

THE MISSOURI SURVEY 2017



Missouri Rural
Development Partners

This statewide survey was designed and conducted by Missouri Rural Development Partners in partnership with University of Missouri Division of Applied Social Sciences, University of Missouri Extension, and the Missouri Department of Economic Development, Office of Rural Development.

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ACKNOWLEDGEMENTS

Missouri Rural Development Partners (MRDP) is Missouri's federally authorized state rural development council. As such MRDP is committed to linking agencies and organizations that serve rural Missouri to facilitate an understanding of what those agencies and organizations offer and how we can work together to better address the needs of rural Missouri. It is our hope that the annual Missouri Survey will help inform MRDP our network of stakeholders and partners across the state about key issues and needs.

The survey was developed and analyzed by a team from MRDP, University of Missouri Extension, University of Missouri Department of Applied Social Sciences (DASS) and the Missouri Department of Economic Development, Office of Rural Development.

Special thanks goes to the numerous agencies and partners that assisted with the development, distribution and promotion of the survey to their membership and contacts across the state. In particular, we would like to thank:

- Associated Electric Cooperatives, Inc. (AECI)
- *Rural Missouri Magazine*
- Ameren Missouri
- Missouri Municipal League
- Missouri Dept. of Economic Development
- Missouri Farm Bureau
- Community Foundation of the Ozarks
- Missouri Community Betterment
- Missouri Dept. of Health and Senior Services, Office of Primary Care and Rural Health
- Missouri Economic Development Council (MEDC)
- Regional Planning Commissions

Finally, thanks to our partner state rural development councils from across the nation who shared their experience and offered advice in the development of this survey.

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EXECUTIVE SUMMARY

Please Help! That was the straightforward plea from one of the survey respondents. It reflects the concern that many respondents have about the future of their community and their recognition that they need guidance and assistance to find a new path forward.

This survey was launched at a unique period in Missouri's history. The Great Recession still casts a shadow over much of the State where 55 counties have not returned to employment and population levels of 2007 with average losses of **-3.7%** in population and **-9.5%** in jobs. The lingering malaise is concentrated in rural areas with 41 of the 55 counties classified as Rural by the Office of Management and Budget while only one metropolitan county is in this situation. The problems are not isolated in Rural areas since 82 counties have not returned to 2007 employment and 67 have fewer residents than in 2007. Nearly all population and job growth since 2007 has been concentrated in a handful of metropolitan counties including St. Charles, Clay, Boone, Platte, Jackson, and Greene where 82% of statewide job growth and 76% of population growth occurred. Against this backdrop the 2017 Rural Missouri Survey was distributed statewide.

An important goal of the distribution effort was to put the survey in front of community leaders. This was accomplished by partnering with statewide agencies and organizations that represent elected officials, community economic development professionals, and a wide range of citizens engaged in community development programs. These agencies distributed the survey to their networks and posted the link on websites and Facebook pages. The effort was successful: 83% of respondents were engaged in some type of community organization. Even more surprising was the large proportion (31.3%) that served on boards or had been an elected official. In total, we received 2,261 valid responses to the survey and nearly 8,000 written comments.

The education profile for respondents is extraordinary. The proportion of survey respondents with a college degree (54.8%) is twice as high as the State (27.6%). The gap is even wider for respondents with an advanced degree, 24.5% for the survey respondents compared with 10.4% for Missouri.

The proportion of females (62.3%) was significantly higher than males (37.7%). The age profile skewed older despite a large range (16 to 91 years). The average age was 53.8 years. Female respondents were younger than males, 52.3 year average compared with 56.3 for males, and were less likely to have served as a leader, 27.1% compared with 38.5% for males.

Respondents have a broad range of professional experience. 50.0% are currently employed full-time and only 1.3% were unemployed and looking for work. Given the relatively old age profile it is no surprise that 19.1% are retired. One-fourth are business owners/managers or farm operators and 15.0% work in the nonprofit sector.

Several key themes emerged from the survey analysis. More detail is provided in the full report, but the significant takeaways include:

Economy and Workforce

Ensuring a stable and resilient local economy is the goal for most communities. The impact of the Great Recession left many communities and counties struggling to return to their perceived normal. Three survey questions specifically addressed the perception of economic recovery. Sixty-eight percent of respondents believe that poverty has increased in their community over the last ten years. In fact poverty has increased in

Missouri since 2007. Between 2007 and 2016 the poverty rate for the State increased from 13.3% to 14.0% with the total number of Missourians in poverty increasing from 758,854 to 825,358 (*Census Bureau, Small Area Income and Poverty Estimates*). Sixty-eight counties experienced an increase in the percentage of persons in poverty and 71 had increases in the total number of persons in poverty.

I'm concerned about the economic future. I don't think our community has a clear plan for the future.

Respondents also believed that there is a shortage of jobs that pay a living wage – 68.6% disagreed with the statement “There are many jobs available that pay a living wage.” Rural Missouri has higher poverty rates and lower incomes than the rest of the State and respondents recognized that reality.

Workforce quality is a key issue in economic development. The availability of a ready to work labor force with the right skills often determines winners and losers as businesses make location and expansion decisions. The survey included two questions addressing workforce issues. The first asked respondents to assess whether workforce skills match local employer needs. Only one-third of respondents thought workforce skills matched employers’ needs but a relatively large proportion (23.5%) had no opinion which indicates a lack of awareness on this issue. The second question asked about the availability of workforce training programs. An even smaller proportion (31.8%) agreed that training opportunities were available for community members, again there was a relatively large proportion with no opinion (18.3%).

We need to invest more resources in business development.

The response to the statement “My Community invests adequate resources in new business development” was striking – only 21.8% of respondents agreed and 56.6% disagreed. Coupled with that,

only 22% of respondents agreed that there were sufficient employment opportunities in their community and 67.2% disagreed with the statement.

The responses to the statements about the economy and workforce were consistent – respondents have serious concerns about the state of the local economy.

Leadership

Recruiting leaders is a problem in many communities. Survey respondents confirmed this with 65.0% agreeing that there are not enough people willing to serve as volunteers and leaders in their community. A nearly equal proportion, 60.6%, indicated they have an opportunity to join community development efforts. It is important to note this question had one of the

There aren't enough people willing to serve as leaders and volunteers.

largest number of respondents who selected “Neither agree nor disagree” (20.2%) which indicates they did not know about volunteer opportunities. This begs the question of how communities are seeking out people to volunteer and serve as community leaders. Many organizations and communities have some type of leadership development program, but how effective are they?

Is there a better way to coach and develop new leaders?

Infrastructure

Developing and maintaining infrastructure is one of the key responsibilities of local government. Respondents are clearly concerned about the financial capacity of local government to maintain infrastructure. 60.6% disagreed with the statement “The community has the financial capacity to support and maintain a sound

infrastructure.” This finding is not a surprise as we witness first hand deteriorating infrastructure and hear stories about communities’ inability to support, much less, improve existing infrastructure.

Access to broadband internet services is a hot topic right now. It is critical to the local economy – businesses need it to handle transactions, schools need it to ensure student access to education opportunities, hospitals and doctors use it to provide access to healthcare. One of the most surprising findings in the survey was the relatively small proportion of respondents who thought access to broadband was a problem, only 41.7% expressed this as a concern. One explanation for the lower than expected level of concern are the characteristics of respondents. With a more highly educated, slightly older respondent pool, there likely are many in a position, personally or professionally, that have access to broadband at work or have personal resources to pay higher fees for good access.

My community doesn't have the financial capacity to maintain infrastructure.

Housing

Affordable housing is an emerging issue in the State. Missouri is following national trends with an increasing proportion of the population renting. Between 2010 and 2016 the percent of the population living in rental housing increased 16.2% while the proportion in owned housing units decreased -2.8% (Census Bureau, 2010 and 2016 American Community Survey). The changes are widespread with 94 counties posting increases in renters. Against this backdrop it is no surprise that respondents were more concerned about affordable rental housing than single family homes. Only 40.8% agreed with the statement “Affordable rental housing is available” while 43.6% disagreed. Even though a much larger proportion of respondents thought affordable single family homes are available (54.6%) there was a significant 36.4% that disagreed with this statement

Community

One of the most encouraging findings from the survey was the degree to which respondents disagreed with the statement “My community is doing just fine and doesn’t need to change.” Nearly 82% of respondents indicated that change was needed. The broad recognition that there is always room for improvement is a positive sign. However, this finding sharply contrasts with the relatively small proportions that believe their communities are forward looking (50.0%) and have a clear plan for the future (30.3%). This suggests that despite the recognition that change is needed there are barriers and many communities have not taken action by creating a plan. These findings suggest a need for more engagement and assistance for communities to explore their opportunities and challenges and to create a forward looking plan.

My community needs to change.

Health

Missouri gets relatively low scores on many state rankings of health and health care systems. The State ranked 40 in the United Health Foundation America’s Health Rankings 2017 and 37 in the Commonwealth Fund Scorecard on State Health System Performance. The State also experienced three hospital closings since 2014 in rural areas -- Parkland Health Center, Farmington (2015); Sac-Osage Hospital, Osceola (2014); and SoutheastHEALTH Center of Reynolds County, Ellington (2016). Funding for health care is also an issue. Because Missouri is not participating in the Medicaid expansion under the Affordable Care Act the State is potentially losing billions of dollars that would have supported health delivery systems. The Robert Wood Johnson Foundation estimates Missouri is losing \$17.8 billion in Medicaid funding and \$6.8 billion in hospital reimbursement over the 2013 to 2022 period, the estimated total cost for the State to participate was \$1.6 billion. In 2016 Missouri ranked 49 in per capita expenditures on health care (Kaiser Family Foundation, State

Health Facts, kff.org). These indicators are cause for concern. Against this backdrop the survey asked respondents to comment on access and affordability of health care in their communities.

Although 80.0% of survey respondents indicated that health care services were available in their communities there were concerns about both the affordability of care and the number of care providers. One-third thought care was not affordable and 54.5% think there are too few health care professionals in their communities. The opioid crisis is shining a bright light on the access to mental health and treatment resources. Survey responses indicate these resources are missing from most Missouri communities. Only 40.2% believe they have mental health services available in their communities and a nearly identical 40.6% do not think drug and alcohol treatment is available.

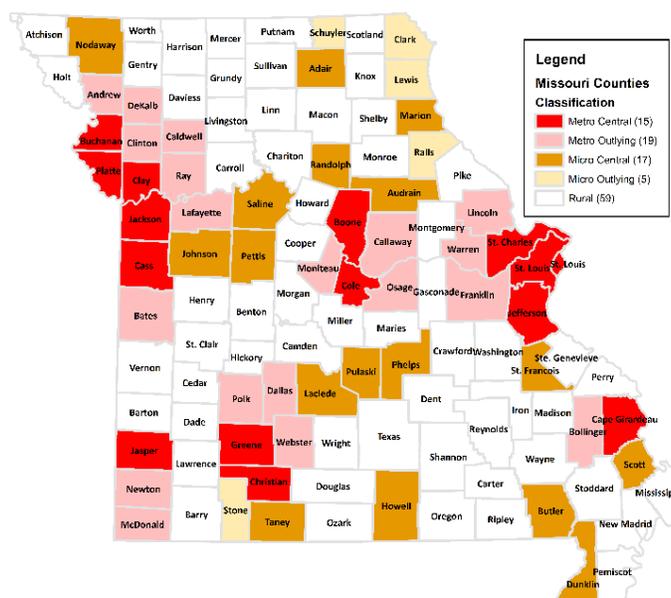
METHODOLOGY

The Missouri Rural Survey, an annual survey modeled after surveys done by state rural development councils from across the nation, debuted in the spring of 2017 and was developed by a team from Missouri Rural Development Partners (MRDP), University of Missouri Extension, University of Missouri Department of Applied Social Sciences (DASS) and the Missouri Department of Economic Development, Office of Rural Development. Numerous other agencies and partners assisted with the distribution of the survey. Special thanks to *Rural Missouri Magazine* for publishing a story on the survey.

Dr. David O'Brien, University of Missouri, DASS and students in his "Community Survey Research" (RSS9480) course provided development and guidance on the survey instrument. They also did the preliminary survey analysis.

One of the motivations for this survey was the persistently discouraging performance of the Rural Missouri economy in the wake of the Great Recession. In order to understand how the State is changing it is useful to cluster counties into groups. The U.S. Office of Management and Budget (OMB) scheme was used to classify counties. This system is based on the size of the largest city in the county.

- All **Metropolitan** counties have a city with at least 50,000 people, 15 of Missouri's 114 counties and the City of St. Louis are in this category¹.
- Counties surrounding Metropolitan counties that have at least 25% of workers commuting to a Metropolitan county are termed **Metropolitan Outlying**. Many of these counties are very rural, eleven of the nineteen counties in this group have populations below 25,000.
- **Micropolitan** counties have at least one city with a population between 10,000 and 50,000. These counties are mostly rural in nature but the large commercial center makes them unique.
- **Micropolitan Outlying** are counties that send at least 25% of their workforce to a Micropolitan county, these are very rural counties with poorly performing economies except for Stone County.
- All **Rural** counties are distinguished by the lack of a large commercial center of 10,000 or more population. There are 59 Rural counties in Missouri using this definition but there are actually 78 counties that do not have a city of 10,000. In the following paragraphs the OMB categories are



¹ Missouri has 114 counties and the City of St. Louis, an independent city. For the purposes of data evaluation and ease of classification, the City of St. Louis is considered a Metropolitan county.

used to illustrate how counties have performed using 2007 as a base year since it was the year preceding the Great Recession.

One of the key indicators of a growing and prosperous economy is population growth. People are the drivers of economic development. They are the entrepreneurs, workers, and community leaders that fuel growth. In the 2007 to 2016 period Missouri grew at less than one-half the rate of the US, 3.5% compared to 7.3% for the nation. Nearly all of the population growth (93%) occurred in the 15 Metropolitan counties which added 191,313 people. The top five counties (St. Charles, Jackson, Clay, Greene and Boone) added 144,277 residents which was 75.4% of the State’s total growth. The Rural (-1.8%) and Micropolitan Outlying (-2.2%) counties were net losers. Sixty-five of Missouri’s counties experienced losses and only 22 had growth rates equal to the State. Camden (+4.4%) is the only rural county with growth that exceeded the State rate. Forty-seven of the 59 Rural counties lost population. The indicators are even worse when we examine the 2010 to 2016 recovery from the Recession. Eighty counties are estimated to have lost population since 2010.

Change in Total Population 2007 and 2016

	2007	2016	Change	% Change
Metropolitan	3,779,134	3,970,447	191,313	5.1%
Metropolitan Outlying	564,690	577,296	12,606	2.2%
Micropolitan	635,335	653,411	18,076	2.8%
Micropolitan Outlying	63,925	62,522	(1,403)	(2.2%)
Rural	844,528	829,324	(15,204)	(1.8%)
Missouri	5,887,612	6,093,000	205,388	3.5%
United States	301,231,207	323,127,513	21,896,306	7.3%

Source: Census Bureau

Employment growth indicators are equally troubling. All groups of counties except Metropolitan have experienced net job losses. Eighty-two of Missouri’s counties have fewer jobs in 2017 than they had in 2007. The losses are greatest in the Micropolitan Outlying (-10.0%) and Rural (-7.1%) categories. Not all Rural counties experienced job losses. Notable exceptions are Perry, Howard, Hickory, and Madison counties with growth rates that exceeded the national rate of 4.8%. Several Metropolitan counties experienced exceptional growth including St. Charles (+21,789), Clay (+13,159) and Boone (+10,632) but there were also notable losses in St. Louis (-9,431) and Jackson (-4,112). The Competitive Effect column in the following table is an estimate of the job deficit when compared with growth in the national economy. If Missouri grew at the same rate as the US there would be an additional 113,260 jobs in the State.

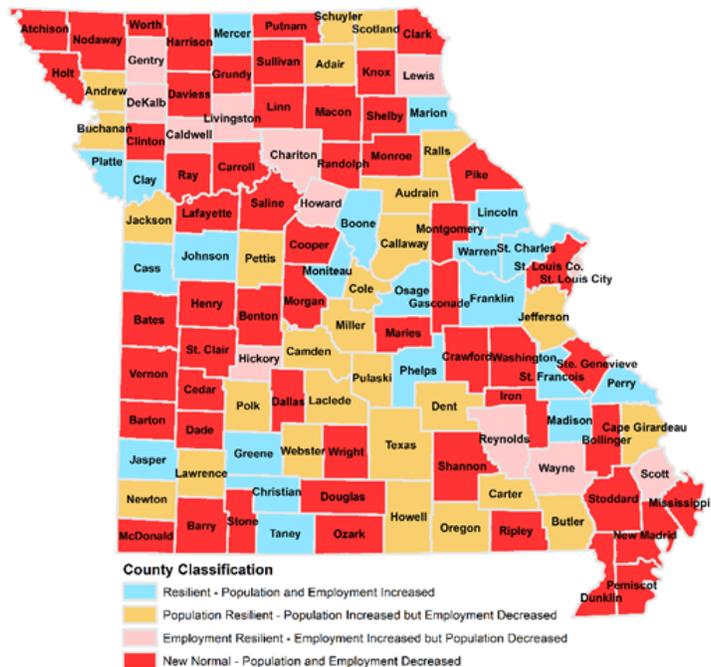
Change in Full-Time Jobs Between 2007 and 2017

	2007 Jobs	2017 Jobs	2007 - 2017 Change	% Change	Competitive Effect
Metropolitan	2,202,492	2,247,645	45,153	2.1%	-59,487
Metropolitan Outlying	183,208	178,464	-4,745	-2.6%	-13,449
Micropolitan	300,670	294,331	-6,338	-2.1%	-20,623
Micropolitan Outlying	19,067	17,166	-1,900	-10.0%	-2,806
Rural	304,592	283,069	-21,522	-7.1%	-35,993
Missouri, county not reported	61,353	83,366	22,014	35.9%	19,099
Missouri	3,071,381	3,104,042	32,661	1.1%	-113,260
United States	152,488,099	159,732,809	7,244,710	4.8%	NA

Source Economic Modeling Specialists Intl., 2018.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

To help visualize the geographic distribution of these changes the percent change in population and employment were combined into an index calculated simply as the sum of the percent change in employment and population. Counties were assigned to four categories based on changes in employment and population.

- Resilient counties** experienced growth in both population and income, 21 counties are in this group. Only three Rural counties are in the Resilient category (Perry, Madison, and Mercer) which is dominated by Metropolitan and Metropolitan Outlying counties. Platte (+29.8%), St. Charles (+28.7%), Clay (+26.3%) and Boone (+25.0%) all had composite indicators of 25% or more while Osage barely made the cut with a 0.3% increase.
- Population Resilient** counties are those that experienced population growth but have not recovered to 2007 employment. This group of 27 counties is the most diverse with counties from all of the OMB categories. The average population increase was 2.7% and average employment losses were **-5.2%**. Although the group was dominated by Rural counties (8) there were also five Metropolitan Central counties (Jackson, Cape Girardeau, Buchanan, Cole and Jefferson).
- Employment Resilient** counties have recovered to 2007 employment but lost population. Rural counties dominated this group with Howard (+8.6%) and Hickory (+8.3%) posting the largest employment gains. The average employment growth was 3.3% while population losses averaged **-2.7%**.



- New Normal** counties have experienced losses in both population and employment. The term New Normal has been widely used in the wake of the Great Recession to refer to places and businesses that may have permanently changed as a result of the recession. There are 55 New Normal counties. The average losses for population were **-3.7%** and jobs **-9.5%**. Forty-one of the 55 counties are Rural and only one is Metropolitan (St. Louis County).

Office of Management and Budget Classification	Percent of Responses
Rural	45.4%
Micropolitan Central	20.1%
Metropolitan Outlying	18.2%
Metropolitan Central	14.4%
Micropolitan Outlying	1.9%

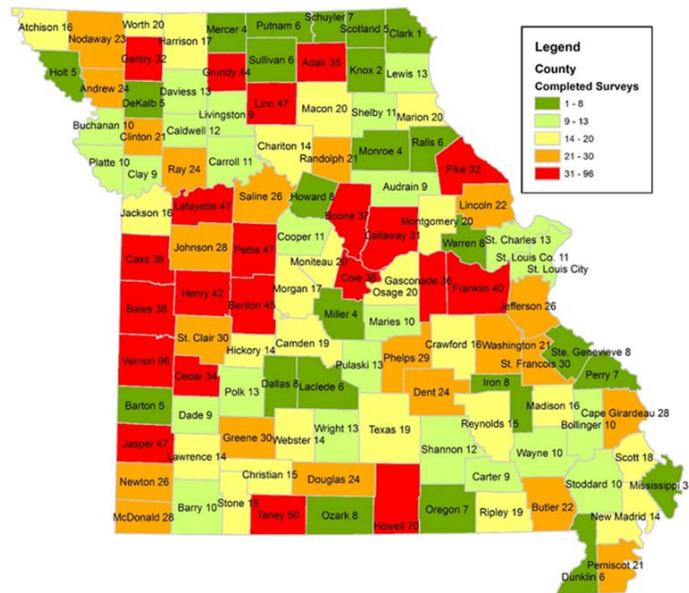
Source: University of Missouri Extension

County Employment and Population Change 2007 to 2017	Percent of Responses
Resilient - Employment and Population Increased	23.1%
Population Resilient - Employment Decreased and Population Increased	22.7%
Employment Resilient - Employment Increased and Population Decreased	10.3%
New Normal - Employment and Population Decreased	44.0%

Source: University of Missouri Extension

RESPONSE RATES BY COUNTY

The survey was conducted as a “convenience” survey. That means that it was open to anyone who had access to the survey and was willing to take the time to respond. Survey distribution was primarily conducted electronically (99%) with a paper survey mailed to anyone who requested one. Most respondents learned of the survey through email (62%) and social media (15%) or the story in the Rural Missouri Magazine (5%). There were 2,261 valid responses included in the analysis. At least one person responded from every county but there were significant differences in the geographic distribution of participation. The largest number of responses came from Vernon County (96) followed by Howell (70) and Taney (50), these were the only counties with 50 or more responses. Thirty counties had less than 10 responses.



RESPONDENT PROFILE

An important goal of the distribution effort was to put the survey in front of community leaders. This was accomplished by partnering with several statewide agencies and organizations that represent elected officials, community economic development professionals, and a wide range of citizens engaged in community development programs. These agencies distributed the survey to their networks and posted the link on websites and Facebook pages. The effort was successful, 83% of respondents were engaged in some type of community organization. Even more surprising was the large proportion (31.3%) that served on boards or had been an elected official. In the following discussion of results we will highlight the differences between this group of highly engaged respondents and those that had no leadership experience.

The education profile for respondents is extraordinary. The proportion of survey respondents with a college degree (54.8%) is twice as high as the State (27.6%). The gap is even wider for respondents with an advanced degree, 24.5% for the survey respondents compared with 10.4% for Missouri.

The proportion of females (62.3%) was significantly higher than males (37.7%). The age profile skewed older despite a large range (16 to 91 years). The average age was 53.8 years. Female respondents were younger than males, 52.3 year average compared with 56.3 for males, and were less likely to have served as a leader, 27.1% compared with 38.5% for males.

Respondents have a broad range of professional experience. 50.0% are currently employed full-time and only 1.3% were unemployed and looking for work. Given the relatively old age profile it is no surprise that 19.1% are retired. One-fourth are business owners/managers or farm operators and 15.0% work in the nonprofit sector.

Respondent Characteristics	Percent
Sex	
Male	37.7%
Female	62.3%
Leadership Experience	
Served in a leadership role	31.3%
No leadership experience	68.7%
Employment Status	
Employed Full-time	50.0%
Retired	19.1%
Work in the not for profit sector	15.0%
Own or manage a for-profit business	13.7%
Own or manage a farm/ranch	11.2%
Employed part-time	6.4%
Student	1.8%
Unemployed/seeking employment	1.3%
Education	
High school or less	10.1%
Some college or associate degree	35.0%
Bachelor's degree in college	30.3%
Advanced degree	24.5%
Age (quintiles)	
40 and under	19.2%
41-51	20.6%
52-58	19.0%
58-65	20.2%
Over 65	21.0%
Mean age	53.8 years
Range	16 to 91 years

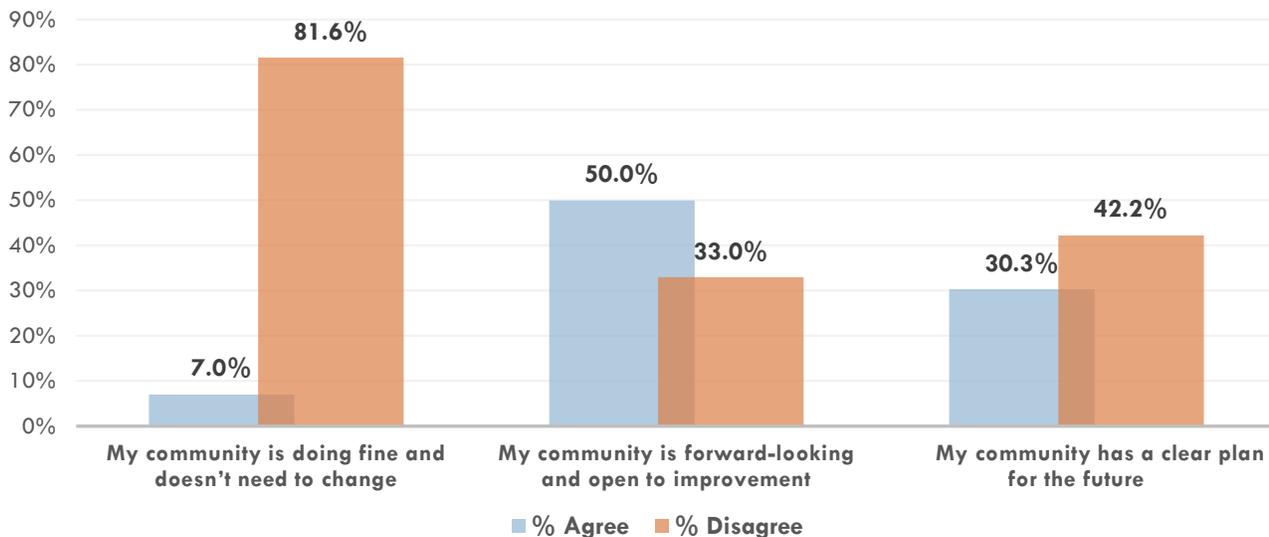
SURVEY RESULTS

The survey questions are presented using four themes: Community, Leadership, Economy and Workforce, and Health and Senior Services. For each theme the results have been aggregated into two categories. The Agree column is the sum of responses that answered “Somewhat Agree,” “Agree,” or “Strongly Agree” and Disagree was calculated using the same method – “Somewhat Disagree,” “Disagree” or “Strongly Disagree.” For readers interested in the frequency tables and responses to the open ended questions, please email: CurryMP@missouri.edu or GulickS@missouri.edu.

COMMUNITY

Community questions are presented using three subthemes. The first considers opinions about the current conditions in the community and how communities are oriented toward the future including whether they have a plan. The second includes indicators for community cohesion, pride and how welcoming the place is to new residents. The third includes questions addressing the affordability of housing and the fourth covers infrastructure concerns.

One of the more striking findings from the survey was the degree to which respondents disagreed with the statement “My community is doing just fine and doesn’t need to change.” Nearly 82% of respondents indicated that change was needed. The broad recognition that there is always room for improvement is a positive sign. However, this finding sharply contrasts with the relatively small proportions that believe there communities are forward looking (50.0%) and have a clear plan for the future (30.3%). This suggests that despite the recognition that change is needed there are barriers and many communities have not taken action by creating a plan. These findings suggest a need for more engagement and assistance for communities to explore their opportunities and challenges and to create a forward looking plan.

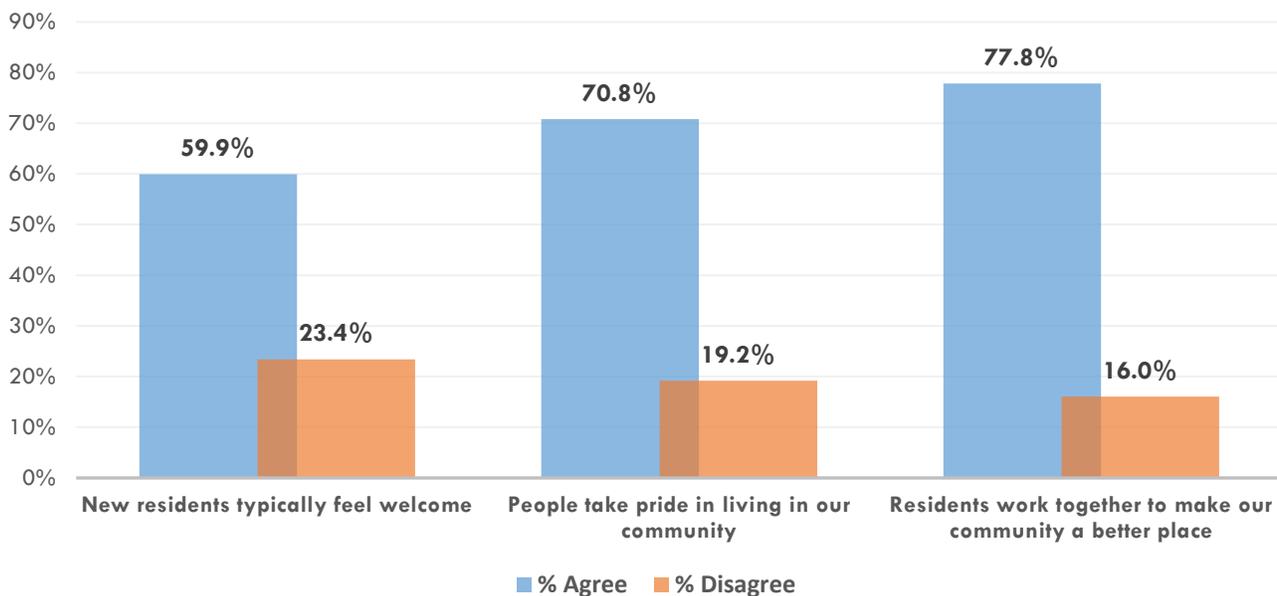


Leaders and non-leaders had similar responses to these questions except for the recognition of a community plan. Leaders were more likely to say there was a plan for the future (37.0%) compared to non-leaders (27.2%). This finding illustrates a common, but concerning, problem with community planning, that is the lack of citizen participation in or awareness of the existence of a plan. Effective community planning programs require citizen engagement and support.

Rural counties had significantly different responses to these questions. 40.4% of respondents from Metro Central counties indicated they had a clear plan for the future compared to 25.5% in Rural counties and only 21.4% in Micropolitan Outlying counties. 61.0% of Metropolitan Central counties indicated their community is forward looking compared to only 46.5% in Rural Missouri. Rural respondents were also more likely to disagree with the statement they are doing fine and don't need to change with 85.7% disagreeing compared with 75.9 in Metro Central counties.

Respondents from New Normal counties also had significantly larger proportions that expressed concerns about their communities. 85.8% disagreed with the statement that “My community is doing fine and doesn't need to change” compared with 75.2% in Resilient counties. Only 44.6% believe their community is forward looking compared with 57.6% in counties that experienced growth. Only 25.3% believe they have a clear plan for the future compared with 39.3% in Resilient. Respondents in counties with either population loss and employment gain or employment gain and population loss had similar responses to these questions and were always between the counties that are net losers and those that had net gains.

How welcoming and cohesive a community is can have a powerful influence on growth and development. Places that are welcoming and care about the quality of life for all residents will have an advantage over places that do not embrace these values. Only 59.9% of respondents agreed with the statement “New residents typically feel welcome” and nearly one-fourth disagreed. A significantly larger 70.8% believed that “People take pride in living in our community” and 77.8% believe that “residents work together to make our community a better place.”



Leaders tended to be on the agree side of these questions more often than non-leaders but the gaps were relatively small. The largest difference was for the question about working together to make the community a better place with 81.0% leaders agreeing compared to 76.3% for non-leaders. Leaders also thought new residents typically feel welcome (61.8%) more often than non-leaders (59.1%). Nearly identical proportions agreed that people take pride in their communities, 71.3% for leaders compared to 70.5% for non-leaders.

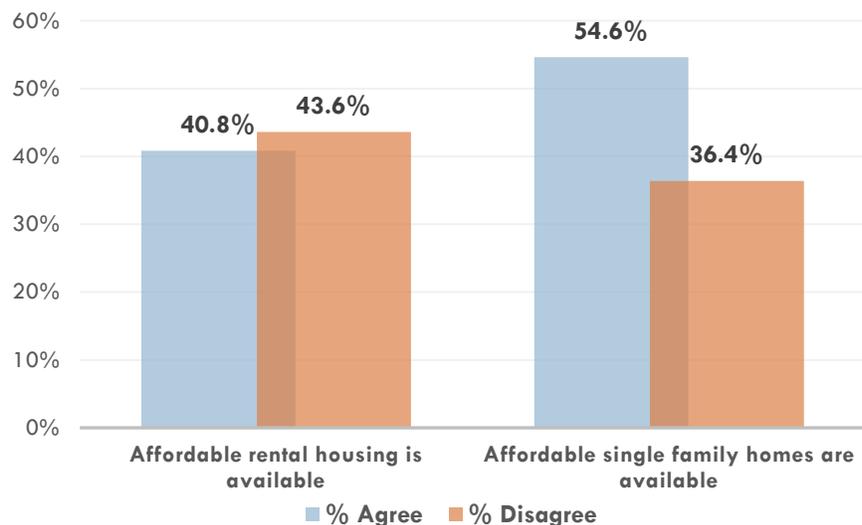
Respondents from Metro Outlying counties were the least likely to agree that they have a welcoming community (55.7%) followed closely by Rural with 58.6% agreeing. This is interesting for two reasons. The

first is that Metro Outlying counties are full of bedroom communities because these counties send large proportions of their residents to Metro counties for employment. In Rural places, where population losses are common, this is an obvious barrier to attracting new residents. Rural (68.1%) and Micropolitan Outlying (64.3%) counties also had smaller proportions that believed residents take priding in living in the community. These responses stand in stark contrast to the 82.7% of respondents from Metro Central counties that agreed residents take pride in their community. All groups of counties except Micropolitan Outlying had similar response concerning community residents working together to make the community a better place. In this group of counties that have suffered the largest proportional losses in population and employment only 69.0% believed residents are working together.

New Normal county respondents are consistently below other groups on every indicator. Only 56.3% believed that new residents feel welcome compared with the overall rate of 59.9%. In Resilient counties 67.6% indicated their communities were welcoming. A similar gap exists for responses concerned with taking pride in the community with 77.7% from Resilient counties indicating residents take pride compared with 65.7% in New Normal counties.

Affordable housing is an emerging issue in the State. Missouri is following national trends with an increasing proportion of the population renting. Between 2010 and 2016 the percent of the population living in rental housing increased 16.2% while the proportion in owned housing units decreased -2.8% (Census Bureau, 2010 and 2016 American Community Survey).

The changes are widespread with 94 counties posting increases in renters. Against this backdrop it is no surprise that respondents were more concerned about affordable rental housing than single family homes. Only 40.8% agreed with the statement “Affordable rental housing is available” while 43.6% disagreed. Even though a much larger proportion of respondents thought affordable single family homes are available (54.6%) there was a significant 36.4% that disagreed with this statement.



There were small differences between leader and non-leader responses to this question but non-leaders were more likely to think housing was a problem.

Respondents from Micropolitan Outlying counties had the largest proportions that are concerned with housing affordability, 50.0% of respondents in these counties disagreed with both statements. Rural county respondents were also more likely to express concerns with 45.8% concerned about rental housing and 38.2% disagreeing that here is affordable single family homes. Respondents from Metropolitan Central and Outlying counties were the least likely to express concerns about housing.

New Normal counties were significantly more likely to have concerns about housing. 49.4% of respondents from these counties thought affordable rental housing was a concern and 40.4% were concerned about

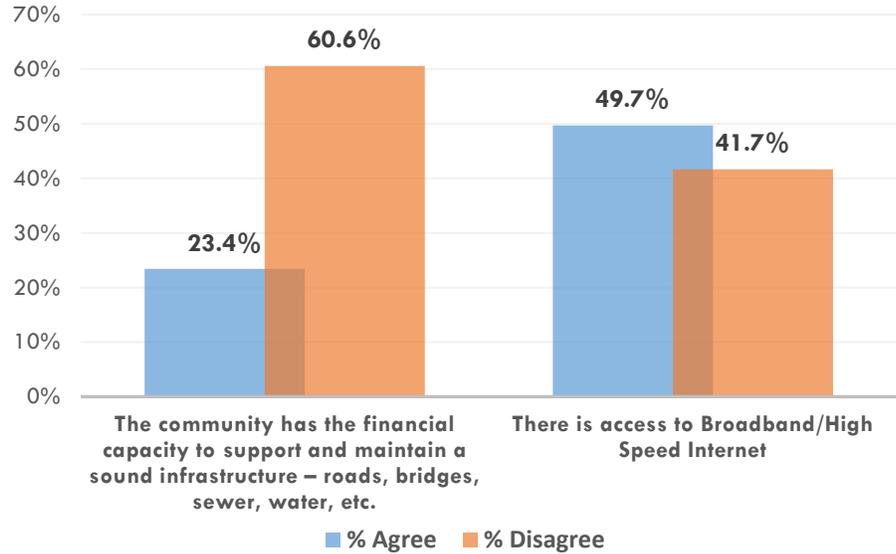
affordable single family homes. In Resilient counties only 38.3% were concerned with affordability of rental housing. This level of concern was similar to groups of counties that lost population or employment (39.6%). The ten percent gap in the perception of rental housing affordability illustrates the likely impact of economic hardship and low income profiles in New Normal counties.

Developing and maintaining infrastructure is one of the key responsibilities of local government. Respondents are clearly concerned about the financial capacity of local government to maintain infrastructure. 60.6%

disagreed with the statement “The community has the financial capacity to support and maintain a sound infrastructure.” This finding is not a surprise as we witness first hand deteriorating infrastructure and hear stories about communities inability to support, much less, improve existing infrastructure.

Access to broadband internet services is a hot topic right now. It is critical to the local economy – businesses need it to handle transactions, schools need it to ensure student access to education opportunities, hospitals

and doctors use it to provide access to healthcare. One of the most surprising findings in the survey was the relatively small proportion of respondents who thought access to broadband was a problem, only 41.7% expressed this as a concern. One explanation for the lower than expected level of concern are the characteristics of respondents. With a more highly educated, slightly older, respondent pool we surmise that many are able, personally or professionally, to broadband and have the personal resources to pay higher fees for good access.



While there were very small differences based on leadership experience there were large differences based on degree of rurality. A majority (66.8%) of Rural county respondents were concerned about community infrastructure financing compared with only 49.4% in Metro Central counties. Metro Outlying (62.4%) and Micropolitan Outlying (61.9%) counties also had relatively large proportions that were concerned about financial capacity. The same was true for access to broadband with only 33.6% of Metro Central respondents indicating that access to broadband was a problem compared with 43.9% in Rural counties. Micropolitan Outlying counties had by far the highest rate of dissatisfaction with 59.5% identifying this as a problem.

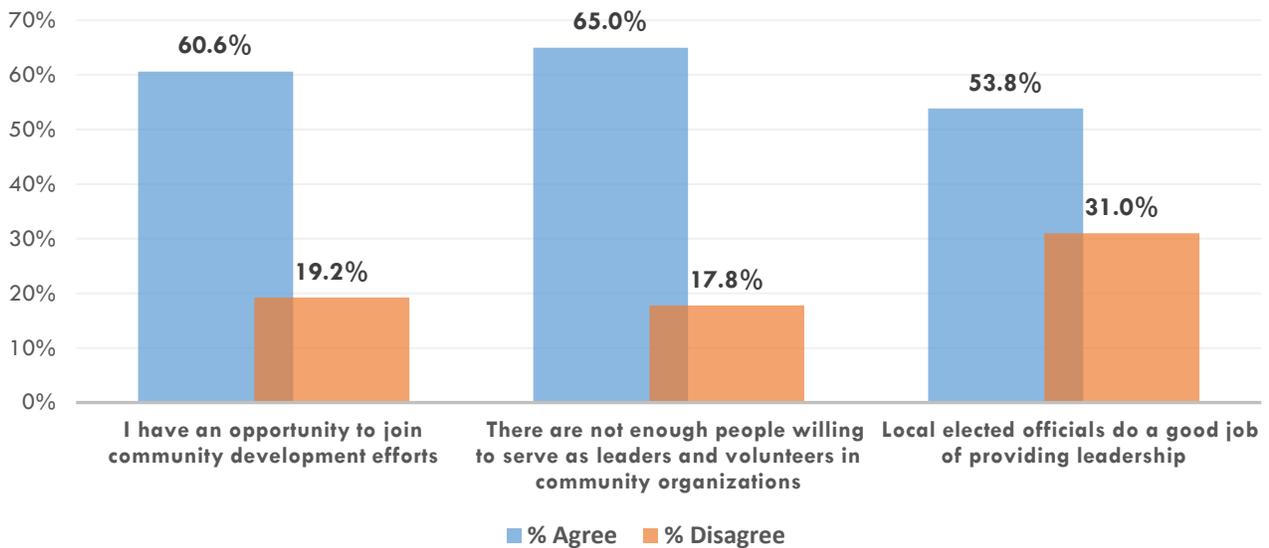
Counties experiencing the greatest economic hardship were more likely to express a high level of concern about the capacity to afford infrastructure costs. In New Normal counties 66.7% were concerned compared with 51.6% in Resilient counties. Employment Resilient counties had the second highest level of concern with 63.0% saying they lack financial capacity to maintain infrastructure.

LEADERSHIP

Recruiting leaders is a problem in many communities. Survey respondents confirmed this with 65.0% agreeing that there are not enough people willing to serve as volunteers and leaders in their community. A nearly equal proportion, 60.6%, indicated they have an opportunity to join community development efforts. It is important to note this question had one of the largest number of respondents who selected “Neither agree nor disagree” (20.2%) which indicates they did not know about volunteer opportunities or how to get involved. This begs the question of how communities are seeking out people to volunteer and serve as community leaders. Many organizations and communities have some type of leadership development program, but how effective are these programs? Are there alternative ways coach and develop new leaders?

Leaders and non-leaders had significantly different answers to these questions. Only 53.7% of non-leaders thought they had opportunities to join community development efforts compared with 75.8% of leaders – a 22% difference. The question addressing the supply of leaders and volunteers also had a relatively large gap with 61.8% of non-leaders and 72.1% of leaders agreeing that this was an issue.

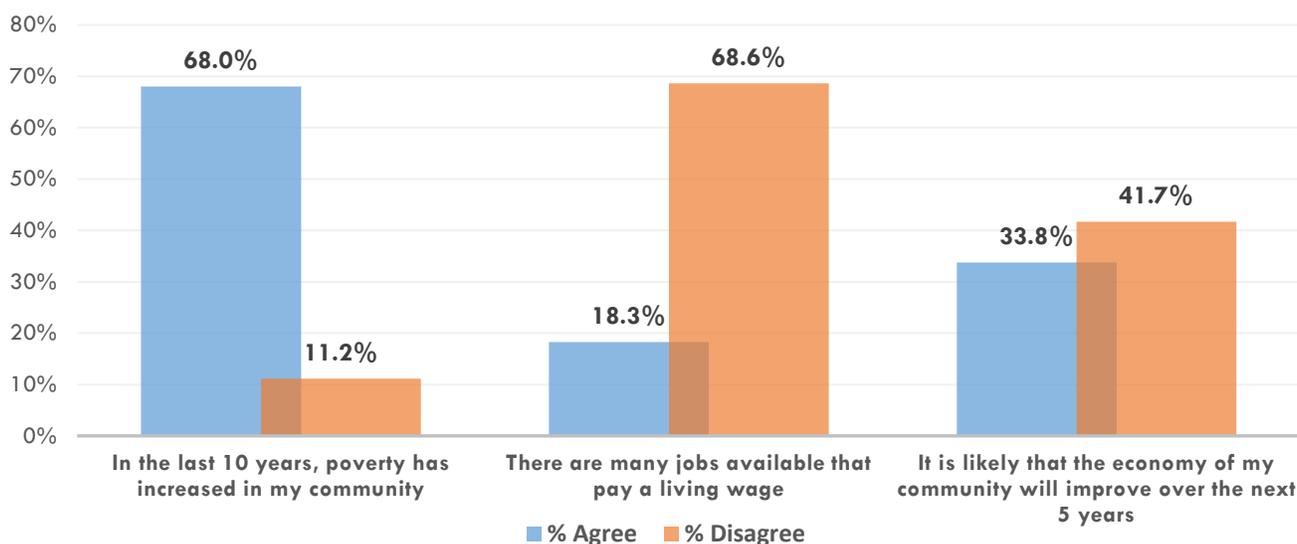
Respondents from Metro Central Counties were the least likely to have leadership issues with 64.1% indicating they have an opportunity to join community development efforts and only 56.3% concerned that there are not enough leaders or volunteers. Micropolitan Outlying counties had the largest concerns about leadership with only 47.6% saying they have an opportunity to join community development efforts and 71.4% indicating there is a shortage of leaders and volunteers. Although Rural respondents were similar to the total on the question of opportunity (60.5%) they had a higher level of concern about the willingness of people to volunteer and lead (69.1%).



Only 53.8% of respondents agreed that local elected officials do a good job of providing leadership. Non-leaders were less likely to agree with the statement than those with leadership experience, 50.9% compared to 60.1%. There were only slight differences based on Office of Management and Budget categories except for Micropolitan Outlying counties that also tended to be more disappointed in local officials with only 50.0% approval. The same was true for New Normal counties where 51.1% of respondents approved of elected officials performance.

ECONOMY AND WORKFORCE

Ensuring a stable and resilient local economy is the goal for most communities. The impact of the Great Recession left many communities and counties struggling to return to their perceived normal. Three survey questions specifically addressed the perception of economic recovery. Sixty-eight percent of respondents believe that poverty has increased in their community over the last ten years. In fact poverty has increased in Missouri since 2007 – between 2007 and 2016 the poverty rate for the State increased from 13.3% to 14.0% with the total number of Missourians in poverty increasing from 758,854 to 825,358 (*Census Bureau, Small Area Income and Poverty Estimates*). Sixty-eight counties experienced an increase in the percentage of persons in poverty and 71 had increases in the total number of persons in poverty.



Respondents also believe there is a shortage of jobs that pay a living wage, 68.6% disagreed with the statement “There are many jobs available that pay a living wage.” Again the survey respondents recognize another problem with the Missouri economy – slow wage growth. Missouri average wages were only 87.6% of the U.S. average in 2016 down from 88.2% in 2007. The divergence in average wages has been a persistent trend since the 1970’s. In 2016 there were 90 counties with an average wage below 70% of the U.S. and only three counties with wages above the U.S. (Jackson, St. Louis, and St. Louis City). Respondents are also skeptical about the future with only 33.8% agreeing with the statement “It is likely that the economy of my community will improve over the next 5 years.” Taken together these responses portray a depressing but accurate account of the Missouri economy.

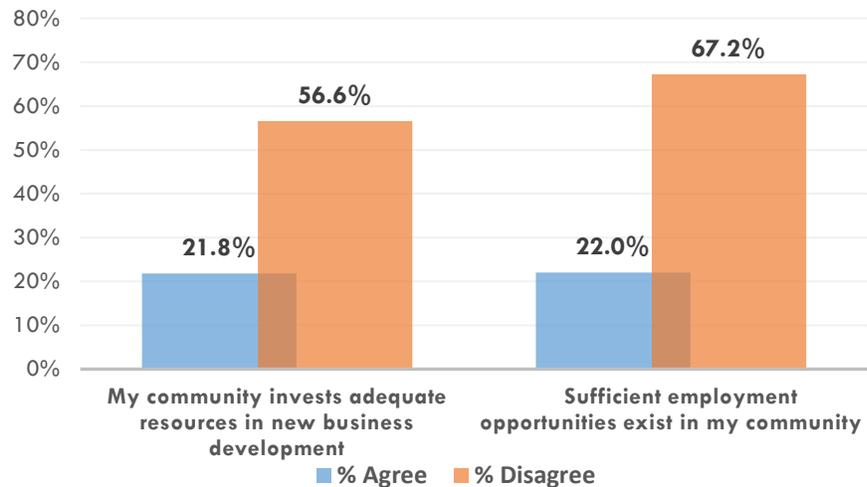
Leaders were more likely to think that poverty increased than non-leaders. 72.9% of leaders thought this was the case while 65.8% of non-leaders thought poverty increased. Non-leaders were more likely to think there was a shortage of living wage jobs (70.5%) than leaders (64.5%). Leaders are also more optimistic about the future with 38.7% believing the economy will improve compared with only 31.4% of non-leaders.

Rural Missouri has higher poverty rates and lower incomes than the rest of the State and respondents from those counties recognize that reality. 72.8% of Rural respondents thought poverty had increased compared with only 58.6% in Metro Central counties where poverty rates are lowest. Micropolitan Outlying counties have the lowest wage profile with average incomes only 61.7% of the U.S. Only 4.8% of respondents in

Micropolitan Outlying counties thought there were jobs that paid living wages. In Rural counties, where the average wage is also low at 62.2% of the U.S., there were significant concerns about living wage jobs with only 13.7% agreeing that living wage jobs are available. It is important to note that even in Metro Central counties where average wages are 95.0% of the U.S. only 29.6% believed there were enough living wage jobs. Counties with dominant commercial centers, which includes Metro Central and Micropolitan Central counties, were significantly more optimistic about the future. 51.1% of Metro Central respondents were optimistic followed by 46.0% in Micropolitan Central counties. In Rural counties pessimism prevails with only 22.4% of respondents expressing optimism about the future with Micropolitan Outlying counties close behind at 28.6%.

Concern about every economic indicator was highest in New Normal counties but there was also a relatively high level of concern in Employment Resilient counties. In the New Normal counties 71.9% believed poverty increased, only 13.2% thought living wage jobs were available, and only 23.4% thought the economy would improve in the next five years. Responses from Job Resilient counties were close behind with 71.6% believing poverty has increased, 15.8% believe there are enough living wage jobs and only 28.3% think the economy will improve. Even in Resilient counties there were many concerns about the economy with 58.9% agreeing that poverty has increased, only 24.4% think there are enough living wage jobs, and less than one-half (49.5%) optimistic about future growth.

Only 21.8% of respondents believe their communities invest adequate resources in business development. This was another question with a very large proportion of respondents indicating they did not know enough to answer the question (21.6%). This is no surprise since many communities do not have active, formal economic development programs. A nearly identical 22.0% agreed with the statement that “Sufficient employment opportunities exist in my community.” These responses are consistent with answers to the previous questions where respondents voiced serious concerns about the state of the economy.



For both questions leaders were more likely to agree. 25.2% of leaders thought the community is investing enough resources in new business development compared with 20.2% of non-leaders. The gap was almost identical for the question addressing employment opportunities with 25.3% of leaders thinking sufficient employment opportunities exist compared with 20.5% of non-leaders.

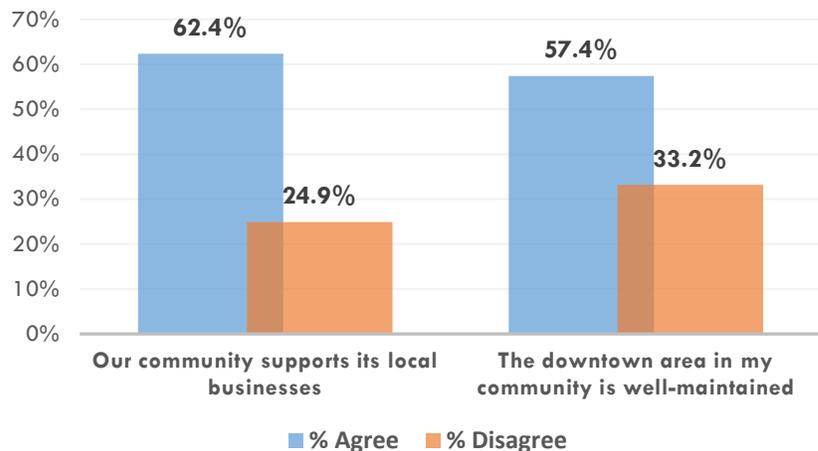
Responses from Micropolitan Outlying and Rural counties were significantly different than Metro respondents. Only 11.9% of Micropolitan Outlying respondents believed they are investing enough in business development with Rural respondents close behind at 14.4%. As a point of comparison 37.7% from Metro Central counties thought they were investing enough in business development. Micropolitan Outlying county respondents were the most concerned about the availability of jobs with only 7.1% agreeing that sufficient

employment opportunities exist in their communities, 14.9% of respondents from Rural counties agreed with the statement.

New Normal and Jobs Resilient counties both had more pessimistic views of the local economy and the resources invested in business development. Only 14.5% of New Normal county respondents think enough is being invested in business development and an equally small proportion (13.8%) think there are enough employment opportunities. Jobs Resilient respondents were also more likely to have concerns about investments in business development (21.7%) and availability of job opportunities (19.7%).

Support for local retail and service businesses is necessary to maintain a robust local economy and generate tax revenue for local governments and schools. Most respondents think the community supports local businesses with 62.4% agreeing with the

statement “Our community supports its local businesses.” Central business districts are often viewed as a barometer of community economic well-being. When asked whether the downtown area is well-maintained a small majority of respondents (57.4%) agreed but nearly one-third disagreed.



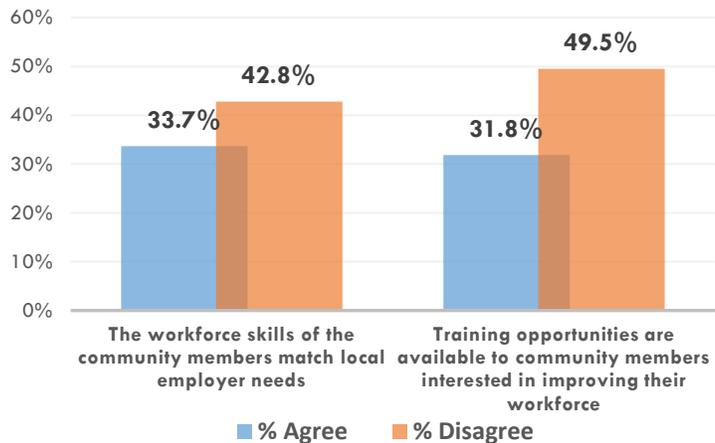
Leaders and non-leaders had nearly identical responses to the question concerned with support for local business, 62.1% of leaders agreed compared with 62.5% for non-

leaders. The gap widened for responses to the question addressing the downtown with leaders (52.8%) less likely to think the downtown is well-maintained than non-leaders (59.4%).

Rural counties have experienced the slowest growth in retail sales of all OMB (Office of Management and Budget) county groups so it is little surprise respondents from those counties were less likely to say residents support local businesses, only 57.7% thought residents supported local businesses. In Metro Central counties with abundant retail and service businesses 70.1% said the community supported local businesses. The largest concern about downtown areas was expressed in Micropolitan Outlying counties where only 40.5% believed downtowns were well maintained. Rural respondents were also more concerned about downtowns with only 53.3% satisfied with downtown maintenance.

Differences based on the economic performance of counties follows the trend in previous questions with New Normal county respondents less likely to believe the community supports local business, the same was true for downtown maintenance. Employment Resilient counties also had higher levels of concern for both of these community characteristics. Only 57.2% of respondents from New Normal counties thought the community supported local businesses and 59.0% from Employment Resilient counties said the same. The responses were similar for downtown maintenance with 52.5% of New Normal respondents thinking downtowns were well-maintained compared with 53.0% in Employment Resilient counties. In Resilient counties community support for local businesses was 69.1% and 65.3% for downtown appearance.

Workforce quality is a top tier issue in economic development. The availability of a ready to work labor force with the right skills will often determine winners and losers as businesses make location and expansion decisions. The survey included two questions addressing workforce issues. The first asked respondents to assess whether workforce skills match local employer needs. Only one-third of respondents thought workforce skills matched employers' needs but a relatively large proportion (23.5%) had no opinion which indicates a lack of awareness on this issue. The second question asked about the availability of workforce training programs. An even smaller proportion (31.8%) agreed that training opportunities were available for community members, again there was a relatively large proportion with no opinion (18.3%).



Leaders and non-leaders had similar responses to the question concerned with workforce skills matching employer needs, 32.5% of leaders thought workforce skills matched employer needs with a slightly larger percentage (34.3%) of non-leaders agreeing with the statement. Differences were significantly larger for the question addressing training opportunities with leaders more likely to think training is available, 36.8% of leaders thought training was available compared to 29.6% for non-leaders.

Micropolitan Outlying counties had the highest levels of concern for both workforce issues followed by Rural counties. Only 19.0% of respondents from Micropolitan Outlying counties agreed that workforce skills matched employer needs and 30.4% agreed in Rural counties. Metropolitan Central counties were significantly higher with 43.7% agreeing. The differences between rural and metropolitan areas was even larger for the question addressing access to workforce training. Only 16.7% of respondents from Micropolitan Outlying counties believe that training is available and in Rural counties 23.9% agreed with the statement. In Metro Central counties the proportion increased to 45.4%.

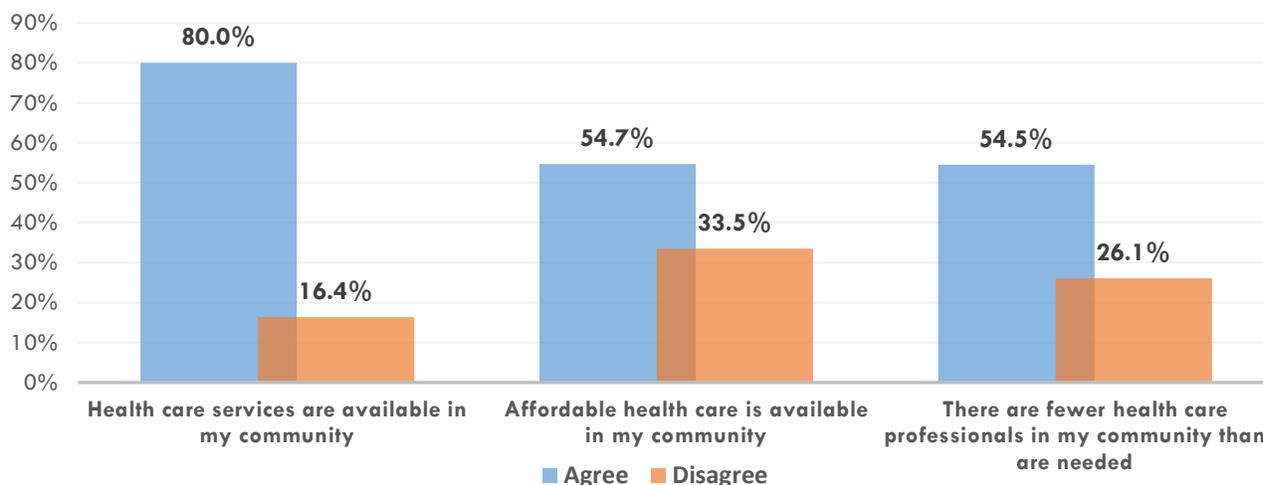
In New Normal counties 30.6% of respondents agreed that workforce skills matched employer needs followed by 34.8% in Employment Resilient counties, 35.5% in Population Resilient areas, and 37.5% in Resilient counties. The gap was larger for the question concerned with access to training where respondents in Employment Resilient counties were the most likely to say training opportunities are not available, only 21.8% agreed with the statement. New Normal counties were close behind with 24.5% agreeing followed by 39.8% in Resilient counties and 42.5% in Population Resilient places.

HEALTH AND SENIOR SERVICES

Missouri gets relatively low scores on many state rankings of health and health care systems. The State ranked 40 in the United Health Foundation America's Health Rankings 2017 and 37 in the Commonwealth Fund Scorecard on State Health System Performance. The State also experienced three hospital closings since 2014 in rural areas -- Parkland Health Center, Farmington (2015); Sac-Osage Hospital, Osceola (2014); and SoutheastHEALTH Center of Reynolds County, Ellington (2016). Funding for health care is also an issue. Because Missouri is not participating in the Medicaid expansion under the Affordable Care Act the State is

losing billions of dollars that would have supported health delivery systems. The Robert Wood Johnson Foundation estimates Missouri is losing \$17.8 billion in Medicaid funding and \$6.8 billion in hospital reimbursement over the 2013 to 2022 period, the estimated total cost for the State to participate was \$1.6 billion. In 2016 Missouri ranked 49 in per capita expenditures on health care (*Kaiser Family Foundation, State Health Facts, kff.org*). These indicators are cause for concern. Against this back drop the survey asked respondents to comment on access and affordability of health care in their communities.

Although 80.0% of respondents indicated that health services are available only 54.7% thought that these services were affordable. Respondents were also concerned about the supply of health care professionals, 54.5% believe there are fewer health care professionals than are needed.

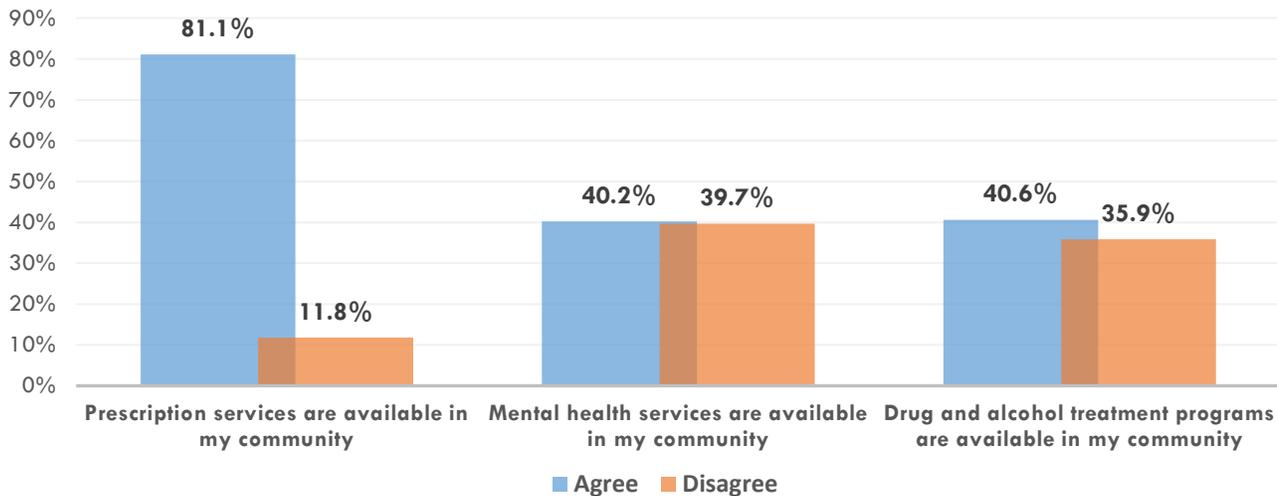


Leaders and non-leaders had similar levels of agreement when responding to the question concerned with availability of health services with 82.2% of leaders indicating services were available compared with 79.0% for non-leaders. The same was true for the assessment of health care professionals, 54.6% of leaders believe there is a shortage compared with 54.5% of non-leaders. There were significant differences in the question concerned with affordability. Only 51.3% of non-leaders believed there were affordable services while 62.2% of leaders agreed. This gap is likely the result of income differences in the two groups. Although the survey did not ask income the educational profiles for the two groups indicate leaders have a larger proportion of college graduates which is highly correlated with higher incomes.

All of the Office of Management and Budget categories had similar responses to the question about the availability of health care services except Micropolitan Outlying counties where only 64.3% agreed that services were available. The same was true for the question addressing affordability where Micropolitan Outlying counties had significantly more concerns with only 33.3% thinking affordable care was available. Respondents from Micropolitan Outlying (69.0%) and Rural (58.1%) counties were more likely to have concerns about the number of health care professionals in their communities.

When responses are compared based on economic indicators the respondents from New Normal counties were less likely to think health care services are available (77.9%) and also believed that there are fewer health care professionals available than are needed (58.5%). In a departure from the trends established in other questions the respondents from Resilient and Population Resilient counties had higher proportions concerned about affordability.

Over 80% of respondents agreed that prescription services are available in their communities but a significant number recognize the lack of access to mental health and substance abuse treatment services and programs. The opioid crisis is shining a bright light on the access to mental health and treatment resources. Survey responses indicate these resources are missing from most Missouri communities. Only 40.2% believe they have mental health services available in their communities and a nearly identical 40.6% do not think drug and alcohol treatment is available. It is important to note that both questions had large proportions that did not feel qualified to answer, 20.1% for mental health services and 23.5% for drug and alcohol treatment.



Leaders were more likely than non-leaders to think all of these services are available. The largest difference in the responses was for drug and alcohol treatment with 45.3% of leaders believing these services are available compared with 38.5% of non-leaders. For prescription drug services 84.1% of leaders agreed compared with 79.7% of non-leaders. There were small differences for mental health services, 41.3% for leaders compared with 39.7% for non-leaders.

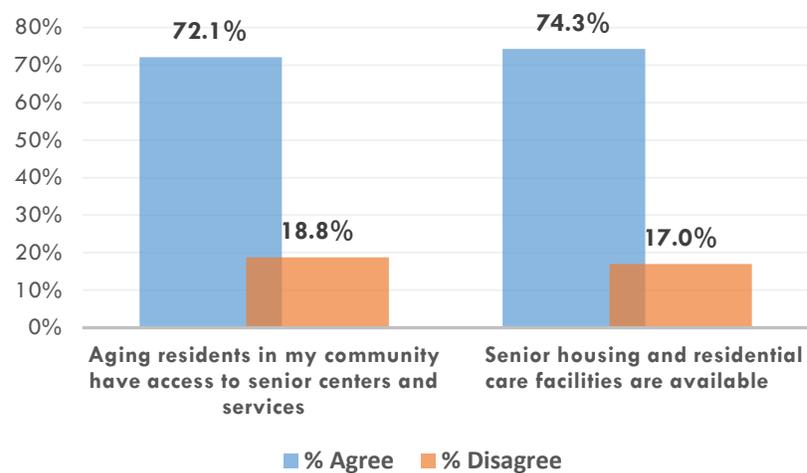
Micropolitan Outlying counties had the highest levels of concern for all of these questions. Only 66.7% said there were prescription services available. Only 11.9% indicated there were mental health services available and 21.4% said the same about drug and alcohol treatment. Metro Outlying county respondents were just as likely to be concerned with access to these services as those from Rural counties.

When counties are compared based on economic indicators there are few differences in response to the question about prescription services. Respondents from Employment Resilient counties had more concerns about access to both mental health (36.5%) and substance abuse (31.3%) resources than other groups of counties. New Normal counties were also more likely to think these resources were missing with 37.3% noting mental health services were not available and 36.9% for substance abuse programs.

There was widespread agreement that senior services, housing and residential care facilities are available. 72.1% of respondents agreed there is access to senior centers and services. An even larger 74.3% indicated there were senior housing and residential care facilities.

On both questions leaders were more likely to think senior services were available than non-leaders. 77.2% of leaders thought there were senior centers and services compared to 69.9% for non-leaders. The gap narrowed for the question addressing housing and residential care with 77.3% of leaders believing these services are available compared with 73.0% of non-leaders.

Once again the outlier among groups of counties using the OMB classification are respondents from Micropolitan Outlying counties. On both indicators they were significantly more likely to say these resources are limited in their communities. Only 54.8% believe there is access to senior centers and services and an equally low 57.1% think senior housing and residential care facilities are available.



There were very few differences among counties based on economic indicators.

OPEN-ENDED QUESTIONS

The survey included four open-ended questions to allow respondents to express ideas that are often missed in forced choice questions. There were 7,762 written responses to four questions. Larger numbers of responses highlighted challenges and problems (2,802) than those that were complementary (2,528). Responses to two of the open-ended questions, *What are the one or two best things about living in your community?* and *What are the one or two most challenging things about living in your community?* were recoded to the Office of Management and Budget Categories and analyzed to identify the issues people were most concerned about.

Most Challenging Things about Living in My Community (sorted by Rural, two largest categories in bold)

Most Challenging Thing	Rural	Micropolitan Outlying	Metropolitan Outlying	Micropolitan Central	Metropolitan Central
Total Comments	1,301	48	509	568	376
Lack of Quality Jobs	19.2%	20.8%	12.8%	14.1%	9.0%
Poor Quality of Life	14.8%	16.7%	16.1%	17.1%	18.6%
Lack of Retail Businesses	9.5%	4.2%	8.6%	6.9%	7.4%
Concerned About Infrastructure	6.4%	12.5%	7.9%	7.9%	14.1%
Limited Access to Healthcare	5.0%	0.0%	5.7%	4.6%	4.5%
Inadequate Internet & Cell Phone Service	4.6%	10.4%	6.3%	4.0%	3.7%
Need More Business Development	4.4%	0.0%	4.1%	2.6%	4.3%
Drugs	4.4%	2.1%	4.1%	6.3%	2.4%
Lack of Leadership	4.1%	2.1%	4.9%	5.3%	4.5%
High Poverty Rates	4.1%	2.1%	3.9%	5.3%	3.2%
Youth Leaving the Community	3.9%	2.1%	3.5%	2.8%	1.9%
Appearance and Affordability of Housing	3.5%	2.1%	2.4%	2.6%	2.9%
Prejudice	3.1%	6.3%	3.9%	4.6%	3.2%
Lack of Resources for Low income Population	2.7%	4.2%	2.2%	0.9%	2.7%
Lack of Pride	2.3%	4.2%	1.4%	1.6%	0.8%
Crime and Public Safety	1.6%	2.1%	1.6%	2.1%	5.9%
Need a Grocery Stores	1.4%	2.1%	2.9%	2.1%	1.3%
Quality of Schools	1.4%	4.2%	2.9%	2.1%	1.6%

Workforce (Quality, Quantity & Availability)	1.2%	0.0%	1.4%	1.8%	1.9%
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The summary of comments for the *Most Challenging Things in My Community* reveals many similarities in concerns among respondents. The lack of quality jobs dominated in Rural and Micropolitan Outlying counties and ranked second in Metropolitan Outlying and Micropolitan Central counties. In job rich Metropolitan Central counties it was the third most frequently mentioned challenge. Poor quality of life was the second highest concern in Rural and Micropolitan Outlying counties but ranked first in counties that have higher levels of urbanization (Metropolitan Central and Outlying, and Micropolitan). The lack of retail shopping was ranked third in Rural and Metropolitan Outlying counties and fourth in Micropolitan and Metropolitan Central. Concerns about infrastructure ranked fourth in Rural and Metropolitan Outlying counties, third in Micropolitan Central and Outlying areas, but was second in Metropolitan Central counties.

Although there are obvious priorities, the diversity of concerns is also notable. The lack of leadership was the focus of 126 comments and a nearly equal number (124) expressed concerns about the impacts of illegal drug use. There were 101 comments addressing racial prejudice which ranked this concern 11 out of 30 categories, ahead of other challenges like out migration of youth (93), housing (84), and crime (64).

Responses to the question about the *Best Things about Living in My Community* were less specific than the assessment of the *Worst Things in My Community*. General statements about the quality of life like “It is a friendly community and a good place to live” dominated the responses with over 50 percent of respondents in each OMB category falling into this classification. The natural environment was the second most frequently mentioned best thing in Rural, Micropolitan Outlying and Micropolitan Central counties and third in Metropolitan Outlying places but was ranked fourth in Metropolitan Central counties. Low crime ranked third in Rural and Micropolitan Outlying and Micropolitan Central counties with respondents in Metropolitan Outlying counties ranking public safety second. Comments about good schools ranked fourth in Rural, Metropolitan Outlying and Micropolitan Central counties but second in Metropolitan Central. There were no positive comments about schools in Micropolitan Outlying counties. There were very few positive comments about topics concerned with the economy including availability of quality jobs, retail businesses, and business development.

The Best Things about Living in My Community (sorted by Rural, two largest categories in bold)

Best Thing	Rural	Micropolitan Outlying	Metropolitan Outlying	Micropolitan Central	Metropolitan Central
Total	1,135	41	443	533	376
Good Quality of Life	61.1%	68.3%	66.4%	57.2%	51.6%
Natural Environment	11.5%	22.0%	7.2%	12.6%	8.0%
Low Crime	9.0%	4.9%	7.4%	6.2%	8.5%
Good Schools	5.5%	0.0%	6.5%	5.3%	10.4%
Low Cost of Living	4.7%	2.4%	3.2%	5.3%	4.8%
Business Development	1.5%	0.0%	1.4%	1.7%	1.3%
Infrastructure	1.4%	2.4%	2.5%	2.4%	1.6%
Healthcare Access	1.1%	0.0%	0.9%	0.4%	3.2%
Low Taxes	1.0%	0.0%	0.7%	0.6%	1.1%
Retail	0.7%	0.0%	1.4%	3.6%	4.8%
Availability of Quality Jobs	0.5%	0.0%	0.9%	1.7%	2.9%

Responses to the question *If you could wave a magic wand to change just one thing in your community, what would it be?* were diverse and often addressed specific issues relevant to the place of residence but fell into four major themes. The economy dominated these comments with 47% of all respondents wishing there were more jobs and economic opportunity for residents. Nearly one-fourth of comments addressed needed improvements in community facilities, infrastructure and services. These comments addressed topics like housing, condition of roads, internet access, appearance of the downtown and services like fire and police protection. Concern about the impact of illegal drugs was the third most frequently mentioned change with 7% of comments mentioning this topic. A nearly equal proportion of comments were concerned with improving community leadership and attitude. Many of these comments addressed issues like community pride, the desire for more progressive and forward looking attitudes, and improving the quality of leaders.

APPENDIX

2017 Survey Instrument

Missouri Survey 2017

This survey is designed to solicit input from Missouri residents, business owners and elected officials on the issues they believe are important in sustaining local communities and building a strong local economy. There are no right or wrong answers. The survey will take 10 minutes to complete. Your participation in the survey is voluntary and your answers will remain completely anonymous. A full report on the survey results will be published later this year.

This research survey was developed by Sharon Gulick, Director of the ExCEED Economic Development Extension Program, Dr. David O'Brien, Survey Research Specialist, Division of Applied Social Sciences at the University of Missouri and Luke Holtschneider, Office of Rural Development, Missouri Department of Economic Development.

Please return the survey, no later than March 30, 2017, to:

ExCEED Program
University of Missouri
222 Gentry Hall
Columbia, Missouri 65211

If you have any questions about the survey please contact any of the following: Sharon Gulick, (573-884-0669) GulickS@missouri.edu, David O'Brien (573-882-0392) obriendi@missouri.edu or the Institutional Review Board (reference IRB #2007503) at the University of Missouri 573-884-0669.

Required response:

Missouri County of residence: _____

Please indicate how much you agree or disagree with each of the following statements about your community:

	Strongly Disagree (1)	Disagree (2)	Somewhat disagree (3)	Neither agree nor disagree (4)	Somewhat agree (5)	Agree (6)	Strongly agree (7)
Residents work together to make our community a better place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable single family homes are available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New residents typically feel welcome	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable rental housing is available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People take pride in living in our community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local elected officials do a good job of providing leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aging residents in my community have access to senior centers and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior housing and residential care facilities are available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The downtown area in my community is well-maintained	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The Missouri Survey 2017

In the last 10 years, poverty has increased in my community	<input type="radio"/>						
My community has a clear plan for the future	<input type="radio"/>						
There are not enough people willing to serve as leaders and volunteers in community organizations	<input type="radio"/>						
My community is forward-looking and open to improvement	<input type="radio"/>						
My community is doing fine and doesn't need to change	<input type="radio"/>						
The community has the financial capacity to support and maintain a sound infrastructure – roads, bridges, sewer, water, etc.	<input type="radio"/>						
There is access to Broadband/ High Speed Internet	<input type="radio"/>						
Our community supports its local businesses	<input type="radio"/>						
It is likely that the economy of my community will improve over the next 5 years	<input type="radio"/>						
The workforce skills of the community members match local employer needs	<input type="radio"/>						

Sufficient employment opportunities exist in my community	<input type="radio"/>						
Training opportunities are available to community members interested in improving their workforce	<input type="radio"/>						
I have an opportunity to join community development efforts	<input type="radio"/>						
There are many jobs available that pay a living wage	<input type="radio"/>						
My community invests adequate resources in new business development	<input type="radio"/>						

Below is a List of Organizations. Please check any of these organizations in which you are a member and if you are or have been an officer/board member in that organization.

	Please check all that apply	
	Belong To	Officer/Board Member
Church, Synagogue, Other Religious Entity	<input type="checkbox"/>	<input type="checkbox"/>
Downtown Merchants Association, Main Street Association, Missouri Community Betterment, etc.	<input type="checkbox"/>	<input type="checkbox"/>
Farm/Commodity Organization (Farm Bureau, MFA, Soybean Growers, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Local/Regional Economic Development organization, Chamber of Commerce, Bank/Financial Institution, Nonprofit, etc.	<input type="checkbox"/>	<input type="checkbox"/>
Youth-related (ex: Boy/Girl Scouts, 4H, sports teams, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
City/Town/County Council, Commissions, School Board, Volunteer Fire Dept., etc.	<input type="checkbox"/>	<input type="checkbox"/>
Civic/Fraternal Organization (Lions, Elks, Eagles, Rotary, VFW, Knights of Columbus, Jaycees, etc.)	<input type="checkbox"/>	<input type="checkbox"/>

Please indicate how much you agree or disagree with each of the following statements about your community.

	Strongly disagree	Disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Agree	Strongly agree
Health care services are available in my community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable health care is available in my community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are fewer health care professionals in my community than are needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental health services are available in my community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prescription services are available in my community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug and alcohol treatment programs are available in my community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What sources do you rely on for information about:

<i>Check all that apply</i>		
	Your Community	State and National Events
Print Newspaper		
Online Newspaper		
News on the radio		
Local TV		
Cable news channels		
Magazine		
Talk Radio		
Social Media		
Community/County website		
Conversations with people in my community		
Other Sources		

What are the one or two very best things about living in your community?

What are the one or two most challenging things about living in your community?

If you could wave a magic wand to change just one thing in your community, what would it be?

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On a scale from 0-10, with 0 being not at all and 10 definitely, how likely are you to recommend living in your community? (Check the appropriate box).

0	1	2	3	4	5	6	7	8	9	10

Please tell us a little about yourself:

What is your year of birth? _____

What is your gender? Male Female

Race:

- American Indian or Alaskan Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- Mixed (2 or more)
- Unknown
- White
- Other: _____

Are you Hispanic/Latino? Yes No

What is the highest level of school you have completed or the highest degree you have received?

- Less than high school degree
- High school graduate (high school diploma or equivalent including GED)
- Some college but no degree
- Associate degree in college (2-year)
- Bachelor's degree in college (4-year)
- Master's degree
- Doctoral degree
- Professional degree (JD, MD)

Which statement best describes your current employment status?

- Own or manage a for-profit business
- Own or manage a farm/ranch
- Work in the not-for-profit sector
- Current or former elected official
- Employed Full-time
- Employed Part-time
- Unemployed/seeking employment
- Retired
- Student
- Other _____

Do you plan to move from your county in the next 5 years? If yes, please tell us why.

- Yes Why: _____
- No

How did you find out about this Survey?

Other Comments or thoughts you want to share:

Thanks for participating in the 2017 Missouri Survey!

Missouri Rural Development Partners

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Missouri Rural
Development Partners



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