95	98	54	411	4.67

Statistic	Choose 1
Min Value	1
Max Value	7
Mean	4.67
Variance	2.84
Standard Deviation	1.69
Total Responses	411
Total Respondents	411

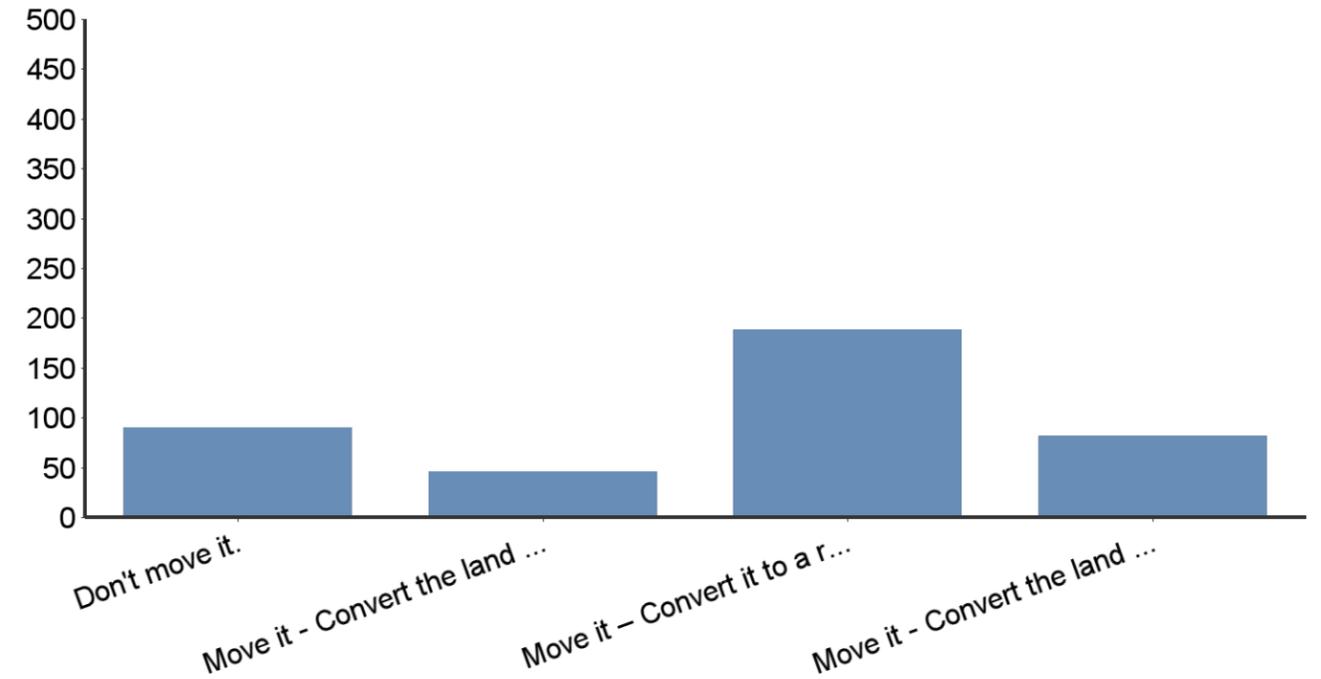
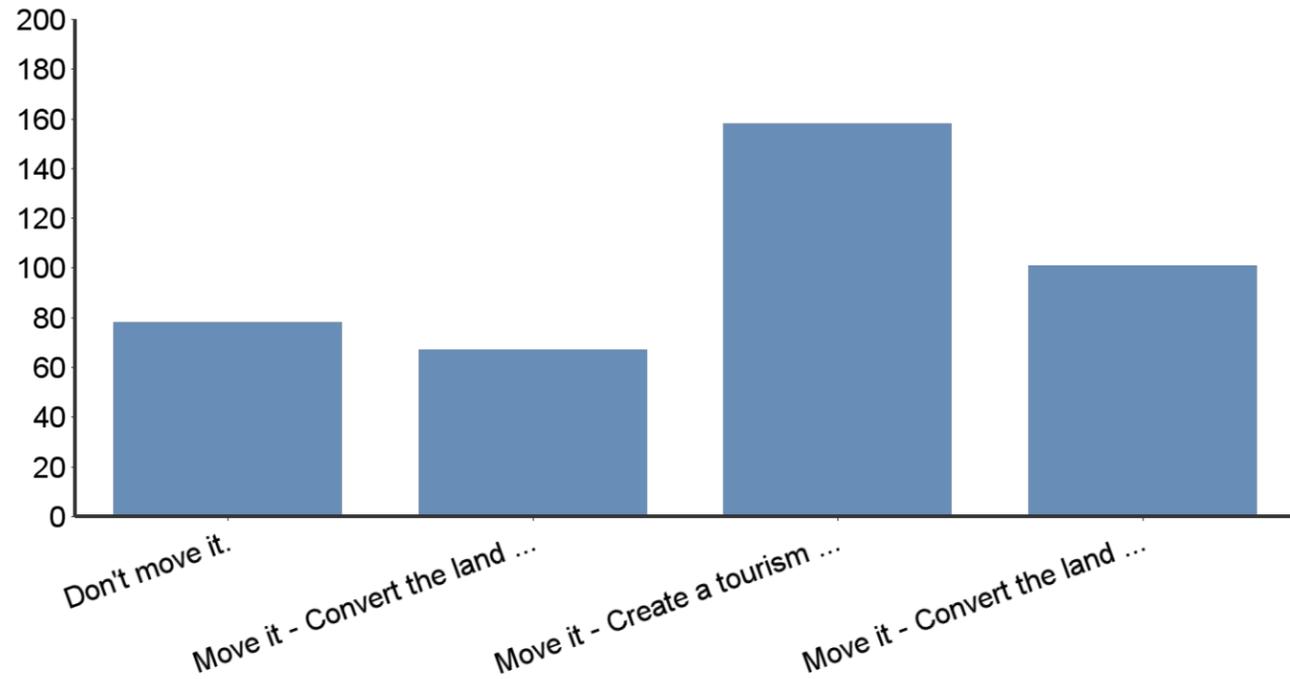


#	Question	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree	Response	Average Value
1	Choose 1	15	31	31	57	86	84	104	408	5.05

Statistic	Choose 1
Min Value	1
Max Value	7
Mean	5.05
Variance	2.95
Standard Deviation	1.72
Total Responses	408
Total Respondents	408

If the current airport were moved, the vacant land could be developed in another way. How would you like to see the land at the airport used?

If the current fairgrounds were moved the vacant land could be developed in another way. How would you like to see the land at the fairgrounds used?



#	Answer	Bar	Response	%
1	Don't move it.	<div style="width: 19.31%;"></div>	78	19.31%
2	Move it - Convert the land to industrial uses.	<div style="width: 16.58%;"></div>	67	16.58%
3	Move it - Create a tourism area with hotels, restaurants, other related amenities.	<div style="width: 39.11%;"></div>	158	39.11%
4	Move it - Convert the land to a park for regional recreation.	<div style="width: 25.00%;"></div>	101	25.00%
Total			404	100.00%

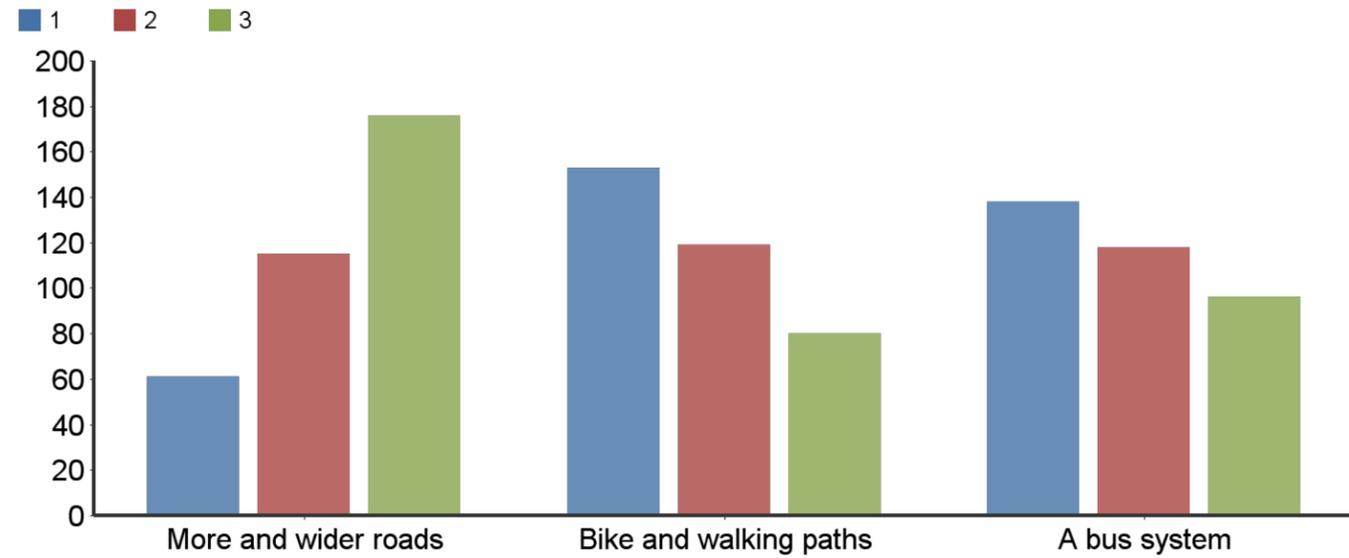
#	Answer	Bar	Response	%
1	Don't move it.	<div style="width: 22.17%;"></div>	90	22.17%
2	Move it - Convert the land to single family housing.	<div style="width: 11.33%;"></div>	46	11.33%
3	Move it - Convert it to a recreation area such as a park.	<div style="width: 46.31%;"></div>	188	46.31%
4	Move it - Convert the land to married student/community housing.	<div style="width: 20.20%;"></div>	82	20.20%
Total			406	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.70	1.10	1.05	404	404

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.65	1.08	1.04	406	406

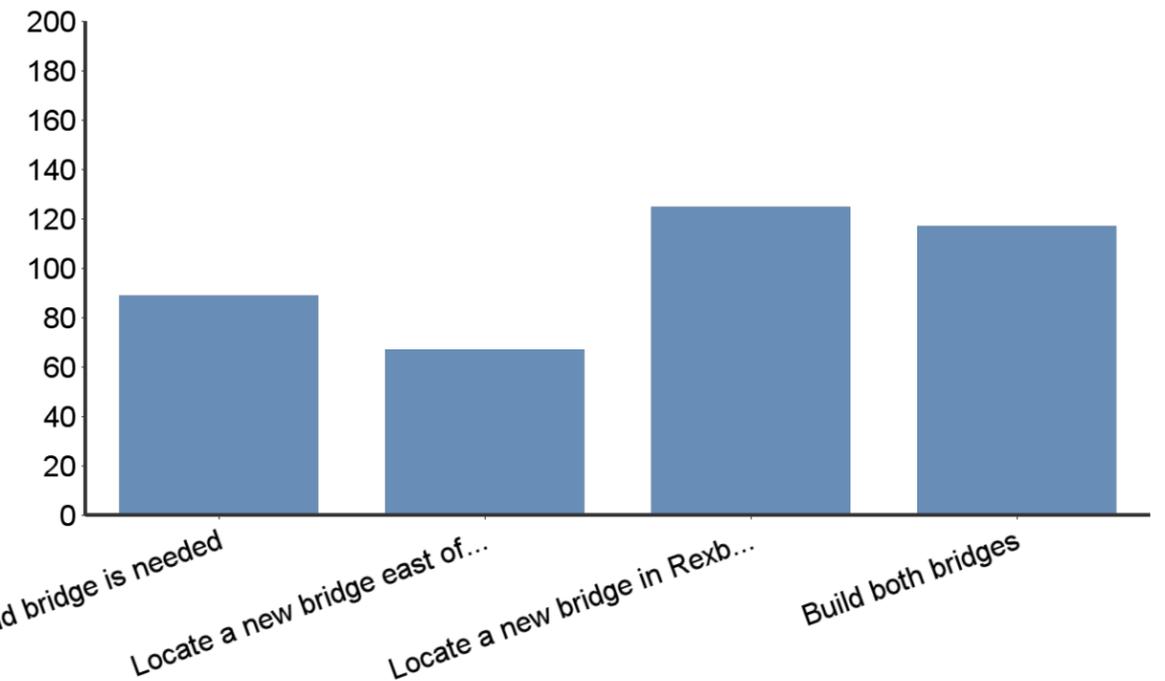
Drag to rank in order of preference which mode of transportation should be the highest priority for future public investment.

One strategy for alleviating traffic congestion in Rexburg is to construct an additional bridge across the river as an alternative to 2nd East. Would you support construction of a bridge, and if so, where?



#	Answer	1	2	3	Responses	Mean
1	More and wider roads	61	115	176	352	2.33
2	Bike and walking paths	153	119	80	352	1.79
3	A bus system	138	118	96	352	1.88
	Total	352	352	352	-	-

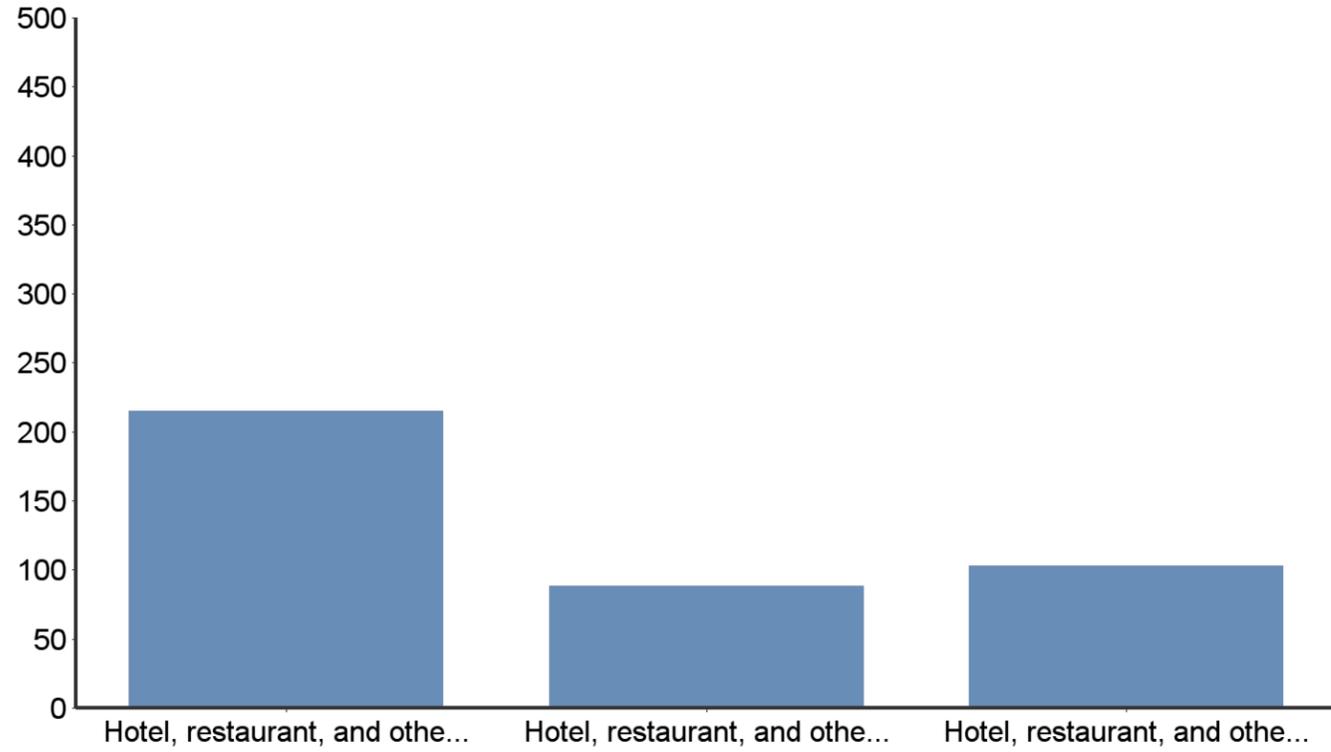
Statistic	More and wider roads	Bike and walking paths	A bus system
Min Value	1	1	1
Max Value	3	3	3
Mean	2.33	1.79	1.88
Variance	0.57	0.62	0.65
Standard Deviation	0.75	0.79	0.81
Total Responses	352	352	352



#	Answer	Bar	Response	%
1	No second bridge is needed		89	22.36%
2	Locate a new bridge east of Rexburg		67	16.83%
3	Locate a new bridge in Rexburg near the current fairgrounds and airport		125	31.41%
4	Build both bridges		117	29.40%
	Total		398	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	2.68	1.26	1.12	398	398

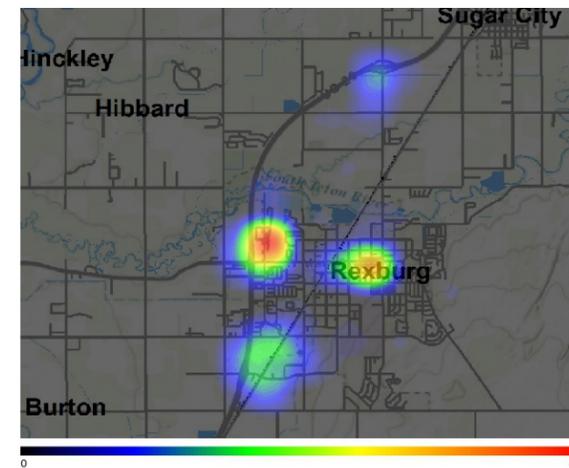
Where would you like new tourist facilities like hotels, restaurants, and other services to be located?



Region	Bar	Responses	%
Region #1	<div style="width: 98.99%;"></div>	295	98.99%
Other	<div style="width: 1.01%;"></div>	3	1.01%

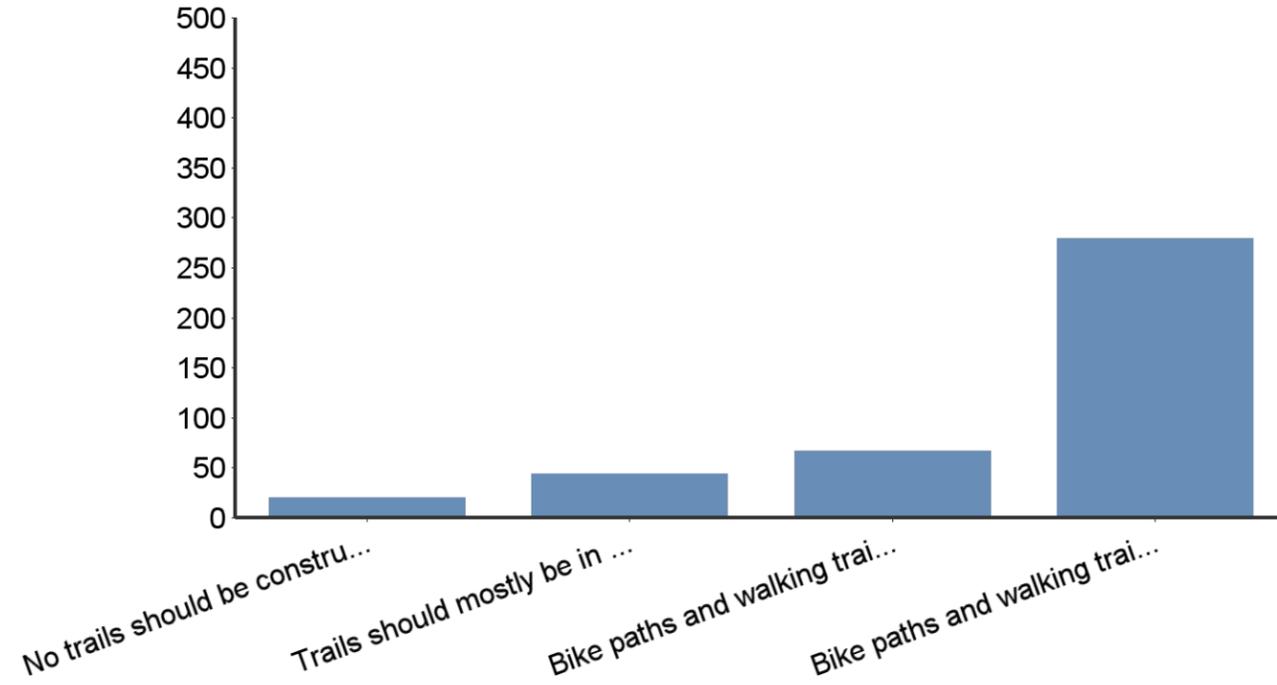
On the map, touch to indicate where would you like new tourist facilities like hotels, restaurants, and other services to be located?

#	Answer	Bar	Response	%
1	Hotel, restaurant, and other services should locate at highway interchanges North or South of Rexburg	<div style="width: 52.96%;"></div>	215	52.96%
2	Hotel, restaurant, and other services should locate in place of the airport	<div style="width: 21.67%;"></div>	88	21.67%
3	Hotel, restaurant, and other services should locate in downtown Rexburg	<div style="width: 25.37%;"></div>	103	25.37%
Total			406	100.00%



Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	3	1.72	0.71	0.84	406	406

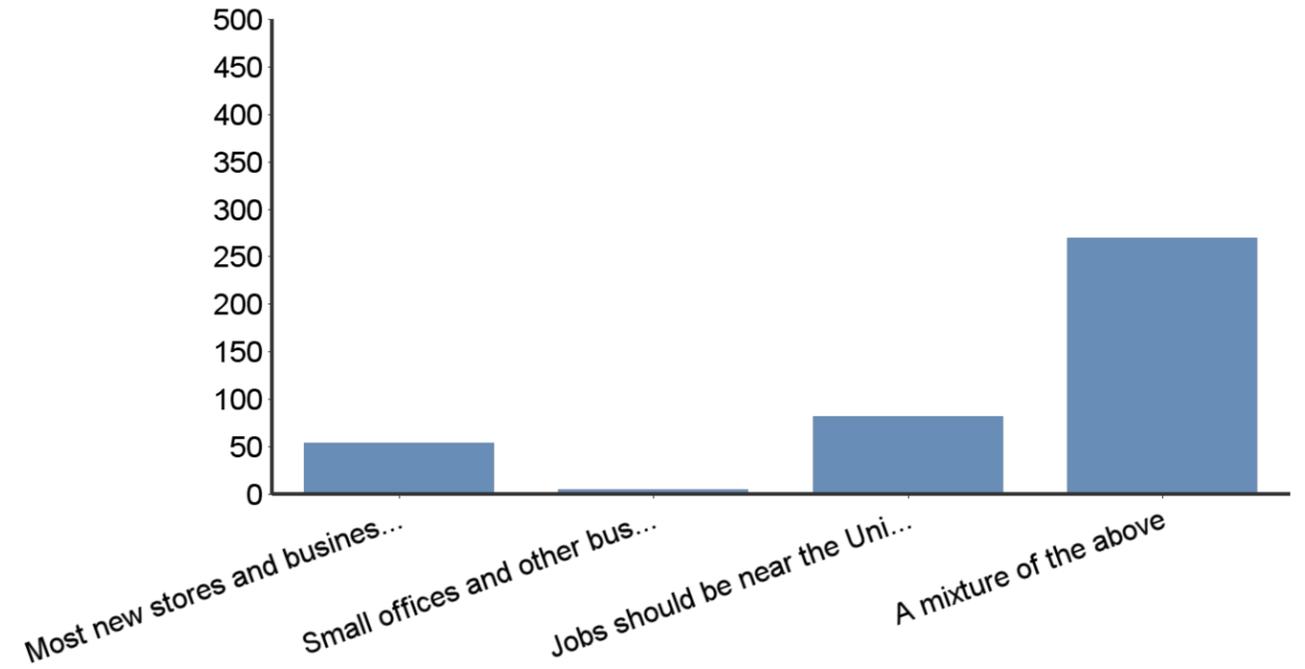
As we grow, how much emphasis should be placed on developing bike and walking trails in your community?



#	Answer	Bar	Response	%
1	No trails should be constructed		20	4.88%
2	Trails should mostly be in the form of bike lanes on roads for commuting		44	10.73%
3	Bike paths and walking trails should be created primarily to connect regional recreation areas		67	16.34%
4	Bike paths and walking trails should be created to provide access to local parks and to get around town		279	68.05%
Total			410	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	3.48	0.76	0.87	410	410

When thinking about the jobs that we will need for our children and grandchildren, where would these jobs best fit into the community?

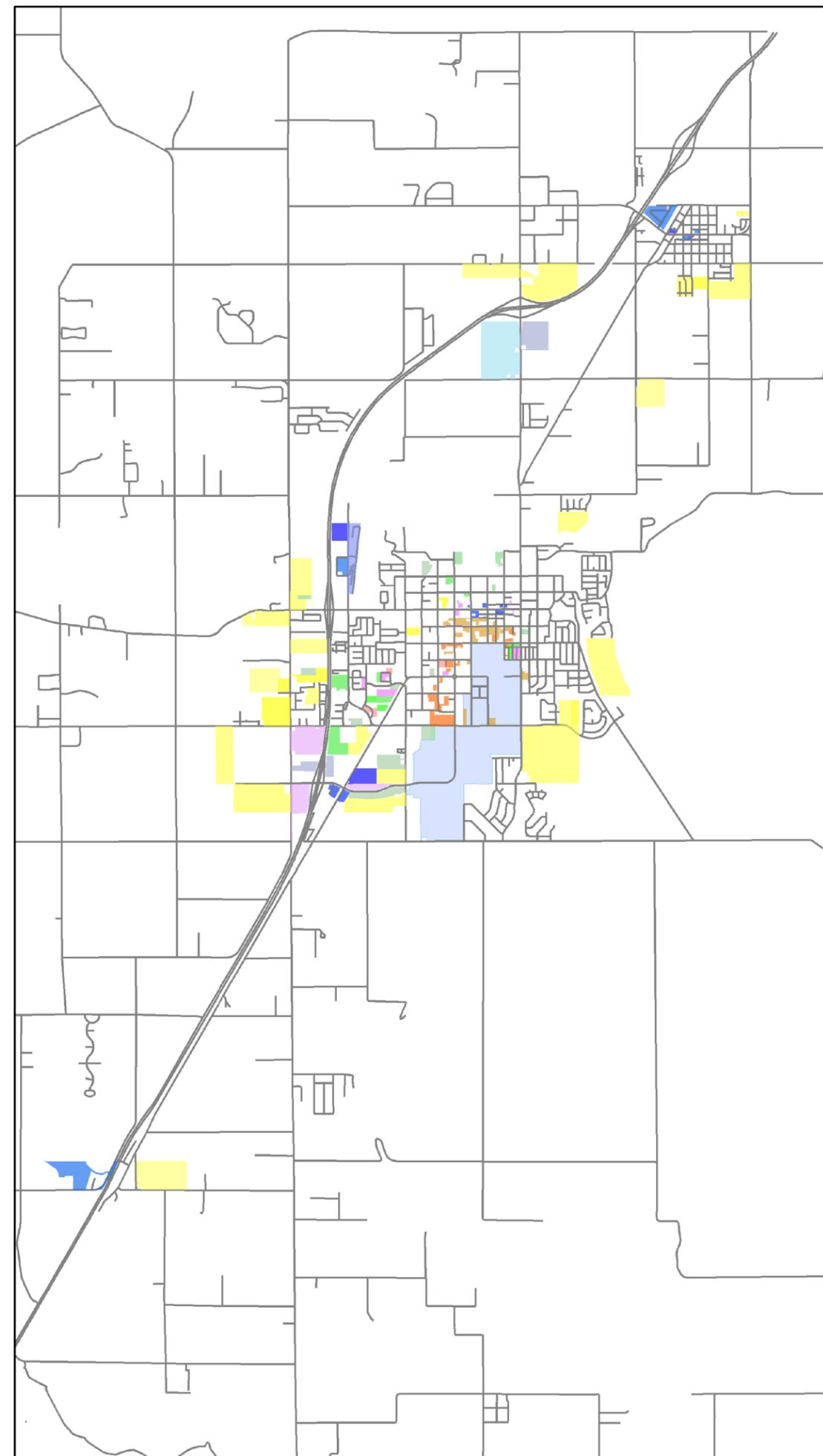


#	Answer	Bar	Response	%
1	Most new stores and businesses should be along 2nd East and Highway 20 interchanges		54	13.14%
2	Small offices and other businesses should be in and near neighborhoods		5	1.22%
3	Jobs should be near the University and downtown to strengthen that area		82	19.95%
4	A mixture of the above		270	65.69%
Total			411	100.00%

Min Value	Max Value	Average Value	Variance	Standard Deviation	Total Responses	Total Respondents
1	4	3.38	1.05	1.03	411	411

# Appendix E

## Illustrative Vision Map



### PARCEL\_5 <ACTIVE> DEV\_TYPE

- ERASE
- Single Family 16 acre
- Single Family 10 acre
- Single Family 5 acre
- Single Family 2 acre
- Single Family 1 acre
- Single Family 0.5 acre
- Single Family 5,000 sqft
- Townhomes
- Low-Rise MF
- Mid-Rise MF
- High-Rise MF (5 story)
- Single Student Housing
- Office 1-story
- Office 3-story
- Business/Office Park
- Low Density Commercial
- Big Box/Strip Commercial
- Main Street Commercial
- Light Industrial
- Heavy Industrial
- Single Student Mixed Use
- Mixed Use Office (3)
- Mixed Use Office (5)
- Mixed Use Residential (3)
- Mixed Use Residential (5)
- Hospitality
- Single Family .25 acre
- Big Box/Strip Commercial new
- Single Family 2 acre (public pays)
- Single Family 1 acre (public pays)
- Single Family 0.5 acre (public pays)
- Single family Very Low Density
- Single Family Low Density