



Business Retention & Expansion Report

November, 2007

Partnership for Community Growth & Development
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*The mission of the
Partnership for Community Growth and Development Inc.
is to foster economic growth and development for the purpose of
enhancing the quality of life in the Liberty Missouri area.*

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Executive Summary

The Partnership for Community Growth and Development is a public/private partnership which provides economic development services for the Liberty area. Economic development organizations commonly implement a program of work to retain businesses currently located in the community to help them grow and expand.

KEY FINDINGS

GROWTH – the visits in 2007 do not indicate the same growth rate that we have seen in the first two years. In 2006 half of the businesses visited indicated that they planned to expand; this year 37% noted expansion plans. For those that provided investment estimates the total is \$22,500,000.00. Some of this information was used in identifying businesses eligible for the Partnership's Community Growth Awards. We also are seeing some key areas declining such as sales and product life cycles. This is a concern and will be reviewed and analyzed by the Business Retention Committee.

LOCATION – Liberty's location in the Kansas City metro area is a major factor for the business community. This satisfaction rating is lower than years past too. However, only four companies are listed with a satisfaction rating less than average. Half of the total number of visits had a satisfaction rating in the top one-quarter. The graph containing this rating, comparing it to previous years is in the report. It could be that a decreased rating is tied to the high number of retail related businesses that were visited.

WORKFORCE – workforce availability remained stable, quality increased slightly, stability decreased slightly as did productivity. However, none of the ratings were less than 5.43 on a 7.0 scale. So even though it appears the workforce lost some ground, Liberty businesses' workforce still ranks much higher than the national and regional averages. Not a single business ranked its workforce below average in stability and productivity. It could be that a decreased rating is tied to the high number of retail related businesses that were visited. This is the risk when selecting businesses at random. The high workforce rankings once again are related to the business community's high opinion of the Liberty School District - 6.93 rating on the 7-point scale.

CONCERNS – the concern heard most frequently was traffic. Not only was it listed as a community weakness but also as a barrier to further expansion.

The Partnership's issue resolution process in collaboration with the City of Liberty strives to address concerns before they become problems. The Partnership's Business Retention Committee addresses issues as they arise, seeking immediate resolution. Signage ordinances were modified this year. Although not all of the Partnership's recommendations were accepted, compromises lead to fewer restrictions.

This report is part of the Partnership's contract for economic development services with the City of Liberty. Questions or comments about this report should be directed to Alicia Stephens, Executive Director of the Partnership for Community Growth & Development. The Partnership thanks its investors, including the City of Liberty, our Business Retention Committee and survey participants for their support of this program. Special thanks also to Aquila for their financial support of the Synchronist program.

Business Retention Report

What is business retention?

Business retention is an important component of business growth. Gauging the satisfaction of our existing business base helps us identify our strengths and weaknesses. Economic development professionals understand this as does the City of Liberty (City) as indicated in its 2007 contract for economic development services with the Partnership for Community Growth & Development (the Partnership).

The Partnership's contract with the City requires marketing, business attraction and business visits (retention). This report contains information from 32 personal, one-on-one business visits completed within the city limits of Liberty.

The tool utilized for the business visits, called Synchronist, includes a survey (see attachment A) and software for data collection, analysis and reporting. The system was developed by BlaneCanada, a national leader in economic development tools and resources. BlaneCanada won a national award from the American Economic Development Council for the software. It is important to understand that 'number crunching' done by the software is only one piece of the process. It is critical for the economic development professional to analyze the data individually and aggregated.

Synchronist is used by economic development organizations across the nation, including economic development colleagues such as the Clay County Economic Development Council, the EDC of Kansas City, the Platte County Economic Development Council, Independence Council for Economic Development, Lee's Summit Economic Development Council, Blue Springs Economic Development Council and Kansas-side economic development organizations such as the Lawrence Chamber.

The purpose of these business interviews is very basic – keep businesses in Liberty and help them grow and prosper – business retention and expansion! Staying in touch with our businesses helps us identify opportunities for business expansions and threats of those leaving or closing. Of course, keeping businesses in Liberty will lead to increases in employment and the tax base which result in a healthier economic climate.

This report includes the good news about Liberty as a business location, as well as the challenges that face the community. In its contract with the Partnership, the City agrees to address issues which are identified. In 2006, a new process was put into place to identify issues and seek resolution at the Partnership committee level. That process will continue in 2008.

How were interviewees chosen?

Economic development professionals know that it is important to annually interview those businesses with the largest economic impact – usually the largest private employers.

Businesses to interview were chosen three ways – the largest employers, businesses requesting an interview and the remaining were at random, taken from a database of close to 1200 businesses in Liberty. New this year was a random selection by the Business Retention Committee. Business lists were divided among the committee members who randomly selected businesses to invite to participate. The Partnership’s Business Retention Committee developed a list of 100 potential visits with whom initial contact was made. Due to this random selection a high number of retail related businesses were visited. This is the risk when selecting businesses at random.

These interviews represent 32 total businesses and over 5,000 employees.

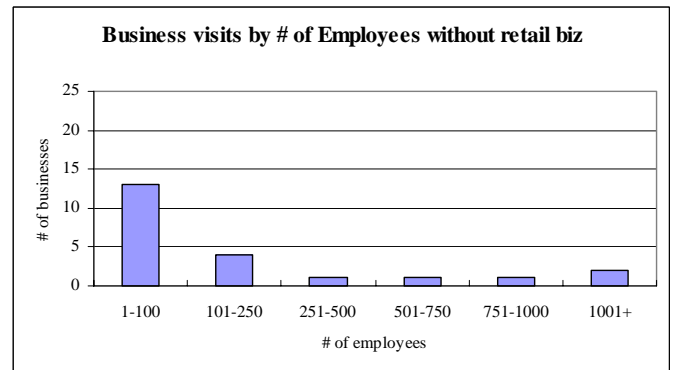
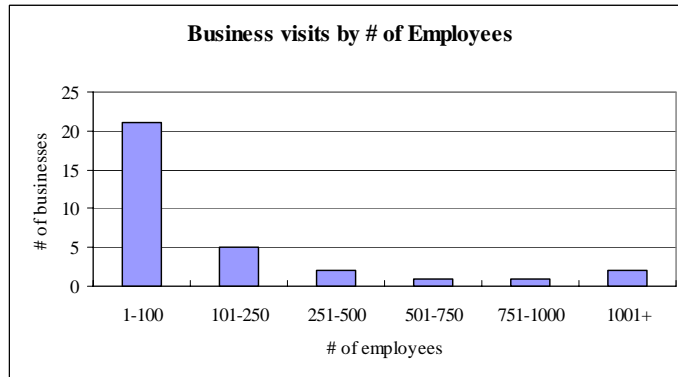
All interviews were completed by Alicia Stephens, Executive Director of the Partnership.

Confidentiality is a firm component of the Partnership’s business retention program.

The names of the participating companies are not divulged in this report. Confidentiality provides the participant a feeling of complete confidence that their data is secure and will not be shared on an individual basis but only in aggregated formats.

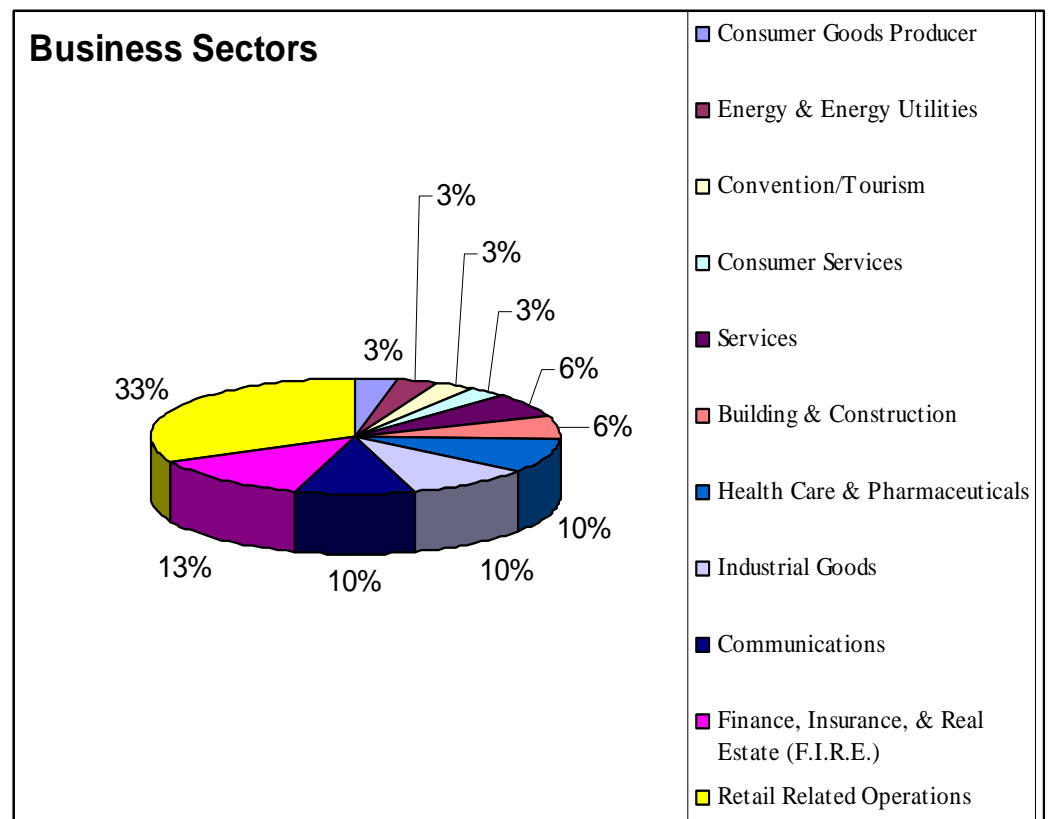
Characteristics of the participating companies

This is a breakdown of the interviews by employee size. The chart on the left shows that the interview numbers were high with companies which have small numbers of employees. On the right, the numbers at the low end of the scale were affected when retail businesses were removed.



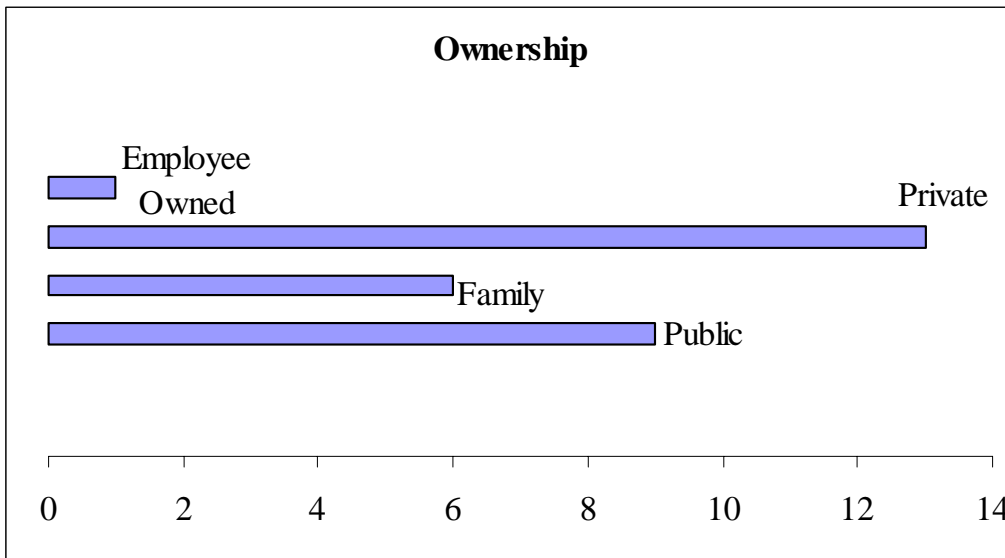
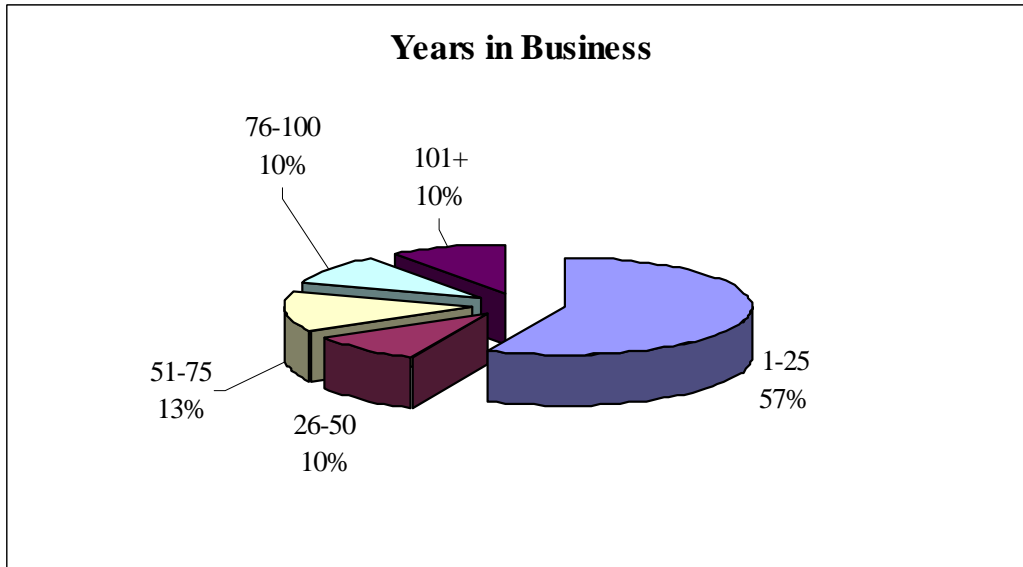
Business sectors were not as well-represented as in the past as seen in the graph →.

The percentage of retail related operations is much too high. This is a result of random sampling without discretion regarding business sector.



Characteristics of the participating companies

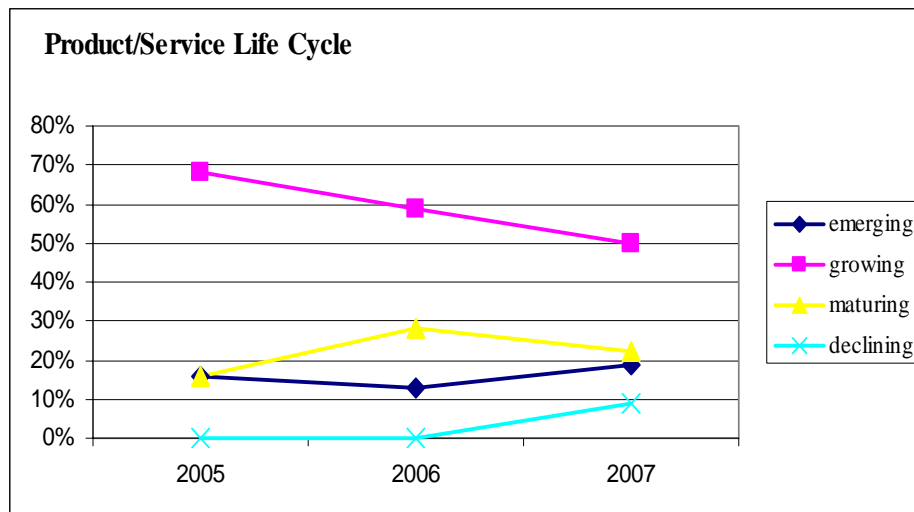
Random selection did not impact the breakdown by the age of the business in Liberty nor the type of ownership of those visited.



KEY FINDINGS

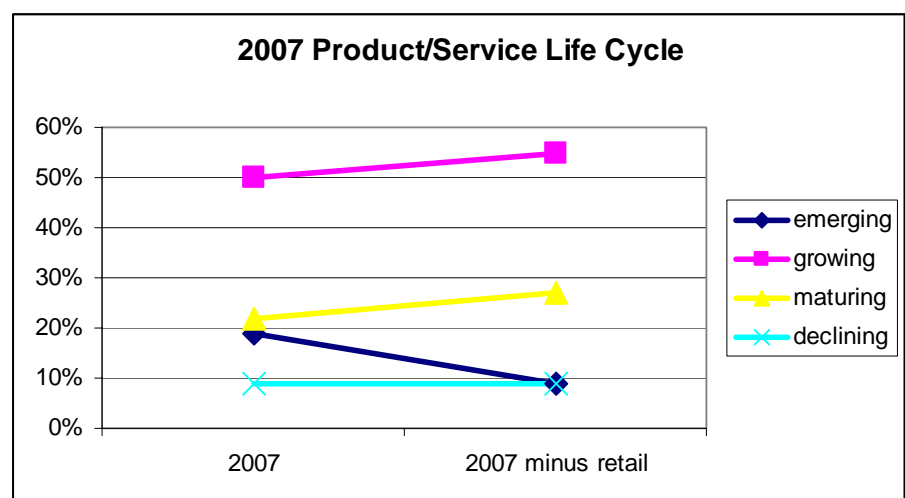
Growth is the key factor to track in many different ways. 2007 is experiencing a decline in some categories. Read on for possible explanations. **Please note that categories that are seeing declines will be presented to the Business Retention Committee for further analysis.**

Interviewees were asked about the life cycle of the products and/or services they provide.



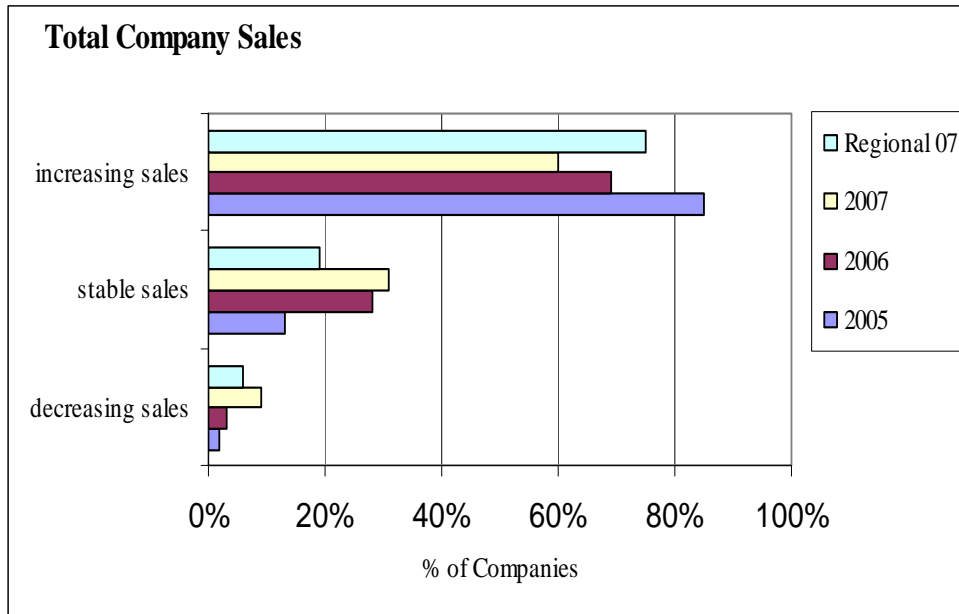
Comparing the three years of data, we are beginning to see a shift. Although the growing cycle is showing a decline, emerging and maturing are increasing. Further analysis will be needed to pinpoint the businesses that are declining and target them for assistance.

The graph to the right shows us that the high percentage of retail visits changes the outcome. When the retail visits are excluded, the percentages of growing and maturing businesses improve. This could be an indication that more attention should be given to existing retailers.



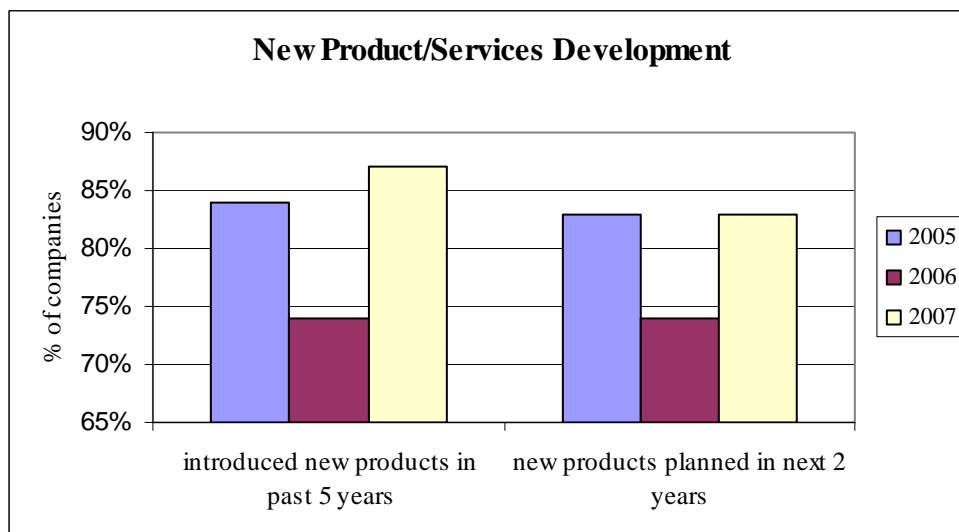
KEY FINDINGS

Growth continued



The number of companies which experienced decreased sales was higher this year. The number of companies with stable sales was slightly higher and the number with increasing sales was lower. When compared to the region, our number with increased sales was significantly lower.

Excluding the retail visits did not significantly change these percentages.



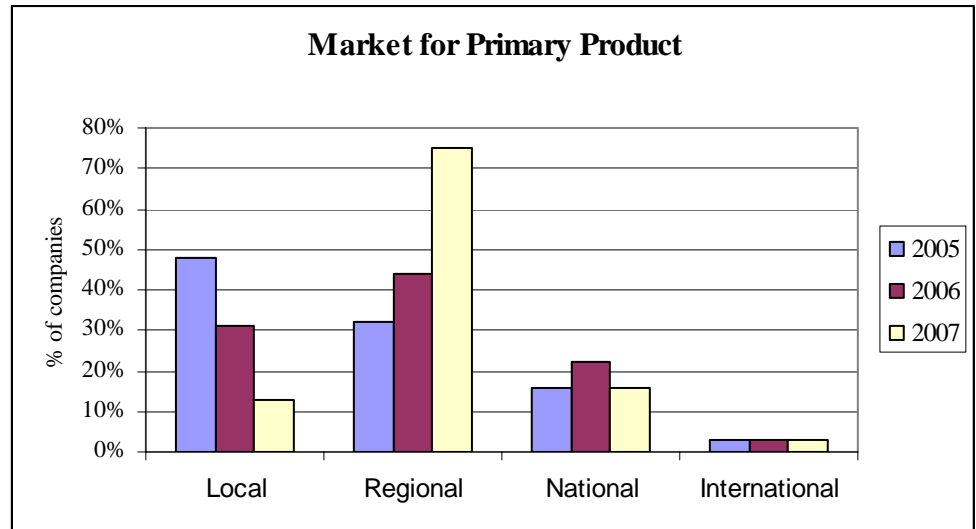
Evident in this graph is that the development of new products and services is a key component in growth, both in the past and for the future. Interesting that sales (above) showed less increase in 2007 and there's an increase (left) in new product/

services that are planned in the next 2 years. Perhaps companies immediately addressed smaller sales increases by beginning to develop new products/services for future sales.

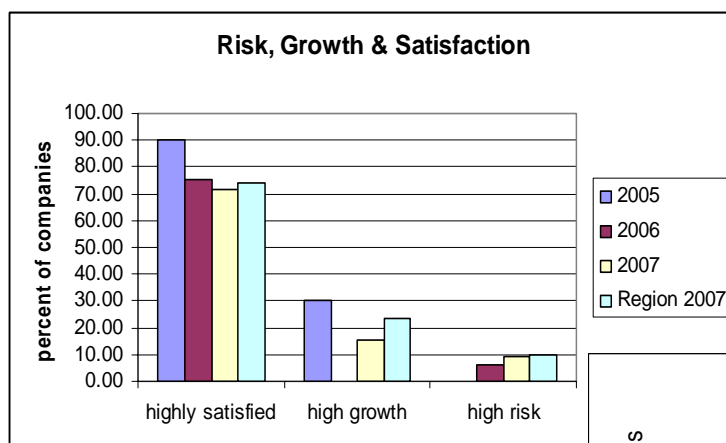
Key Findings

Growth continued

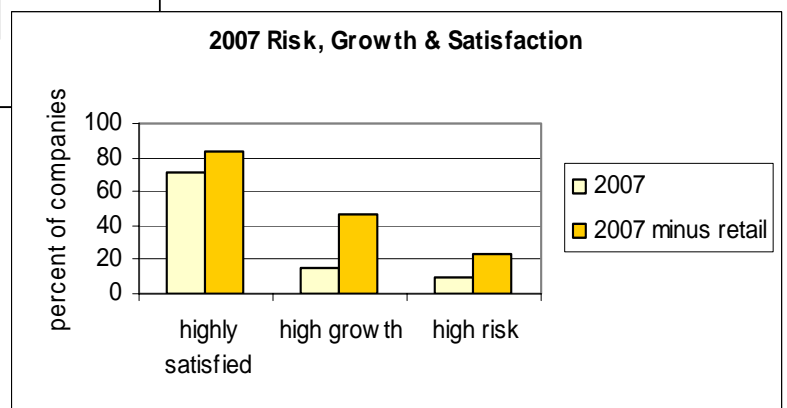
The following graph shows that the companies do most of their business in the area. Comparing the three years of data, companies are reporting that their regional market is growing – that’s good news. It means more revenue is coming from outside the local market.



The software used in the business retention program calculates risk, growth and satisfaction ratings for the companies. Companies to watch are those with high growth potential; as well as companies that are at high risk. The satisfaction rating lets us know how businesses view the community as a place to do business. Again in the graph, we are providing a figure that does not include the retail because that sector significantly impacted the full 2007 data set.

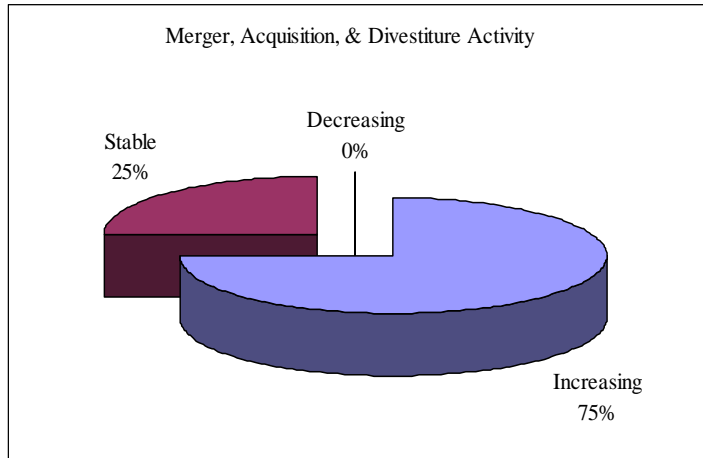


Attention should be given to both high risk and high growth companies. When the retail companies are included in the data set for this year, the satisfaction rating drops. When retail companies are removed (graph below), the satisfaction rating increases.



Growth continued

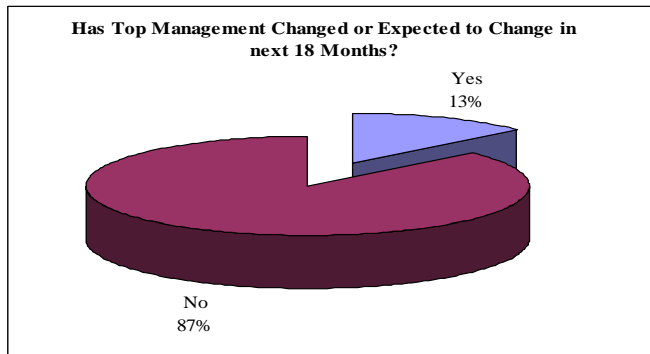
In addition to market questions, the interviewee is asked an open-ended question about what they consider the company's greatest achievement was in the last 5 years. This year, answers to this question were much more diverse than in the past. The most frequently noted achievement dealt with sales growth, market share and the ability to compete.



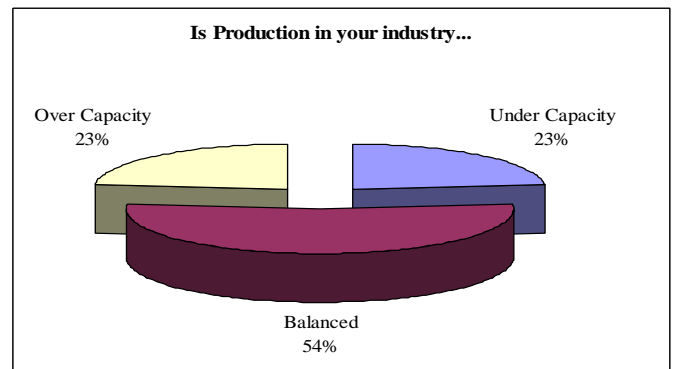
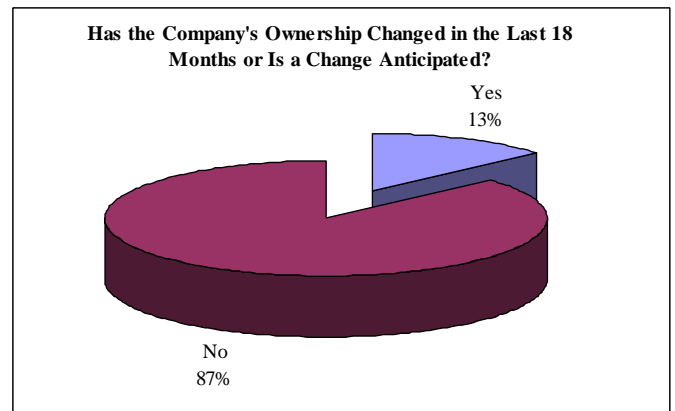
In 2005, 83% of the visited companies noted that the activity noted in the graph was increasing. Last year only 65% noted such. But this year that number headed back up to 75%. However, none in all three years thought it was decreasing. As indicated, a large percent of the companies continue to watch trends of company ownership and failure. The interview question asks about merger, acquisition and divestiture activity in their specific business sector.

Ownership change was relatively stable. Slightly more than last year indicated there was no ownership change nor did they anticipate one.

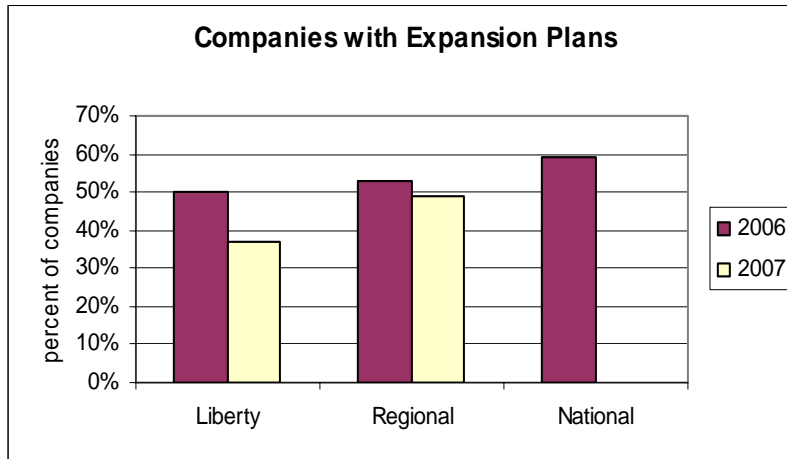
Significantly fewer companies (87%) than last year (53%) have experienced top management changes nor do they anticipate changes.



It is odd that more companies than last year (45%) believe that their business sector is balanced in their production capacity. Other indicators such as sales and life cycles show a stronger competition. Perhaps this illustrates that it has more to do with the overall economy and not just business in our area.



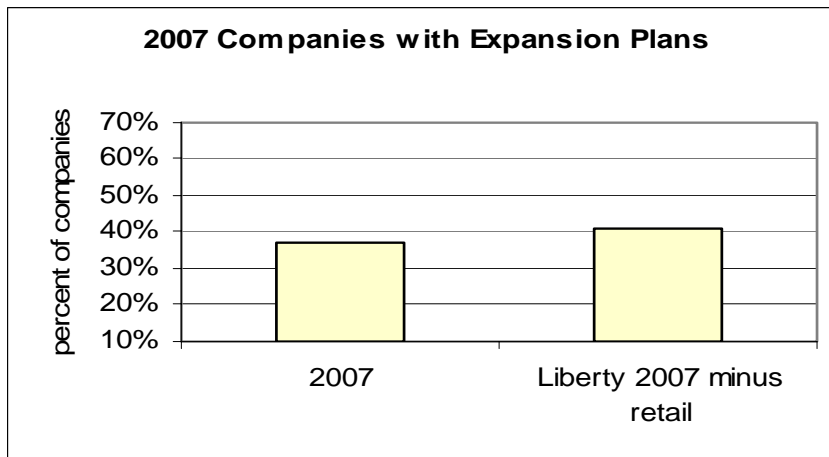
Growth continued



Investment forecast

For those that reported figures, the total potential Liberty companies expanding equal \$22,500,000 in investment, 235 jobs and 66,600 new square feet. The companies which plan to expand represent the industrial, services and retail sectors.

The 2006 national data study is based on more than 11,000 interviews representing 1.3 million employees. The regional data is based on 177 interviews representing 25,161 employees.



Note that the expansion percentage rises slightly when retail is taken out of the mix.

Additionally, the Partnership will host its second annual awards event in November, 2007. The purpose of the event is to honor companies which have made new investments in their operations. Community Growth Awards will be presented to fourteen individual businesses.

Barriers to growth

For the second year, the most frequently mentioned barrier to growth was **traffic congestion**. The light synchronization project along 152 should be completed in 2007. This has been reported to the business community. They eagerly await the result of the stop lights along 152 in Liberty communicating with the lights on the west side of I-35 in Kansas City. The Partnership will keep the business visits up to date on this project's progress.

Additionally, the Partnership continues to work toward an improved transportation system in south Liberty, which will ease traffic once the projects are completed.

Key findings

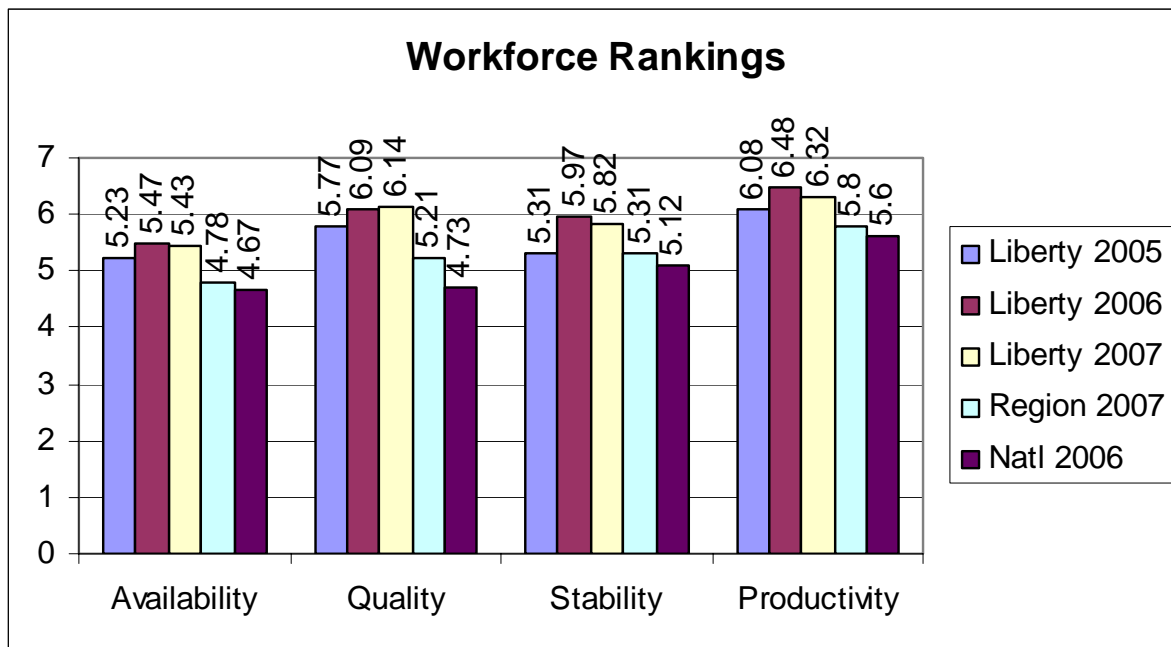
Workforce reports continue to be great news! Since the inception of the business visits in Liberty, businesses continue to give our workforce high marks. Employment costs are among the largest costs of businesses' operations and in Liberty businesses give their workforce rankings better than regional and national numbers.

During the interview, the employer was asked to rank its workforce.
A rating of 1 is the lowest (poor) and the highest score is 7.

For example, quality –

- increases each year,
- is almost a full point ahead in comparisons with the region and nation,
- and the overall score is 6.14.

Remember that 7 would be a perfect score. The Partnership will use this information in its promotional and marketing materials.



Charted, the information paints an excellent picture of the workforce of the Liberty businesses that were interviewed, as well as information from the region.

Since the average is 4 in this ranking system, all characteristics are above average.

The national average was gleaned from a 2006 report of 11,127 interviews, representing 1.3 million employees.

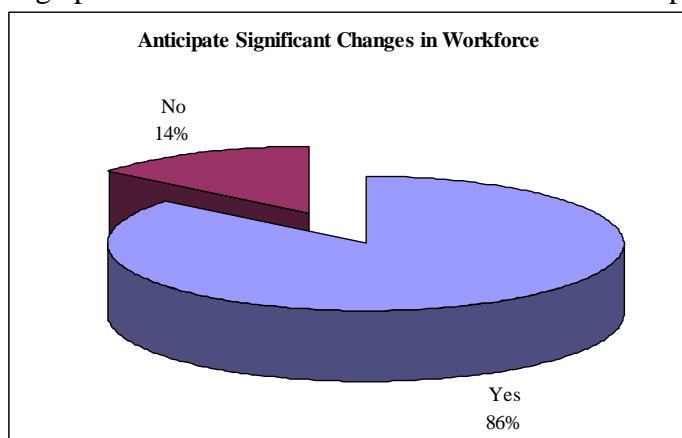
The regional data is based on 177 interviews, representing 25,161 employees.

Workforce continued

Availability of workers received a rank of 5.43, which is a good number on the seven-point scale and well above national and regional ratings.

- The businesses that indicated recruitment difficulties, all noted that the difficulties are industry-wide not just in our community

Stability of the workforce consistently ranks high. The stability figure could be impacted by the large percent of visits that were retail businesses. Especially when you consider this graph.



86% of the businesses did not expect significant changes in their workforce!

Two questions not included in the survey but asked by the interviewer were regarding turnover and employees' home location.

Turnover is connected to the stability characteristic (5.82). But even with the slight decrease from the previous year, businesses noted that their turnover was at or less than average for their industry sector. The slight decrease could be a result of the high number of retail businesses selected at random.

The **home locations of employees** were all over the metro area. Communities where employees live include Gladstone, Kansas City, Concordia, Grain Valley, Excelsior Springs, Holt, Kearney, Cameron, Independence, Blue Springs, Polo, Richmond and, of course, Liberty. The interviewer was surprised at the minimal mention of communities such as Lenexa, Olathe or Overland Park. The large number of communities represented is good news . . . this means that when attracting new businesses, we can indeed say that the labor pool from which to pull includes a 30-40 minute commute. As expected those willing to commute increase the number of available workers.

Key findings

Community Weaknesses and Strengths

It is important to understand that this question in the interview tool is open-ended, meaning that the comments are in the interviewees own words.

During the interview, there is an opportunity for general comments. All of the businesses provided feedback about the community in general.

Community weaknesses

- Negative business climate comments were noted no more frequently than last year – 9%, which is significantly lower than the first year’s visits (65%).
- Comments about the Unified Development Ordinance (UDO) were less this year than in 2006 and 2005. This could be due, in part, to addressing the issues of signage and banners.
- **Traffic was the most frequently mentioned concern.** Congestion was noted along the I-35 exits, at Highways 152 & 291. Of the 23 companies which ranked traffic control below average, 17 of them were along 152 and/or north along 291.

Community Strengths

- The **growth and potential for growth** were noted most often as a community strength. The business community’s economic health is reflected in Liberty’s potential. Not only are businesses currently growing, they also see growth in the future.
- Liberty’s **location** is noted as a strength due to its accessibility to major interstates and highways and due to its proximity to Kansas City.
- The community strength - **quality of life** - is tied to other high ranking factors such as Liberty’s location in the metro area, the high-ranking Liberty School District and the highly regarded Liberty Hospital.

Key findings

Public services

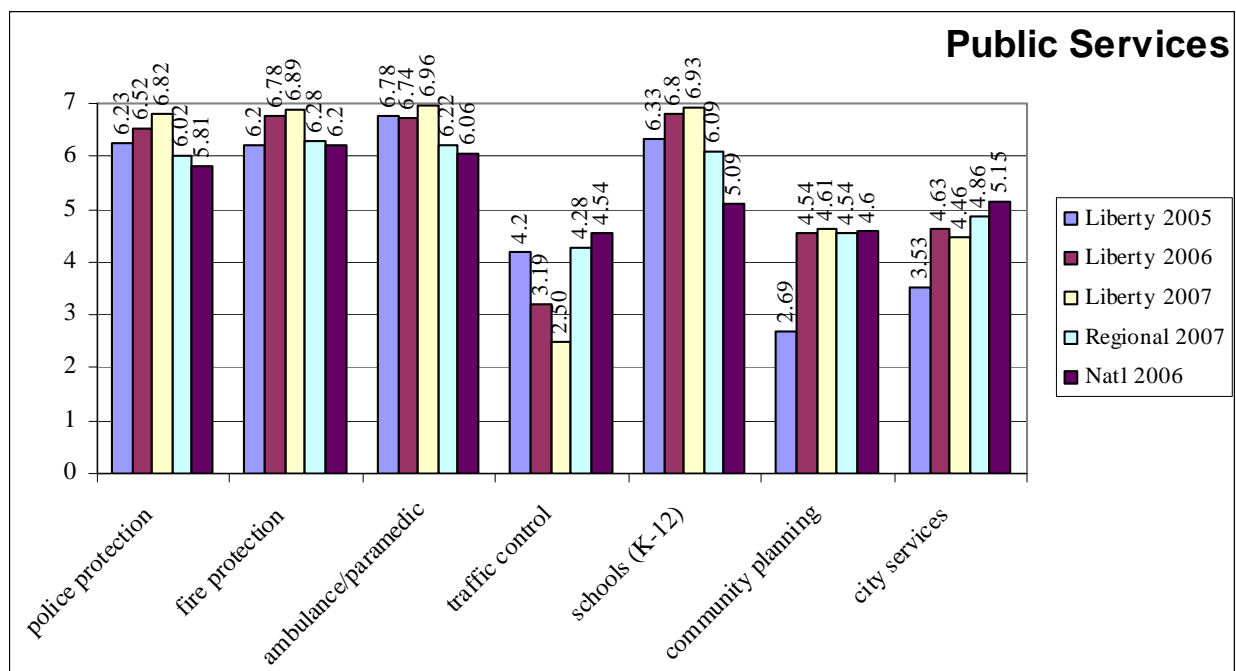
Public services ratings are requested in the survey. Like the workforce rankings, a rating of 1 is the lowest (poor) and the highest score is a 7.

	Liberty 2005	Liberty 2006	Liberty 2007	Regional 2007	Natl 2006
police protection	6.23	6.52	6.82	6.02	5.81
fire protection	6.20	6.78	6.89	6.28	6.20
ambulance/paramedic	6.78	6.74	6.96	6.22	6.06
traffic control	4.20	3.19	2.50	4.28	4.54
schools (K-12)	6.33	6.80	6.93	6.09	5.09
community planning	2.69	4.54	4.61	4.54	4.60
city services	3.53	4.63	4.46	4.86	5.15

The score which worsened the most is the same as comments made – traffic. Community planning has recovered slightly from its poor 2005 score. **All other rankings improved from 2005 except other city services which dropped slightly.**

Consider the good news. Emergency services – police, fire protection, ambulance/paramedic – get high marks. Comments included fast response time, excellent response to large scale emergencies and cooperation with the school district. **The Liberty School District achieved a near-perfect score at 6.93 – it gets higher marks each year!**

The graph below provides a good visual for the table above.



Legislative issues

The survey asks the interviewee about legislation (local, state or federal) that could impact business. It is an open-ended question with no suggestions. Most interviewees agreed that any legislation could negatively or positively impact business depending on the action taken by the legislators.

- Many noted that employment law can make a huge difference to their operations especially with regard to the minimum wage. Some thought that immigration could impact some small business owners.
- Healthcare issues continue as concerns - such as costs, Medicare/Medicaid cuts and insurance reform.
- The cost of fuel was again noted by businesses as a concern.
- Although importing/exporting was not prevalent in the business visits, there was concern noted about shipping costs and security.

The above information will be provided to Congressman Graves and his staff.

A local issue noted was annexation. It was noted without judgment or opinion – just something that will need to be addressed in the near future.

Conclusions/Recognitions

After our third year of business visits, there is a better understanding about business retention programs. Business retention is an ongoing process not a one-time blitz. It not only identifies our community weaknesses but also our strengths. It provides an avenue for addressing those weaknesses and marketing our strengths.

Our plans for 2008 must include following up with businesses that are ranked at high-risk. We will work to find resources to assist them with their challenges.

We must also stay in touch with businesses with high growth potential. This year the Partnership, the Chamber and Historic Downtown Liberty co-sponsored a business seminar – “Tools for Business Growth”. As we consider offering additional programs, we will use the information gathered here to decide topics and to develop our invitation list.

Considering the data from the retail businesses, it is time to consider special software specific to the retail sector. This has been discussed in the past with the Chamber. The financial investment for the organization could result in a higher return on that investment if we can identify and address retail sector challenges.

This report confirms that Liberty has high growth potential. The City, the Partnership and its business partners have the opportunity to continue to improve our economic well-being.

When you have an opportunity to promote Liberty to business suppliers, professional colleagues and neighbors, here are your positive speaking points:

- Liberty School District gets an excellent rating from the business community;
- Liberty’s labor force is among the best in the nation;
- Liberty’s location is one of the best in the KC metro area and the nation;
- Liberty’s community planning is improving and above the national average;
- Liberty’s quality of life is what brings us here, keeps us here and keeps it growing.

Again – the Partnership thanks its investors, including the City of Liberty, our Business Retention Committee and survey participants for their support of this program. Special thanks also to Aquila for their financial support of the Synchronist software and program.

All business representatives are encouraged to participate in this business retention program. Interested parties should contact the office to set an appointment.

The business community is eager to realize, support and experience the full potential of growth and development in Liberty.

Partnership for Community Growth & Development

9 S. Leonard

Liberty, MO 64068

816/407-9242

www.thinklibertymo.com

Attachment A

Survey tools

COMPANY BACKGROUND FORM 3.1

Information is confidential

8.12.06

Parent Company Information (if applicable)		
Parent Name		
Address		City/State/ZIP
Country		Parent Region
Phone () -	Fax () -	E-mail
CEO Name	Title	Web Site
Parent Notes		

Parent Company Contacts			
Type <input type="checkbox"/> Parent Company Primary <input type="checkbox"/> Parent Company Secondary			Title
Name	Middle	Last	E-mail
Phone () -	Extension	Cell Phone () -	Fax () -
Parent Contact Notes			

Type <input type="checkbox"/> Parent Company Primary <input type="checkbox"/> Parent Company Secondary			Title
Name	Middle	Last	E-mail
Phone () -	Extension	Fax () -	
Parent Contact Notes			

Company Information					
Person Filling Out This Form		Date Form Filled Out			
Company Name			Previous Company Name (if applicable)		
Address			Phone () -		
City/State/ZIP			Fax () -		
Web Site			E-mail		
Utility Provider 1:			Utility Provider 2 (if appropriate):		
County	Region (user defined)	SCode (Defined by Master License Holder)	Visit Priority High Medium Low	Next Visit Date	Member/Investor <input type="checkbox"/> Yes <input type="checkbox"/> No
Company Notes					

Company Contact(s)			
Contact # 1			
Contact Type (Circle one) <input type="radio"/> Company Primary Executive <input type="radio"/> Company Secondary Executive <input type="radio"/> Company Middle Manager			Title
First	Middle	Last	
Phone () -	Extension	Cell Phone () -	Fax () -
Visit Date	Letter Date	Referred by	Next Contact Date
Company Contact Notes			

Contact # 2			
Contact Type (Circle one) <input type="radio"/> Company Primary Executive <input type="radio"/> Company Secondary Executive <input type="radio"/> Company Middle Manager			Title
First	Middle	Last	
Phone () -	Extension	Cell Phone () -	Fax () -
Visit Date	Letter Date	Referred by	Next Contact Date
Company Contact Notes			

History			
Affiliation to parent company	<input type="checkbox"/> Subsidiary	<input type="checkbox"/> Division	<input type="checkbox"/> Branch
Years in Business	Year Company Established in Community	Beginning of Fiscal Year (Month)	

Type of Facility (Please check all that apply)					
<input type="checkbox"/> Headquarters	<input type="checkbox"/> Division	<input type="checkbox"/> Office operation	<input type="checkbox"/> Branch plant	<input type="checkbox"/> Distribution/Warehouse	<input type="checkbox"/> Manufacturing

Type of Ownership (Please check one)			
<input type="checkbox"/> Public	<input type="checkbox"/> Employee-owned	<input type="checkbox"/> Private	<input type="checkbox"/> Family
<input type="checkbox"/> Not-for-Profit	<input type="checkbox"/> State government	<input type="checkbox"/> Federal government	

Products/Services				
Primary Products/Services				
If known, please list your NAICS (NAICS = North American Industry Classification System Code)				
1)	2)	3)	4)	5)

Business Sector (Please check one)			
<input type="checkbox"/> Advanced Manufacturing	<input type="checkbox"/> Consumer Goods Producer	<input type="checkbox"/> Energy & Energy Utilities	<input type="checkbox"/> Industrial Goods
<input type="checkbox"/> Aeronautics and Defense	<input type="checkbox"/> Consumer Services	<input type="checkbox"/> Finance, Insurance, Real Estate	<input type="checkbox"/> Retail Related Operations
<input type="checkbox"/> Agriculture, Forestry, Minerals	<input type="checkbox"/> Convention/tourism	<input type="checkbox"/> Government	<input type="checkbox"/> Technology/Information
<input type="checkbox"/> Building & Construction	<input type="checkbox"/> Diversified	<input type="checkbox"/> Health care & Pharmaceuticals	<input type="checkbox"/> Telecommunications
<input type="checkbox"/> Communications	<input type="checkbox"/> Durable goods producer	<input type="checkbox"/> High-end Business Services	<input type="checkbox"/> Transportation
Business Sector Notes			

Information is confidential

8.12.06

Local Employment																																	
<table style="width:100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black;">Type</th> <th style="text-align: right; border-bottom: 1px solid black;">Number</th> </tr> <tr> <td style="padding: 2px 5px;">Full-time</td> <td style="border-bottom: 1px solid black; width: 100px;"></td> </tr> <tr> <td style="padding: 2px 5px;">Part-time</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 2px 5px;">Leased</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 5px 5px 0 0;">Total Employees</td> <td style="border-bottom: 1px solid black; text-align: right;">(mm/yy)</td> </tr> </table>	Type	Number	Full-time		Part-time		Leased		Total Employees	(mm/yy)	<table style="width:100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black;">Function</th> <th style="text-align: right; border-bottom: 1px solid black;">Number</th> </tr> <tr> <td style="padding: 2px 5px;">Management</td> <td style="border-bottom: 1px solid black; width: 100px;"></td> </tr> <tr> <td style="padding: 2px 5px;">Technical</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 2px 5px;">Sales/Marketing</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 2px 5px;">Clerical</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 2px 5px;">Production</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="padding: 5px 5px 0 0;">Total Employees</td> <td style="border-bottom: 1px solid black;"></td> </tr> </table>	Function	Number	Management		Technical		Sales/Marketing		Clerical		Production		Total Employees		<table style="width:100%; border-collapse: collapse;"> <tr> <td style="padding: 5px 5px 0 0;">Number of jobs added or lost (-) in past 3 years</td> <td style="padding: 5px 5px 0 0;">Number of shifts per day</td> <td style="padding: 5px 5px 0 0;">Number of days per week</td> <td style="padding: 5px 5px 0 0;">Peak Season (circle all that apply) J F M A M J J A S O N D</td> </tr> </table>	Number of jobs added or lost (-) in past 3 years	Number of shifts per day	Number of days per week	Peak Season (circle all that apply) J F M A M J J A S O N D	<table style="width:100%; border-collapse: collapse;"> <tr> <td style="padding: 5px 5px 0 0;">Total Gross Annual Payroll</td> <td style="padding: 5px 5px 0 0;">\$</td> </tr> </table>	Total Gross Annual Payroll	\$
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<i>Employment Notes</i> 																																	

Union Representation	
Is there union representation at your business? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If Yes, Name of Primary Union	Contract expiration date (mm/yy)
2 nd Union (if applicable)	2 nd Contract expiration date (mm/yy)
3 rd Union (if applicable)	3 rd Contract expiration date (mm/yy)
Percentage of Workforce Represented _____%	
Union Activity (please check all that apply)	
<input type="checkbox"/> Positive working relationship	<input type="checkbox"/> Organization activities
<input type="checkbox"/> Strike or lockout	<input type="checkbox"/> Arbitration
<input type="checkbox"/> Certification	
<input type="checkbox"/> Decertification	
<i>Union Notes</i> 	

Facility		
Acreage	Building Size (square feet)	Number of Buildings
Average Age of Building(s) (check one) <input type="checkbox"/> Under 10 years <input type="checkbox"/> 11–25 years <input type="checkbox"/> Over 25 years		
Average Condition of Building(s) (check one) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Average <input type="checkbox"/> Fair <input type="checkbox"/> Poor		
Space added or deleted (-) in last 3 years (square feet)		
Past expansion date (mm/yy)	Size and purpose of expansion	
Past expansion date (mm/yy)	Size and purpose of expansion	
Past expansion date (mm/yy)	Size and purpose of expansion	
Is there room for additional expansion at this location: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Is the facility owned or leased? <input type="checkbox"/> Owned <input type="checkbox"/> Leased		If leased, lease expiration date
Name, location, phone number of property owner		
<i>Facility Notes</i>		

Other Facilities	
Are there other company-owned facilities in the region? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, what type? (Please check all that apply) <input type="checkbox"/> Headquarters <input type="checkbox"/> Division <input type="checkbox"/> Office operation <input type="checkbox"/> Branch plant <input type="checkbox"/> Distribution/Warehouse <input type="checkbox"/> Manufacturing	
Where are they located?	
Are there other company facilities that make the same or similar products? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, where are they located?	
<i>Other Facility Notes</i>	

ON-SITE VISIT FORM 3.1

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Company Information	
Company Name	Date of Visit (mm/dd/yy)
Contact Name	City/State/ZIP
Phone () -	
Interviewer(s)	
Lead Interviewer	Organization
Other Interviewer(s)	Organization

Product/Service	
1. What is your company's greatest achievement in the last three (3) years? _____ _____	DNA/K Dcl
2. Where is the company's primary product/service in its life cycle? <input type="checkbox"/> Emerging <input type="checkbox"/> Maturing <input type="checkbox"/> Growing <input type="checkbox"/> Declining	DNA/K Dcl
3. Has the company introduced new products/services/capabilities in the last five (5) years? <input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
4. Are new products/services anticipated in the next two years? <input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
5. As a percent of sales, how much does the company spend on R&D? <input type="checkbox"/> 0% <input type="checkbox"/> 3%–6% <input type="checkbox"/> Under 3% <input type="checkbox"/> Over 6%	DNA/K Dcl
As a percentage, approximately how is the R&D budget divided among: Where is the R&D facility located? _____	New product development _____% Product improvement(s) _____% Production improvement(s) _____% DNA/K Dcl
<i>Product/Service Notes</i>	

Market	
6. Is the company's primary market: <input type="checkbox"/> Local <input type="checkbox"/> Regional <input type="checkbox"/> National <input type="checkbox"/> International	DNA/K Dcl
7. Are total company sales: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing	DNA/K Dcl
8. Is the market share of the company's key product(s) : <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing	DNA/K Dcl
<i>If changing, please explain:</i> _____ _____	

ON-SITE VISIT FORM 3.1

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9. Does the company plan to expand in the next three years: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, estimated total investment \$ _____ Approximate percentage equipment/technology _____ % Approximate percentage real estate _____ % Estimated number of jobs added or lost (-) _____ Estimated facility size increase _____ sq. ft. Approximate date of expansion _____ (mm/yy) Comments: _____ _____	DNA/K	Dcl
10. Are export sales as a percentage of total sales: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing <input type="checkbox"/> No exports If exporting, approximately what percentage of sales comes from export sales? 1-20% 41-60% 81-100% 21-40% 61-80% Where are your export markets? _____	DNA/K	Dcl
11. Is the percentage of products and/or components imported by the company : <input type="checkbox"/> Increasing <input type="checkbox"/> Decreasing <input type="checkbox"/> Stable <input type="checkbox"/> No imports	DNA/K	Dcl
12. Does the company have production facilities outside the country ? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, are they contract production or a company facility: <input type="checkbox"/> Contract production <input type="checkbox"/> Company facility <input type="checkbox"/> Both What is the function of the overseas location(s) _____ Where is foreign production located? _____	DNA/K	Dcl
<i>Market Notes</i>		

Industry		
13. Where are primary international competitors located (City and Country)? _____	DNA/K	Dcl
14. Is overseas production by domestic competitors: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing Please explain: _____ _____	DNA/K	Dcl
15. Is merger, acquisition or divestiture activity in your industry: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing	DNA/K	Dcl
16. In your industry, is production: <input type="checkbox"/> Under capacity <input type="checkbox"/> Balanced <input type="checkbox"/> Over capacity	DNA/K	Dcl
17. Do you anticipate any federal, state, or local legislation changes that will adversely affect your business in the next five years: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what changes? _____ How will they affect the company? _____ _____	DNA/K	Dcl

18. Do you anticipate any federal, state, or local legislation changes that will benefit your business in the next five years: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what changes? _____ How will they affect the company? _____ _____	DNA/K Dcl
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Industry Notes

Management

19. Has the company's ownership changed in the last 18 months, or do you anticipate a change: <input type="checkbox"/> Changed <input type="checkbox"/> Change Pending <input type="checkbox"/> No If changing, please explain: _____ _____ _____	DNA/K Dcl
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Has the company's top management changed or is it expected to change in the next 18 months: <input type="checkbox"/> Changed <input type="checkbox"/> Change Pending <input type="checkbox"/> No If changing, please explain: _____ _____ If changed, what impact will this/these changes have on the local operation? _____ _____	DNA/K Dcl
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20. Are the projected employment needs for this facility: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing	DNA/K Dcl
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21. What are the community's strengths as a place to do business? _____ _____	DNA/K Dcl
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22. What are the community's weaknesses as a place to do business? _____ _____	DNA/K Dcl
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23. Are there any barriers to growth in this community? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what? _____ _____	DNA/K Dcl
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24. Does the attitude among executives at corporate headquarters toward this community as a place to do business differ from local management: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please explain? _____ _____ _____	DNA/K Dcl
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ON-SITE VISIT FORM 3.1

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8.12.06

25. Are there any reasons the community may not be considered for future expansion? <input type="checkbox"/>Yes <input type="checkbox"/> No If yes, please explain? _____ _____	DNA/K	Dcl
26. Are there suppliers or service providers that the company would like to have located closer to this facility: <input type="checkbox"/>Yes <input type="checkbox"/> No If yes, product/service, company, and current location? _____	DNA/K	Dcl
<i>Management Notes</i>		

Workforce										
	Low	1	2	3	4	5	6	7	High	
27. How do you rate the availability of workers in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
28. How do you rate the quality of workforce in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
29. How do you rate the stability of workforce in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
30. As compared to other company facilities, how would you rate productivity in this facility:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
31. Is the company experiencing recruitment problems with any employee positions or skills: <input type="checkbox"/>Yes <input type="checkbox"/> No If yes, what problems, positions, skills? _____ _____									DNA/K Dcl	
32. Is the number of unfilled positions: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing Estimated number of unfilled positions today: _____ Approximately when will these jobs be filled? _____ (mm/yy)									DNA/K Dcl	
33. Have you experienced or do you anticipate any significant changes in the make-up of your workforce? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how did/will you deal with this change? _____ _____									DNA/K Dcl	
34. Are primary recruitment problems limited to: <input type="checkbox"/>Community <input type="checkbox"/>Industry									DNA/K Dcl	
35. Is company investment in employee training: <input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing <input type="checkbox"/> None If investing in employee training, what percentage of the training budget is for:									DNA/K Dcl	
	New job skills training _____%									
	Proficiency training _____%									
	Remedial skill training _____%									
<i>Workforce Notes</i>										

Technology										
36. Is there new technology emerging that will substantially change either your company's primary product/service or how it is produced?							<input type="checkbox"/> Yes <input type="checkbox"/> No		DNA/K Dcl	
Comments: _____ _____										
37. Compared to your business segment, how would you rank your company's use of technology for:										
Use	Low						High			
Internal office operations	1	2	3	4	5	6	7	DNA/K Dcl		
Production	1	2	3	4	5	6	7	DNA/K Dcl		
Sales and inventory management	1	2	3	4	5	6	7	DNA/K Dcl		
Marketing	1	2	3	4	5	6	7	DNA/K Dcl		
Comments: _____ _____										
38. Compared to your business segment, rate your company's technology investment:							Low 1 2 3 4 5 6 7 High		DNA/K Dcl	
Comments: _____ _____										
39. Is the community's technology infrastructure adequate for your company's growth plan?							<input type="checkbox"/> Yes <input type="checkbox"/> No		DNA/K Dcl	
Comments: _____ _____ _____										
Technology Notes										

Utility Services												
40. How is the consumption of the following utilities changing?					41. Please rate your satisfaction with your utility providers							
<u>Type of Utility</u>	I*	S*	D*		Low				High			
					1	2	3	4	5	6	7	
A) Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
B) Sewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
C) Natural Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
D) Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
E) Telecom (voice)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
F) Cellular service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
G) Internet access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
H) Internet speed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
* I = Increasing, S = Stable, D = Decreasing												

ON-SITE VISIT FORM 3.1

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8.12.06

For any utility services with satisfaction rated 3 or below, please comment:	
Utility service issue 1 (circle one) A B C D E F G H	Low Rank Comment 1: _____ _____ _____
Utility service issue 2 (circle one) A B C D E F G H	Low Rank Comment 2: _____ _____ _____
Utility service issue 3 (circle one) A B C D E F G H	Low Rank Comment 3: _____ _____ _____
Utility Notes	

Community Services								
42. Please rate the quality of the following services provided by the community on a scale of 1 to 7, 7 being high.								
	Low						High	
	1	2	3	4	5	6	7	
A) Police protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
B) Fire protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
C) Ambulance paramedic service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
D) Health care services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
E) Child care services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
F) School (K-12)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
G) Tech college	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
H) Community college	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
I) College(s) and university(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
J) Public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
K) Traffic control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
L) Streets and roads (local)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
M) Highways (State & Federal)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
N) Airline passenger service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
O) Air cargo service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
P) Trucking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl

ON-SITE VISIT FORM 3.1

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8.12.06

42. Continued	1	2	3	4	5	6	7	
Q) Property tax assessment (fair & equitable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
R) Zoning changes and building permits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
S) Regulatory enforcement (fair & equitable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
T) Community planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
U) Community services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
V) County services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
W) Chamber of Commerce or business association	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
X) Economic development organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DNA/K Dcl
For services with satisfaction rated 3 or below, please comment:								
Service issue 1 (circle one) A B C D E F G H I J K L M N O P Q R S T U V W X	Low Rank Comment 1: _____ _____ _____							
Service issue 2 (circle one) A B C D E F G H I J K L M N O P Q R S T U V W X	Low Rank Comment 2: _____ _____ _____							
Service issue 3 (circle one) A B C D E F G H I J K L M N O P Q R S T U V W X	Low Rank Comment 3: _____ _____ _____							
Community Service Notes								

Do you have any other comments you would like to share?

Thank you for your assistance.