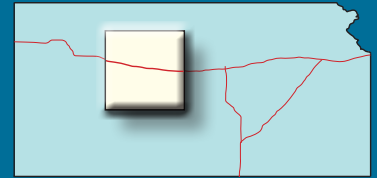


Ellis County



A look at the development potential for Ellis County, Kansas

Ellis County Coalition for Economic Development

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of Place

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WELCOME

Hays, the county seat of Ellis County, Kansas, is a university community of 20,862 people located halfway between Kansas City and Denver on Interstate 70. Ellis County boasts a total population approaching 30,000 and is the regional hub of northwest Kansas for retail, education, medical services, entertainment and recreation.

Low crime and unemployment rates help make Ellis County a great place to live and raise a family, as do the excellent Hays public schools, four private schools and two institutions of higher learning. Founded in 1902, Fort Hays State University is one of six state-assisted institutions of higher education and is a partner to the Ellis County Coalition for Economic Development. In addition to Fort Hays State University, Ellis County also is served by the Hays campus of North Central Kansas Technical College, which was established in 1975 and serves students from throughout Kansas, as well as southwest and south-central Nebraska.

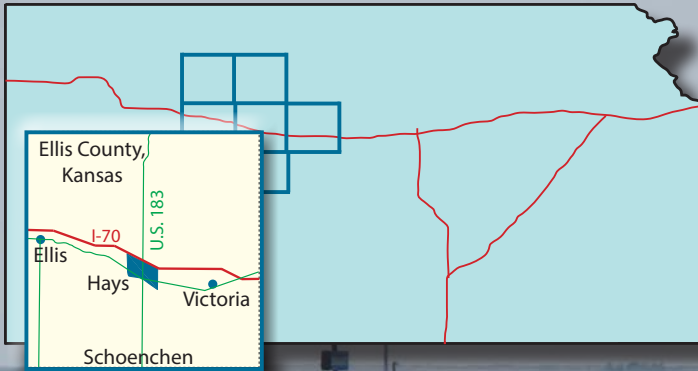
Ellis County is home to HaysMed, an outstanding medical institution and major employer in the area. Modern Healthcare magazine has named HaysMed one of the country's Best Places to Work in health care in the nation for five consecutive years.

Annually, Ellis County has one of the top retail pull factors in the state. The historic downtown area has been revitalized with unique shops, a microbrewery and entertainment, while the north side of town is expanding with additional retail offerings. The Hays Regional Airport offers daily flights to and from Denver. Affordable housing in Hays and Ellis County is a reality. In Hays, nearly 65 percent of residents are homeowners. Median sales price of existing homes is \$135,600 and new construction averages \$200,500.

To celebrate its history and heritage, Hays plays host to several annual events that attract visitors to the area. Among the many festivals are Wild West Festival, FrostFest and activities throughout the year at Historic Fort Hays. The German heritage of Ellis County is celebrated with several festivals and events each year including Herzogfest, Memorial Polka Fest and Oktoberfest.

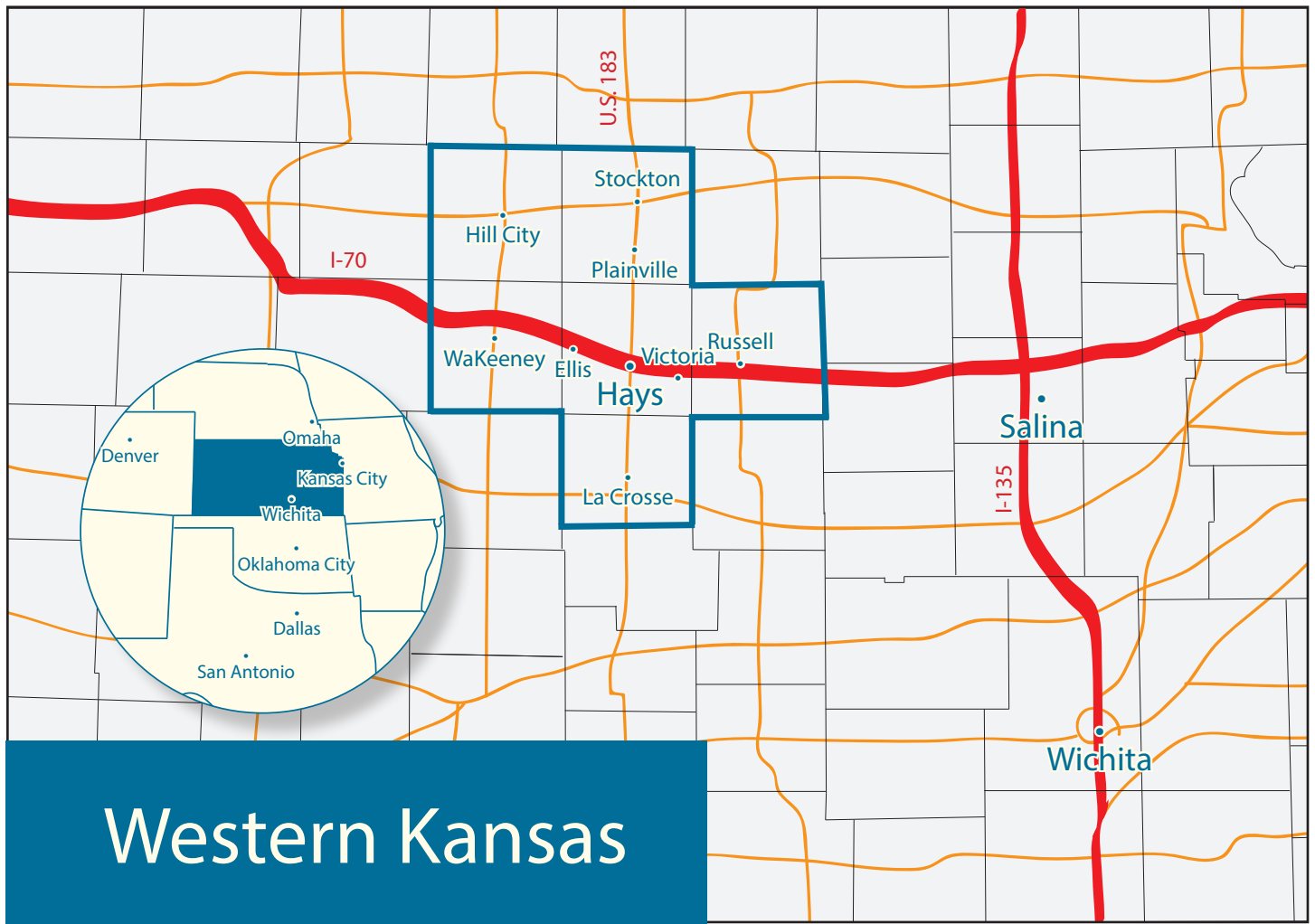
That's not all. There is even more that Ellis County can boast about. The award-winning Hays Arts Center is home to the oldest Arts Council in the state of Kansas. The Hays Symphony Orchestra has over 100-years of continuous performances. The Hays Public Library ranks fourth in the nation among libraries serving populations of 10,000 to 99,000, and for the past 10 years has ranked No. 1 in the state for circulation per capita. Finally, according to recent rankings by Progressive Farmer and E-Podunk, Hays, Kansas, has a great quality of life.

Demographics



The city of Hays, as the largest community in Ellis County, long has served as the employment and retail hub for northwest Kansas. Availability of local employment, quality health care, national retailers and restaurants, unique shopping and dining experiences in the downtown and other areas, plus higher education opportunities have made Ellis County and Hays a destination community and have spurred steady growth.

Here is a quick look at our community demographics:



Western Kansas

Ellis County is a growing region of western Kansas, with the communities of Hays, Ellis and Victoria located on Interstate 70. Hays, the largest community in the county, is situated at the junction of I-70 and U.S. Highway 183. Home to more than 30 trucking firms, the city of Hays provides convenient distribution to metro areas across the Midwest and West.



Union Pacific Rail System

Rail access to various sites can be served through Union Pacific Railroad, a Class I rail carrier. The UP mainline running through Ellis County has capacity to provide rail service to additional businesses.

City	Miles
Wichita	183
Kansas City	268
Omaha	331
Oklahoma City	342
Denver	339
St. Louis	514
Dallas	546
Minneapolis	704
Chicago	776



Ellis County

2015 County Population — 29,005
 Median Household Income — \$42,487
 Median Age — 32.1
 Age Dispersion (2013)
 Percent of residents under 19 yrs old — 25.8%
 Percent of residents 18-65 yrs old — 60.7%
 Percent of residents over 65 yrs old — 13.5%

Ethnicity
 White — 92.9%
 Hispanic — 5.6%
 Asian — 1.4%
 Black — 0.9%

Education Attainment, age 25+
 No high school diploma - 7.21%
 High school graduate or GED — 28.08%
 College, no degree - 24.63%
 College or advanced degree — 40.1%

City of Hays

2015 City population — 20,862
 Median Household income — \$39,925
 Median Age — 29.6

City of Ellis

2015 city population — 2,065
 Median Household income — \$52,328
 Median Age — 37.1

City of Victoria

2015 city population — 1,215
 Median household income — \$52,129
 Median age — 39.7







Ellis County has more than 2,100 businesses operating today, covering all NAICS classifications. Here is a breakdown of the top industries, by NAICS industry code:

- Health Care and Social Assistance — 15%
- Retail Trades — 14%
- Other Service — 12.1%
- Construction — 9.2%
- Professional/Scientific/Technical Services — 7%
- Finance and Insurance — 6.8%
- Wholesale Trade — 4.8%
- Accommodation and Food Service — 4.5%
- Real Estate Rental and Leasing — 4.2%
- Public Administration — 3.9%
- Manufacturing — 3.7%

These industries account for more than 85 percent of the businesses located in Ellis County and highlight a diverse economy.

The city of Hays is home to the largest employers in the county. The community has a diverse economy, from health care to education, communications to manufacturing. Here is a listing of our top employers:

-  Health Care
-  Education and Government
-  Manufacturing and Industrial
-  Other Top Employers

Additional information regarding the Ellis County expanded labor market can be found in the Docking Institute labor analysis in the Workforce Development on page 7.

Top Employers

Hays Medical Center	1,235	Health Provider
Fort Hays State University	849	Division II College
USD 489 - Hays	747	School District
Wal-Mart	430	Retail Goods
Ellis County / City of Hays	428	Local Government
Hess Services	286	Oilfield Supply Manufacturer
EnerSys	280	Sealed Lead Battery Manufacturer
Eagle Communications	261	Telecommunications
DSNWK	220	Health Provider for Disabled Individuals
Dillons - a Kroeger store	162	Retail Grocery
Via Christi Village	220	Health Provider
Nex-Tech / Rural Telephone	137	Telecommunications
Wheelchairs of Kansas	129	Medical Equipment Manufacturer
Midwest Energy	118	Utility Provider
USD 388 - Ellis	118	School District
Nex-Tech Wireless	97	Wireless Provider
Amphenol Adronics	96	Automotive Parts Manufacturer
Glassman Corporation	90	Building Mechanical Systems
APAC Kansas-Shears Division	86	Heavy Construction
Sunflower Electric	86	Utility Provider
Thomas More Prep - Marion	68	School District
Midland Marketing	66	Grain Storage / AG Product
S & W Supply	66	Oil Field Supply Manufacturer
Nalco Chemical	56	Oil Field Supply Manufacturer

Workforce Development



Ellis County and the city of Hays long have served as the employment hub for northwest Kansas. With diverse industries, post-secondary institutes for training, and an attractive quality of life, the community has proven to be an attraction for potential employees. The Ellis County Coalition works closely with new and expanding companies to meet their workforce development needs. Identifying and applying for state training incentives, identifying training needs and potential providers, and providing regional data on labor pool and wages are just a few of the services the ECC offers at no cost.

The Docking Institute of Public Affairs, a public policy research institute at Fort Hays State University, identified the Ellis County Labor Basin to include the counties of Barton, Ellis, Graham, Ness, Osborne, Rooks, Rush, Russell and Trego counties in Kansas. The “Available Labor Pool” represents those who indicate they are looking for employment or would consider changing their jobs for the right employment opportunity.

The 2012 Docking Institute’s independent analysis of the labor basin shows:

- The population of the Ellis County Labor Basin is estimated to be 84,147. The Civilian Labor Force (CLF) is estimated to be 50,720. The Institute estimates 21,124 individuals are considered to be part of the Available Labor Pool.

- Of the Available Labor Pool, an estimated 1,235 (5.9%) non-working and 2,162 (10.2%) working individuals are looking for new full-time employment, while 3,833 (18.1%) non-working and 13,894 (65.8%) working individuals would consider new and/or different full-time employment for the right opportunities.

- Almost 74% of the Available Labor Pool has at least some college experience, and slightly more than 95% has at least a high school diploma. The average age for members of the Available Labor Pool is 43 years old, and women make up 53% of the Available Labor Pool.

- An estimated 5,074 (24%) members of the Available Labor Pool currently work in general labor occupations (such as cleaning, construction, delivery and maintenance), while an additional 1,079 (5.1%) work in government services occupations (such as police and fire) or technical/high-skill, blue-collar occupations (such as welder and lab technician).

- An estimated 7,078 (33.5%) members of the Available Labor Pool currently work in service sector occupations (such as clerical worker, retail sales clerk, certified nurse’s assistant and small business manager), while an additional 2,825 (13.4%) work in white-collar professional occupations (such as administrator, doctor, teacher and professional sales).

- More than four-fifths (84.8%) of the Available Labor Pool indicates they are “willing to work outside of their primary field of employment for a new or different employment opportunity.”

- Approximately 21% of the members of the Available Labor Pool will commute up to 45 minutes, one way, for an employment opportunity. Almost 65% will commute up to 30 minutes, one way, for employment.

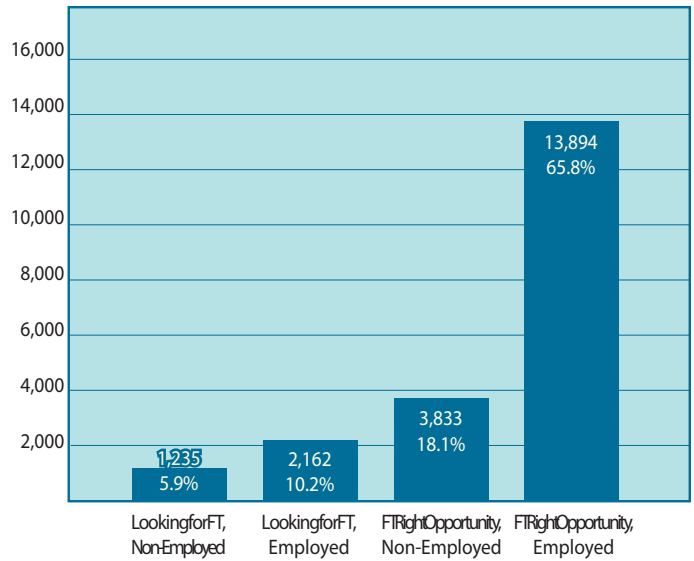
- The four most important benefits are, in descending order, good health benefits, good retirement benefits, on-the-job (OJT) or paid training and good salary/hourly pay.

- An estimated 5,682 people (52% of the Available Labor Pool) are interested in a new job at \$15 an hour, 3,512 (32%) are interested at \$12 an hour and 1,270 (12%) are interested at \$9 an hour.

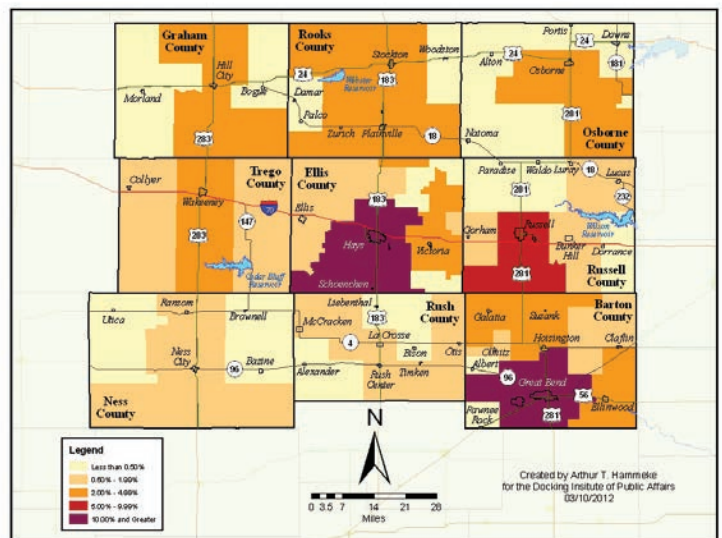
- Of the 16,056 members in the subset of employed members of the Available Labor Pool, 4,351 (27%) consider themselves underemployed.

Available Labor Pool

Ellis County Labor Basin



It is estimated 1,235 (5.9% of the Available Labor Pool) non-employed and 2,162 (10.2%) employed individuals are currently looking for new or different full-time employment, and 3,833 (18.1%) non-employed individuals and 13,894 (65.8%) employed individuals would consider new or different full-time employment for the right opportunities.



This map shows how each zip code in the basin compares to all other zip codes in terms of the percent of total available labor in the Ellis County Labor Basin. Each zip code is grouped into one of five categories specified in the legend. Large portions of the Available Labor Pool are located in zip code areas in Ellis, Barton and Russell counties, although zip code areas in all counties in the basin hold members of the Available Labor Pool.

Various occupational categories of the 21,124-member Available Labor Pool are identified in the chart. General labor occupations represent 24% of the entire pool, while high-skilled, blue-collar jobs make up 5.1%. Traditional service-related occupations represent 33.5% of the available labor, while professional occupations represent 13.4% of the Available Labor Pool.

Major Occupational Categories

	Number	Percent	Mean Years at Job	Median Years at Job
General Labor/Cleaning/ Farm Labor/Delivery	2,986	14.1	8.6	5.0
Maintenance/ Factory Work	1,197	5.7	14.7	13.1
Trucking/Heavy Equipment Operation	891	4.2	11.5	9.0
Total General Labor	5,074	24.0	11.6	9.0
Government Service/ Protective Service	336	1.6	20.1	19.5
Technician/Mechanic/ Welder	743	3.5	22.6	20.3
Total Highly-Skilled Labor	1,079	5.1	21.3	19.9
Customer Service/ Receptionist/Food Service	1,481	7.0	8.6	6.0
Clerical/Secretarial	2,225	10.5	10.1	7.3
Social Service/ Para-Professional/Nursing	2,167	10.3	11.9	12.0
Office Manager/ Small Business Owner	1,206	5.7	10.4	8.5
Total Service Sector	7,078	33.5	10.2	8.4
Government and Business Professional/Sales	1,181	5.6	11.2	10.3
Educator/Counselor/ Doctor/Attorney	1,644	7.8	18.8	17.1
Total Professional	2,825	13.4	15.0	13.7
Homemakers/ Unemployed	1,420	6.7	n/a	n/a
Students	64	0.3	n/a	n/a
Retired/Disabled	3,584	17.0	n/a	n/a
Total Non-Employed	5,068	24.0		

2011 Wage Survey

Occupation Title	Entry Level	Mean (Average)	Experienced
Architecture and Engineering (All)	\$34,059	\$45,827	\$51,711
Arts, Design, Entertainment, Sports, Media	\$20,350	\$26,368	\$32,236
Building and Grounds Cleaning and Maintenance	\$16,656	\$20,463	\$22,367
Business and Financial Operations	\$28,365	\$49,973	\$60,777
Community and Social Services	\$22,524	\$33,402	\$38,841
Computer and Mathematical	\$34,685	\$49,335	\$56,660
Construction and Extraction	\$24,465	\$40,918	\$49,145
Education, Training and Library	\$21,927	\$43,468	\$54,239
Food Preparation and Serving Related	\$16,675	\$18,129	\$18,856
Health Care Practitioners and Technical	\$32,236	\$71,662	\$91,375
Health Care Support	\$16,957	\$20,661	\$22,512
Installation, Maintenance, Repair	\$24,143	\$37,421	\$44,061
Legal	\$29,200	\$59,953	\$75,330
Life, Physical, Social Science	\$34,377	\$53,807	\$63,521
Management	\$33,133	\$87,506	\$114,693
Office and Administrative Support	\$17,756	\$27,372	\$32,180
Personal Care and Service	\$16,495	\$20,130	\$21,948
Production	\$16,964	\$26,928	\$31,909
Protective Service	\$23,391	\$35,190	\$41,089
Sales and Related	\$16,807	\$27,578	\$32,963
Transportation and Material Moving	\$16,702	\$26,555	\$31,481

To gain perspective on the types of workers that are available for new and/or different employment in the Ellis County Labor Basin, survey respondents were asked “open-ended” type questions assessing work skills and previous work experience. Responses were grouped into 19 categories.

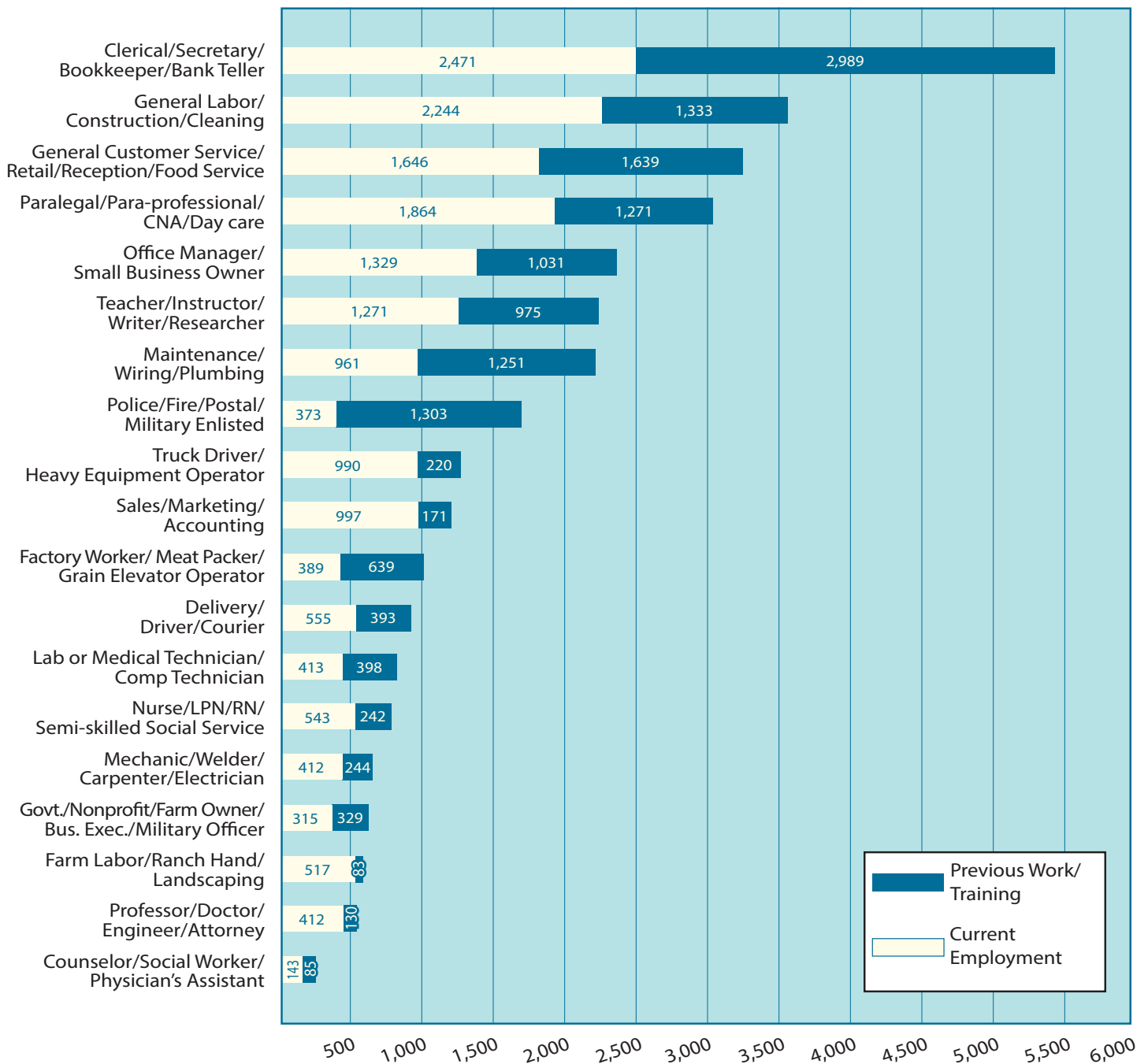
It is estimated, for example, 2,020 members of the available labor in the Ellis County Labor Basin are currently employed in general labor, construction, cleaning and similar positions. An additional 1,200 Available Labor Pool members in the basin indicate previous employment experience

or training in those or similar jobs, for a total of 3,220 individuals.

Many Available Labor Pool members report current work experience or previous work/training as clerical workers, bookkeepers, bank tellers and similar jobs requiring detailed work while dealing with the public.

There are 2,471 working Available Labor Pool members currently employed in this category and 2,969 other individuals that have been previously employed or trained in this category.

Current Work and Previous Training Experience



In addition to collecting data regarding the current employment status and previous work or training experience through a series of “open-ended” survey questions, respondents were asked about five specific employment areas. Respondents first were asked if they had training or work experience in a specific field, and then if they would take a job in that field regardless of their prior training or experience.

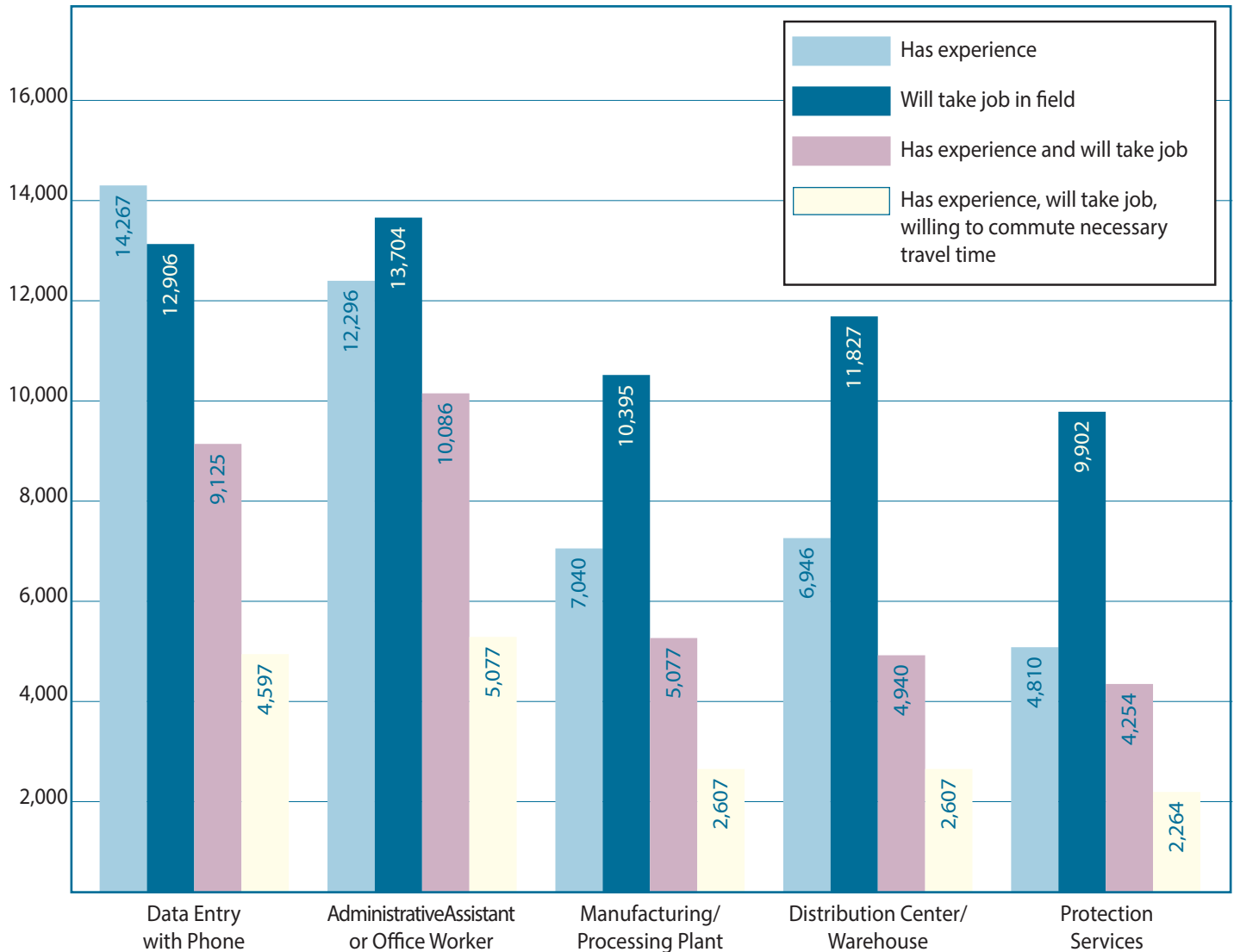
For example, 14,267 Available Labor Pool members report having training and/or experience in data entry with telephone operation, while fewer (12,906) would consider taking a job in that field. The figure also shows an estimated

12,296 members of the Available Labor Pool report having training or experience in professional office environments as office workers or administrative assistants. More (13,704) indicate they would take a job in that field.

The third column shows the estimated numbers who have experience or training in a field and are willing to work in that field again.

The fourth column shows the estimated numbers who have training/experience and are willing to take a job in that field and are willing to commute the necessary travel time for a new or different job.

Work Experience/Willing to Work in Field



An important consideration for many employers looking to locate or expand operations is whether workers are willing to pursue new employment opportunities.

Some workers could be available for new employment, but are unwilling to switch from their current job to a different type of position.

A large percentage of those unwilling to change their jobs might limit the types of employers that could enter or expand in the labor basin.

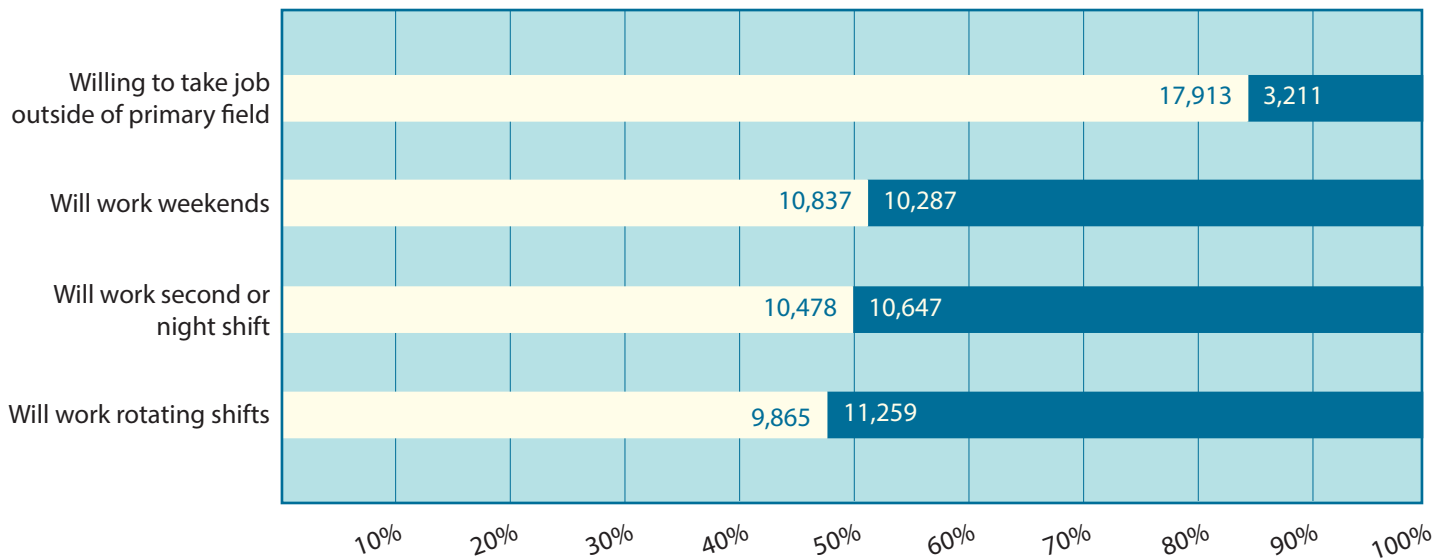
This does not seem to be the case in the Ellis County Labor Basin. Approximately 84.8% (17,913 members of the

Available Labor Pool) are willing to accept positions outside of their primary fields of employment. This percentage compares very favorably to pools from other basins.

Respondents also were asked questions regarding work shifts — if they would be willing to work weekends, a second or night shift and rotating shifts.

The figure shows about half (51%) of the Available Labor Pool indicated they were willing to work weekends. Half (49.6%) indicated a willingness to work second shifts. Fewer than half (46.7%) indicated a willingness to work rotating shifts for a new or different job.

Considerations for Employment



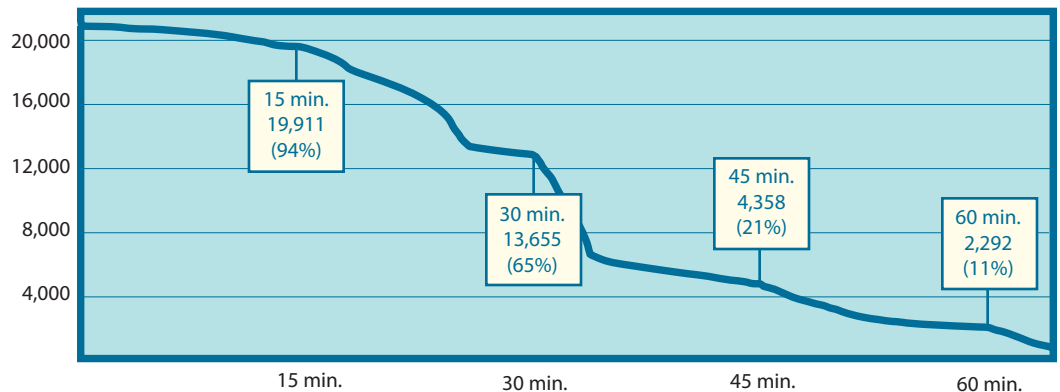
Another important consideration for many employers is whether workers are willing to commute for a new or different employment opportunity. Responses indicate a large portion of the Available Labor Pool in the Ellis County Labor Basin is open to commuting.

About a fifth (21%) of the members of the Available Labor Pool will commute up to 45 minutes, one way, for an employment opportunity, while 65% will commute up to 30 minutes for employment. Almost all (94%) will travel up to 15 minutes for employment.

Respondents were asked if the minutes they are willing to commute for work were influenced by gasoline prices. During the period of the study, gas prices in the study area ranged from a low of \$3.28 to a high of \$3.69 per gallon.

Less than half (45%) consider gas prices to “greatly influence” the commute minute estimate, while 39.4% consider gas prices to “somewhat influence” the estimate. Slightly more than 16% responded that gas prices do “not influence” the minutes willing to commute for a job.

Available Labor by Commute Minutes



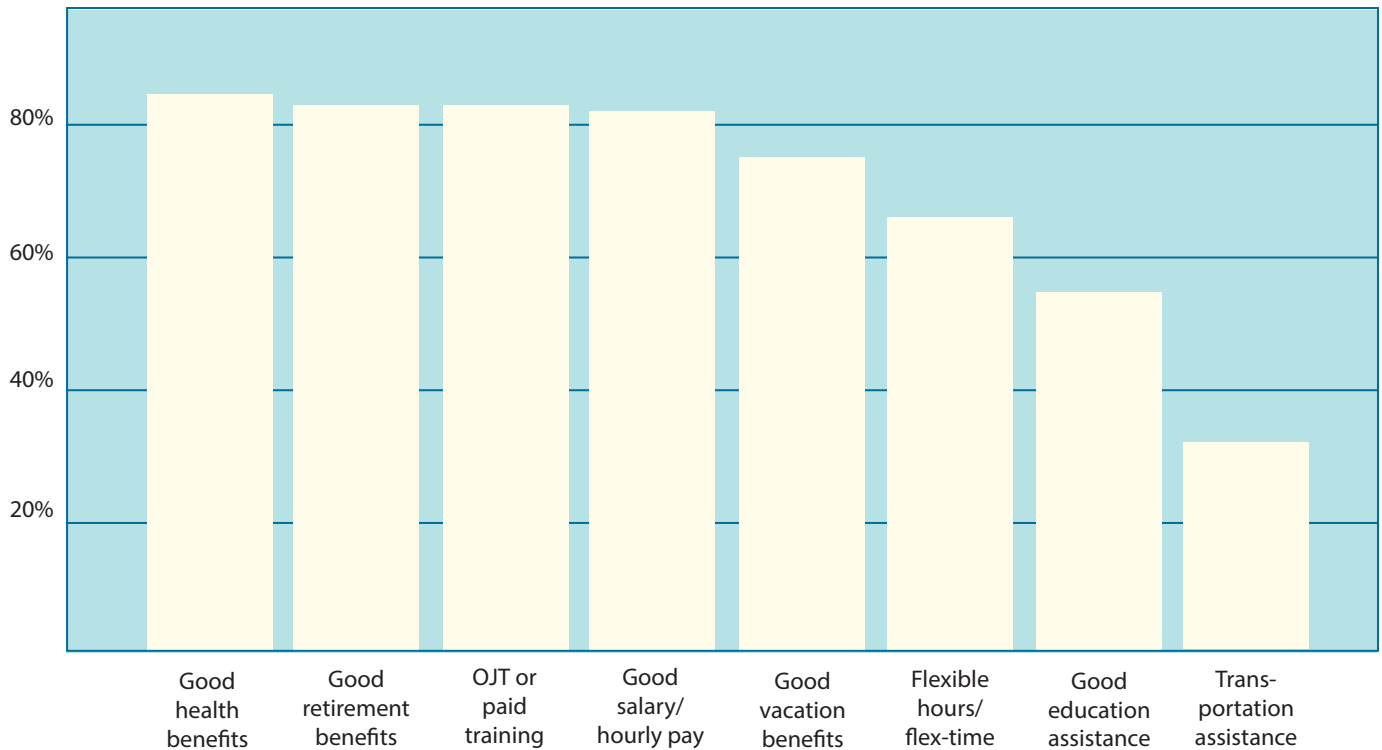
Available Labor Pool members were asked about various benefits that might be important for considering whether to take a new or different job. Respondents were asked if each benefit would be a “very important consideration for taking a new job.” Answer options included “yes” and “no.”

The percentages shown are of “yes” responses — indicating that benefit was “very important” to the respondent. The four most important benefits are, in

descending order, good health benefits, good retirement benefits, on-the-job (OJT) or paid training and good salary/hourly pay. These benefits are considered “very important” by 80% or more (each) of the Available Labor Pool.

The two least desired benefits are good education assistance and transportation assistance. These benefits are considered “very important” by 54% and 31% of Available Labor Pool members, respectively.

Benefits Very Important to Change Employment

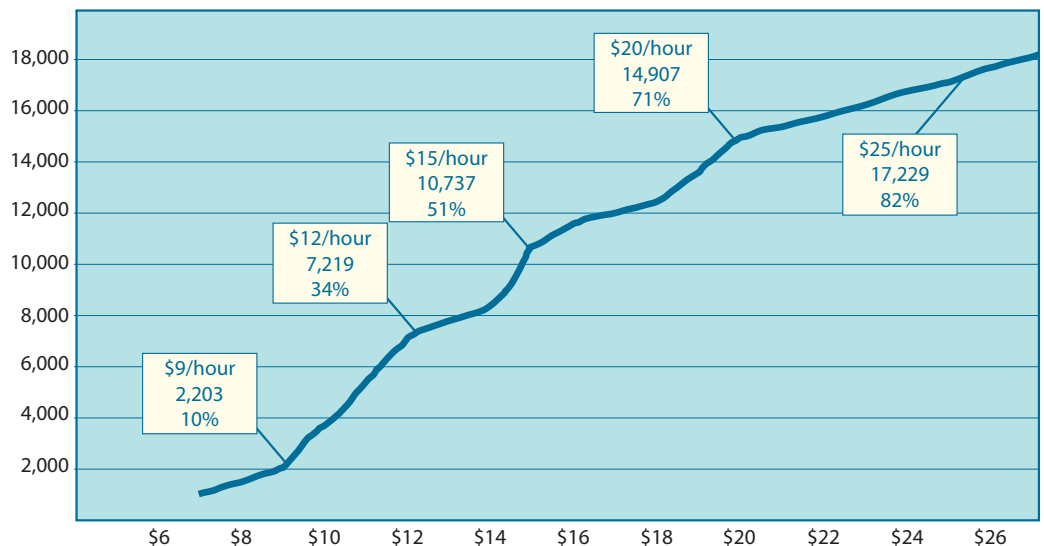


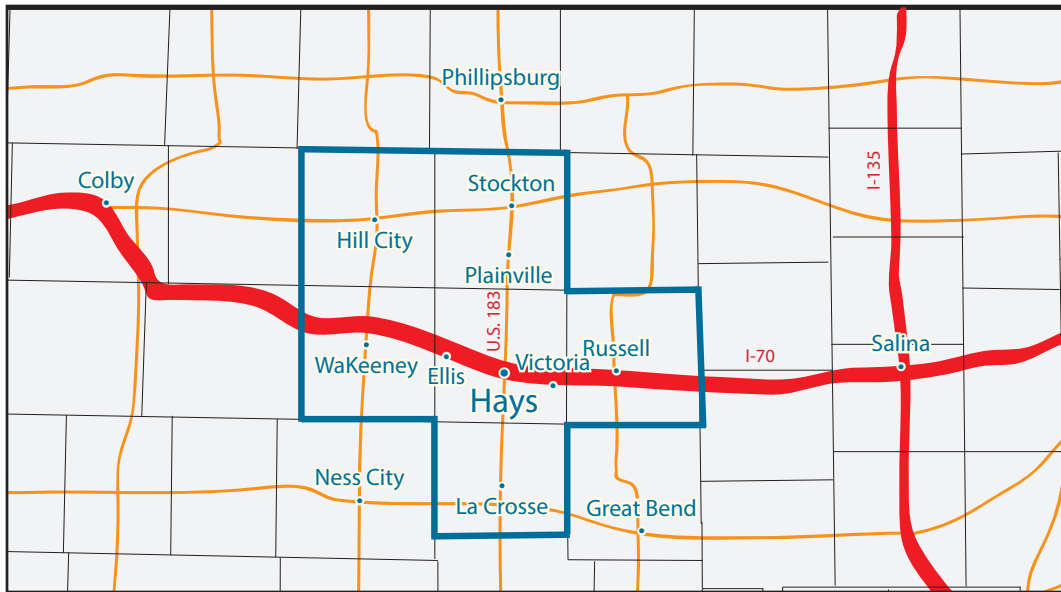
Wage demands are another important consideration for employers and economic developers. It is estimated 17,229 people (or 82% of the available labor) are interested in a new job at \$25 an hour.

An estimated 17,907 (or 71%) members of the labor pool are interested in a new employment opportunity at \$20 an hour, while 10,737 (51%) are interested at \$15 an hour.

Finally, an estimated 7,219 people (34%) are interested in a new job at \$12 an hour and 2,203 (10%) at \$9 an hour.

Available Labor by Hourly Wage





Commute Times	
Victoria	— 12 min.
Ellis	— 18 min.
La Crosse	— 25 min.
Plainville	— 26 min.
Russell	— 26 min.
WaKeeney	— 30 min.
Stockton	— 39 min.
Hill City	— 1 hr. 2 min.
Phillipsburg	— 1 hr. 5 min.
Ness City	— 1 hr. 12 min.
<hr/>	
Great Bend	— 1 hr. 11 min.
Salina	— 1 hr. 24 min.
Colby	— 1 hr. 34 min.
Dodge City	— 1 hr. 51 min.
Garden City	— 2 hr. 35 min.

Subset 1: The Willing to Commute the Necessary Travel Time

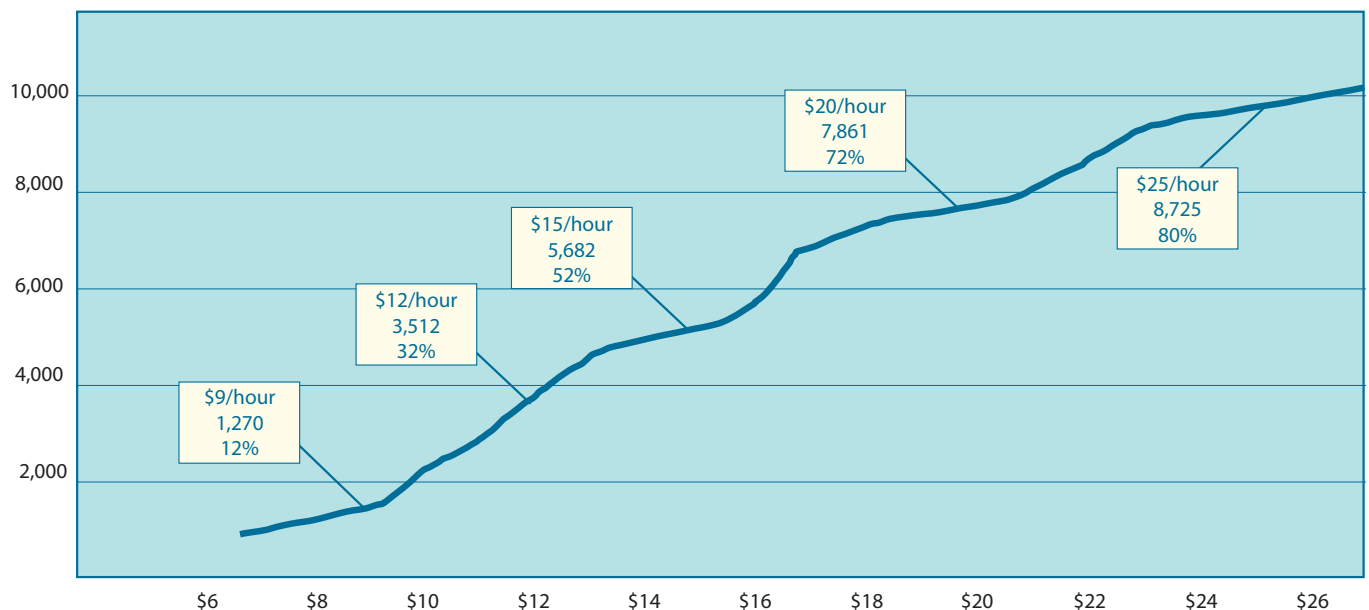
To present an even more refined picture regarding the number of workers who would seriously consider a new employment opportunity, the data in this section includes only those respondents who are determined to be “willing to commute the necessary travel time” for a new or different job opportunity.

“Necessary travel time” is defined as a travel time stated by the respondent that is equal to or greater than the travel time necessary for the respondent to commute from his or her zip code of residence to the zip code at the center of the labor basin.

For example, a respondent who is willing to travel for 30 minutes, one-way, for a new or different job opportunity and that lives an estimated 15 minutes from Hays is considered “willing to commute the necessary travel time” for a new job. Data from these respondents are included in this section of the report. The phrase “willing to commute necessary travel time” is shortened to “willing to commute.”

With regards to those “willing to commute,” it is estimated 8,725 (80%) people are interested in a new job at \$25 an hour, while an estimated 7,861 (72%) are interested in a new employment opportunity at \$20 an hour. An estimated 5,682 (52%) are interested at \$15 an hour, 3,512 (32%) at \$12 an hour and 1,270 (12%) at \$9 an hour.

Available Labor by Hourly Wage (Willing to Commute)



Subset 2: The Underemployed Among Available Labor Pool Workers

Underemployment — individuals possessing skills and/or training levels who exceed the responsibilities of their current job — is a significant issue in many communities. To assess underemployment in the Ellis County Labor Basin, employed members of the ALP were presented with a scenario describing underemployment. They then were asked a series of questions assessing if they perceived themselves as underemployed because: 1) their skill level is greater than their current job requires, 2) they possess higher levels of education than is required on the job, 3) they earned a higher income at a similar job previously, or 4) they were limited in the number of hours they are able to work.

There are 16,056 employed members of the Available Labor Pool (shown in Figure 15).

Of the employed members of the pool, about a quarter (27%) answered “yes” to one or more of the questions presented above and is considered underemployed.

Of those who describe themselves as underemployed, more than a fifth (22%) of this subset of the Available Labor Pool has earned higher incomes at previous but similar positions.

Slightly more than 20% has greater skill levels than currently required and about 19% has education levels exceeding those needed for their current positions. About 12% is not able to work enough hours.

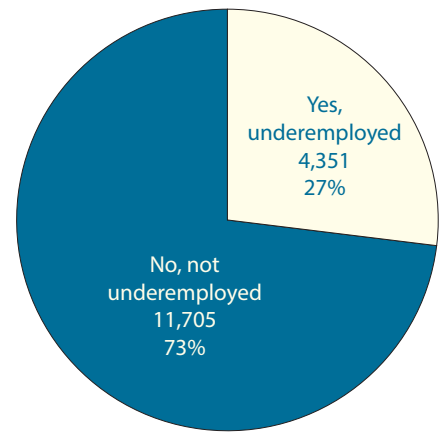
Most of the underemployed workers are employed in the service sector or as general labors (43.7% and 43.9%, respectively).

Nearly 9% of the underemployed workers is employed in professional or sales occupations, while almost 4% is employed as highly skilled laborers.

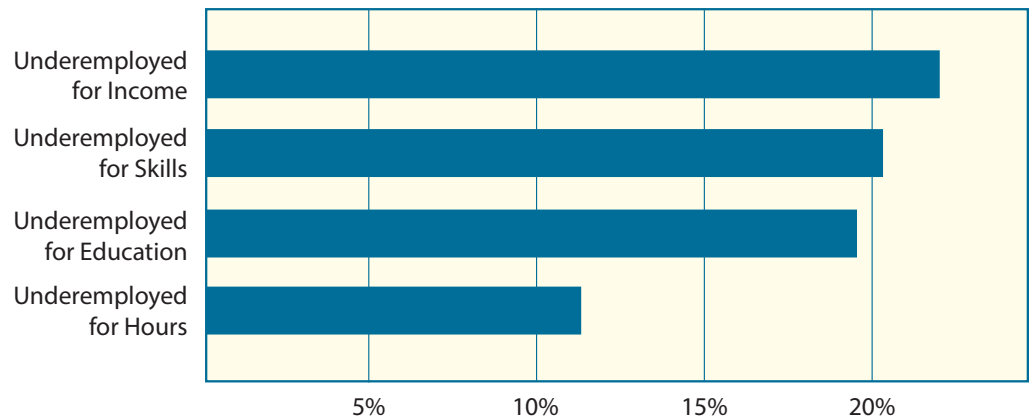
Respondents indicating they were underemployed also were asked a follow-up question addressing their willingness to change jobs in order to address their underemployment status.

A high percentage — 73.7% (or an estimated 3,207 individuals) — of the underemployed workers is willing to change jobs to address underemployment.

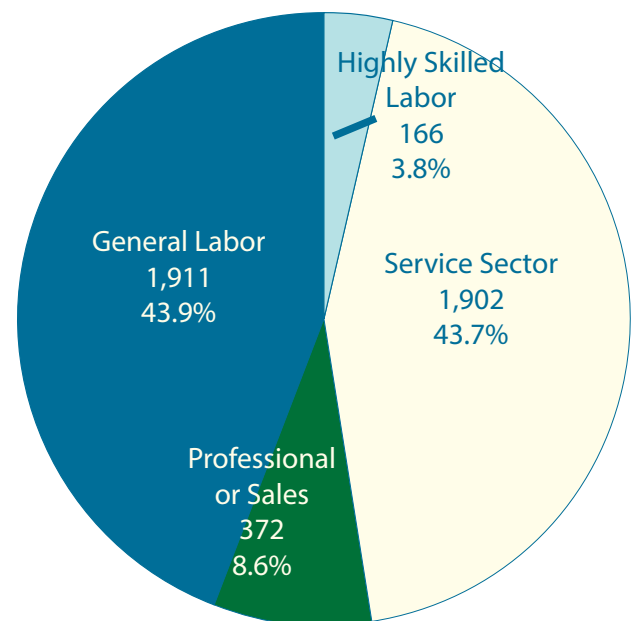
Underemployed Workers



Reasons for Underemployment



Occupational Sectors of Underemployed Workers



The ability to recruit a well-trained workforce is vital to the success of a business. The Ellis County Coalition works closely with new and existing companies, in partnership with state and federal organizations, to ensure your workforce needs are met.

ECC maintains and operates the HaysHasJobs.com website as one such strategy. The site allows employers in the Ellis County area to post open positions at no cost. ECC also is affiliated with WesternKSJobs.com, another free job posting site hosted by the Western Kansas Rural Economic Developers Alliance.

ECC staff also attends a number of job fairs in Kansas and surrounding states each year, promoting opportunities within the region.

Along with recruitment, ECC helps coordinate training for new employees, through a number of post-secondary schools in the region. ECC also helps companies secure training grants to help offset costs. All of this is provided at no cost to the company.

	Civilian Labor Force	Employment	Unemployment	
Aug ' 14	20,650	20,106	544	2.6
Sept ' 14	20,873	20,408	465	2.2
Oct ' 14	21,062	20,650	412	2.0
Nov ' 1 4	21,096	20,649	447	2.1
Dec ' 14	20,859	20,428	431	2.1
Jan ' 15	17,975	17,452	513	2.9
Feb ' 15	17,962	17,405	557	3.1
Mar ' 15	18,167	17,600	567	3.1
Apr ' 15	18,015	17,415	603	3.3
May '15	17,847	17,266	581	3.3
Jun ' 15	17,964	17,370	594	3.3
Jul ' 15	17,891	17,240	651	3.6
Aug ' 15	17,629	17,104	525	3.0
Sept ' 15	17,501	17,033	468	2.7
Oct ' 15	17,631	17,161	470	2.7
Nov ' 15	17,675	17,219	456	2.6
Dec ' 15	17,564	17,113	451	2.6
Jan ' 16	17,556	16,998	558	3.2
Feb ' 16	17,526	19,961	565	3.2



Training/Education



A well developed and productive workforce starts with good training and education. Fort Hays State University, a four year state university, and NCK Tech provide up to date training and education capabilities, and will work closely with employers to meet their training needs with customized programs. Kansas Department of Commerce staff, in coordination with the Ellis County Coalition, coordinates state programs that provide assistance in training, curriculum development and funding. In addition, the western Kansas region is home to seven additional community colleges with a wide range of programs, all of which actively collaborate with other schools to properly educate our workforce.



Picken Hall at Fort Hays State University.

FHSU takes technology, leadership to the next level

Fort Hays State University is a regional comprehensive university with more than 13,000 students and approximately 350 faculty. FHSU is located in Hays, Kansas, which has been recognized as the third-best college town in America among small cities.

FHSU is known for its innovation and entrepreneurship. Among the universities in the Kansas Board of Regents system, FHSU has the unique mission to integrate computer and telecommunications technology into the educational environment and the workplace. It is a national leader in delivering education-at-distance through its Virtual College.

The university has three teaching modalities: on-campus, with an annual enrollment of approximately 4,500; the Virtual College, with an enrollment of approximately 5,000 that includes Kansas, nearly all 50 states and U.S. Armed Services personnel internationally; and in China, with approximately 3,500 students at partner

universities.

The university has a long history of addressing the needs of the people, institutions and businesses in its primary service area of western Kansas and beyond. Here are just a few examples:

A change in regulations under the federal No Child Left Behind Act threatened to leave a segment of public school teachers without certification about a decade ago, so FHSU quickly established accessible online courses to fill the gap.

FHSU's Docking Institute of Public Affairs facilitates effective decision-making among governmental and nonprofit leaders through applied research, training and strategic planning.

When the petroleum industry expressed the need for more highly trained workers, FHSU worked with the Kansas Independent Oil and Gas Association to develop a petroleum geologist program.

FHSU serves as administrator

of the Kansas Small Business Development Center network, which is a partnership with the U.S. Small Business Administration and the Kansas Department of Commerce.

Through its Department of Informatics, FHSU serves as both a local and regional academy for Cisco Systems, the worldwide leader in networking for the Internet. The U.S. government has designated the university a National Center of Academic Excellence in Information Assurance.

FHSU has been a frequent partner with local governments and the Ellis County Coalition for Economic Development to provide training and other services to new and expanding businesses.

With the lowest tuition in the region, FHSU offers its students hands-on learning with close attention from faculty that prepares them with a global perspective, professional skills and confidence to pursue successful careers.

University offers business, research expertise

Students can pursue majors in more than 30 academic departments in four colleges and the Graduate School.

...

Businesses and organizations can inquire about support from Fort Hays State University by contacting the following:

The Docking Institute
of Public Affairs
www.fhsu.edu/docking
(785) 628-4197

The Docking Institute of Public Affairs is a dynamic public policy research institute with a mission to facilitate effective decision-making among governmental and nonprofit leaders.

The Institute's six primary programs are:

Survey research, program evaluation research, public policy research, and community and economic development research;

Strategic planning and consulting;
Grants facilitation;

Economic and community development consulting;

Public administration training programs;

Public affairs programming through conferences, speakers, forums, television and radio programming, newspaper columns, and scholarly publications.

Each person involved in the success of the Docking Institute is highly qualified to achieve excellence in the field of policy research. The Institute regularly provides services to organizations and communities of all sizes throughout the region. Since its founding in 1980, the Docking Institute has worked with hundreds of local, state and regional organizations, agencies and communities to assist them in charting their future success.

The Department
of Technology Studies
www.fhsu.edu/tecs
(785) 628-4211

The Department of Technology Studies in the College of Education and Technology prepares students for rewarding careers in Drafting and



Design, Manufacturing, Production, Power/Energy, and Construction Technologies in both the industry and education fields.

The department provides three degree programs: Industrial Technology, Technology Education and Technology Leadership. Graduates are highly sought after and quickly assume leadership positions. Students with an AAS (Associate's in Applied Science) degree are eligible for the Bachelor of Technology Leadership (BTL) degree and find positions in management fields related to their area of study.

The department also works in partnership with the private manufacturing sector to address educational needs in the region.

The Kansas Small Business
Development Center
www.fhsu.edu/ksbdc
(785) 628-5615

The main office of the Kansas Small Business Development Center is in Topeka, and Fort Hays State University is the sponsoring agency for the network of eight regional and nine outreach centers across the state.

KSBDC helps established firms, growth companies and start-up businesses meet challenges, manage change and plan for the future in today's evolving global marketplace.

The KSBDC network is funded in part through a cooperative agreement with the U.S. Small Business Administration and the Kansas Department of Commerce. KSBDC is nationally accredited through the Association of Small Business Development Centers by congressional mandate.

KSBDC partners with higher education and economic development organizations to provide Kansas entrepreneurs with individualized,

confidential and comprehensive business consulting at no charge. KSBDC consultants are skilled professionals with expertise in many areas, including marketing and sales, accounting, financial analysis and cost control, personnel, inventory control, business start-up or acquisition, business liquidation or sale, strategic planning, and many other areas.

The Small Business Development Center at FHSU is a regional resource and support center for the small business person. Any individual interested in starting a small business or existing small business firms may receive assistance from the FHSU SBDC. There are no charges associated with one-on-one consulting, but fees may be charged for costs associated with training courses.

The Management
Development Center
www.fhsu.edu/mdc
(785) 628-4124

The Management Development Center is located in FHSU's College of Business and Leadership. In today's competitive business environment, successful organizations consistently provide products and services their customers desire while performing at the highest levels of efficiency through continuously improving their people and processes. This balance between remaining internally equitable and externally competitive is a challenge encountered frequently by business professionals throughout the world.

The Management Development Center has a simple mission, which is to help organizations be successful through the development of people that improve organizations. The primary avenue for connecting people and organizations to services is through workshops offered on campus, virtually or at a customer's facility. These workshops are designed based on sound management theory and delivered in a practical, applied method allowing the learner to immediately employ the newly learned knowledge in the workplace.



Hays main campus of NCK Tech.

NCK Tech offers technical training in 10 programs at Hays campus

NCK Tech is an innovative leader in technical education, primarily serving north-central and northwest Kansas. However, the high demand for many of the college's 24 full-time programs pulls students from all across Kansas and surrounding states.

NCK Tech began as a vocational-technical school in 1964, but became an accredited college in 1996. The college has two locations, Beloit and Hays. The Hays Campus also includes the Big Creek Technical Center located in downtown Hays.

The current full-time enrollment for the college is more than 600 students with nearly 200 students per year taking part-time or specialty short-term programs such as general education courses, online coursework, CDL, CMA, CNA and directional drilling. Approximately 60 faculty members are trained in their area of study along with appropriate educational credentials to enhance and supplement a complete student learning experience.

The college focuses on hands-on training associated with classroom/lecture teaching components. Students

can earn a certificate or Associate of Applied Science degree depending on their concentration of study.

Partnerships and transferability agreements exist with Fort Hays State University, Kansas State University, University of Kansas, Pittsburg State University, Washburn University, community colleges and other institutions of higher education. The opportunity is available for students to enter the workforce after only nine to 18 months or to continue their education at another institution.

The Hays Campus of NCK Tech also offers an Allied Health program and an automotive program for area secondary school students. Short-term programs such as CNA and CMA are a vital part of the campus enrollment. The Big Creek Technical Center in downtown Hays houses the construction trade programs and also is used for short-term programs such as CDL.

Unique opportunities exist with an education from NCK Tech. The college offers guaranteed placement for students who qualify and follow the guidelines set by the college. NCK Tech



NCK Tech's Programs of Study

Beloit Campus

- Agricultural Equipment Technology
- Automotive Collision Technology
- Automotive Technology
- Bricklaying
- Business Management
- Carpentry/Cabinetmaking
- Culinary Arts
- Diesel Technology
- Electrical Technology
- Electronic Engineering Technology
- Heavy Equipment Operation
- Information Technology
- Practical Nursing (LPN)
- Plumbing, Heating and Air Conditioning
- Telecommunications and Network Technology
- Welding

Hays Campus

- Automotive Technology
- Business Management
- Business Technology
- Carpentry/Cabinetmaking
- Electrical Technology
- Nursing (LPN and RN)
- Pharmacy Technician
- Plumbing, Heating and Air Conditioning
- Residential Electricity
- Welding

will offer to retrain (tuition free) any student who meets the qualifications and is unable to find employment.

NCK Tech is a growing institution focused on meeting the needs of business and industry. It is the goal of the college to provide "Hands-on Skills. High-Tech Careers."

For more information on NCK Tech, visit www.ncktc.edu or contact the following campus locations: Beloit, (800) 658-4655, or Hays, (888) 567-4297.

Retail Market

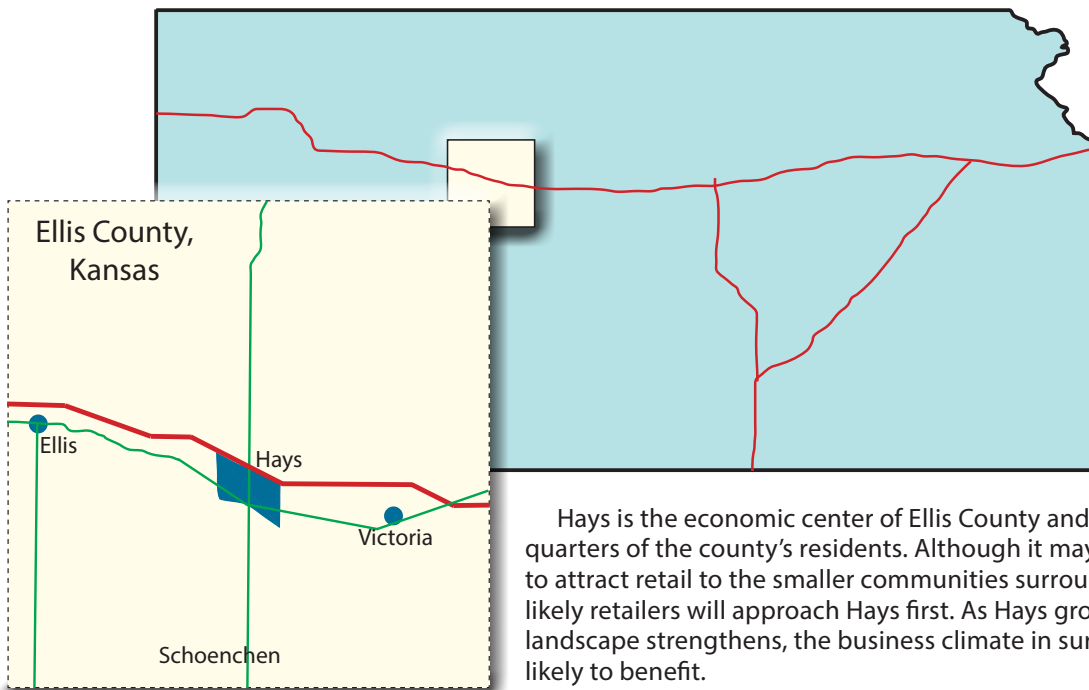


The city of Hays long has served as the retail hub of northwest Kansas, which is reflected in its retail pull factor of 1.87 and more than \$470 million in retail sales in 2011. Residents of communities in the region rely on Hays for their retail shopping needs. This has enabled the community to maintain steady retail growth in the last decade. With more than 200,000 square feet of available retail space, and multiple sites for greenfield development in the primary retail corridors, the city of Hays is an ideal location for new retailers.

The Ellis County Coalition contracted an independent consultant to evaluate our retail market potential, with the population in our expanded market in excess of 65,000 residents. The findings identified several market gaps with significant potential for new businesses, with the top potential in the following areas:

- Supermarkets — market potential is \$84,700,000
- Department stores — market potential is \$35,200,000
- Women’s/junior’s/misses clothing — market potential is \$11,100,000
- General merchandise stores — market potential is \$11,400,000

Additional information is available on the Coalition website: www.haysamerica.net.



Hays is located along Interstate 70, approximately 325 miles east of Denver, 250 miles west of Kansas City and 186 miles northwest of Wichita. Hays is home to approximately 20,000 people. Ellis County’s population is approximately 27,800.

Hays is the economic center of Ellis County and is home to nearly three-quarters of the county’s residents. Although it may or may not be appropriate to attract retail to the smaller communities surrounding Hays, it is much more likely retailers will approach Hays first. As Hays grows and the city’s retail landscape strengthens, the business climate in surrounding towns will be more likely to benefit.

The major retailers in Hays include Walmart Supercenter (general merchandise and grocery), Home Depot (home improvement), Walgreens (drug), J.C. Penney (department store), and Dillons (grocery). The restaurant offering includes the quick serve staples — Pizza Hut, Taco Bell, McDonald’s and Sonic. In the chain casual dining space, Hays has Applebee’s and IHOP.

Most retail is located along the Vine Street corridor, stretching just north of Interstate 70, past Big Creek Crossing, down to 13th Street.



Following is visual representation of Hays approximate market area. The market area was calculated using a proprietary implementation of Reilly’s Law of Retail Gravitation. Reilly’s Law states that the break point between two cities is equal to the distance divided by 1 + the square root of the population of city A divided by city B.

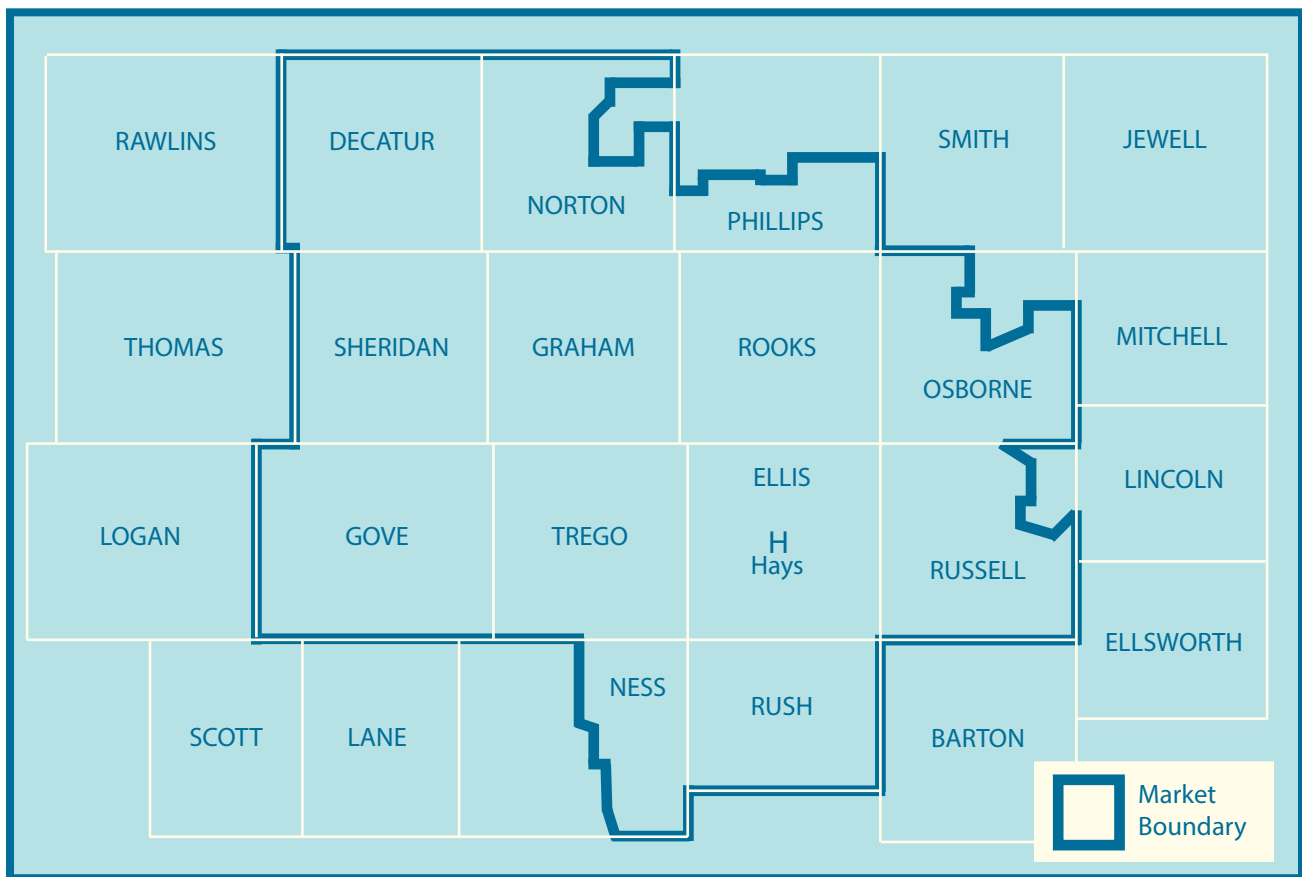
In other words, since Dodge City and Hays are similar in size, the break point where consumers will travel to one city or the other is nearly equidistant between them. Where one city is much larger, as in the case of Wichita, the break point will be much closer to the smaller community (Hays) since

the pull of the larger community (Wichita) is stronger.

The market area encompasses households most likely to make use of Hays’ retail offering. Patronage largely is driven by convenience and offering. Thus, if Hays offers the retail and service offering that shoppers in the market area desire, they will be likely to travel there to shop.

In most cases, however, shoppers outside of the market area will find similar or more abundant retail opportunities in other, more convenient, communities. It should be noted that retail is considered in aggregate, or as a single destination. The pull distance of individual retailers will vary.

Ellis County Market Area



The pull factor is a calculation that identifies how much retail business is leaving your community in comparison to the population. A retail pull factor of 1 is neutral — there are as many people coming into the community to shop as are going elsewhere. A retail pull factor of less than 1 means there are more people leaving your community to shop than are coming in from the surrounding area. A retail pull factor greater than 1 means more people come to the community to shop than go elsewhere.

Retail Sales Revenue in 2015 was \$325,000,000

The city of Hays enjoys a 1.87 pull factor, one of the highest in the state of Kansas. Our geographical location and access, coupled with national chain store locations and a unique downtown shopping experience make Hays a retail destination for a large number of western Kansas shoppers.

The city of Hays has enjoyed significant growth in retail sales during the last few years. Again, a combination of location and variety makes Hays a destination for many shoppers.

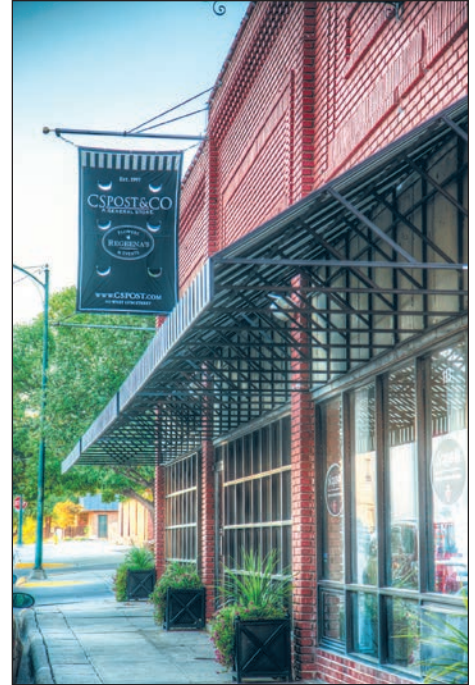
Ellis County Demographics

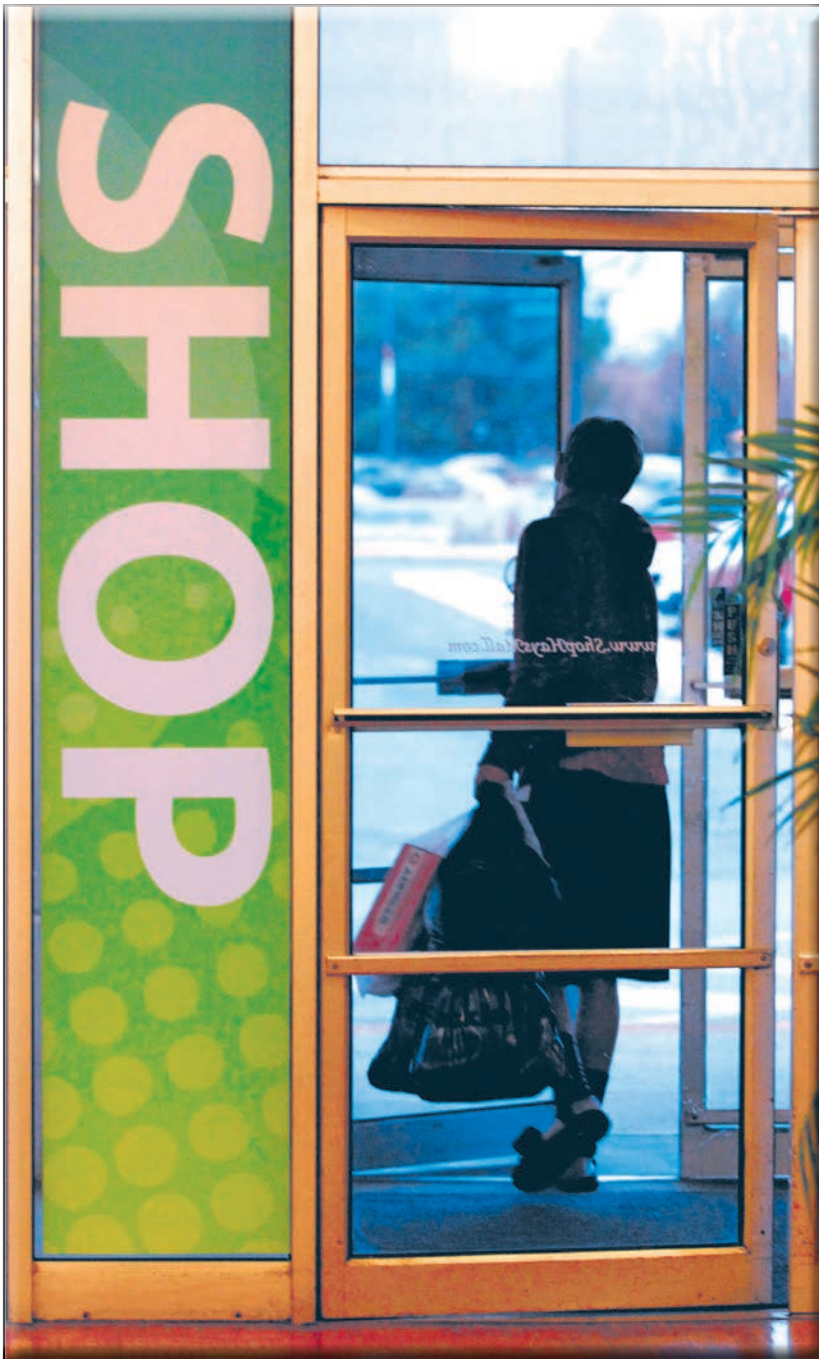
	City of Hays	Ellis County	Market Area
Population			
2015 Population	20,862	29,005	74,927
2020 Population (projected)	20,855	29,175	74,778

Households			
2015 Households	8,778	12,049	32,534
Average Persons/Household	2.3	2.3	2.2

Income (2015)			
Median HH Income	\$39,925	\$42,487	\$42,590
% Income <\$25K	32.8%	29.9%	28.6%
% Income \$25K-\$50K	26.4%	26.7%	29.1%
% Income \$50K-\$75K	16.3%	17.0%	18.9%
% Income \$75K-125K	18.2%	19.4%	17.2%
% Income \$125K-\$200K	4.8%	5.2%	4.3%
% Income \$200K+	1.5%	1.7%	1.9%

Education (2015)			
% K-8	3.3%	3.2%	3.7%
% High School	5.4%	4.0%	9.6%
% High School Grad	33.0%	28.1%	33.6%
% College - No Degree	26.1%	24.6%	25.3%
% Bachelor's Degree	24.8%	28.8%	23.9%
% Master's Degree	7.4%	9.2%	7.6%





Many national and regional retailers have populated Ellis County, specifically Hays. Individual restaurants and stores are located along the major retail corridors in Hays, and The Mall at Hays and Centennial Plaza provide central locations.

National/Regional Retail Chains

- Home Depot
- Wal-Mart
- Hobby Lobby
- Hastings Books, Music, Video
- Ace Hardware
- Sears Hometown
- Gamestop
- Hibbett Sports
- Walgreens
- Ashley Furniture
- Radioshack
- Aaron's
- Vanderbilt's
- Orscheln
- Dillons (Kroeger)
- Dollar General
- Salon Brands
- Rent-A-Center
- Genuine Appliance

National Restaurants

- Applebee's
- Golden Corral
- IHOP
- Whiskey Creek
- 32 fast food chain flags

The Mall at Hays/Centennial Plaza Retailers

- AMC Theatre
- Bath and Body Works
- Brown's Shoe Fit
- Sherwin Williams
- The Buckle
- Christopher and Banks
- CJ Banks

- Claire's
- Famous Footwear
- GNC
- J.C. Penney
- Maurices
- Payless Shoe Source
- Regis

- Riddle's Jewelry
- Rue 21
- Stage
- Tandy's Hallmark
- Tradehome
- Vanity

The Bricks in Downtown Hays is the oldest destination in our historic city and the heart and soul of our community. Since 2001, the area has been undergoing a process of restoration driven by the desire to preserve the history and pride of the community while creating the excitement of the old-fashioned Main Street atmosphere.

The brick streets play home to an array of businesses for shopping, dining, art and entertainment as well as the historic Chestnut Street District. The area has more than 400 thriving businesses that provide numerous goods, services and entertainment options. Visitors can shop for furniture, antiques, gifts, crafts, sporting goods, clothes, children’s merchandise, office supplies, beauty products, electronics and more. If dining and entertainment is what you prefer, then you’ll love our award-winning microbrewery, old-fashioned diner, sushi restaurant, bakery shops, bars and and numerous art galleries.

Downtown also plays host to some of the largest and most exciting events in the community, including Brews on the Bricks, Wild West Festival, Gallery Walks, Fire on the Frontier BBQ Classic, Oktoberfest, FrostFest and many more. A truly unique shopping experience, The Bricks in Downtown Hays offers a little bit of everything and has become the premier shopping district in western Kansas.

Downtown Hays Development Corporation is continuously working towards improving, building, and marketing the Downtown area. It is a true community effort spear headed by DHDC’s staff and board. They are always looking to collaborate with the City of Hays, Fort Hays State University, developers, retailers, volunteers and the business community to continue the exciting transformation that was started in 2001. Visit The Bricks in Downtown Hays to see for yourself the beautiful treasure our downtown is.



A FEW OF THE BUSINESSES IN THE DOWNTOWN AREA:

Food/Dining

- Augustine’s Bakery
- Cancun Mexican Grill
- Chinese Food Express
- Gella’s Diner and LB Brewing Co.
- Gutch’s Bar and Grill
- Sake2me Sushi Rolls
- Lomato’s Pizza
- TK’s Smokehaus

Salon/Spa/Wellness

- Body+Soul Day Spa
- Body Shoppe Salon
- Elements of Massage
- J Studio Salon
- Main Street Gym
- Salon 1007

Shopping

- Be Made
- Bella Luna
- Chestnut Street Kitchens
- the Paisley Pear
- CS Post & Co.
- Diamond R Jewelry
- Goodwin’s Sporting Goods
- Lilly & Marie
- Refine
- Simply Charmed
- Turquoise Ranch
- Northwestern Office
- Couture for Men and Women
- Kuhn’s Diamond Jewelers
- The Furniture Look

Arts/Entertainment

- Hays Arts Council
- Paint the Towne
- Pottery Works
- Styles Dance Centre
- Jackie Creamer’s



Quality of Place



The city of Hays has a number of attributes that provide for a tremendous quality of life. From arts and outdoor recreation to education and entertainment, Ellis County and the city of Hays have a lot to offer.

Outdoor Recreation

If your passion is the outdoors, from unsurpassed upland game hunting to excellent golf courses to wild west rodeos to scenic walking and bike trails, Hays has it all. If you are an avid sports person who enjoys participating or just watching, you'll find our community has a variety of opportunities for you to choose from.

Access to 10 lakes and state parks, plus public lease walk-in hunting areas, provides great opportunities for hunting, fishing, hiking, camping, boating and more.

Additional amenities include:

- Two 18-hole golf courses in Hays, one nine-hole course in Ellis.
- Five walking trails.
- More than 12 parks with facilities for baseball, softball, volleyball, basketball, disc golf and soccer. The newest addition is the Bickle/Schmidt Sports Complex, a fantastic facility that accommodates multiple sports.

Arts

The city of Hays supports a thriving arts community, with several nationally known artists from the area:

- 711 Studio — Paintings, drawings, etchings of Michael Jilg
- Artists at Work Studio — shared by seven women who work in a variety of medium
- Hadley Art Collection — More than 200 works of art from Kansas artists on display
- Hays Arts Council — First arts council established in the state of Kansas
- Fort Hays State University — The university includes a center for performing arts, with regularly scheduled concerts and other events
- Moss-Thorns Gallery of Art — FHSU also boasts an art gallery that displays the work of students, faculty and visiting artists throughout the year
- Stone Gallery — Display of the sculptures of local artist Pete Felten



History

With their roots as a rough frontier town, Ellis County and the city of Hays are steeped in western, German and natural history.

- Boot Hill Cemetery — Burial site of numerous outlaws from the Frontier days.
- Ellis County Historical Society Museum — A permanent display of exhibits related to the early pioneer days of Ellis County.
- Fort Hays Historic Site — Site of the original fort, includes visitors center and some original buildings.
- Historic churches — Native limestone churches built in the tradition of European design, including the “Cathedral on the Plains” in Victoria.
- Sternberg Museum of Natural History — Display of dinosaurs, fossils and other extinct creatures that roamed the plains millions of years ago.



Festivals

From January to December, Hays hosts numerous community get-togethers and festivals that draw in many visitors from surrounding communities.

Those include:

- Soup-R-Bowl food festival
- Polkafest
- Seasonal Gallery Walks
- Wild West Fest
- Fire on the Frontier BBQ Classic
- Youth Outdoor Festival
- Oktoberfest
- FrostFest



