

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



Business Retention & Expansion Report September 2009

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 2009 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 retention. This Business Retention report contains information from 31 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 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. 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. '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.

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. Consequently, 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 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 1100 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 123 potential visits with whom initial contact was made.

This year visits specifically to retail businesses were completed by the Liberty Area Chamber, Historic Downtown Liberty Inc. and the Partnership. That report was provided separately.

You're free to grow



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.

Executive Summary

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

The 2009 Liberty interviews represent 31 total businesses and 5,938 employees.

The retail visits were reported separately.

The 2009 regional statistics are based on 103 businesses representing 16,300 employees.

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

KEY FINDINGS

The theme of the report could be “Stayin’ Alive”. Many of the businesses reported that their greatest recent achievement is remaining a viable, profitable, open-for-business company.

Workforce - Small job losses were reported, on the average about a 10% decrease in the workforce. Some indicated that they are remaining flexible with their employment needs. Staying in touch with those at risk is critical. Workforce rankings improved across the board, all are above 6 on the 7-point scale.

Location – Liberty’s location in the northeast quadrant of the Kansas City metro area is a major factor for the business community. This satisfaction rating held steady this year - 81% of the businesses visited are highly satisfied with their Liberty location.

Education – The Liberty Public School District, as rated by the business community, is right at perfect on a 7-point scale. It improved slightly from the previous year. Those who know William Jewell College gave it high marks. That is the case with our area’s technical school offerings. Those who use institutions of higher learning are very satisfied with their performance.

Areas of concern – We again heard about traffic. Not only was it listed as a community weakness but also as a barrier to growth. Expectedly, the state of the general economy was also noted as a concern. Infrastructure concerns were raised – age and condition mixed with future infrastructure needs.

Follow-up – The Partnership experienced an increased amount of requests for assistance, 80YTD, which means that the business community is beginning to see the Partnership as the ‘go to’ organization for questions, concerns, connections and referrals. 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.

CONCLUSIONS/RECOGNITIONS

This is our fifth year of business visits so 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 2010 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 wants to repeat in 2010 the retail visits blitz.

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-bites to promote Liberty as a perfect business location for business suppliers, professional colleagues and neighbors:

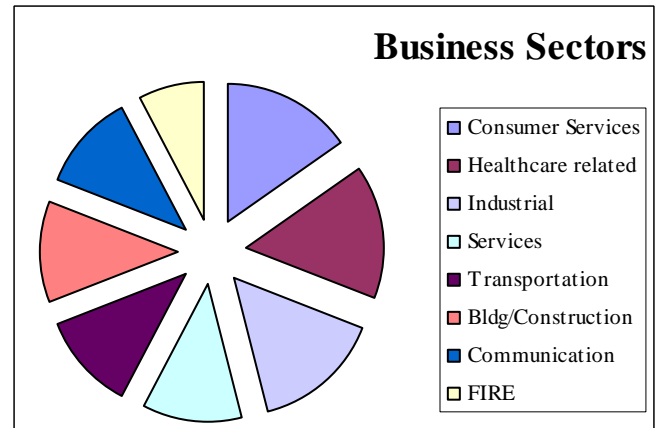
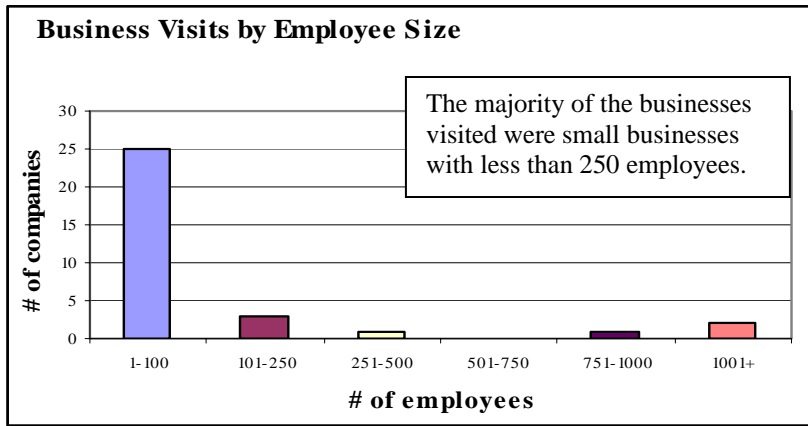
- Liberty School District gets a high rating from the business community;
- Liberty’s workforce is among the best in the nation;
- Liberty’s location is one of the best in the KC metro area and the nation;
- Liberty’s quality of life is unwavering.

The Partnership thanks its investors, including the City of Liberty, our Business Retention Committee and survey participants for their support of this program.

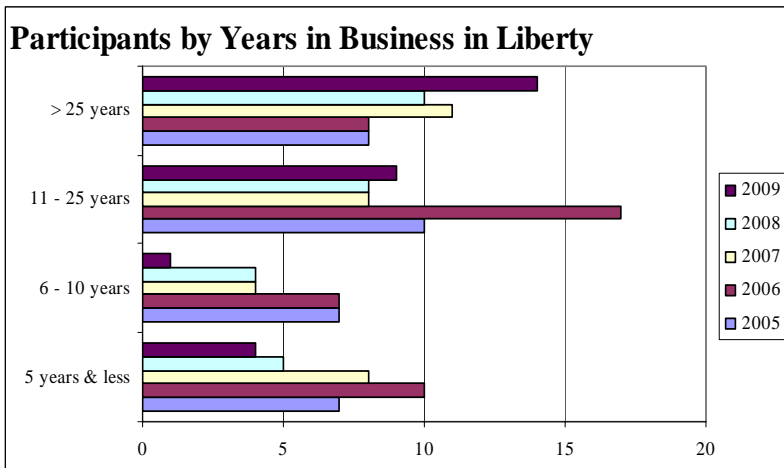
Special thanks also to KCP&L for their financial support of the Synchronist software and program.



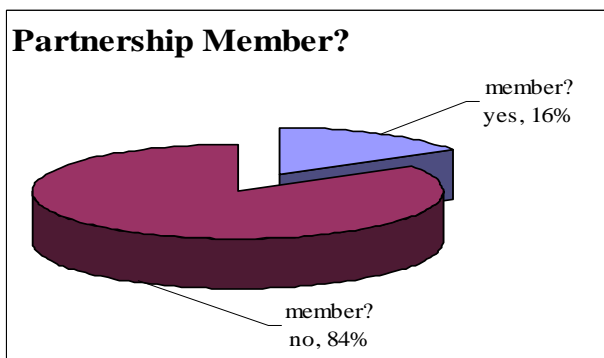
Characteristics of the participating companies



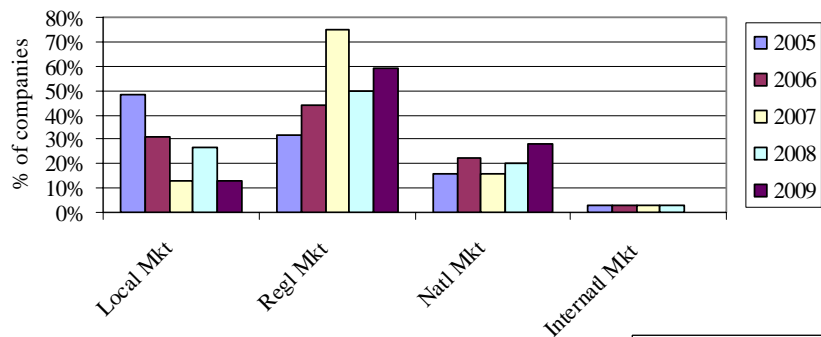
Many business sectors were represented indicating a good cross-section of the Liberty business community.



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



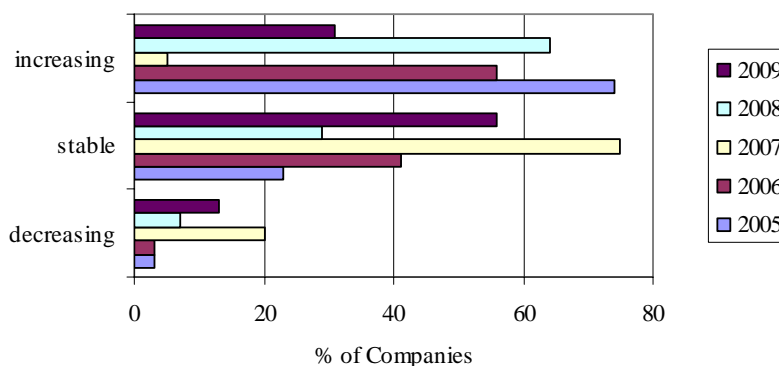
Market for Primary Product/Service



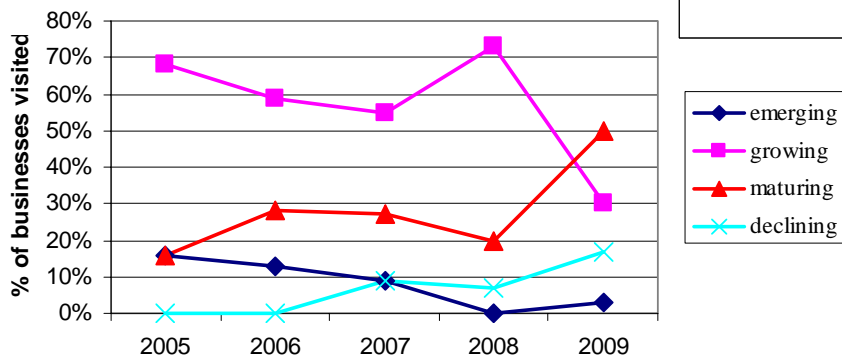
Companies do most of their business in the region, which means more revenue is coming from outside the local market. The ratio between local and regional markets continues to shrink.

Market Data

Market Share



Product/Service Life Cycle

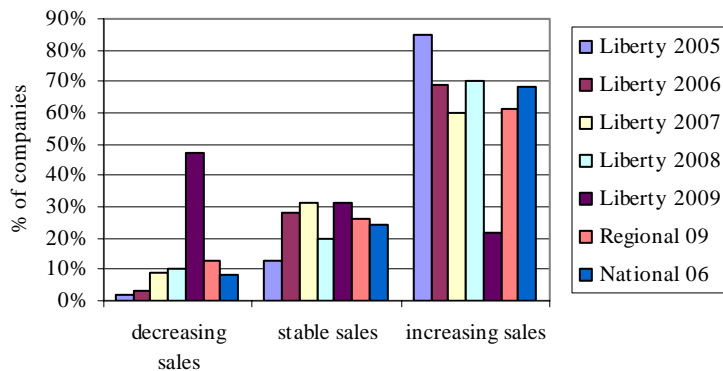


Growth Data

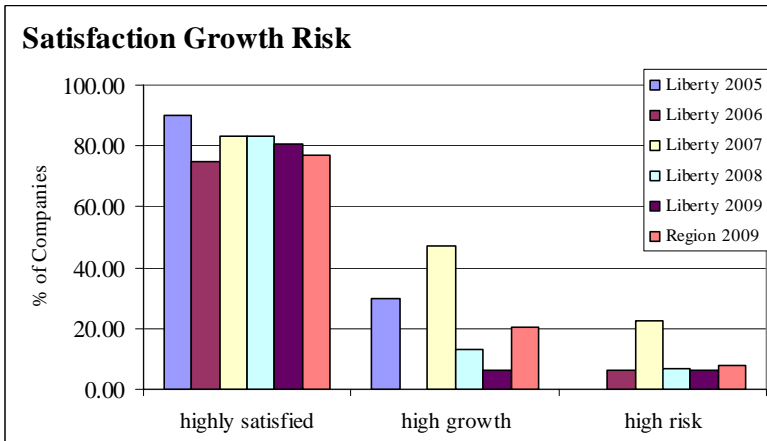
Life cycle is in direct correlation to the age of the businesses. Almost half the businesses were over 25 years old. It also is indication of the graph which shows declining sales.

The number of Liberty companies which experienced decreased sales was significantly higher this year and above the region average.

Company Sales

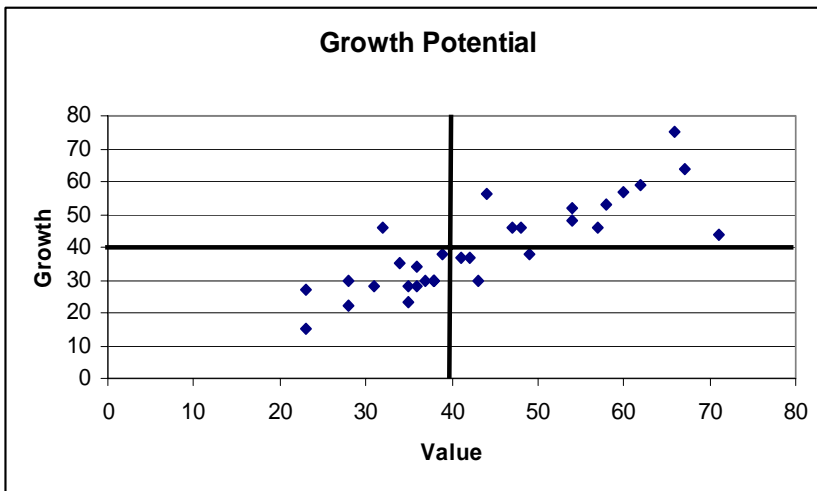


Growth Data



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.

None of our high risk companies had high growth or high value ratings.



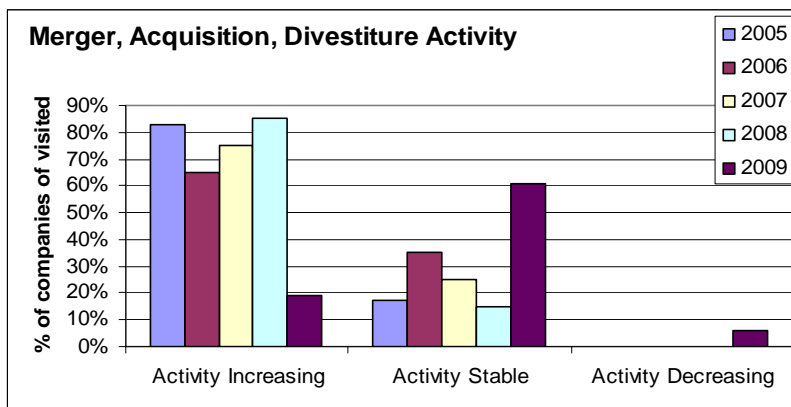
The scatter graph shows which companies we'll want to watch and assist. There are twelve companies with a high growth rate and a high value in the community.

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.

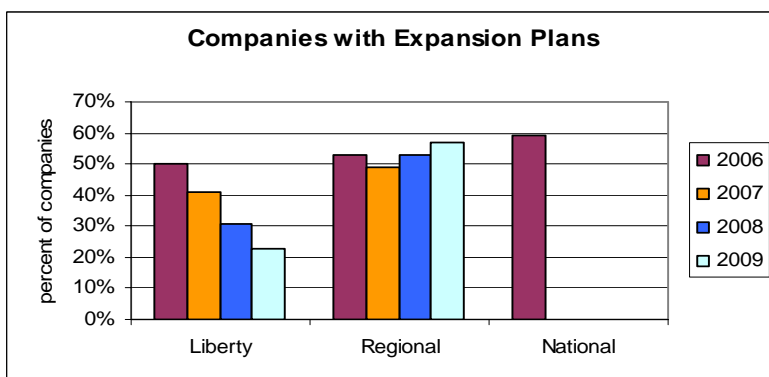
If the majority of the dots are in the lower left-hand quadrant, the community has a weakness due to dominance of low value/low growth companies.

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



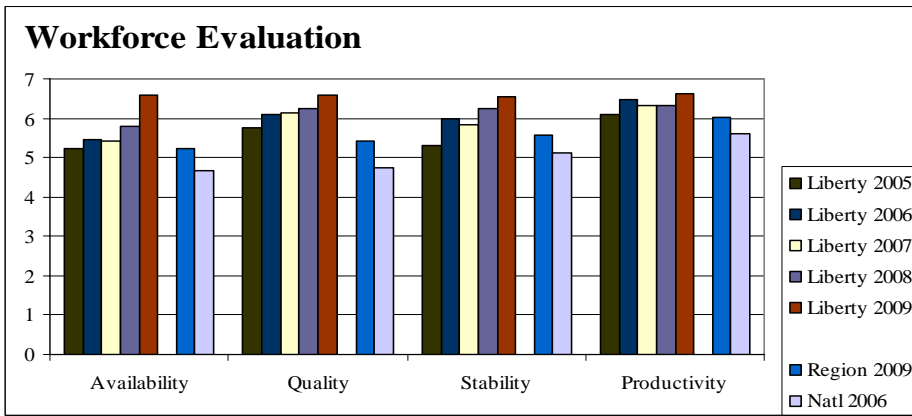
Companies' ownership appears to be stable. The writer believes this is directly related to frozen credit markets. Even if acquisitions make good business sense, the ability to finance the acquisition is limited.

None of the companies experienced ownership change in the last 18 months.



Different from years past, is that one in five of the businesses visited plan to expand, but the timeframe for those expansions is uncertain. 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.

Workforce Data



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.

The business person is asked to rate its workforce on the characteristics noted.

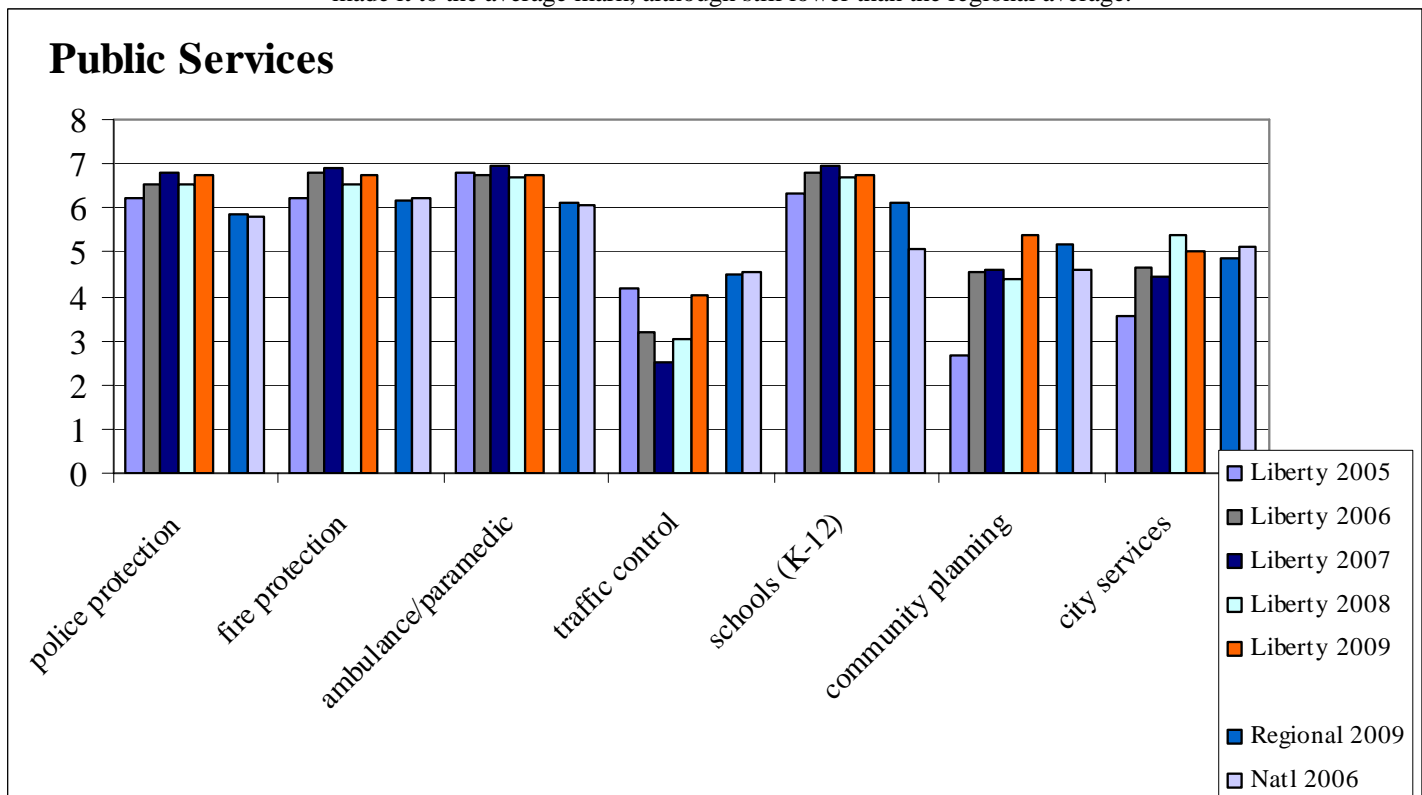
1 = poor, 4 = average, 7=excellent

This year, every category improved to near perfect scores!

The **home locations of employees** were all over the metro area such as 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. In business attraction, we can indeed, say that the labor pool from which to attract employees includes a 30-40 minute commute.

Public Services

For easy reading, this year's bar is rust colored. Most services improved slightly, even traffic control made it to the average mark, although still lower than the regional average.



1 = poor, 4 = average, 7=excellent

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) Company Primary Executive Company Secondary Executive 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) Company Primary Executive Company Secondary Executive 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> <tr> <td colspan="2" style="text-align: right; padding: 5px 5px 0 0;">Date</td> </tr> </table>	Type	Number	Full-time		Part-time		Leased		Total Employees	(mm/yy)	Date		<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	\$
Type	Number																																		
Full-time																																			
Part-time																																			
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Total Employees	(mm/yy)																																		
Date																																			
Function	Number																																		
Management																																			
Technical																																			
Sales/Marketing																																			
Clerical																																			
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Total Gross Annual Payroll	\$																																		
<i>Employment Notes</i> <div style="border: 1px solid black; height: 40px; margin-top: 5px;"></div>																																			

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> <div style="border: 1px solid black; height: 80px; margin-top: 5px;"></div>	

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

To be filled out by the interviewer — Information is confidential

8.12.06

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> _____ _____	

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					High		
					1	2	3	4	5	6	7	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: _____ _____ _____												
<i>Technology Notes</i>												

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		
A) Water	□	□	□	DNA/K	Dcl	1	2	3	4	5	6	7	DNA/K Dcl
B) Sewer	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
C) Natural Gas	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
D) Electric	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
E) Telecom (voice)	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
F) Cellular service	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
G) Internet access	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	DNA/K Dcl
H) Internet speed	□	□	□	DNA/K	Dcl	□	□	□	□	□	□	□	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.