



Business Retention & Expansion Report October, 2008

Partnership for Community Growth & Development
9 S. Leonard
Liberty, Missouri 64068
816/407-9242
www.thinklibertymo.com

*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.*

You're free to succeed



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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 – businesses visited this year continue to report their business is growing. Interesting is the indication that they believe their market is more local than last year which was regional. Through the use of a new scatter graph, we can pinpoint those companies with the highest opportunity for growth and also those at highest risk of leaving. Identifying those companies will tell us who we need to track and assist.

LOCATION – Liberty’s location in the Kansas City metro area is a major factor for the business community. This satisfaction rating held steady this year - just over 83% of the businesses visited are highly satisfied with their Liberty location. Two companies are listed with a satisfaction rating less than average. The graph containing this rating, comparing it to previous years, is in the report.

WORKFORCE – workforce rankings improved across the board. With a little more improvement to availability, our workforce rankings could all be above 6 on the 7-point scale. Liberty businesses’ workforce still ranks much higher than the national and regional averages. For a second year, not a single business ranked its workforce below average in stability and productivity. The high workforce rankings once again are related to the business community’s high opinion of the Liberty School District - 6.71 rating on the 7-point scale.

CONCERNS – although the companies were not experiencing mergers or acquisitions, they indicated that they believe that type of activity is on the rise. Businesses are feeling less confident. We again heard about traffic. Not only was it listed as a community weakness but also as a barrier to growth and expectedly, the state of the general economy was also noted as a concern.

FOLLOW-UP – the Partnership experienced an increased amount of requests for assistance (75 YTD). That’s a good thing! It means that the business community is beginning to see the Partnership as the ‘go to’ organization for questions, concerns and connections. Follow-up activities ranged from workforce assistance to financing assistance to referral assistance.

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 quick resolution.

This report is part of the Partnership’s contract for economic development services with the City of Liberty. Questions or comments about it should be directed to Alicia Stephens, Executive Director of the Partnership for Community Growth & Development. Special thanks to our investors, the City of Liberty, our Business Retention Committee, survey participants for their support and to **KCP&L 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 2008 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 30 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 continues.

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 700 businesses in Liberty. The random selection was done by the Partnership’s Business Retention Committee. Business lists were divided among the committee members who randomly selected businesses to invite to participate. The Committee developed a list of 128 potential visits with whom initial contact was made.

The 2008 Liberty interviews represent 30 total businesses and 5,920 employees.

The retail visits are reported separately.

The 2008 regional statistics are based on 137 businesses representing 25,026 employees.

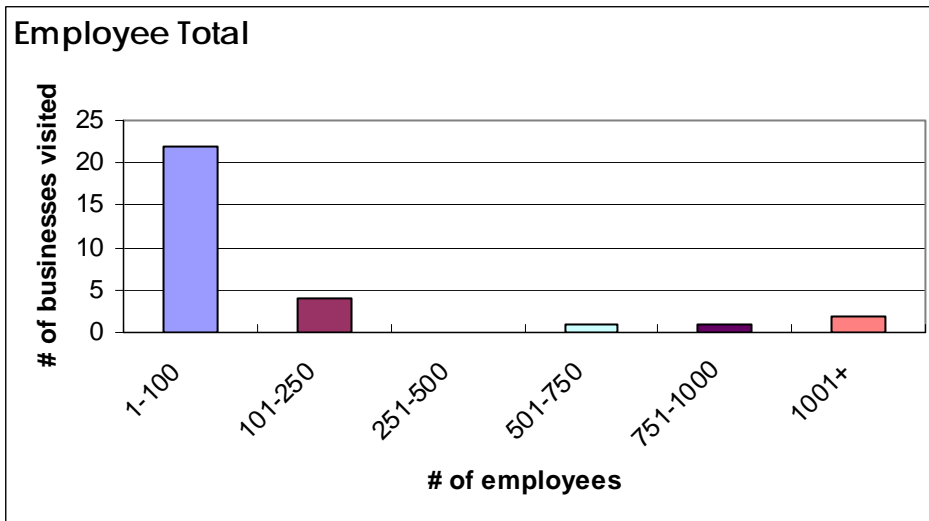
The 2006 national information is based on 11,000 interviews and 1.3 million employees.

New this year, are visits specifically to retail businesses; those visits were completed by the Liberty Area Chamber. A brief synopsis is at the end of this report. All non-retail interviews were completed by Alicia Stephens, Executive Director of the Partnership.

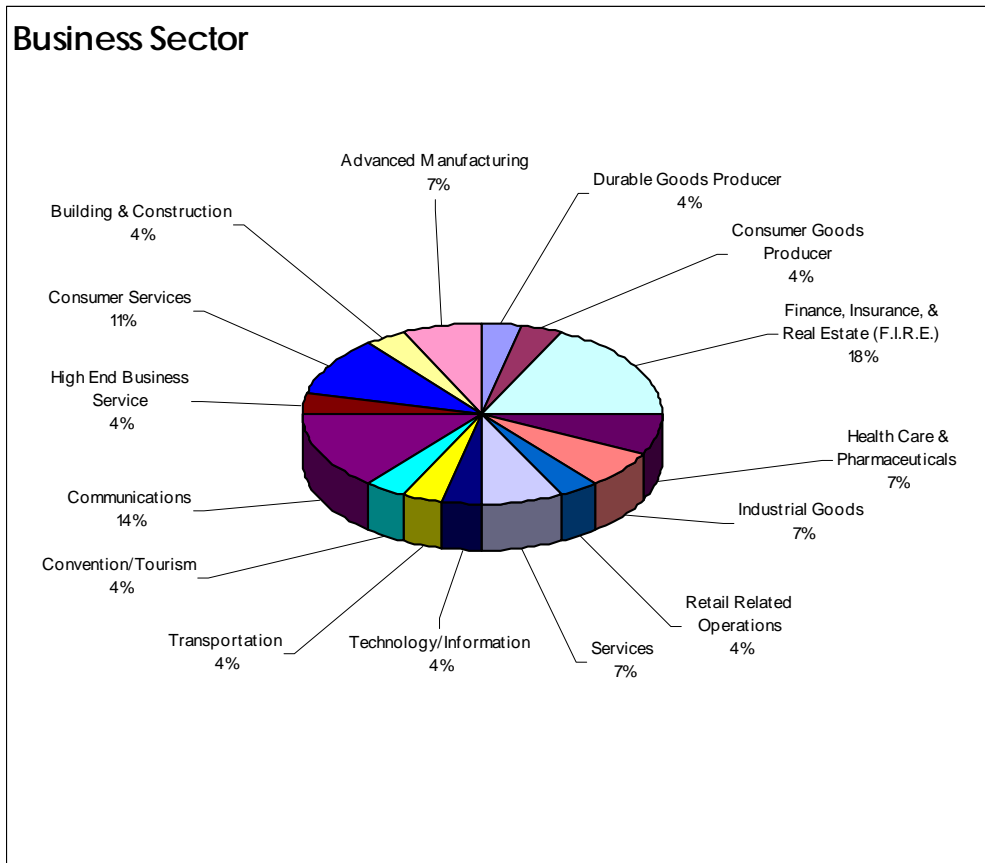
Confidentiality is a firm aspect of the Partnership’s business retention program.

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



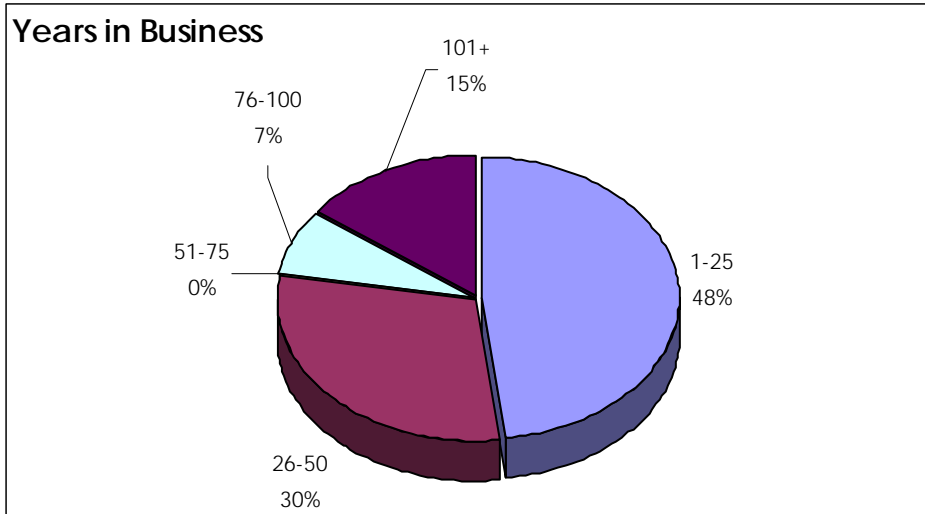
This is a breakdown of the interviews by employee size. The majority of the businesses visited were small businesses with less than 250 employees.



Many business sectors were represented as seen in the graph.

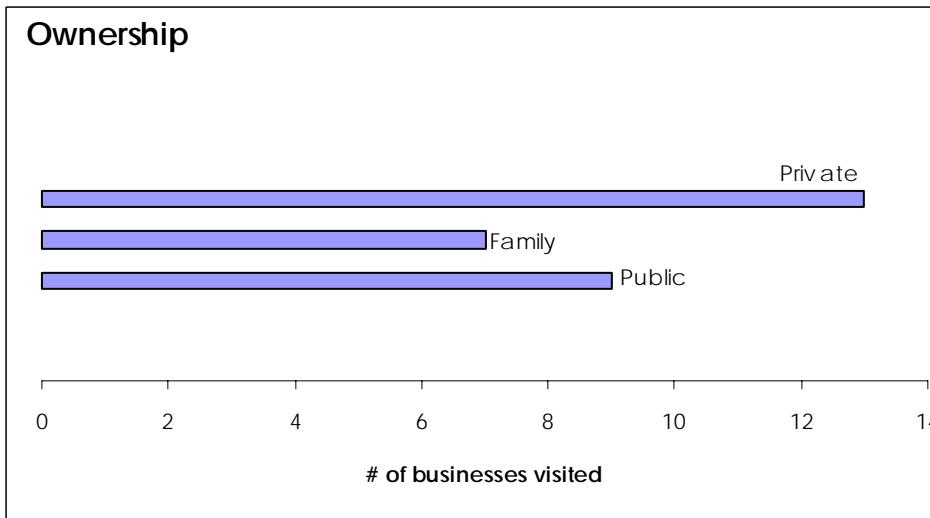
The interviews completed this year were a good cross-section of the Liberty business community.

Characteristics of the participating companies

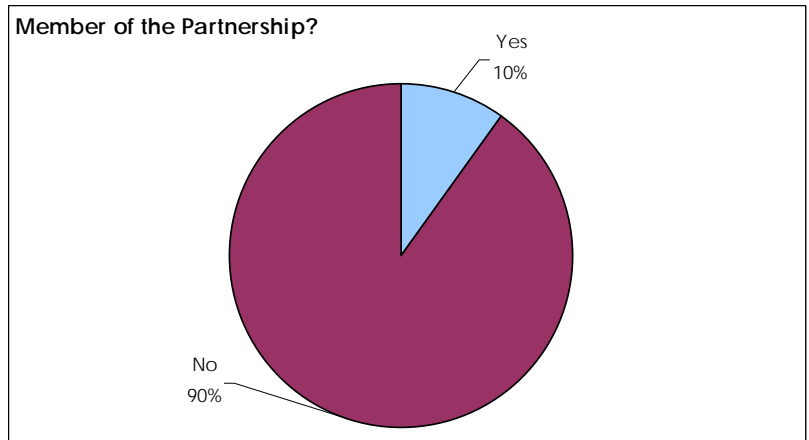


Almost half of the businesses visited have been in business less than 25 years.

It's remarkable that Liberty has businesses that have been operating for more than a half a century, even a century.



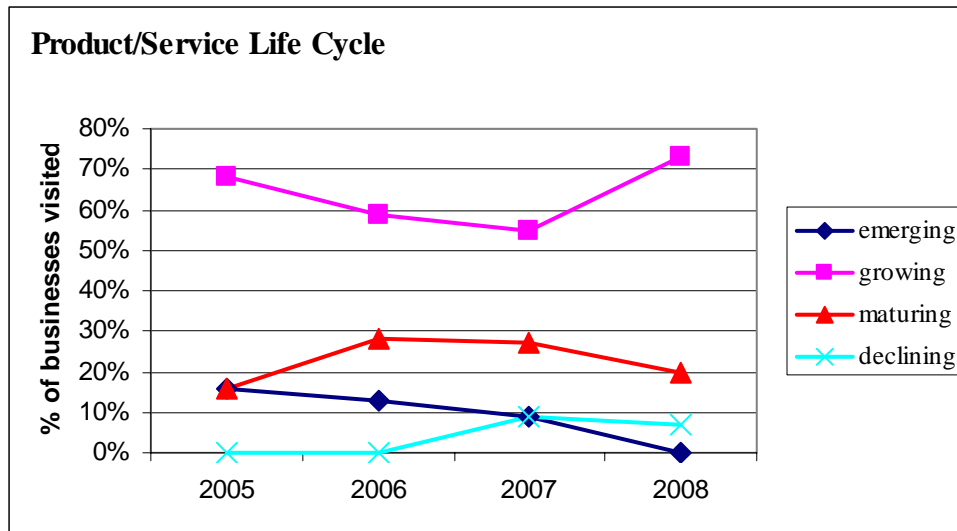
Very few of the businesses visited are members/investors in the Partnership.



KEY FINDINGS

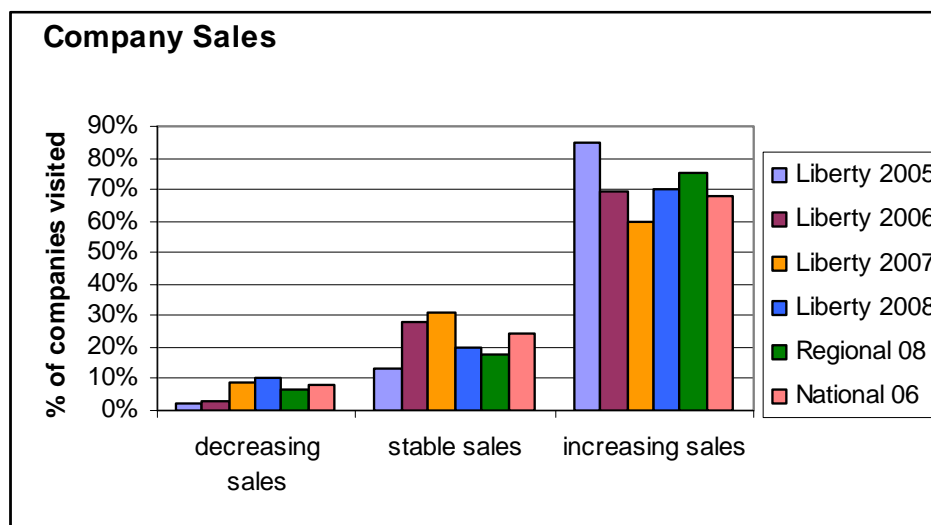
Growth is a key factor to track in many different ways. Contrary to the news we hear, the visits this year show an increase in those companies that are growing AND a decrease in business decline.

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



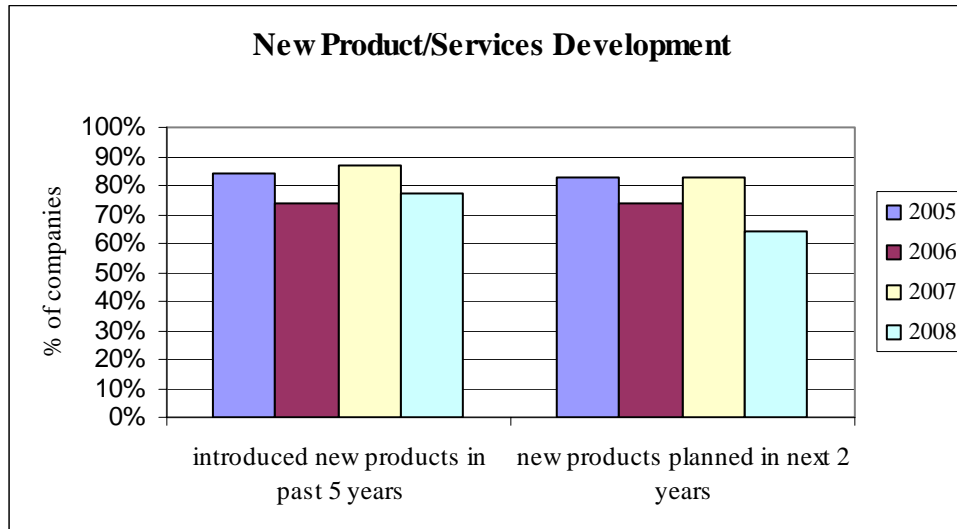
The good news is seen in the growing indicator and in the declining trend. However, attention is needed for start-ups/emerging new businesses.

The number of Liberty companies which experienced decreased sales was slightly higher this year. The number of companies with stable sales was significantly lower. It would appear that the 10% difference in stable sales was picked up in increasing sales. The comparison here to the region is more meaningful than the national stats of 2006.



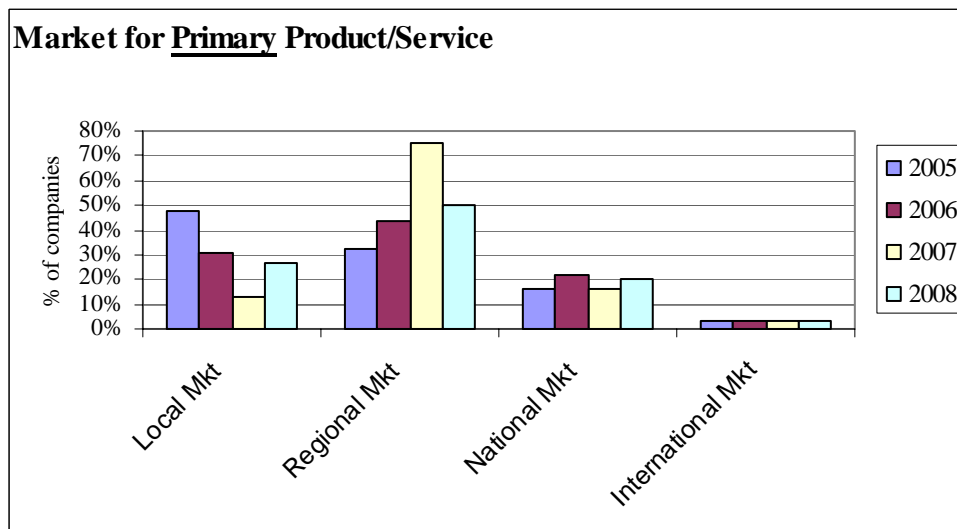
Key Findings

Growth continued



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.

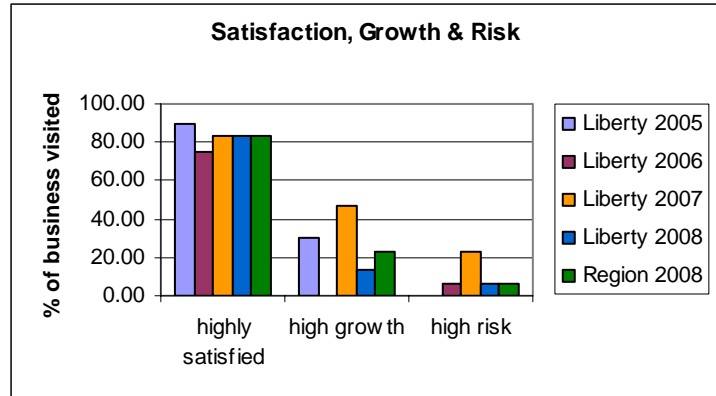
The following graph shows that the companies do most of their business in the region. It means more revenue is coming from outside the local market. However, the ratio between local and regional markets shrunk this year.



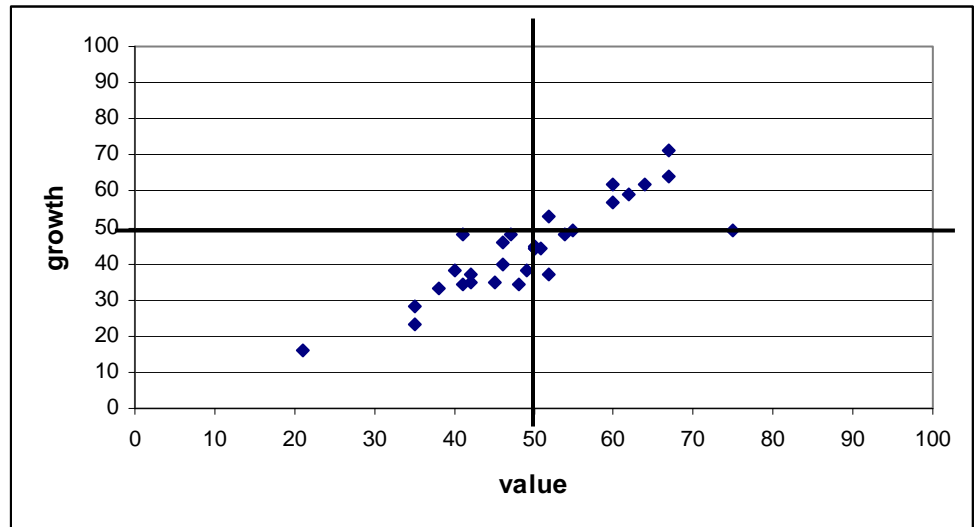
Key Findings continued

The software used in the business retention program calculates risk, growth and satisfaction ratings for the companies. It considers many data points in its calculation. 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.

In the analysis of these criteria, we look for high growth companies to help them expand and high risk companies which may be leaving the community. We focus our attention on those that have potential for expansion.



The scatter graph shows which companies we'll want to watch and assist. There are about seven companies with a growth rate higher than 50 and are calculated as a high value in the community.



The analysis provided by the software developer notes:

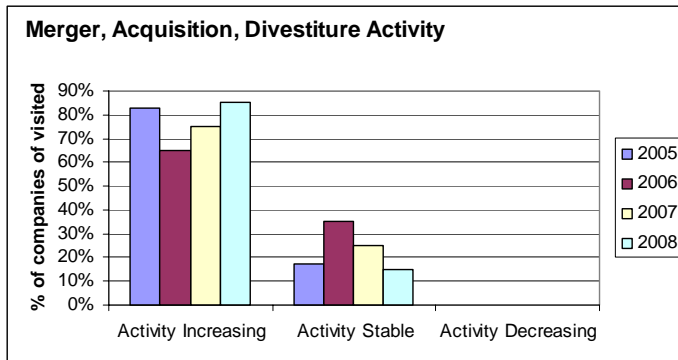
If the majority of the dots are in the upper right-hand quadrants, the community has a strong cluster of high value/high growth companies.

If the majority of the dots are in the lower left-hand quadrant, the community has a weakness due to dominance of low value/low growth companies.

If the dots are evenly distributed, the community's economic engine is well-balanced.

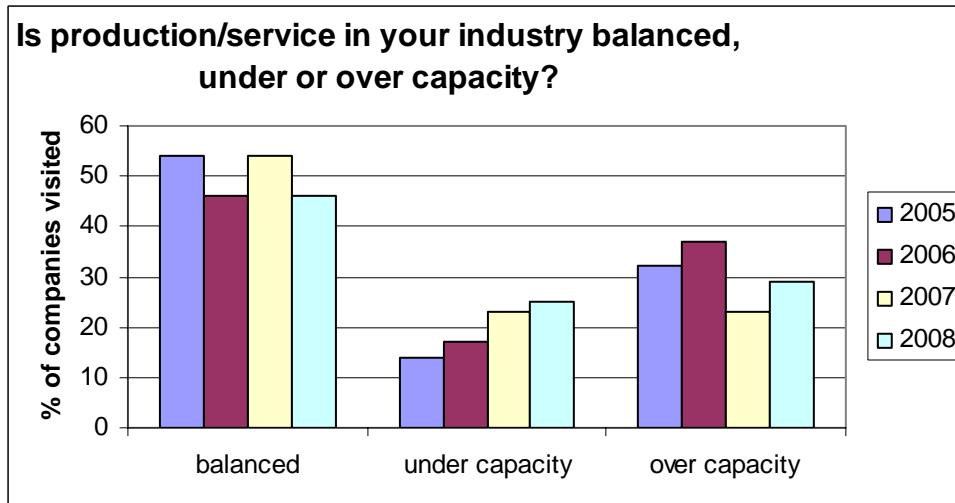
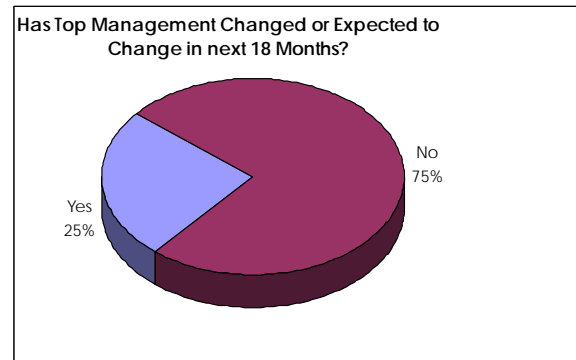
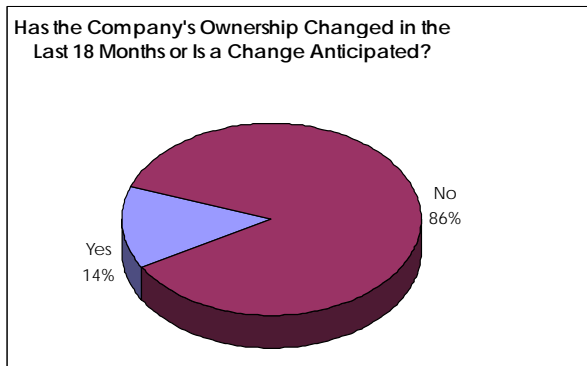
Growth continued

In addition to market questions, the interviewee is asked an open-ended question about what they consider the company's **greatest achievement** in the last 5 years. Slightly more than half of those visited noted their achievement dealt with sales growth, market share and the ability to compete.



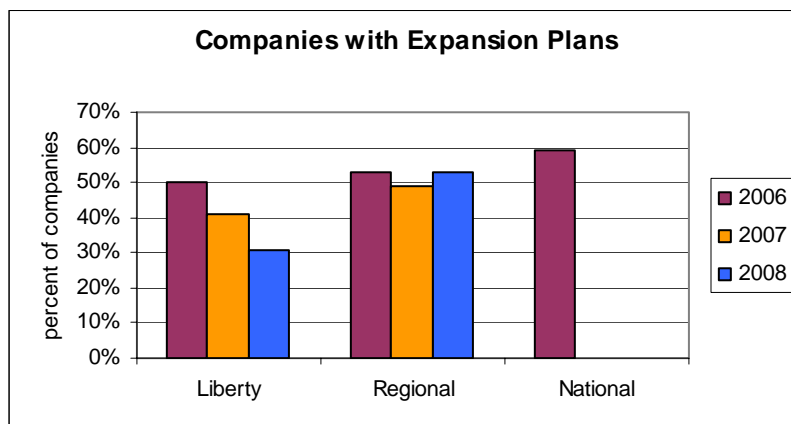
An interview question asks about merger, acquisition and divestiture activity in their specific business sector. The upward trend in such activity shows that although businesses are pleased with their own sales growth, they continue to watch their industry sector and believe the activity is on the upswing.

And even though the activity is increasing in their sector, they do not indicate that it's taking place in their own business as indicated in the following two graphs. These graphs have remained stable over the years.



This graph shows that our businesses have great potential for growth and expansion. The center section of bars indicates that there is an upward trend amenable to business expansion, from 14% in 2005 to 25% this year.

Growth continued



Investment forecast

A little different from years past, is that one-third of the businesses visited plan to expand, but the timeframe for those expansions is uncertain. Most indicated that they have a business plan that includes expansion but could not provide square footage, number of new jobs or the amount of the investment. Liberty companies'

expansion plans continue to be lower than the region. Cautiously optimistic best describes the environment. This could also be due to the fact that most of the Liberty companies interviewed would be considered small business.

The 2008 Liberty interviews represent 30 total businesses and 5,920 employees.

The retail visits are reported separately.

The 2008 regional statistics are based on 137 businesses representing 25,026 employees.

The 2006 national information is based on 11,000 interviews and 1.3 million employees.

The Partnership will host its third annual awards event in November, 2008. The purpose of the event is to honor companies which have made new investments in their operations. Community Growth Awards will be presented to twelve businesses.

Barriers to growth

For the fourth year, the most frequently mentioned barrier to growth was **traffic-related**. After the November, 2008 election and the outcome of the sales taxes ballot issues, the Partnership will keep business visits up to date on infrastructure plans.

The economy in general was noted as a growth deterrent including financial risks and the mortgage crisis.

Key findings

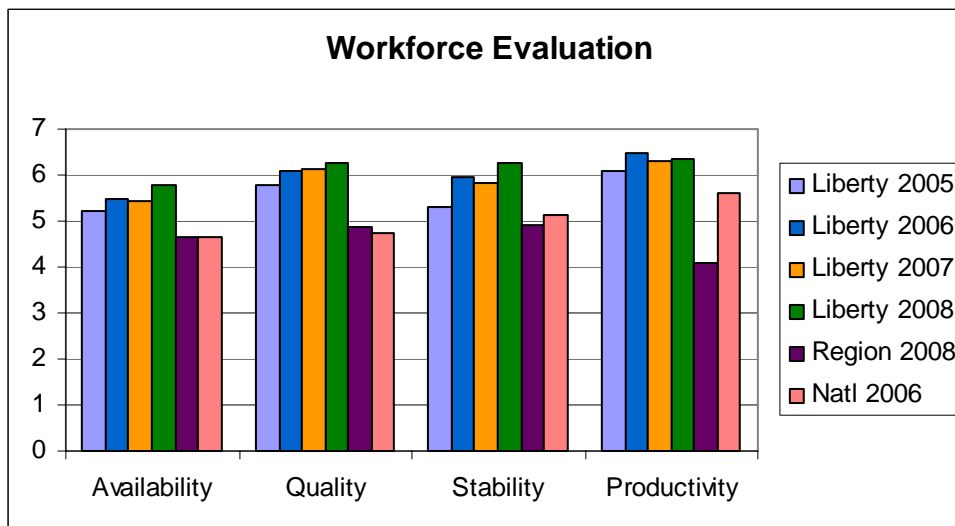
Workforce reports continue to be great news! Since the inception of the business visits in Liberty, businesses continue to give our workforce high marks. Employment costs are among the largest costs of businesses' operations and in Liberty businesses give their workforce rankings better than regional 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 slightly each year,
- is more than a full point ahead in comparisons with the region and nation,
- and the overall quality score is 6.24.

Remember that 7 would be a perfect score. The Partnership will continue to tout our workforce in 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 2008 Liberty interviews represent 30 total businesses and 5,920 employees.

The 2008 regional statistics are based on 137 businesses representing 25,026 employees

The retail visits are reported separately.

The 2006 national information is based on 11,000 interviews and 1.3 million employees.

Proof from our recent recruitment successes.....

"Because of Liberty's thriving workforce, strong work ethic, support for small business and favorable work environment, it was an ideal location for us to start our operation and grow our business."

John Tankesley, Plant Manager, Piston Automotive

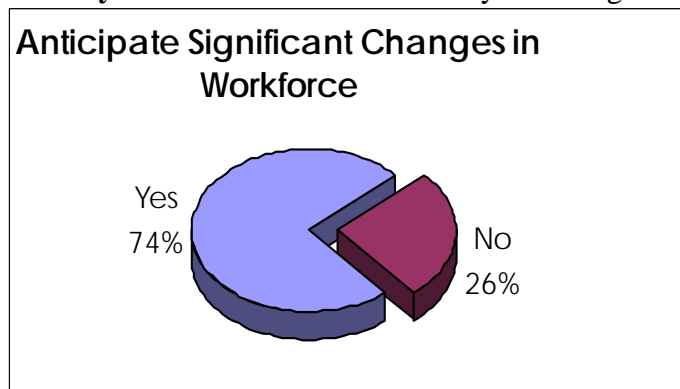
"Liberty's close proximity to major manufacturers was a factor because we felt it would provide candidates for our workforce with technical expertise in our processes. The Partnership has been instrumental in finding resources needed, and we've had a very good experience with the available workforce." **Jerry Brown, Operations Manager, Vari-Form US Holdings Inc.**

Workforce continued

Availability of workers increased from 5.43 to 5.79, which is a good number on the seven-point scale and well above national and regional ratings.

- Of the businesses that indicated recruitment difficulties, all but one noted that the difficulties are industry-wide not just in our community. The one noted that their recruiting difficulties are community-based is due to the location of their facility.

Stability of the workforce consistently ranks high. Especially when you consider this graph.



74% of the businesses expect significant changes in their workforce! The changes noted include maturation of the workforce and ethnic diversity.

For comparison the regional percent anticipating changes in the workforce was 81%.

The **home locations of employees** were all over the metro area. As a matter of fact, Lear Corporation which closed its doors in July had very few Liberty citizens working at the plant. Of course, that could be due to the ever-decreasing number of employees remaining over the last few years.

Interviewees still indicate that their employees live in Gladstone, Kansas City, Concordia, Grain Valley, Excelsior Springs, Holt, Kearney, Cameron, Independence, Blue Springs, Polo, Richmond and, of course, Liberty. The large number of communities represented is good news. This means that in business attraction, we can indeed say that the labor pool from which to attract employees includes a 30-40 minute commute.

Key findings

Public services

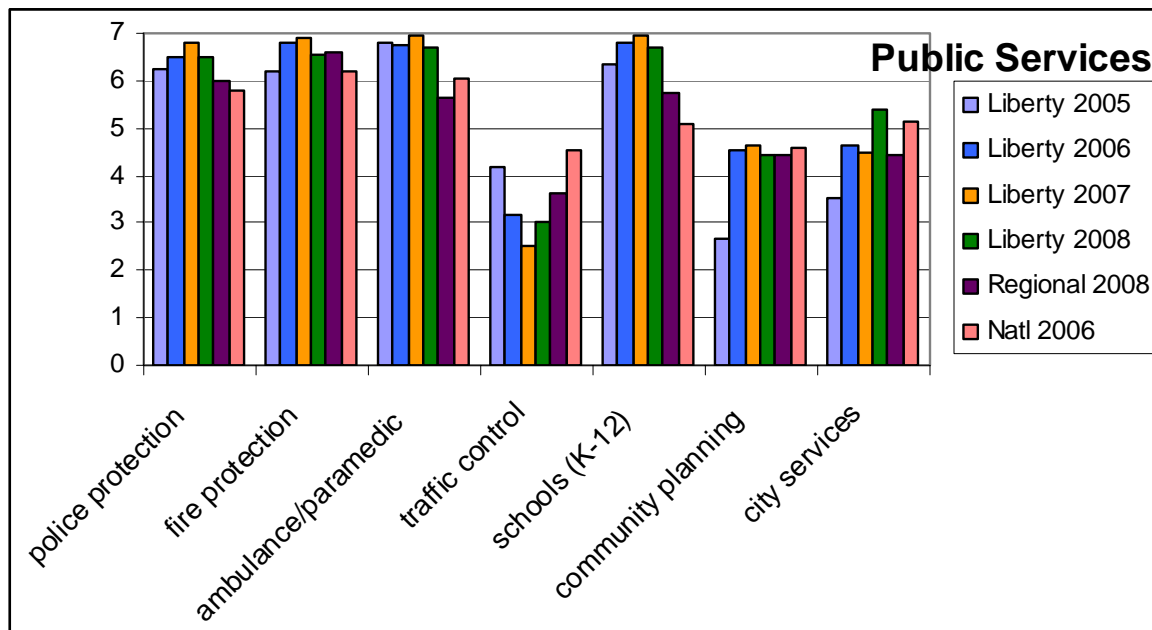
Public services ratings are requested in the survey. Like the workforce rankings, a rating of 1 is the lowest (poor) and a perfect score is a 7.

	Liberty 2005	Liberty 2006	Liberty 2007	Liberty 2008	Regional 2008	National 2006
police protection	6.23	6.52	6.82	6.52	6.00	5.81
fire protection	6.20	6.78	6.89	6.56	6.59	6.20
ambulance/paramedic	6.78	6.74	6.96	6.68	5.64	6.06
traffic control	4.20	3.19	2.50	3.04	3.63	4.54
schools (K-12)	6.33	6.80	6.93	6.71	5.76	5.09
community planning	2.69	4.54	4.61	4.41	4.41	4.60
city services	3.53	4.63	4.46	5.39	4.43	5.15

Most of the services dropped around one-quarter of a point which is insignificant. And it is important to consider the score on the 7-point scale. Traffic control improved slightly which we attribute to the Partnership's efforts to inform the business community about the light synchronization. "Other" city services showed an improvement; "other" services includes things such as snow removal.

Consider the good news. Even with a one-quarter point decrease emergency services – police, fire protection, ambulance/paramedic – still get high marks. Comments included fast response time. **The Liberty School District achieved a near-perfect score at 6.71!**

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.

- Every year of the reporting of the business visits, healthcare issues have been noted as a concern - such as costs, Medicare/Medicaid cuts and insurance reform.
- For the third year, the cost of fuel was again noted by businesses as a concern.
- And for the first time, concerns were indicated regarding the economy including the banking, mortgage and foreclosure crises.

The above information will be provided to our state and federal legislators.

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 less frequently (7%) compared to last year (9%), which is significantly lower than the first year's visits (65%).
- **Transportation weakness was the most frequently mentioned concern.** Comments included traffic congestion and downtown parking.

Community Strengths

- A **stable economy/positive climate** was 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 **quality of life (#2) and location (#3)** flipped positions this year. As seen in the public services graph, quality of life characteristics such as public safety, healthcare and education are continuously close to the highest rating.
- 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 and the KCI Airport.

Retail synopsis

With the assistance of the Liberty Area Chamber of Commerce, the following is a brief look at the seven retail visits which were completed. All retail visits were Liberty businesses. We do not have trend information for this sector as this is the first year we've implemented software specific to retail.

- They have been in business less than 5 years (4) and more than 15 years (3)
- 3 of the retailers noted that their trade area is less than 5 miles; the other 4 were >16 miles
- **Business Growth**
 - 5 indicated that their greatest achievement is sales related i.e. market share, sales growth, customer retention
 - 57% said their sales are increasing, about 29% are stable and 14% are decreasing
 - Almost half have high growth potential, none indicated a risk of leaving
 - 3 indicated expansion or upgrade plans
- **Customer statistics**
 - mix is mostly families
 - average age of their customers is 25-50
 - average customer makes between \$35,000 – \$100,000 annually
 - customers visit at least weekly
- **Workforce statistics**
 - These businesses employ 334 full-time equivalents
 - Average age of the retail workforce – 28.83
 - 49% of them are full-time, head of household
 - Workforce Availability on a 7-point (excellent) scale is 5.60
 - Workforce Quality on a 7-point scale is 4.5
 - Workforce Stability on a 7-point scale is 5.2
 - Workforce Productivity on a 7-point scale is 5.2
- **Public services rankings** (all based on a 7-point (excellent) scale)
 - Police – 6.0
 - Fire – 6.5
 - Ambulance – 6.17
 - Traffic control – 4.5
 - Schools – 6.5
 - Universities (William Jewell) – 6.4
 - Sign regulations – 4.3

Conclusions/Recognitions

After our fourth year of business visits, the data provides an excellent base for trends. The business retention program is continuous, especially with necessary follow-up. The opportunities for the Partnership to assist businesses were significant in number and in relationship building.

Our plans for 2009 must include following up with businesses that have risk ratings greater than 50. We will work to find resources to assist them with their challenges. The other side of that effort is identifying the businesses with high growth rate and helping them achieve more growth, expansion and continued success.

The Business Retention Committee is committed to increasing the number of retail visits in 2009.

This report confirms that Liberty has continued growth potential, even though there was a sense of caution. The City, the Partnership and its business partners have the opportunity to continue to improve our economic well-being.

We should all consider ourselves promoters of Liberty. Here are some sound-bytes to promote Liberty as a perfect business location for business suppliers, professional colleagues and neighbors:

- Liberty School District gets a high rating from the business community;
- Liberty's workforce 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 quality of life is unwavering.

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 KCP&L 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.

Partnership for Community Growth & Development
9 S. Leonard
Liberty, MO 64068
816/407-9242
www.thinklibertymo.com

Attachment A

Survey Tools

To be filled out by the interviewer — Information is confidential

8.12.06

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

To be filled out by the interviewer — Information is confidential

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

To be filled out by the interviewer — Information is confidential

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

To be filled out by the interviewer — Information is confidential

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.

Attachment B

Retail Survey Tool

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

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Workforce									
	Low						High		
15. How do you rate the availability of workers in this area:	1	2	3	4	5	6	7	DNA/K Dcl	
How do you rate the quality of the workforce in this area:	1	2	3	4	5	6	7	DNA/K Dcl	
How do you rate the stability of the workforce in this area:	1	2	3	4	5	6	7	DNA/K Dcl	
How would you rate productivity in this facility:	1	2	3	4	5	6	7	DNA/K Dcl	
16. What is the average age of employees? _____								DNA/K Dcl	
17. Approximately what percentage of full-time employees are heads of households?	None	0-20	21-40	41-60	61-80	80-100	DNA/K Dcl		
18. Are projected employment needs for this facility:	<input type="checkbox"/> Increasing			<input type="checkbox"/> Stable		<input type="checkbox"/> Decreasing		DNA/K Dcl	
19. Is the number of unfilled positions:	<input type="checkbox"/> Increasing			<input type="checkbox"/> Stable		<input type="checkbox"/> Decreasing		DNA/K Dcl	
Approximate number of unfilled positions today: _____									
What positions are most difficult to fill and why? _____									
20. Do you "import" employees from outside the normal employee drive range?				<input type="checkbox"/> Yes		<input type="checkbox"/> No		DNA/K Dcl	
If yes, from where? _____									
What time of year? _____									
What position(s): _____									
21. 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		DNA/K Dcl	
If yes, how did/will you deal with this change? _____									

[Interviewer (circle one each): Was the comment: Positive, Negative, Both]									
22. Does the business provide health and retirement benefits?	<input type="checkbox"/> Health			<input type="checkbox"/> Pension		<input type="checkbox"/> 401K/Profit Sharing		<input type="checkbox"/> None	DNA/K Dcl
If benefits: <input type="checkbox"/> Full time <input type="checkbox"/> Part-time <input type="checkbox"/> Both									
If health benefit, what percentage of health benefit are covered by the employer? Individual _____ % Family _____ %									
Comments? _____									

23. Does the company provide on-the-job or outside training?	<input type="checkbox"/> On-the-job			<input type="checkbox"/> Outside		<input type="checkbox"/> Both		DNA/K Dcl	
If using outside training, what percentage of training is provided by others? _____ %									
If using outside providers, what training provider(s) are used? Comments? _____									

If no outside training, would you like information about training providers?				<input type="checkbox"/> Yes		<input type="checkbox"/> No		DNA/K Dcl	
24. Is company investment in employee training:	<input type="checkbox"/> Increasing			<input type="checkbox"/> Stable		<input type="checkbox"/> Decreasing		<input type="checkbox"/> None	DNA/K Dcl
Workforce Notes									

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

10.15.08

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Community		
25. What are the community's strengths as a place to do business? _____		DNA/K Dcl

26. What are the community's weaknesses as a place to do business? _____		DNA/K Dcl

27. What type of businesses/products are your customers looking for that they are not finding in this community? _____		DNA/K Dcl

28. Have there been any changes in the community or neighborhood impacting your business in the last two (2) years (demographic, physical, competition)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
Comments: _____		

[Interviewer (circle one each): Is the comment about Community, Neighborhood, Both Was the comment: Positive, Negative, Both]		
29. Do you anticipate any community or neighborhood changes?	<input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
Comments: _____		

[Interviewer (circle one each): Is the comment about Community, Neighborhood, Both Was the comment: Positive, Negative, Both]		
30. Has your attitude toward doing business in this community changed during the last two (2) years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
If Yes, how has your attitude changed? (Interviewer, Circle one – Positive, Negative, Both)		

31. Does your company have any difficulty securing needed business services in the area?	<input type="checkbox"/> Yes <input type="checkbox"/> No	DNA/K Dcl
If yes, what services? _____		

32. 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	DNA/K Dcl
If yes, what changes? _____		
How will they affect the company? _____		

33. 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	DNA/K Dcl
If yes, what changes? _____		
How will they affect the company? _____		

Community Notes		

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

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Technology												
34. Is there new technology emerging that will substantially change your company's business?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	DNA/K	Dcl						
<i>Comments:</i> (Circle one – Positive, Negative, Both) _____												
35. Are there new technology-based business opportunities emerging for your company?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	DNA/K	Dcl						
<i>Comments:</i> _____												
36. 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			
Operations/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			
<i>Comments:</i> _____												
37. Compared to your business segment, is your company's technology investment:				Below Average				Above Average				
				1	2	3	4	5	6	7	DNA/K	Dcl
<i>Comments:</i> _____												
38. Is the community's technology infrastructure adequate for your company's growth plan?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	DNA/K	Dcl						
<i>Comments:</i> _____												
<i>Technology Notes</i>												

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

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Management	
39. In the past 18 months has the company's ownership or senior management changed or are changes expected?	
Changed ownership/senior management <input type="checkbox"/> Yes <input type="checkbox"/> No Planned Change <input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl Comments? _____ _____	
Has the local manager changed or is a change expected? <input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl Comments? _____ _____	
40. Is the owner or one of the owners involved in the day-to-day operations of the business?	<input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl
41. The top 20% of your best clients represent approximately what percent of your sales:	<input type="checkbox"/> <15% <input type="checkbox"/> 16-35% <input type="checkbox"/> 36-55% <input type="checkbox"/> 56-75% <input type="checkbox"/> >76% DNA/K Dcl
42. Is the company's advertising/promotion budget	<input type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Decreasing <input type="checkbox"/> None DNA/K Dcl
43. Does your company invest time/money in a cooperative marketing effort (advertising, events, promotions, etc.) with other area businesses?	<input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl
Comments? _____ _____	
44. Have there been any changes in distributor/supplier relationships which have negatively impacted your business in the last two (2) years?	<input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl
Comments? _____ _____	
Are any distributor/supplier changes anticipated? <input type="checkbox"/> Yes <input type="checkbox"/> No DNA/K Dcl Comments? _____ _____	
<i>Management Notes</i>	

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

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Community Service										
45. Please rate the quality of the following services provided by/in the community on a scale of 1 to 7.										
				Low					High	
A) Police protection	1	2	3	4	5	6	7			DNA/K Dcl
B) Fire protection	1	2	3	4	5	6	7			DNA/K Dcl
C) Ambulance paramedic service	1	2	3	4	5	6	7			DNA/K Dcl
D) Streetscape maintenance	1	2	3	4	5	6	7			DNA/K Dcl
E) Streets and roads (local)	1	2	3	4	5	6	7			DNA/K Dcl
F) Highways (state/federal)	1	2	3	4	5	6	7			DNA/K Dcl
G) Traffic control	1	2	3	4	5	6	7			DNA/K Dcl
H) Public transportation	1	2	3	4	5	6	7			DNA/K Dcl
I) Airline passenger service	1	2	3	4	5	6	7			DNA/K Dcl
J) Health care services	1	2	3	4	5	6	7			DNA/K Dcl
K) Spousal employment	1	2	3	4	5	6	7			DNA/K Dcl
L) Child care	1	2	3	4	5	6	7			DNA/K Dcl
M) Community college/tech college	1	2	3	4	5	6	7			DNA/K Dcl
N) College(s) and university(ies)	1	2	3	4	5	6	7			DNA/K Dcl
O) Housing	1	2	3	4	5	6	7			DNA/K Dcl
P) Schools (K–12)	1	2	3	4	5	6	7			DNA/K Dcl
Q) Property tax assessment (fair & equitable)	1	2	3	4	5	6	7			DNA/K Dcl
R) Zoning changes and building permits	1	2	3	4	5	6	7			DNA/K Dcl
S) Regulatory enforcement (fair & equitable)	1	2	3	4	5	6	7			DNA/K Dcl
T) Sign regulations	1	2	3	4	5	6	7			DNA/K Dcl
U) Community planning	1	2	3	4	5	6	7			DNA/K Dcl
V) Chamber of Commerce or business assoc.	1	2	3	4	5	6	7			DNA/K Dcl
W) Economic Development Organization	1	2	3	4	5	6	7			DNA/K Dcl
X) Visitors Bureau	1	2	3	4	5	6	7			DNA/K Dcl
For services with satisfaction rated 3 or below , please comment:										
Service issue 1 (<i>circle one</i>) 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 (<i>circle one</i>) 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 (<i>circle one</i>) 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										

CRTS ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

10.15.08

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Utility Services										
46. Please rate your satisfaction with your utility services.										
Type of Utility	Low		Satisfaction					High		
A) Water	1	2	3	4	5	6	7	DNA/K	Dcl	
B) Sewer	1	2	3	4	5	6	7	DNA/K	Dcl	
C) Solid waste removal	1	2	3	4	5	6	7	DNA/K	Dcl	
D) Natural gas	1	2	3	4	5	6	7	DNA/K	Dcl	
E) Electric	1	2	3	4	5	6	7	DNA/K	Dcl	
F) Telecom (voice)	1	2	3	4	5	6	7	DNA/K	Dcl	
G) Cellular service	1	2	3	4	5	6	7	DNA/K	Dcl	
H) Internet access	1	2	3	4	5	6	7	DNA/K	Dcl	
I) Internet speed	1	2	3	4	5	6	7	DNA/K	Dcl	
For any utility services with satisfaction rated 3 or below , please comment:										
Utility service issue 1 (<i>circle one</i>) A B C D E F G H I			Low Rank Comment 1: _____ _____ _____							
Utility service issue 2 (<i>circle one</i>) A B C D E F G H I			Low Rank Comment 2: _____ _____ _____							
Utility service issue 3 (<i>circle one</i>) A B C D E F G H I			Low Rank Comment 3: _____ _____ _____							
Utility Notes										
Do you have any other comments you would like to share?										

Thank you for your assistance.