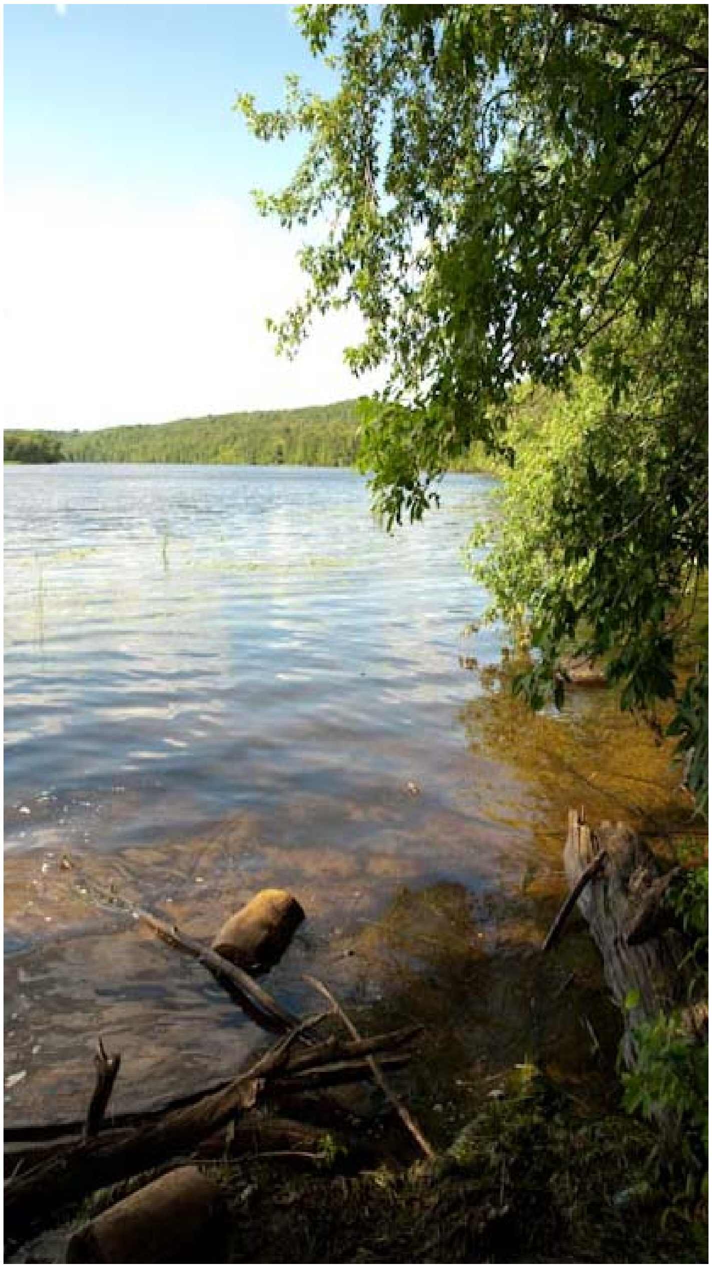

Lion Park Photo by Erik Barstow

Polk County 2010

Wisconsin Business Retention and Expansion Study

Polk County WI Economic Development Corporation

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Jim Doyle, Governor
Aaron Olver, Secretary

June 2010

I. FOREWORD

As Wisconsin's economy continues to face change, it is imperative that government and economic development agencies at state and local levels work collaboratively to assist local businesses. Gathering data and feedback from business CEOs provides valuable information that can help communities develop strategic plans aimed at strengthening their local economies. In support of this philosophy, the Wisconsin Department of Commerce created a business retention program.

Commerce believes that economic development initiatives implemented at the municipal level hold the key to the successful revitalization of Wisconsin's economy. Furthermore, efforts designed to help local administrators gain a better understanding of local business needs should serve as a key component of all local economic development programs.

Economic development activities that focus solely on attracting new businesses often yield insufficient returns for the investment. Efforts to retain and expand existing businesses can aid in stabilizing a community's economic base and create an environment conducive to attracting businesses.

Another component of local economic development activity is the promotion of small businesses. A study, called "The Job Creation Process," conducted at the Massachusetts Institute of Technology under the direction of Dr. David Birch revealed 60 to 80 percent of all new jobs are generated from the expansion of existing businesses, and the creation of new small businesses. In addition, a survey conducted by the American Economic Development Council and Arthur D. Little, Inc. showed 41 to 61 percent of the jobs in Wisconsin were created by the expansion of existing businesses. Therefore, the retention and prosperity of existing businesses is extremely vital to the economic stability and growth of any community.

The Polk County Economic Development Corporation (PCEDC) demonstrated enthusiasm in participating in a regional tri-county business retention study to include Polk, Rusk, and

Barron counties; therefore the Department of Commerce agreed to co-sponsor a study of Polk County.

The data obtained will serve as the foundation for planning and implementing sound economic development strategies in the area. This information will be invaluable in defining efforts to improve Polk County's economic stability today and in the future.

This project would not have been successful without the advice, assistance and support of all individuals involved. Their efforts are greatly appreciated.

Aaron Olver, Secretary
State of Wisconsin Department of Commerce

II. ACKNOWLEDGMENTS

The Wisconsin Business Retention and Expansion Study (WIBRES) -- Polk County 2010 was conducted through the joint sponsorship and sustained support of:

Polk County Economic Development Corporation
Coldwell Banker Burnet
The RiverBank
Village of Osceola
UW-Extension Polk County
Xcel Energy
Welsh Companies
Westaff

and

Wisconsin Department of Commerce

This study could not have been accomplished without the expertise and cooperation of a variety of individuals. Special gratitude is extended to all those participating as volunteer interviewers or task force members. We wish to thank Patti Anderson and Kari Zegarski for their dedication to the data entry process.

A special thank-you is extended to those firms participating in the study. Without their time and candid responses, this project would not have been possible.

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III. INTRODUCTION

BACKGROUND

Years 2008 and 2009 brought significant stress for many U.S. businesses. The Wisconsin business climate remained strong well into the recession, but eventually even healthy businesses experienced the trickle down of a struggling national and global economy.

A healthy and diverse business community has been the economic backbone of Wisconsin's major cities and is vitally important to the overall well being of the state. With the nature of competition, technology and consumer choices continually changing, consumer spending slowing, and increased pressure for manufacturers to shift operations to low-cost overseas labor markets, it is necessary for business strategies to respond in a timely, effective manner. If not, the potential loss of employment and the accompanying hardships this can cause the community, not only in terms of tax dollars, but also in terms of impact on other area businesses, is significant. Therefore, local governments must address the current and future needs of the businesses in their area as a part of their on-going strategic economic development activities.

In light of the fiscal reality affecting most municipal and county budgets, it has become even more important that the public sector dollars available for economic development are used to gain the greatest return on investment. We must also acknowledge that our continuing local economic success cannot be taken for granted, it must be worked at. Dedicated leadership and well-funded economic development programs have never been more significant than in challenging economic times such as today.

In recent years, some Wisconsin business executives have been the target of aggressive marketing campaigns from other states offering impressive financial packages and tax incentives. It has become imperative for communities to develop strategies aimed at maintaining a healthy economic base. One such strategy has been to focus on retaining those businesses established in the area and to create an environment that encourages growth of those firms. Expansion of existing facilities can have a ripple effect on the community's economy. Expanding and retaining firms can be the simplest and most efficient way to increase local employment and production. The subsequent multiplier effect will increase the tax base of the community and upgrade the quality of life of all who live there.

A key focus in adding jobs to relevant business sectors is bringing in revenue from outside the community. Companies with products (hard or soft) for sale beyond Wisconsin's borders create jobs that are paid for by out-of-state customers. This adds new money to the local economy, enlarging the local pie rather than dividing it. This benefits the community and its locally focused businesses.

Ultimately, if retention and expansion efforts prove effective, and a healthy, positive business environment prevails, the stage will be set for new business attraction. Reasonable operating costs, a good infrastructure, and a local government with the reputation of responding to the needs of its existing businesses increase the odds that business attraction efforts will succeed.

An examination of Wisconsin's economic development efforts revealed a pattern of limited public resources available for economic development initiatives at local levels. In addition, limited emphasis on business retention resulted in the loss of some businesses from the state. The Wisconsin Department of Commerce offers this business retention and expansion survey program to enhance economic development initiatives.

Polk County was chosen as a project site for several reasons: 1.) There is a significant business base; 2.) PCEDC requested that the WIBRES survey project be implemented in the county; 3.) Polk County wished to participate in a tri-county study in an effort to assess similarities and needs of the region as a whole; and 4.) There was sufficient support for the project to assure PCEDC could coordinate the volunteers and administrative support necessary to successfully complete the project.

Representatives from county and local governments, education, and local utility groups acted in the capacity of a taskforce for the study. Their functions included, but were not limited to, the following: 1.) Determine the target list of businesses and develop the list of business contacts; 2.) Determine if an addendum questionnaire was needed to address community specific issues; 3.) Conduct follow-up interviews; 4.) Monitor survey responses; 5.) Develop recommendations based on survey results; and 6.) Identify follow-up measures.

PURPOSE OF THE REPORT

The purpose of this study is to create a confidential, comprehensive data profile on businesses in the community in order to develop a systematic approach to retention and expansion. Repeat studies also serve as a follow-up and can reflect how economic changes have impacted the business community, verify past situations have been corrected, and determine current needs and plans. These programs enable the community to develop targeted marketing and retention programs as well as identify those areas where expansion and retention efforts can be improved.

OBJECTIVES OF THE REPORT

The major objectives of the study are to:

1. Conduct personal interviews with chief executive officers of the businesses.
2. Develop a data base profile of businesses in the county.
3. Gain an understanding of the business community's view of the local economy.
4. Determine companies' business plans for the future (i.e., expansion and/or relocation), and thereby set up an early warning system for local action.
5. Acquaint business leaders with assistance available through various economic development programs.
6. Improve the communications bridge between local/county government and the business community.
7. Identify specific concerns and problems of the local businesses and provide solutions to those problems in a swift and effective way.

An overall objective of the business retention and expansion project is related to the process itself. By conducting the study, business executives are provided an opportunity to have their opinions listened to and passed directly on to government officials in a highly confidential manner. It is a positive step for local government toward understanding the implications of their policies for this very important segment of the community. The underlying goal is to be responsive to business needs.

IV. PROCEDURES AND METHODOLOGY

The task force reviewed the WIBRES survey instrument to verify it was appropriate for Polk County's business region. Both objective and subjective questions are included in the survey. The questionnaire contains 12 categories:

I.	History and Status of Present Location
II.	Nature of Business
III.	Physical Specifications of Plant
IV.	Markets and Customers
V.	Competitors
VI.	Future Plans
VII.	Labor and Manpower
VIII.	Assessment of Government Services (Infrastructure)
IX.	Financial Matters
X.	Energy Matters
XI.	Community Linkage
XII.	Overall Impressions
Addendum	Polk County – Waste Management
Addendum	Osceola – 100 X 2025 and Business Community Educational Needs

Additional questions were developed to address community specific issues and presented as an addendum to the main survey questionnaire. The Osceola addendum dealt with their 100 X 2025 Initiative and educational needs of the businesses, while Polk County offered an additional question about waste management.

A short form of the questionnaire containing several key questions was developed for use by respondents unable to complete the long form. Seven short form questionnaires were completed. All completed short forms were evaluated, but not entered into the database.

The Polk County survey task force developed a list of businesses to interview in addition to those taking part in the Osceola study. Businesses participating in the study ranged in size from owner operated to more than 400 employees.

A. DATA COLLECTION PROCEDURES

Interviewers were selected who had experience with the business community. Due to the confidential nature of the survey questions, careful consideration was given to choosing the individuals who were to perform in this capacity. The interviewers participated in a training session designed to orient them to the business retention program, the survey instrument, the interview process, and the strict confidentiality of the project. Training materials were provided by the Wisconsin Department of Commerce. The interviewers were charged with recording the subjective as well as objective information obtained during the interview.

The WIBRES questionnaires were distributed at two different times; the Village of Osceola conducted its study in late fall of 2009, while additional Polk County businesses were approached in first quarter 2010. In total, 123 survey questionnaires were distributed to Polk County businesses accompanied by a letter explaining the program and urging each business contact to participate. Shortly after the questionnaires were received, volunteers scheduled appointments for follow-up interviews with the chief executive officers of participating companies assigned to them. The purpose of the interview was to provide the opportunity to discuss key questions and collect the completed questionnaire. A total of 72 main questionnaires were completed in the county.

B. DATA ANALYSIS

The interviewers returned completed questionnaires to respective project managers for the studies, Neil Soltis for Osceola and Bob Kazmierski for Polk County. Based on the interviewers' written comments and preliminary inspection by the project managers, businesses requiring immediate attention were identified. The Wisconsin Department of Commerce provided a data base and instruction for data entry to be completed by assigned personnel in the two survey communities. The data files were then returned to the Department of Commerce for analysis of the objective as well as narrative questions.

C. CONFIDENTIALITY

Due to the in-depth nature of the survey questions, confidentiality was strongly emphasized throughout this project. Interviewers were selected on this basis and confidentiality was stressed during the training session. Once the interviews were completed, only the task force members, the persons performing data entry, and the Wisconsin Department of Commerce employee working on the project had direct access to the individual questionnaires.

V. MAJOR FINDINGS

The Wisconsin Business Retention and Expansion Study (WIBRES) conducted in Polk County targeted a business population consisting of 123 firms; 72 firms completed the survey questionnaire representing 59 percent participation. Respondents who were unable to complete the long form provided information to interviewers using a short form. Those responses are evaluated by the project manager, but are not entered into the database.

This section is based on the summary of the 72 survey instruments compiled between October 2009 and March 2010. It contains chart illustrations and a brief narrative description highlighting selected items of significance. Appendix A of this report presents a complete and detailed listing of the numeric questionnaire results.

Composite data, which is cited in this report, is a compilation of survey answers collected from other Wisconsin communities during the previous three years. These communities include the following: Columbia, Douglas, Green, and Vilas counties; and the communities of Washburn and Waunakee.

Please note that all percentage figures are based on the number of responses to that question, unless otherwise indicated. Due to rounding, percentage totals may not always equal 100 percent.

NATURE OF BUSINESS

The Polk County business interests are diverse with higher fractions representing the retail segment followed by those with a focus in miscellaneous manufacturing, service, and financial/insurance/real estate. Figure 1 illustrates the top six focuses among the participating businesses. This information can be helpful in guiding business attraction efforts in order to maintain a diverse business base while complementing the existing industries doing business in the county. Composite findings, used for comparison throughout this report, are influenced by larger fractions of business involvement in food/food products, service, retail, and miscellaneous manufacturing.

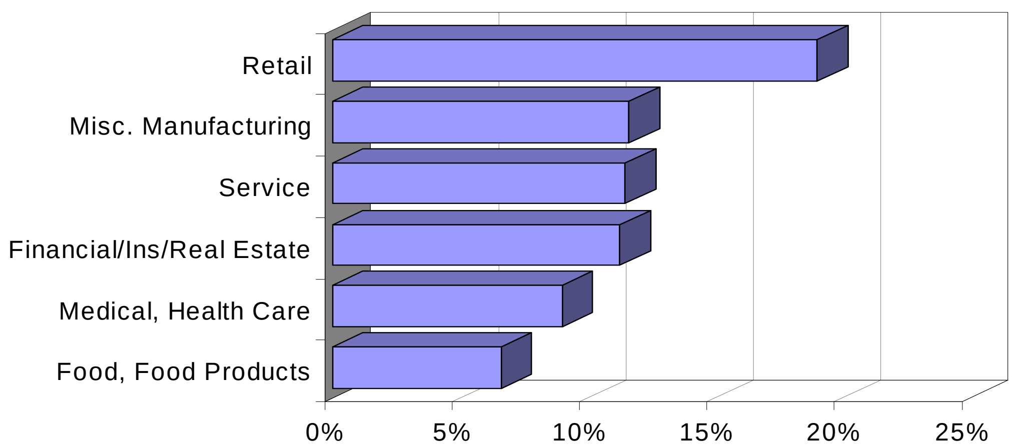

Figure 1 - Types of Business

BACKGROUND

The location of the corporate headquarters in the immediate area is a significant factor for business retention and expansion since, historically, a firm is less likely to relocate if its headquarters is already established in the community. Figure 2 shows the distribution of headquarters locations for the Polk County businesses. Respondents reported the local facility is the headquarters for 74 percent of the businesses. This figure is very similar to

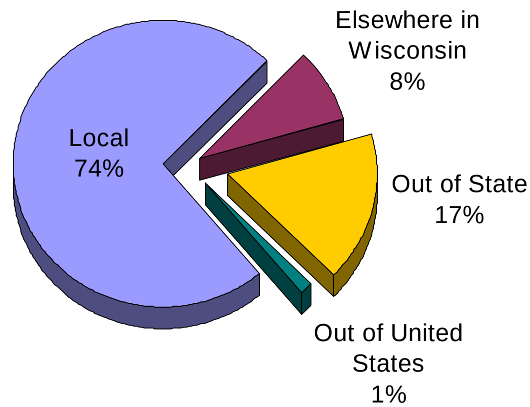

Figure 2 - Location of Headquarters

the composite average (75 percent) of other communities surveyed in the past three years. Of the responding businesses, 8 percent are headquartered elsewhere in Wisconsin, 17 percent out of state, and 1 percent out of the United States.

Several (38 percent) of the businesses surveyed have locations in addition to the local community site, a percentage seven points below the composite average (45 percent). In a tough economy, consolidation of operations may be a consideration for some businesses. Three of the Polk County executives interviewed reported the likelihood of consolidating operations is probable and four more said it is possible. Assessment of future plans expressed by the executives is the first step toward ensuring the businesses maintain a local presence.

More than half (57 percent) of the businesses are incorporated. Many businesses that took part in the survey are well-established; 61 percent have been in operation 20 years or longer with 6 percent of those operating more than 100 years. Start-up activity is also evident as four businesses have been operating less than two years and five more opened their doors between three and five years ago. Figure 3 shows business start-up patterns for the Polk County business region.

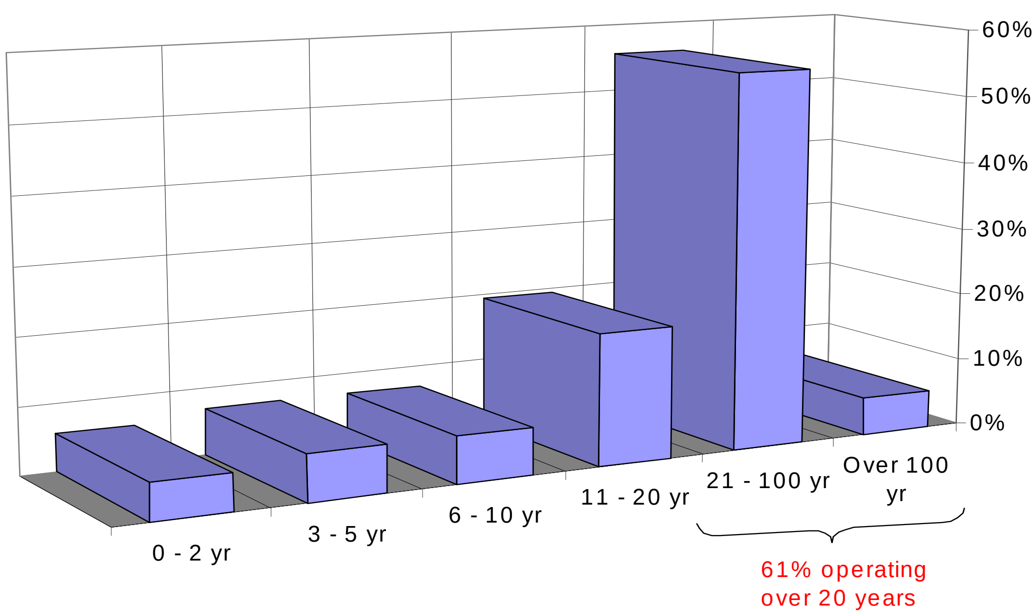

Figure 3 - Year Business Established

Building ownership is a complex issue regarding business retention and expansion. Some businesses may own real estate as a strategy for building owners' wealth. Other companies may acquire real estate to protect a large investment in equipment. High growth knowledge-based companies may not acquire real estate because they expect to outgrow facilities in a short period of time. Figure 4 shows percentages of the Polk County businesses that own, lease, or do both. Seventy percent own their facility, 23 percent lease, and 7 percent do both. The composite figures are similar: 74 percent own, 22 percent lease, and 4 percent combine ownership and leasing. Companies that own their facilities tend to remain in the area.

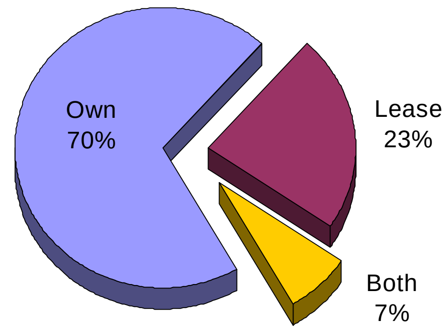

Figure 4 - Facility Ownership

The executives were asked to rank 13 factors as they negatively impact the current or future development of the company's product or business activity. The factor they ranked highest in importance by a large margin was market condition/economy (see Figure 5).

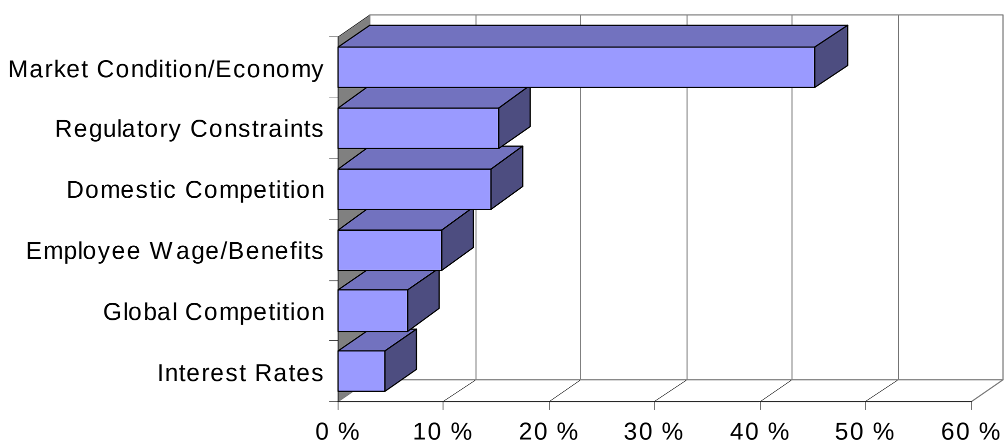

Figure 5 - Negative Factors Affecting Product Development

Survey participants were asked to identify the geographic sources of raw materials and supplies utilized by their businesses. Tallied results reflect 21 percent of supplies come from the local area/county and 16 percent from elsewhere in Wisconsin, but most supplies are brought in from outside of the state; 35 percent from Midwestern states, 23 percent from across the nation and 6 percent of supplies are obtained from international locations.

Satisfaction with the method used to transport supplies and finished products may be a factor when a firm decides where to locate. Executives reported that 59 percent of supplies are transported by truck, 28 percent by common carrier, and 12 percent by personal or company vehicle. A much smaller amount of supplies are transported via air, ship, or rail.

The most popular method used for transporting *finished* products is also via truck. Currently, 45 percent of finished products are shipped via truck, 33 percent by common carrier, and 7 percent by personal/company vehicle. Very small portions of finished products are transported via air, ship, or rail. The executives responding to the survey also rated how well the modes of transportation serve their business needs, all shown in Table A.

	Excellent	Good	Fair	Poor
Truck	25	20	3	0
Common Carrier	30	19	3	0
Rail	1	1	0	11
Air	2	8	1	6
Ship	1	2	0	8
Personal/Company Vehicle	10	10	2	2

Table A - Methods of Transportation

MARKETS AND CUSTOMERS

More than a third (38 percent) of the respondents described the number of customers they serve as increasing while 34 percent said the number remains stable. However, tough economic times are reflected by 28 percent who reported customer numbers as decreasing.

The Polk County executives reported more than half (54 percent) of their customers are located in the local area and 12 percent are elsewhere in Wisconsin. Exporting to customers beyond state borders brings in new revenue to the community. Executives reported 20 percent of their customers are located throughout the Midwest with an additional 12 percent in national locations and a small percent (2 percent) situated globally. Figure 6 illustrates the distribution of customers in these locations.

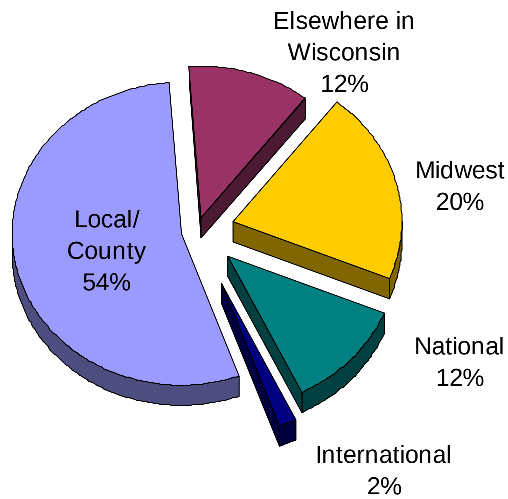

Figure 6 - Customer Location

The Internet has become a vehicle for about half of the Polk County businesses to conduct business sales. While 53 percent said none of their sales come from Internet transactions, 9 percent reported the Internet is the vehicle used (to some degree) for between 25 percent and 50 percent of company sales. A few (4 percent) use it for 10 percent to 25 percent, and 34 percent reported up to 10 percent of sales activity involves use of the Internet.

The executives were asked if they supply finished products directly to the federal, state, or local government. Currently, 14 percent supply products or services to federal government, 26 percent supply to the state, with 38 percent supplying the local government. The figures for federal and state contracts are lower than the composite averages, 27 percent – federal and 32 percent – state. Local government contracting however is just above the composite average of 36 percent. Figure 7 illustrates the percentage of executives who currently hold government contracts and the percentage of executives who are interested in initiating or expanding government contracts. More than a quarter (28 percent) expressed *interest* in federal contracts, 37 percent in state contracts, and 40 percent in local government contracts.

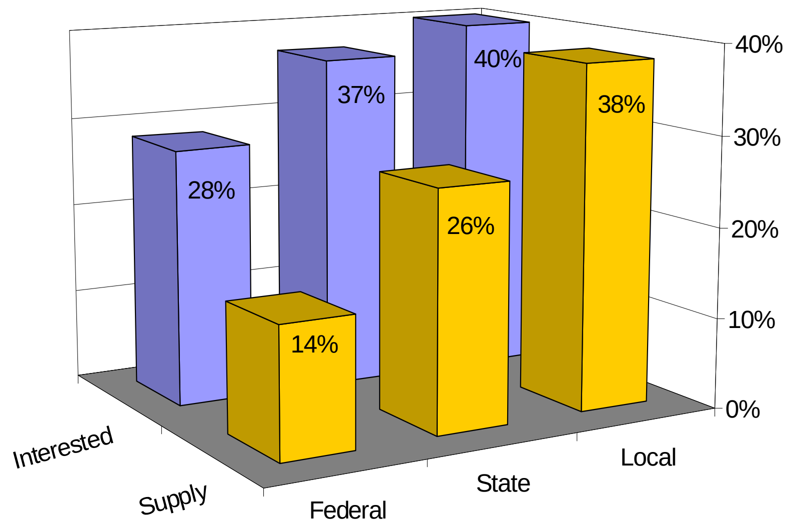

Figure 7 - Government Contracts

COMPETITION

More than a third of participants (35 percent) described their company's market share as increasing while 45 percent said it is stable. Others (20 percent) reported a decrease in market share, reflecting the tough economic climate. The composite average, compiled from data collected over the past three years, is somewhat different with only 7 percent reporting a decrease in market share.

Half of the respondents' competitors are located within the county. Figure 8 shows the distribution of competitors situated locally and elsewhere. Some respondents (3 percent) are experiencing international competition.

Executives also responded as to how they view their competitors. Of the responding Polk County executives, 19 percent feel competitors are "Making significant inroads" while 29 percent see them as a "Future Threat" to their business (see Figure 9). Other local executives surveyed (43 percent) feel competitors have "No Real Impact" and 9 percent responded that competitors have "Never Been a Consideration."

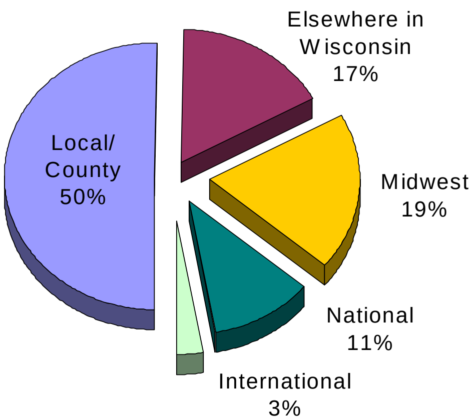

Figure 8 - Competitor Locations

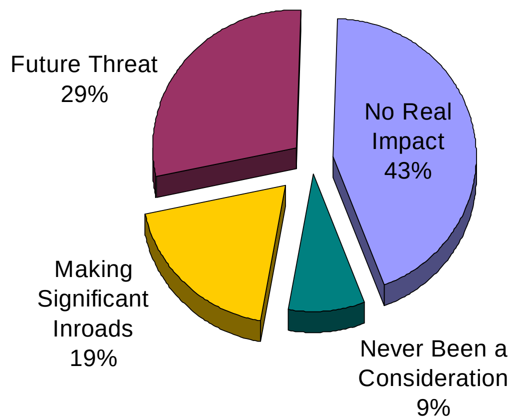

Figure 9 - Competitive Threat

BUSINESS GROWTH AND EXPANSION PLANS

Executives responding to the survey hold top-level positions and many shared future plans related to potential growth and expansion of their business operations at the present site or some other location. Sixty-seven percent said they currently have sufficient property to allow for expansion of their existing building(s). Fourteen executives (19 percent) reported plans to expand an existing building(s) at the site; the composite average is higher at 25 percent. Expansion plans would add a total of 83,000 square feet to business sites in Polk County. Executives were asked when expansion construction would take place. One indicated construction is to begin in 2010 and one in 2011. Ten executives expect expansion projects to move forward within the next five years, while one said it will be beyond five years and two others were unsure of the timeframe.

Survey results indicate 7 percent of the responding executives (five firms) have plans for a new building either at the present site or elsewhere in the community. This finding is much lower than the composite average, which is 21 percent. The executives estimated the new building construction would total 50,900 square feet. When asked about the timeframe for the building projects, one respondent indicated construction is slated to begin in 2010 and one within the next five years, while one indicated the project is more than five years out. Others were unsure of the timeframe.

A quarter of Polk County executives (25 percent) reported plans to modernize or improve their present building(s) now or in the near future and 53 percent plan to improve their equipment. The study found that 55 percent of the respondents said there are technological innovations they plan to put in place within the next two years.

Seven of the responding executives (11 percent) reported plans to expand their businesses elsewhere in Wisconsin, a finding similar to the composite average (12 percent). When asked about out-of-state expansion, eight executives (12 percent) reported having such plans. The composite average for those with out-of-state expansion plans is 13 percent (similar, by comparison). Figure 10 demonstrates reported expansion plans.

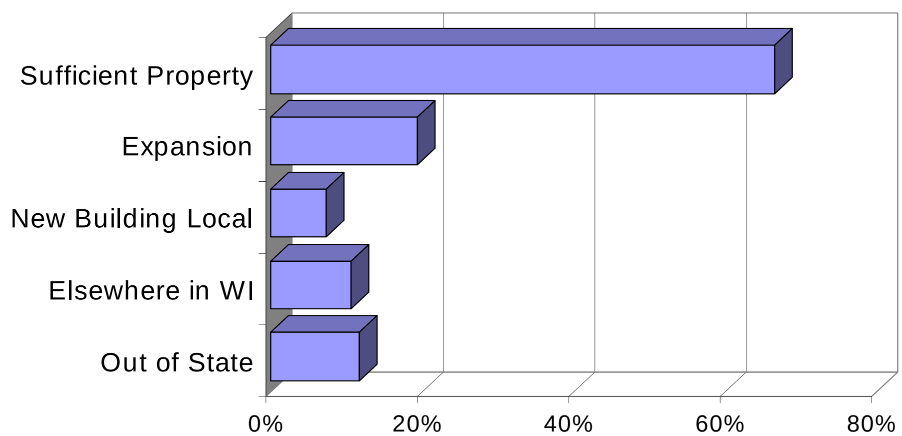

Figure 10 - Expansion Plans

Four of the responding Polk County executives (6 percent) reported immediate or future plans to move all or part of the operation to another location and two others (3 percent) indicated this is a possibility. Further investigation found four of the moves would be to another site in the local area, but two of the executives indicated relocating to a site outside of the U.S. The composite average is 8 percent with plans to move, with an additional 10 percent indicating the possibility of a move.

As part of their economic development, states attempt to persuade companies to relocate or expand in their state. This survey found that 13 percent of the Polk County firms responding reported being the target of such marketing. Marketing efforts are similar to activity experienced by others who have completed the study in the past three years.

When asked to estimate the chances for phasing out or shutting down the operation with no plans for expansion elsewhere, three Polk County business executives said it is “Probable” while five said the likelihood is “Possible." Others said the possibility of closing is “Remote" or "Non-existent."

LABOR AND MANAGEMENT

Seventy Polk County businesses responded that they currently employ a total of 2,817 full-time people. The firms range in size from owner operated to more than 400 employees.

A series of questions was asked about employment history and projections over a 10-year period, from five years ago to five years into the future. Data gathered from 46 executives who responded to all five questions about employment reflect current employment is down 9 percent from a year ago and 4 percent lower than five years ago. The executives anticipate an increase of 6 percent next year in the number of persons they employ with an overall increase of 32 percent at the end of five years (see Figure 11). Business attractions and start-ups will also affect employment numbers in the county.

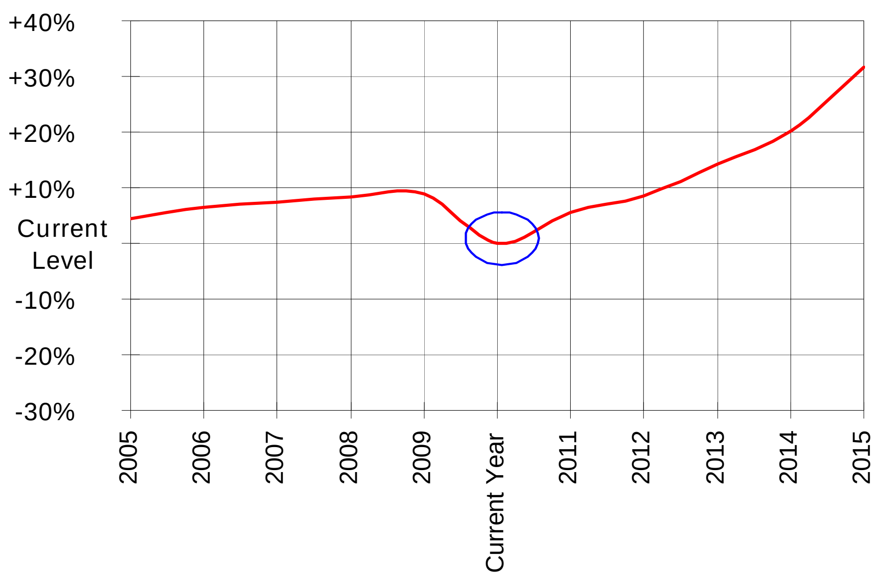

Figure 11 - Ten Year Employment Data

Composite figures indicate part-time positions play an important role in business operations with an average of 68 percent employing people on a part-time basis. Polk County findings, with 70 percent of the firms utilizing part-time people, are similar to their interviewed counterparts. The total number of part-time employees reported by survey respondents is 765. Of firms using part-time workers, the majority (53 percent) utilize four or fewer with 38 percent of the executives citing seasonal fluctuations as a factor impacting the quantity of part-time workers. This is lower then those citing seasonal fluctuations in the composite (43 percent). Economic fluctuations are cited as impacting part-time employment numbers by 63 percent, which is much greater than the composite average of 38 percent.

The Polk County executives are asked to supply the average overall wage for various positions. The average hourly rate offered by employers in Polk County for professional/technical staff positions is $29.45, and $15.39 for office staff. The average rate offered for highly skilled positions is $19.98 per hour, semi-skilled positions average $13.99 hourly, and rates for unskilled positions in Polk County average $11.91 per hour.

High employee turnover rates generally are perceived as being a costly problem for employers because of the significant cost of hiring and training. Of the Polk County executives who responded to the question regarding total annual turnover rates, 67 percent reported a turnover rate of 10 percent or less and 11 percent said annual turnover is between 11 and 25 percent (shown in Figure 12). Employers find the most common reasons for employee turnover are other opportunities, terminated due to performance, and career change.

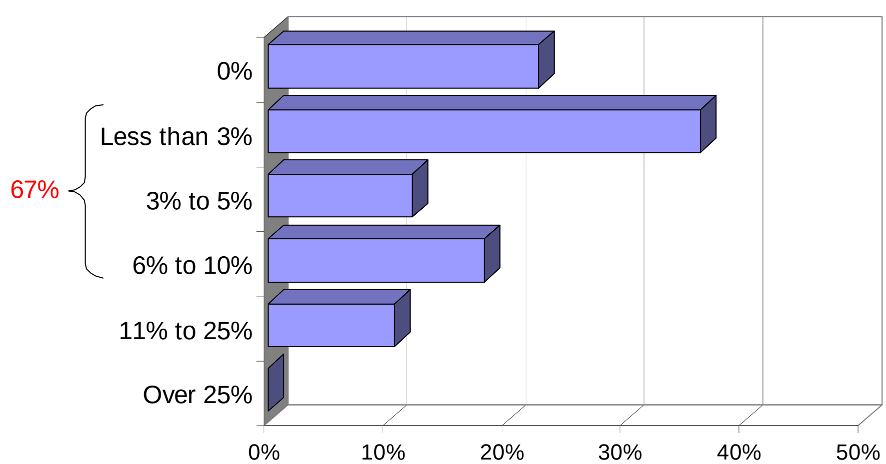

Figure 12 - Turnover Rates

The survey indicates that 77 percent of the executives stated their employees need skills training to perform their job responsibilities at the required level. In regard to dollars budgeted to training, 35 percent said the company's investment in training programs is increasing, 6 percent said it is decreasing, and 59 percent reported there is no change. A majority of companies (59 percent) invest less than 3 percent of their annual sales in employee training.

One source of training has been made available through government-sponsored job development programs. The federal government has attempted to get employers to hire disadvantaged unemployed workers by providing financial incentives. When asked if they were familiar with jobs development/training programs sponsored by county, state, or federal government, more than half (57 percent) said they were not. Executives rated the programs available as seen in Table B.

Program	Useful	Not Useful	No Opinion
Job Center	23%	19%	58%
WI Mfg. Outreach Center	11%	11%	79%
WI Mfg. Extension Partnership	3%	11%	87%
Technical College	57%	5%	38%
University	44%	5%	51%
Apprenticeship	31%	13%	56%
School-to-Work	26%	16%	58%

Table B - Employee Training Programs Perceptions

EMPLOYMENT OF WORK FORCE

Executives reported 74 percent of their employees reside within the county. Data was collected to determine which positions employers have the most difficulty filling. The Polk County executives reported they are having the greatest difficulty recruiting for professional/technical staff positions. The survey finds that 50 percent reported difficulty recruiting for this category. Some (16 percent) said they have difficulty recruiting for blue-collar positions, and 13 percent expressed difficulty recruiting office support staff.

Employers reported a variety of sources used in seeking new and replacement employees. Most expressed they get the best results recruiting by word of mouth. Local newspaper advertisement and the Internet are also vehicles used by several and are considered the best second–choice options. Additional resources executives turn to include private services, a storefront sign, and the tech college or university (see Appendix A, Question 77).

Consideration must be given to factors that have an impact on recruiting employees in the state of Wisconsin. As shown in Figure 13, the Polk County executives believe the most positive factors dealing with recruiting are the quality of life and K-12 education system. The factor considered to have the most negative impact is personal taxes.

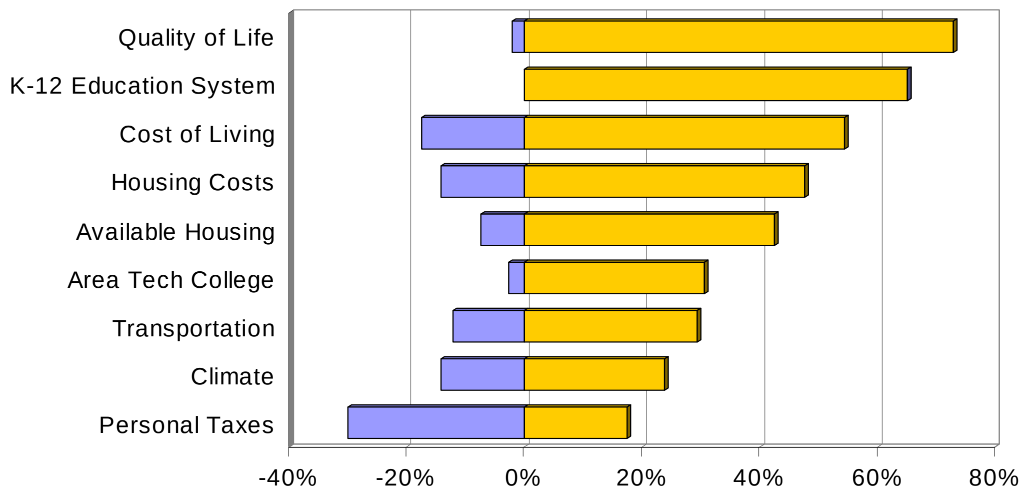

Figure 13 - Factors Affecting Recruiting

The quality of labor management relations can be a key factor when companies are making locale decisions. Figure 14 shows the percentage of the Polk County firms associated with a union (7 percent). This encompasses 13 percent of the total full-time employment base reported by survey participants. The three-year composite shows 11 percent of firms are associated with a union.

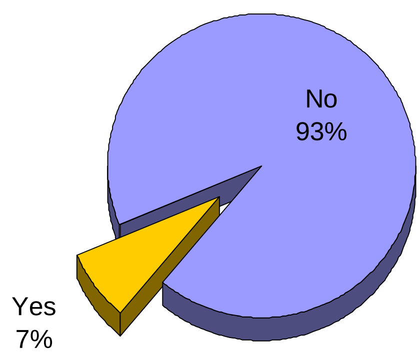

Figure 14 - Labor Unionization

ASSESSMENT OF GOVERNMENT SERVICES

Government services can play a role in the success of a firm's operation in the area. Firms rated their levels of satisfaction with site environmental and physical plant services provided by the community. Water pressure and supply provided to the building are expressed as adequate by 94 percent of the study participants while 94 percent responded they are satisfied with storm water drainage and/or sanitary sewer services provided.

When asked if voice lines provided by the local phone company are adequately meeting business communication needs, 89 percent said “Yes.” Broadband or high-speed Internet service provided in the area is considered adequate by 74 percent of the executives (not applicable for 11 percent). Wireless communication services were reported as adequate by 65 percent (not applicable for 18 percent).

Crime and vandalism in the area are similar to what other surveyed communities in the state have reported. While only 6 percent reported employees have been victims of crime near the facility within the past 12 months, 19 percent said the facility has been the target of vandalism or burglary within the same time period. Still, 99 percent said they feel local law enforcement agencies are doing all they can to protect employees and property. Satisfaction with local fire protection capabilities was expressed by 99 percent of respondents also.

There were no complaints of serious potholes in the pavement near the business facility. Three percent said they’ve experienced flash flooding on nearby streets. Snow removal is considered to be adequate by 100 percent of the respondents and 93 percent are satisfied with streets near the facility being cleaned regularly. A majority (95 percent) of the executives feel code enforcement efforts are being adequately and evenly applied. See Appendix A, Questions 86 through 102 for a complete list of tallied results.

TRANSPORTATION

Most workers drive their own vehicle as their primary means of transportation to and from work, 1 percent car pool, while 2 percent walk or bike. The survey found that 97 percent of the executives responded that public transportation is not available to and from the work site, 7 percent would like it to be available.

The importance of public transportation services used for business travel is suggested by the degree of usage. Most (88 percent) of the executives, however, use personal vehicles for business travel and 42 percent use company automobiles in this capacity. Air travel to and from Minneapolis – St. Paul is used by 28 percent of the respondents. None of the survey respondents reported air travel through Eau Claire or Duluth. One executive reported business travel to and from Osceola.

ECONOMIC DEVELOPMENT PROGRAMS

An effort was made to determine the extent of familiarity or personal contact businesses have with the various economic development programs, and their degree of satisfaction. Table C shows how respondents feel about various financing options available. The local lending institutions are seen as some of the more useful options available to executives in Polk County. Based on the number responding "No Opinion" to the options offered, it could be that many are unfamiliar with the array of financing alternatives available to them.

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	83%	3%	13%
Targeted Jobs Tax credit	9%	20%	72%
Small Bus. Admin. Financing	32%	12%	56%
Industrial Revenue Bonds	14%	14%	73%
County/City Revolving Loan Fund	23%	11%	66%
Tax Incremental Financing	31%	14%	55%
WI Housing & Econ. Dev. Authority	20%	9%	71%

Table C - Financing Options Perceptions

Figure 15 shows 42 percent of the responding executives rated local economic development as excellent or good (10 percent – Excellent, 32 percent – Good). Another 30 percent rated it as fair and a rating of poor was given by 8 percent. Excellent and good ratings (individually and combined) are the same as the average of other Wisconsin communities studied in the past three years. Also, the local rating of poor is nearly 10 points lower than the composite average. Comparing local findings to the composite averages indicates that local executives are fairly satisfied with the direction taken by those involved in economic development in Polk County.

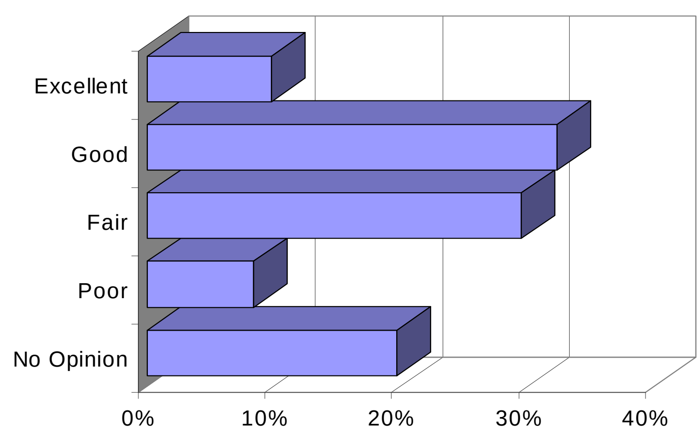

Figure 15 - Local Economic Development

LOCAL GOVERNMENT

The same effort was made to determine the executives' level of contact and degree of satisfaction with the various local boards. A high degree of satisfaction is a good indicator of a strong community. Public service bodies scoring highest in satisfactory ratings from the executives in Polk County were the police department, fire department, fire inspector and city administrator. The complete results are shown in Appendix A, Question 111.

When asked their opinion of the local government, 68 percent of the respondents said it is excellent or good (13 percent – Excellent, 55 percent – Good). Another 21 percent gave a rating of fair. Few of the executives (1 percent) rated local government as poor (all shown in Figure 16). The combined rating for excellent and good is six points above the 62 percent composite average.

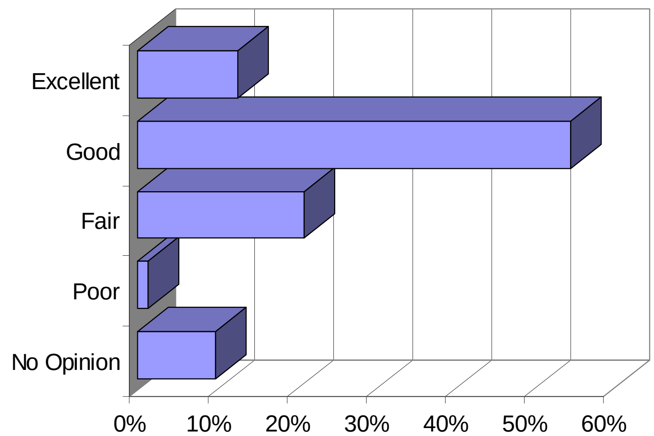

Figure 16 – Satisfaction with Local Government

FINANCIAL MATTERS

The executives provide information on several items under the title of financial matters, including how stable sales are for the company. Examined as a whole, these data can help to paint a picture of the business climate in the local area and in the region. Firm sales were reported as "Increasing" by 35 percent of the respondents. Others (33 percent) reported sales are "Stable," while 32 percent said sales are "Decreasing."

Study participants were asked to indicate the percentage of annual sales they have dedicated to research and development (R&D). An allocation of less than 5 percent was indicated by 44 percent of respondents. Some (6 percent) reported between 5 percent and 10 percent is ear-marked for R&D, 3 percent dedicate 10 percent to 20 percent, and 5 percent spend more than 20 percent on R&D. On the other hand, 42 percent of responding firms dedicate nothing to this area.

Figure 17 displays the responses received when the executives were asked to rank the factors they feel are most negatively impacting their present financial condition. The factor they clearly indicated as most important is market condition/economy, followed by employee wage/benefits, energy costs, local property taxes, material costs, and interest rates. In the three–year composite roll up, market condition/economy also ranked first, but not nearly by as big of a margin. Energy costs ranked second in the composite roll-up, material costs third, and employee wage/benefits fourth.

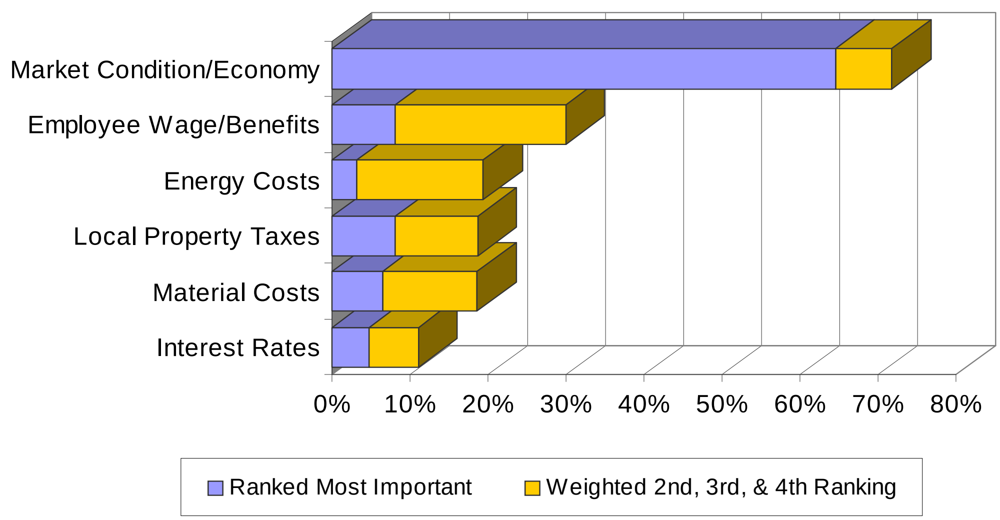

Figure 17 - Factors Adversely Affecting Financial Condition

The executives were asked where the company's primary banking institution is located. Figure 18 shows that 74 percent indicated financial transactions for the company are handled locally, while 8 percent said they are handled elsewhere in Wisconsin. Another 18 percent indicated most banking is done out of state. There is a direct correlation between where financial matters are handled and the location of headquarters for the business.

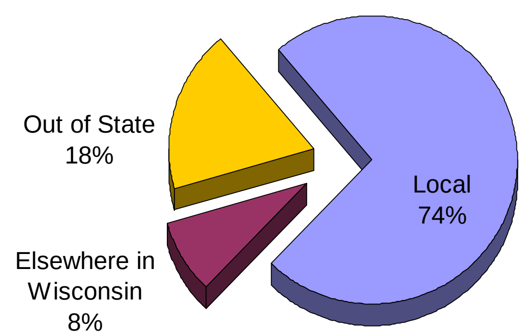

Figure 18 - Primary Bank Locations

Economic conditions influence company development and expansion. As reported in this Major Findings section, under the heading of Future Plans, several of the executives have plans for expansions and improvements irrespective of the currently depressed economy. Several intend to add on to a building, construct new facilities, or modernize or improve equipment. Some indicated there are technological innovations they plan to put in place soon. An important factor relates to how the industries will finance these innovations, new facilities, and modernization. Respondents were to indicate all methods of payment that would be used. As shown in Figure 19, cash flow and conventional financing are clearly the most likely options the executives will turn to.

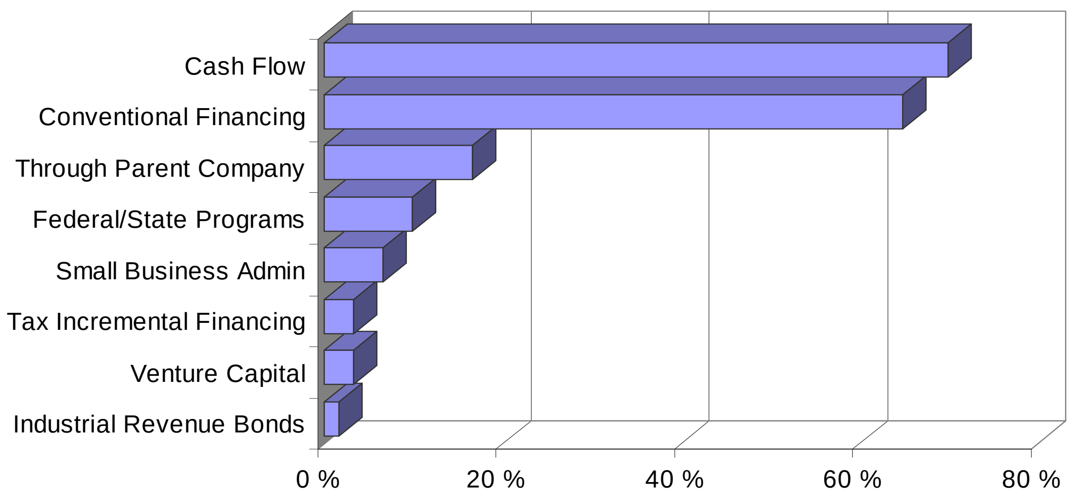

Figure 19 - Preferred Financing Methods

ENERGY MATTERS

Information was collected to determine projections in utility needs for the next three years. Executives estimated how business needs may change in regard to energy, water, sewer, voice lines, broadband/high-speed internet service, and wireless service. Respondents anticipate the biggest increases will be seen in usage of high-speed Internet service, wireless service, and electricity consumption (complete results are shown in Appendix A, Question 119). Only a few of the executives (14 percent) reported having an energy back-up system. The Polk County business executives seem to have a good working relationship with local utilities, only 9 percent reported experiencing difficulties in working with utility companies serving the area.

COMMUNITY LINKAGE

Community involvement through memberships and affiliations in local organizations serves to develop a company's ties with the community. Figures indicate the Polk County executives are fairly involved with the community. Of the respondents, 64 percent have a membership with the local Chamber of Commerce, which is very near the composite average of 63 percent. Thirty-seven percent of the executives are members of other business organizations. Local organizations should communicate opportunities for involvement as 55 percent of the Polk County executives expressed interest in participating in community organizations.

One factor that can have an impact on a company's involvement in the community is location of residence. Of the executives responding to this survey, 74 percent indicated that they reside in the local area, 16 percent reported they live elsewhere in Wisconsin, and 10 percent reported living outside of the state.

OVERALL IMPRESSIONS

The executives were asked to give their overall opinion of their local community and the state as a place to conduct business. As Figure 20 displays, Polk County communities received more favorable ratings than the state. While more gave ratings of good than excellent, 88 percent of the responding executives feel the community is an excellent or good place to do business. The rating is 10 points higher than average. The composite average for an excellent/good rating is 78 percent. When rating the state as a place to do business, the excellent/good rating combined is 71 percent. The composite figure for an excellent or good rating for the state is lower at 60 percent.

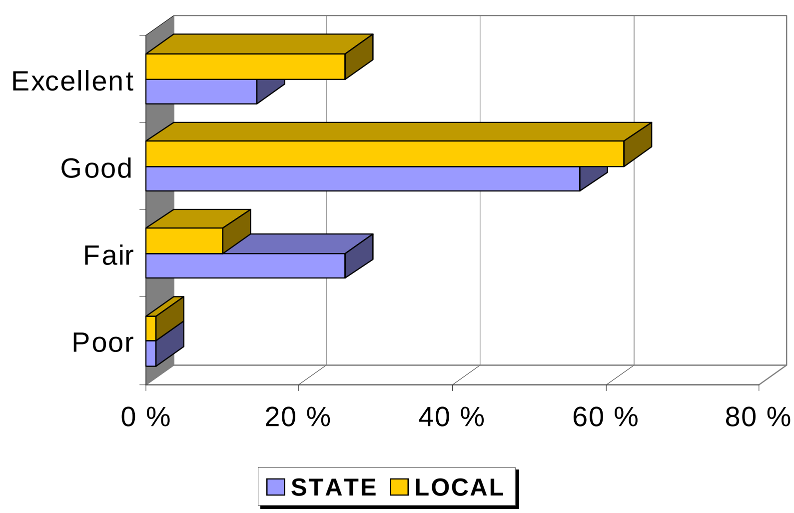

Figure 20 - A Place for Business

Survey respondents also were asked to give their overall opinion of the State of Wisconsin Department of Commerce. Ratings, which range from excellent to poor, are illustrated in Figure 21. The executives also had the opportunity to make suggestions or recommendations for working with the Wisconsin Department of Commerce. Their comments are available in Appendix A, Question 137.

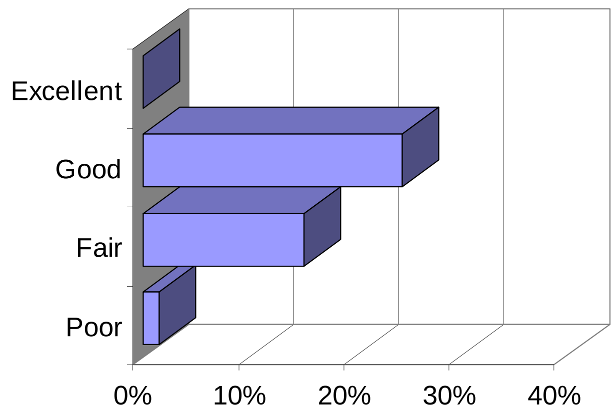

Figure 21 – Department of Commerce Ratings

The Department of Commerce administers several programs in an effort to stimulate commerce in Wisconsin's communities. Executives were asked to rate these programs as to their usefulness. The results are shown in Table D below.

Program	Useful	Not Useful	No Opinion
Business Planning Assistance	9%	4%	87%
Financing Programs	17%	9%	74%
Labor Training Programs	9%	6%	85%
Community Development Zones	11%	7%	81%
Main Street Program	28%	9%	64%
International Trade Program	6%	7%	87%

Table D - Administered Program Perceptions

When asked about key issues facing the firm in the next three to five years, the most frequently given responses were related to the following: economy, competition, healthcare, labor and taxes. Multiple comments are listed in Appendix A, Question 134.

The survey also solicited each executive's view of improvements in Wisconsin's business climate. As Figure 22 (next page) shows, only 7 percent of the Polk County executives feel the business climate has improved over the past few years. However, 51 percent feel conditions have remained stable. The recession is most likely to blame for the 32 percent who feel conditions have gotten worse. The remaining 9 percent stated "No opinion."

With regard to the state's *future* business climate, several (27 percent) feel conditions will improve or at least stay the same (35 percent) for the next few years. Others (26 percent) are expecting conditions will worsen. Polk County predictions are slightly more optimistic than expectations of others surveyed in the state. Composite findings for future expectations are as follows: 24 percent – Better, 43 percent – Same, and 24 percent – Worse.

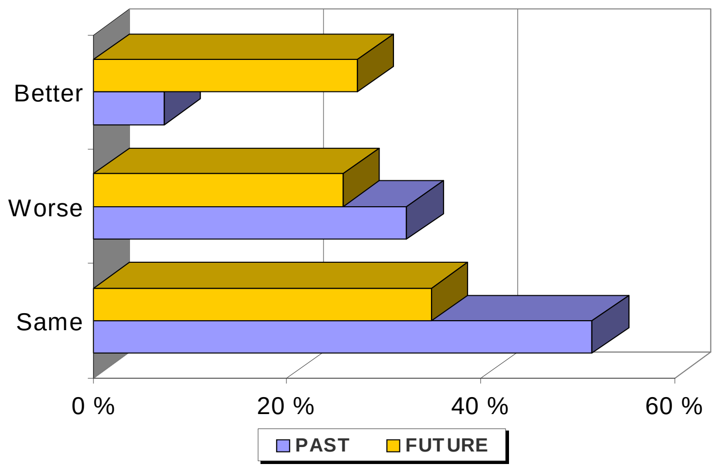

Figure 22 Improvements in Business Climate - Past/Future

Though executives are cautious in predicting a rosy business climate for the state in the near future, findings that surfaced from the study point toward a positive forecast for Polk County businesses. While there was evidence that some businesses are struggling, other local executives have positive plans for the future of their businesses. Several in the sample group expressed plans to expand, build new, and/or improve operations. Executives offering estimates on future employment projected a significant increase in the number of persons they plan to hire over the next five years. The executives' plans paint a favorable picture of the business climate in the county. It reflects companies that are not only weathering the recession, but are focused on a prosperous future.

VI. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The results of the Polk County Business Retention and Expansion Study are discussed in detail in the preceding Major Findings section. There are several conclusions that can be drawn from the data results. These include:

1. The interviewed Polk County business region is diverse with the largest percentage of those interviewed dealing with retail and the miscellaneous manufacturing industries.
2. The interviewed Polk County business community is very well established; 61 percent have been in business more than 20 years. Start-up activity is evident as nine businesses have opened their doors within the past five years.
3. Nearly three quarters of the interviewed firms (73 percent) serve as the company headquarters, with 38 percent stating there are additional facilities located in other communities. Of the businesses responding, 57 percent are incorporated.
4. The top factor negatively impacting the companies' current or future development is market condition/economy.
5. Of the interviewed executives, 14 percent reported supplying a portion of their products to federal government, 26 percent to state government, and 38 percent to local government. Polk County executives expressed an interest in initiating or expanding government contracts: 28 percent - federal; 37 percent - state; and 40 percent have local interest.
6. The majority (54 percent) of respondents' customers reside in the local area. Most of the executives described their customer base as increasing (38 percent) or stable (34 percent). The remaining 28 percent said it is decreasing, an above average percent.
7. When asked where competitors are located, the majority of the executives responded they are in the local area. Almost half of the executives (48 percent) feel competitors are "Making significant inroads" or are a "Future threat" to their businesses.
8. When describing market shares for the companies' products/services, 35 percent said it is increasing and 45 percent feel it has remained stable. Market share was described as decreasing by 20 percent of the respondents.

9. The study finds that of the Polk County businesses responding, 70 percent own the business facility, 23 percent lease, and 7 percent combine ownership with leasing.

10. Many of the businesses (67 percent) reported having enough property to expand at the present location, and 19 percent have definite expansion plans.

11. Five of the responding executives have plans for a new building either at the present site or elsewhere in the community.

12. Some of the executives (25 percent) have plans to modernize or improve their present building(s) within the next two years, and 53 percent have plans to modernize or improve their equipment.

13. Results indicate seven of the executives have plans to expand the business in another Wisconsin community; eight reported plans to expand out of state.

14. The study found that 6 percent of the executives (four persons) indicated plans to move all or part of the operation, either now or in the future. In addition, two executives said a move is possible.

15. Consolidation plans were expressed as “Probable” by three of the executives and four more said it is “Possible.”

16. Three executives reported the possibility of having to shut down the business as “Probable” and five more said it’s “Possible.”

17. Other states have contacted 13 percent of the interviewed businesses in an attempt to persuade them to relocate.

18. Of the interviewed executives, 70 said that they currently employ 2,817 full-time people. Data gathered from 46 executives (those responding to all five questions in a series about employment) reflects current employment is 9 percent lower than one year ago and 4 percent lower than five years ago. The executives anticipate an increase of 6 percent next year and an increase of 32 percent over the next five years.

19. A total of 765 part-time workers are employed by 70 percent of the businesses.

20. Employees in professional/technical roles earn an average of $29.45 hourly, while office staff average $15.39 per hour. Highly skilled employees in Polk County receive an average hourly wage of $19.98, semi-skilled employees receive an average of $13.99, and unskilled workers receive an average of $11.91.

21. The Polk County executives reported they are having the greatest difficulty recruiting for professional/technical staff positions. The survey found that 50 percent reported difficulty recruiting for professional/technical staff positions. Fewer (16 percent) said they have difficulty recruiting for blue-collar positions, and 13 percent expressed difficulty recruiting office support staff.

22. The Polk County executives believe the most positive factors dealing with recruiting are the quality of life and K-12 education system. The factor considered to have the most negative impact is personal taxes.

23. Investment in training programs is increasing for 35 percent of the executives, decreasing for 6 percent, and remains the same for 59 percent.

24. Some of the respondents (7 percent) reported an association with a union, encompassing 14 percent of the full-time employment base.

25. The study finds 42 percent of the executives rated their local economic development efforts as “Excellent” or “Good”, 30 percent responded "Fair" and 8 percent said “Poor.” The remaining 20 percent expressed no opinion.

26. Of the executives responding to this survey, 68 percent rated their local government excellent or good, 21 percent fair, 1 percent poor, and 10 percent offered no opinion.

27. Responses indicate that 35 percent of businesses have seen an increase in gross sales, 32 percent have seen a decrease, and 33 percent reported gross sales remain stable.

28. Of those responding to the question regarding research and development, 58 percent dedicate a portion of annual sales to research and development. Most (44 percent) allot less than 5 percent.

29. Two factors most negatively impacting the firms' present financial conditions are market condition/economy and employee wage/benefits.

30. Of the respondents, 64 percent are area Chamber of Commerce members and 37 percent are members of other business organizations. Fifty-five percent signified an interest in participating in community organizations.

31. Many executives (88 percent) feel their local community is an excellent or good place to do business. The state received an excellent or good rating from 71 percent of the respondents.

32. The study found 7 percent of the executives feel Wisconsin's business climate has improved over the past few years, 51 percent feel it has not changed, and 32 percent feel conditions have gotten worse. Nine percent had no opinion.

33. Where Wisconsin's future business climate is concerned, 27 percent of the respondents feel the climate will improve over the next few years, 35 percent feel it will stay the same, and 26 percent feel conditions will deteriorate. Twelve percent asserted no opinion.

RECOMMENDATIONS

The study revealed a number of issues that call for the PCEDC to follow-up with survey participants. In particular, the survey identified a number of businesses that are planning expansions and some that indicated the possibility of relocation or closure. Many of these requests are immediately being addressed. The PCEDC will disseminate information on local economic development conditions through three outreach educational events. Other action items include:

A. <u>Survey Follow Up</u>

1. Identify business needs or concerns and share them with the appropriate agencies.
    a. UW-Extension will develop presentation materials that highlight results of the WIBRES and Labor Market studies.
    b. The PCEDC will communicate the results of the survey through the new website, the newsletter, at the annual meeting, and other outreach events.
    c. The PCEDC will provide CD copies of the report to all area economic development and promotional groups.
    d. Staff of the PCEDC will immediately respond to 'red-flag' concerns identified in the WIBRES study by meeting with the respective businesses to develop solutions to their specific issues. Regular communication will follow with all parties involved to ensure results and address any emerging issues.
    e. Develop a system of tracking progress toward fulfilling informational requests.
    f. PCEDC staff will follow-up with firms that indicated plans to relocate or expand outside the county. Create a system of dialog to discuss intentions and provide options for retention.
    g. The PCEDC will work with the State of Wisconsin Department of Commerce to seek solutions for emerging business needs and issues.
    h. The PCEDC and UW-Extension will develop an executive summary of the Labor Market and WIBRES reports and distribute to all units of government, local businesses and appropriate agencies.
    i. The PCEDC will commit to doing subsequent business retention and expansion studies in three to five years.

B. <u>Business Retention and Expansion</u>

1. Promote local business expansion opportunities to Polk County's existing industry and businesses.
    a. The PCEDC will provide information on state and federal programs available for local business expansion through the website, email notices, and the newsletter.
    b. Implement a marketing plan that creates awareness.
    c. Be a conduit of information sharing between businesses.
    d. Most employers continue to face difficulty in finding and retaining qualified workers. PCEDC will work in developing/advocating workforce development efforts.
    e. Build productive and collaborative relationships with existing businesses.
    f. Figures indicate that Polk County firms are interested in their communities and are involved. Identify business executives who could be considered candidates for PCEDC board members.
    g. Improve interactions between businesses. Identify opportunities for collaborative product development/support businesses.

C. <u>Business Attraction</u>

1. Facilitate new business recruitment.
    a. Based upon the WIBRES survey, the PCEDC staff will develop marketing lists of businesses for recruitment that would compliment existing businesses in Polk County.
    b. Work with Momentum West to promote Polk County to business prospects both nationally and internationally through the trade shows they have scheduled.
    c. PCEDC will participate in call trips to the Minneapolis/St. Paul area along with Momentum West.
    d. Conduct follow-up meetings with all prospects and utilize a team of Polk County stakeholders or board members, if needed.
    e. Provide timely information to all area Economic Development Corporations (EDC's)/municipalities regarding prospective businesses looking for property.
    f. Assist area EDC's/municipalities with additional business development needs, including:

- ◊ Conduct an inventory of industrial sites and buildings utilizing the Location One Information System (LOIS) and WEDA sites and buildings tools.
- ◊ Serve as a 'One-Stop Shopping' resource for all economic development needs.

D. <u>Marketing, Communication and Education</u>

1. Communicate and promote the benefits of Polk County.
   a. Identify strengths and the unique benefits of doing business in Polk County.
   b. Work with municipalities to assure information posted on LOIS and the WEDA sites and buildings tool is current and accurately reflects land and building sites available throughout the county.
   c. Update and maintain the PCEDC website to market Polk County opportunities.
   d. Collaborate with the Polk County Information Center, when possible.
2. Communication resource for economic development funding opportunities.
   a. Share information on state and federal loan programs available through the website and the newsletter.
   b. Utilize PDEDC's website to provide links to access state and regional financing opportunities.
3. Provide information on education, training, and employment opportunities available in the county including technical college training, various workforce resource agencies, etc. to assist in securing a skilled labor force for area businesses. Also serve as an advocate for enhanced workforce development.
   a. The PCEDC will work with WITC, UW-River Falls, and UW-Stout to encourage development of curriculums that would prepare a workforce qualified to meet the needs of area employers.
   b. Develop a workshop or seminar on contracting. The percentages for local firms that contract with federal or state governments are lower than average. There is an opportunity to increase sales through contracting.
   c. PCEDC and UWEX will develop educational events to address employee training and recruiting program needs identified most frequently in the study.

4. Communicate and promote EDC efforts to Polk County EDC stakeholders.
    a. In order to disseminate information on new initiatives, programs, economic conditions, and projects, the PCEDC staff will communicate e-bulletin/ newsletters regularly with:
        - ◊ Local businesses
        - ◊ Civic organizations (Chambers, community clubs, etc.)
        - ◊ Local elected officials/EDC's
        - ◊ County officials
        - ◊ Media
        - ◊ State officials
    b. Coordinate and lead the annual meeting of EDC's. Prepare an annual report.
    c. Utilize PCEDC's new website for members to provide links to sources of information on topics related to the business community.
    d. Develop a recognition program to promote existing businesses in our County. Awards for longevity, size, community involvement, partnerships, etc. are possible examples.
    e. UWEX and SBDC will evaluate the development of an annual business planning competition. Enticements such as a zero-interest loan for the winner may be considered.
5. Participate in regional economic development organizations and planning activities.
    a. Serve as a resource to Polk County board, Momentum West, the International Trade, Business and Economic Development Council (ITBEC) for Northwest Wisconsin, and West Central Wisconsin Regional Planning Commission on economic development policy.

APPENDIX A

POLK COUNTY SUMMARY OF RESPONSES BASED ON 72 FIRMS

- AFP Advanced Food Products, LLC
- Amery Free Press
- Amery Regional Medical Center
- Amery Telcom
- Anchor Bank, fsb
- ARC - Association Retreat Center
- Bealka Casting, Inc.
- Bill's Ace Hardware & Appliance
- Bishop Fixture and Millwork
- Bending Branches, LLC
- Bremer Bank
- Cardinal Glass
- Carlson Highland & Co., LLP
- Cascade Oil Company / Cascade BP
- Century 21 Premier Group
- Creation Station
- Croixland Leather Works
- Custom Fire Apparatus, Inc.
- Cutler Law Office
- Denny's Auto, Inc.
- Dick's Fresh Market
- Downtown Dental, S.C.
- Durex Products, Inc.
- Dynatronix, Inc.
- Edward Jones
- F & M Plastics, Inc.
- Federated Co-ops, Inc.
- Ferrell Gas Partners, LP
- Foremost Farms USA
- Four Seasons Wood Products, Inc.
- Gille Trucking & Excavating, Inc.
- Greene Implement, Inc.
- Industrial Tool & Plastics, Inc.
- Kathy's Mainstreeter Cafe & Pizza Cellar, LLC
- Laux Law Firm, LLC
- MPP Corporation
- MRL Manufacturing, Inc.
- Mark It Graphics
- Monarch Paving
- Mrs. I's Yarn Parlor
- Noah Insurance Group
- Olson Chiropractic / Foundations In Health
- Osceola Auto Body
- Osceola Cleaners
- Osceola Interiors
- Osceola Medical Center
- Osceola Pharmacy
- PY's
- Paradise Pizza
- Performance Plastics, LLC
- Prairie Marsh Carvers; Champion Ind., LTD
- Precision Wood & Fixturing Co., Inc.
- RAB, Inc. dba/Tippy Canoes & RAB Investments, LLC
- Red Rock Radio - WLMX
- River Valley Inn & Suites
- St. Croix Plastics, Inc.
- State Farm Insurance
- Steven B. Schletty, DDS
- Studio A Salon - Spa
- Surpass, Inc.
- The Builders Choice - A Fullerton Company
- The Riverbank
- The Sun
- Total Image
- UFE, Inc. - Dresser
- UFE, Inc. - Luck
- UniPunch Products, Inc.
- Valley Spirits
- Video Den
- WESTconsin Credit Union
- Wal-Mart
- Wildwood Flowers

Note: For your convenience, you will find composite data dropped into the far right column of this summary and highlighted in tan. These figures are made available for comparison of Polk County data to a compilation of other areas participating in the WIBRES program within the past three years. Composite counties and communities include:

Columbia County
Dodge County
Douglas County
Green County
Washburn
Waunakee

I. HISTORY AND STATUS OF PRESENT LOCATION

Composite Data

1. Where is your firm's corporate headquarters located?

			Composite Data
Local	52	73.2%	74.8%
Elsewhere in Wisconsin	6	8.5%	7.5%
Out of State*	12	16.9%	15.3%
Out of United States*	1	1.4%	2.4%

2. Does your firm have multiple locations?

			Composite Data
Yes	27	37.5%	44.7%
No	45	62.5%	55.3%

3. Where?
(Executives are asked to indicate all that apply. Percentages are based on multiple responses.)

Executives Responding	27	
Local	8	29.6%
Elsewhere in Wisconsin	20	74.1%
Out of State*	19	70.4%
Out of United States*	4	14.8%

4. If you have businesses in other areas, how does the nature of business relate to this facility?
(Executives are asked to indicate all that apply. Percentages are based on multiple responses.)

Executives Responding	27	
Similar product/service	22	81.5%
Supply to/support local operation	5	18.5%
Local operation supplies/supports them	4	14.8%
Independent business focus	5	18.5%

5. What is the likelihood of consolidating operations?

			Composite Data
Probable	3	11.1%	5.1%
Possible	4	14.8%	16.7%
Remote	12	44.4%	36.2%
Non-existent	8	29.6%	42.0%

6. When was your firm established?

			Composite Data
0 - 2 years ago	4	5.6%	4.0%
3 - 5 years ago	5	6.9%	7.0%
6 - 10 years ago	5	6.9%	9.7%
11 - 20 years ago	14	19.4%	19.5%
21 - 100 years ago	40	55.6%	53.8%
Over 100 years ago	4	5.6%	6.1%

7. What form of organization does your business have?

			Composite Data
Corporation (S or C)	41	56.9%	66.6%
Cooperative	3	4.2%	1.2%
Partnership	1	1.4%	2.5%
Limited Liability Corp.	9	12.5%	17.5%
Limited Liability Partnership	3	4.2%	1.8%
Sole Proprietorship	13	18.1%	7.4%
Other*	2	2.8%	3.1%

* Additional Information in Section XIII.

II. NATURE OF BUSINESS

8. What is the nature of your business?

Administration	0.07	0.1%	0.2%
Agriculture	0.90	1.3%	2.7%
Chemical, Petroleum, Rubber, Plastics	2.75	3.9%	3.4%
Communication	2.00	2.8%	0.9%
Computer, Computer Software	0.20	0.3%	0.1%
Construction	2.10	3.0%	4.5%
Consulting	0.26	0.4%	1.0%
Distribution	0.05	0.1%	4.7%
Education	0.25	0.4%	0.2%
Electrical, Electrical Equipment	1.00	1.4%	1.7%
Energy	- -	- -	0.6%
Fabricated Metals	1.60	2.3%	4.8%
Financial/Insurance/Real Estate	8.00	11.3%	3.4%
Food, Food Products	4.70	6.6%	11.4%
Hospitality	2.50	3.5%	2.5%
Lumber, Wood Products	3.35	4.7%	2.7%
Machinery, Excluding Electrical	0.81	1.1%	2.7%
Medical, Health Care	6.40	9.0%	3.9%
Misc. Manufacturing	8.25	11.6%	10.1%
Paper, Allied Products	- -	- -	0.2%
Primary Metals	0.01	0.0%	1.2%
Printing, Publishing	2.45	3.4%	3.1%
Recreation	0.50	0.7%	1.4%
Research	- -	- -	0.5%
Retail	13.51	19.0%	10.8%
Service	8.15	11.5%	11.1%
Stone, Clay, Glass, Concrete	1.00	1.4%	1.9%
Telemarketing	- -	- -	0.6%
Textiles and Apparel	0.10	0.1%	0.2%
Transportation	0.10	0.1%	3.8%
Waste, Recycling	- -	- -	0.9%
Other*	- -	- -	

Question 8 Explanation:

The first column lists the type of business in the survey.

The second column lists the headcount or number of respondents based on their percent of involvement (if a company is involved in multiple businesses, ie: 50% Education, 40% Consulting, and 10% Communication, the headcount will display .50, .40, and .10).

The third column shows the community percent of involvement in each business type based on the number of executives responding to question 8.

9. What percent of raw materials/supplies utilized by your business come from the following areas?

Local/County	20.7%	25.6%
Elsewhere Wisconsin	15.8%	19.2%
Midwest	34.8%	26.0%
National	22.7%	21.4%
International	5.9%	7.9%

* Additional Information in Section XIII.

II. NATURE OF BUSINESS

10. Please list suppliers that you would like to have located closer to your facility.

Aluminum extruder	Painting
Circuit boards	Pocket-door frame hardware
Composites raw material distribution	Roll-Up compartment doors
Food service distributor	Sheet metal
Hydraulic generator	Sheet plastic distributor
Lumber	Transformers
Office supplies	

11. What percent of your raw materials/supplies are transported in the following manner?

Truck	58.6%
Common Carrier	27.6%
Rail	0.1%
Air	1.1%
Ship	0.5%
Personal/company vehicle	12.2%
Other	- -

12. What percent of your finished products are transported in the following manner?

Truck	45.4%
Common Carrier	33.2%
Rail	0.1%
Air	1.2%
Ship	0.2%
Personal/company vehicle	6.5%
Other	13.4%

13. How well do the following modes of transport serve your business needs?

	Excellent	Good	Fair	Poor
Truck	25	20	3	- -
Common Carrier	30	19	3	- -
Rail	1	1	- -	11
Air	2	8	1	6
Ship	1	2	- -	8
Personal/Company Vehicle	10	10	2	2
Other	1	1	- -	- -

14. Which of the following factors, if any, have the greatest negative impact on the current/future development of your product or business? (Rank up to four in order of priority: 1=Greatest Impact, etc.)

	Rankings				
Factors	One	Two	Three	Four	Total
Global Competition	4	3	4	- -	11
Regulatory Constraints	9	7	7	5	28
Domestic Competition	7	9	8	6	30
Energy Costs	1	2	4	9	16
Material Shortages	- -	3	3	- -	6
Antiquated Machinery	- -	- -	3	1	4
Insufficient Space	1	1	2	1	5
Transportation Problems	- -	- -	1	1	2
Interest Rates	1	5	3	1	10
Market Condition/Economy	36	13	5	5	59
Labor Supply	- -	- -	4	3	7
Labor Quality	- -	3	1	7	11
Employee Wage/Benefits	2	9	8	9	28
Other	3	4	- -	- -	7
Total Responses	64	59	53	48	224

* Additional Information in Section XIII.

III. PHYSICAL SPECIFICATION OF PLANT

Composite Data

15. Do you own or lease this location?

			Composite Data
Own	49	70.0%	73.9%
Lease	16	22.9%	21.8%
Both	5	7.1%	4.2%

16. If you lease, when does the lease expire?

0 - 2 years	4	33.3%
3 - 5 years	6	50.0%
6 - 10 years	1	8.3%
11 - 20 years	1	8.3%
Over 20 years	- -	- -

17. What is the property size of this location?

Total acres: 3,367

1 acre	15	32.6%
2 acres	3	6.5%
3 - under 5 acres	11	23.9%
5 - under 10 acres	10	21.7%
10 - 25 acres	1	2.2%
26 - 50 acres	2	4.3%
Over 50 acres	4	8.7%

18. How much building space do you occupy at your current location?

Total square feet: 2,159,114

Under 2,500 sq. ft.	19	32.2%
2,500 - 5,000 sq. ft.	8	13.6%
5,001 - 7,500 sq. ft.	2	3.4%
7,501 - 10,000 sq. ft.	3	5.1%
10,001 - 25,000 sq. ft.	6	10.2%
25,001 - 50,000 sq. ft.	9	15.3%
50,001 - 100,000 sq. ft.	7	11.9%
Over 100,000 sq. ft.	5	8.5%

19. If you use additional space elsewhere in the community for this business, how much?

Total square feet: 113,944

Under 2,500 sq. ft.	17	70.8%
2,500 - 5,000 sq. ft.	2	8.3%
5,001 - 7,500 sq. ft.	2	8.3%
7,501 - 10,000 sq. ft.	1	4.2%
10,001 - 25,000 sq. ft.	1	4.2%
25,001 - 50,000 sq. ft.	- -	- -
50,001 - 100,000 sq. ft.	1	4.2%
Over 100,000 sq. ft.	- -	- -

20. Is car and truck access to your building adequate?

			Composite Data
Yes	61	93.8%	92.1%
No	4	6.2%	7.9%

21. Is there adequate on-site parking for your employees?

			Composite Data
Yes	57	86.4%	88.7%
No	9	13.6%	11.3%

IV. MARKETS, CUSTOMERS

22. What percent of your customers are located in the following areas?

				Composite Data
Local/County		54.5%		41.0%
Elsewhere in Wisconsin		11.6%		20.8%
Midwest		20.4%		16.9%
National		11.8%		17.7%
International*		1.6%		3.6%

23. What percent of your company's sales is conducted over the Internet?

				Composite Data
None		37	52.9%	57.6%
Less than 10%		24	34.3%	31.3%
10% - 25%		3	4.3%	5.3%
25% - 50%		6	8.6%	2.5%
50% - 75%		- -	- -	1.5%
More than 75%		- -	- -	1.9%

24. How would you describe the number of customers you serve?

				Composite Data
Increasing		27	38.0%	58.4%
Decreasing		20	28.2%	9.4%
Stable		24	33.8%	32.2%

25. Do you directly sell to any levels of government shown below?

				Composite Data
Federal:	Yes	8	14.3%	27.4%
	No	45	80.4%	70.9%
	Don't Know	3	5.4%	1.7%
State:	Yes	15	26.3%	31.6%
	No	40	70.2%	66.1%
	Don't Know	2	3.5%	2.3%
Local:	Yes	24	38.1%	36.3%
	No	36	57.1%	61.4%
	Don't Know	3	4.8%	2.3%

26. If Yes, approximately what percent of your sales are to governments?

Less than 10%		23	74.2%
10% - 25%		4	12.9%
25% - 50%		2	6.5%
50% - 75%		- -	- -
More than 75%		2	6.5%

27. Are you interested in initiating or expanding government contracts?

				Composite Data
Federal:	Yes	15	28.3%	38.8%
	No	28	52.8%	40.3%
	Don't Know	10	18.9%	20.9%
State:	Yes	20	37.0%	41.2%
	No	22	40.7%	38.4%
	Don't Know	12	22.2%	20.4%
Local:	Yes	22	40.0%	44.8%
	No	20	36.4%	34.4%
	Don't Know	13	23.6%	20.8%

28. If there are customers that would benefit by relocating closer to your facility, please provide information.

Medical devices companies, start-ups and established
Online retailers
Electroplating
Flooring companies
Paddle sport equipment

* Additional Information in Section XIII.

V. COMPETITORS

29. What percent of your competitors are located in the following areas?

			Composite Data
Local/County	50.2%		39.4%
Elsewhere in Wisconsin	16.8%		22.8%
Midwest	19.2%		15.3%
National	11.1%		17.0%
International*	2.7%		5.4%

30. What effect are your primary competitors having on your business?

			Composite Data
Making Significant Inroads	13	18.8%	17.1%
Future Threat	20	29.0%	33.9%
No Real Impact	30	43.5%	43.0%
Never Been a Consideration	6	8.7%	6.0%

31. How would you describe the market share of your company's products/services?

			Composite Data
Increasing	24	34.8%	56%
Decreasing	14	20.3%	7%
Stable	31	44.9%	37%

* Additional Information in Section XIII.

VI. FUTURE PLANS

32. Do you own or lease sufficient property to allow for expansion of your building(s) at this location?

Yes	48	66.7%	68.0%
No	24	33.3%	32.0%

33. Are you planning any expansion of your existing building(s) at this location?

Yes	14	19.4%	24.7%
No	58	80.6%	75.3%

34. If Yes, when do you plan to start construction?

Now in progress	- -	- -
This Year	- -	- -
Next Year	2	13.3%
Within 5 Years	10	66.7%
Beyond 5 Years	1	6.7%
Don't Know	2	13.3%

35. How large would this addition be?

Total square feet	83,000	
Under 2,500 sq. ft.	2	22.2%
2,500 - 5,000 sq. ft.	1	11.1%
5,001 - 7,500 sq. ft.	- -	- -
7,501 - 10,000 sq. ft.	2	22.2%
10,001 - 15,000 sq. ft.	4	44.4%
15,001 - 25,000 sq. ft.	- -	- -
25,001 - 50,000 sq. ft.	- -	- -
Over 50,000 sq. ft.	- -	- -

36. Do you have any plans to modernize or improve your present building(s) within the next two years?

Yes	17	24.6%	42%
No	52	75.4%	58%

37. Do you have plans for a new building on your present site or elsewhere in the community?

Yes	5	7.5%	21.5%
No	62	92.5%	78.5%

38. How large will the building be?

Total square feet	50,900	
Under 2,500 sq. ft.	1	20.0%
2,500 - 5,000 sq. ft.	2	40.0%
5,001 - 7,500 sq. ft.	- -	- -
7,501 - 10,000 sq. ft.	1	20.0%
10,001 - 15,000 sq. ft.	- -	- -
15,001 - 25,000 sq. ft.	- -	- -
25,001 - 50,000 sq. ft.	1	20.0%
Over 50,000 sq. ft.	- -	- -

39. When do you plan to start construction?

Now in progress	- -	- -
This Year	- -	- -
Next Year	1	14.3%
Within 5 Years	1	14.3%
Beyond 5 Years	1	14.3%
Don't Know	4	57.1%

* Additional Information in Section XIII.

VI. FUTURE PLANS

40. Do you have plans to expand elsewhere in the state?

Yes	7	10.6%	11.7%
No	59	89.4%	88.3%

41. If Yes, where?

Within 50 Miles	4	57.1%
Within 100 Miles	2	28.6%
Elsewhere in the State	1	14.3%

42. If Yes, when?

Now in progress	2	25.0%
This Year	- -	- -
Next Year	2	25.0%
Within 5 Years	3	37.5%
Beyond 5 Years	- -	- -
Don't Know	1	12.5%

43. Do you have plans to expand outside the state?

Yes	8	11.8%	13.5%
No	60	88.2%	86.5%

44. If Yes, where?

Executives Responding	8	
Midwest	5	62.5%
Sunbelt	1	12.5%
East Coast	1	12.5%
West Coast	1	12.5%
Other US*	1	12.5%
International*	2	25.0%

45. If Yes, when?

Now in progress	4	50.0%
This Year	1	12.5%
Next Year	1	12.5%
Within 5 Years	2	25.0%
Beyond 5 Years	- -	- -
Don't Know	- -	- -

46. Do you have any plans to modernize or improve your present equipment within the next two years?

Yes	36	52.9%	73%
No	32	47.1%	27%

47. Are there technological innovations that you plan to put in place within the next two years?

Yes	37	55.2%	65.1%
No	30	44.8%	34.9%

* Additional Information in Section XIII.

VI. FUTURE PLANS

48. Do you have any plans to move all or part of your operation from this location?

			Composite Data
Yes	4	5.8%	7.8%
No	63	91.3%	82.5%
Possible Candidate	2	2.9%	9.7%

49. If Yes, where do you plan to move?

Local	4	66.7%
Elsewhere in Wisconsin	- -	- -
Midwest	- -	- -
East Coast	- -	- -
Sunbelt	- -	- -
West Coast	- -	- -
Other US*	- -	- -
International*	2	33.3%

50. If Yes, when do you plan to move?

Now in progress	- -	- -
This Year	- -	- -
Next Year	2	33.3%
Within 5 Years	3	50.0%
Beyond 5 Years	- -	- -
Don't Know	1	16.7%

51. If Yes, why do you plan to move?

	Rankings				
Factors	*One*	*Two*	*Three*	*Four*	*Total*
Closer to Customer	1	- -	- -	- -	1
Closer to Supplier	- -	- -	1	- -	1
Building Overcrowded	1	1	- -	- -	2
No Land to Expand	- -	- -	- -	1	1
Access/Egress Problems	- -	- -	1	- -	1
Crime/Vandalism	- -	- -	- -	- -	- -
Labor Costs	1	1	- -	- -	2
Labor Supply	- -	- -	- -	- -	- -
Energy Costs	- -	- -	1	- -	1
Regulatory Concerns	- -	- -	- -	1	1
Rigid Code Enforcement	- -	- -	- -	- -	- -
Property Taxes	- -	- -	- -	- -	- -
State Corporate Taxes	- -	- -	- -	- -	- -
Personal Income Taxes	- -	- -	- -	- -	- -
Other*	3	1	- -	- -	4
Total Responses	6	3	3	2	14

52. In the past few years, have other states' representatives contacted you trying to get you to move your company from Wisconsin?

			Composite Data
Yes	9	13.0%	15.1%
No	60	87.0%	84.9%

53. Which states had representatives contacted you?
(6) Minnesota, (2) South Dakota, South Carolina, Nebraska, Utah, Iowa

* Additional Information in Section XIII.

VI. FUTURE PLANS

54. What is the likelihood of phasing out or shutting down this operation with no plans for expansion elsewhere?

Probable	3	4.3%	1.3%
Possible	5	7.2%	9.7%
Remote	23	33.3%	41.2%
Non-existent	38	55.1%	47.8%

55. If probable or possible, why?

Changing business model of our primary line
Debt - Shutting down some buildings in the winter time - capacity is 600 people in buildings - avg. is 220..
Economy
If business continues to slow down & paying bills gets tougher
3 - Retirement
State HWY project - Depends on finding suitable relocation location

56. to 60. What is your approximate number of full-time employees for the following years?

Number of Employees	Five Years Ago	Last Year	Current	Next Year	Five Years from Now
0	5	4	3	2	2
1 - 4	17	19	19	16	15
5 - 9	17	11	13	11	7
10 - 19	3	8	10	9	8
20 - 39	5	5	4	4	7
40 - 69	7	7	9	8	5
70 - 99	- -	2	1	1	1
100 - 249	6	8	9	6	7
250 - 499	2	2	2	2	2
500 - 999	- -	- -	- -	- -	- -
1000 and over	- -	- -	- -	- -	- -
Total Employment Size	2,148	2,816	2,817	2,472	2,341
Average Company Size	35	43	40	42	43
Median Company Size	8	9	10	10	15
Number of Executives Responding	62	66	70	59	54
Number of Executives Responding to all questions in this series			46		

61. How many shifts do you have in your operation?

One	39	62.9%
Two	7	11.3%
Three	12	19.4%
Other*	4	6.5%

62. Do you employ part-time employees?

Yes	50	70.4%
No	21	29.6%

63. If Yes, how many part time employees?

	Staff	Contract	Total	
1 - 4	21	3	24	53.3%
5 - 9	7	3	10	22.2%
10 - 19	5	1	6	13.3%
20 - 39	1	- -	1	2.2%
40 - 69	1	- -	1	2.2%
70 - 99	- -	- -	- -	- -
100 or More	3	- -	3	6.7%
Total part-time employment:	734	31	765	

64. Is the number of part-time employees related to seasonal fluctuation?

Yes	19	38.0%
No	31	62.0%

65. Is the number of part-time employees related to economic fluctuation?

Yes	31	63.3%
No	18	36.7%

* Additional Information in Section XIII.

66. What percent of your employment is:

		Composite
Professional/Technical	26.0%	23.1%
Office Staff	20.5%	12.1%
Highly Skilled	14.6%	21.7%
Semi-Skilled	30.3%	30.7%
Unskilled	8.6%	12.5%

67. What is the average hourly wage in your company (excluding benefits) for:

	Professional Tech	Office Staff	Highly Skilled	Semi-Skilled	Unskilled
Under $6.00	- -	- -	- -	- -	1
$6.00 - 7.99	- -	1	- -	- -	1
$8.00 - 9.99	- -	- -	1	7	3
$10.00 - 11.99	- -	3	1	2	1
$12.00 - 13.99	3	8	- -	8	3
$14.00 - 15.99	1	11	5	7	3
$16.00 - 17.99	3	9	5	5	3
$18.00 - 19.99	2	3	4	3	- -
$20.00 - 24.99	6	4	6	3	- -
$25.00 - 29.99	4	1	5	- -	- -
$30.00 - 34.99	3	- -	1	- -	- -
$35.00 - 39.99	7	- -	- -	- -	- -
$40.00 - 44.99	1	- -	1	- -	- -
$45.00 and Over	6	- -	- -	- -	- -
Average Wage	$29.45	$15.39	$19.98	$13.99	$11.91
Mean Wage	$26.00	$15.00	$18.60	$15.00	$12.00
Average Wage - Last five communities studied:	$27.71	$14.99	$20.61	$13.86	$10.40

68. Do the majority of your employees need skills training to perform at the required level?

			Composite
Yes	51	77.3%	83.2%
No	15	22.7%	16.8%

69. Does your firm require all workers to have a high school diploma or equivalent?

			Composite
Yes	33	50.0%	44.4%
No	33	50.0%	55.6%

70. What percent of your employees reside within this county?

Less than 40%	3	4.8%
40% to 49%	- -	- -
50% to 59%	9	14.3%
60% to 69%	4	6.3%
70% to 79%	4	6.3%
80% to 89%	8	12.7%
90% to 99%	13	20.6%
100%	22	34.9%

Overall workforce living in the county based on executives responding to questions 56 and 70: 74.3%

* Additional Information in Section XIII.

VII. LABOR AND MANPOWER MATTERS

71. What percent of your employees, on the average, retire annually?

			Composite Data
0%	32	50.0%	53.8%
Less than 3%	30	46.9%	41.3%
3% to 5%	2	3.1%	3.2%
6% to 10%	- -	- -	1.6%
11% to 25%	- -	- -	- -
Over 25%	- -	- -	- -

72. What is your total employee turnover rate, on the average, annually?

			Composite Data
0%	15	22.7%	17.4%
Less than 3%	24	36.4%	30.5%
3% to 5%	8	12.1%	15.4%
6% to 10%	12	18.2%	17.0%
11% to 25%	7	10.6%	12.9%
Over 25%	- -	- -	6.8%

73. What percent of your new employees leave within the first six months?

			Composite Data
0%	25	39.1%	27.8%
Less than 3%	23	35.9%	37.8%
3% to 5%	5	7.8%	7.7%
6% to 10%	6	9.4%	11.7%
11% to 25%	3	4.7%	9.0%
Over 25%	2	3.1%	6.0%

74. What is the most common reason for employee turnover?
(Respondents are asked to indicate all that apply. Percentages based on total responses.)

			Composite Data
Executives Responding	61		
Career change	16	26.2%	20.5%
College graduation	- -	- -	8.1%
Job security	- -	- -	3.2%
Other opportunity	37	60.7%	47.7%
Relocation, spouse/family	13	21.3%	17.0%
Retirement	7	11.5%	14.1%
Skills don't align	9	14.8%	19.1%
Wage/benefits	12	19.7%	15.5%
Terminated, performance	21	34.4%	43.5%
Terminated, work ethic	11	18.0%	27.2%

75. Are replacement employees difficult to recruit?

				Composite Data
Blue Collar:	Yes	10	16.1%	46.0%
	No	39	62.9%	42.0%
	Not Applicable	13	21.0%	12.0%
Office Support (hourly):	Yes	8	13.1%	22.3%
	No	42	68.9%	62.2%
	Not Applicable	11	18.0%	15.5%
Professional/Technical:	Yes	31	50.0%	53.9%
	No	18	29.0%	26.6%
	Not Applicable	13	21.0%	19.5%

* Additional Information in Section XIII.

76. How do the following effect your recruiting?

	Positive	Negative	No Effect
Quality of Life	35	1	12
Cost of Living	25	8	13
Climate	10	6	26
Housing Costs	20	6	16
Available Housing	17	3	20
Personal Taxes	7	12	21
K-12 Education System	26	- -	14
Area Technical College	11	1	24
Transportation	12	5	24
Other*	2	- -	8

77. How do you obtain replacement employees?

	Best	Also Used
Word of Mouth	31	20
Newspaper	15	26
Internet	6	21
Private Services	3	11
Job Service	1	6
Storefront Sign	3	4
Area Tech College	2	6
University/College	- -	8
Other*	2	2

78. Are you familiar with "jobs development program/training programs" sponsored by county, state, or federal government?

Yes	29	42.6%
No	39	57.4%

79. Please give your perception of the following:

	Useful	Not useful	No opinion
Job Center	10	8	25
WI Mfg. Outreach Center	4	4	30
WI Mfg. Extension Partnership	1	4	33
Technical college	24	2	16
University	17	2	20
Apprenticeship	12	5	22
School-to-Work	11	7	25

80. Is your investment in employee training programs:

Increasing	22	34.9%
Decreasing	4	6.3%
No change	37	58.7%

81. Approximately what percent of annual sales does the company invest in training?

0%	5	10.9%	10.6%
0.1% to 3%	27	58.7%	62.1%
3.1% to 5%	10	21.7%	18.1%
5.1% to 10%	2	4.3%	6.6%
10.1% to 15%	2	4.3%	0.4%
Over 15%	- -	- -	2.2%

* Additional Information in Section XIII.

82. Is the number of unfilled positions in your company:

Increasing	2	3.3%	12.8%
Decreasing	6	9.8%	8.1%
No change	53	86.9%	79.1%

83. What new training programs would you like to have offered by area technical college(s) to meet your changing needs?

3 - Customer Service
2 - Communication skills
2 - Computer skills
2 - Sales training
Additional Microsoft Office training
Basic job skills
Electronics, Soldering
Hospitality services
LEAN
Licensing classes for real estate
Lifestyle
Maintenance
Medical Technical, Lab, RHIT, X-ray
Preventative Maintenance for equipment
Purchasing
Solidworks classes
Veterinary Tech classes
Wine training

84. Does your firm have a union?

Yes	5	7.5%	10.9%
No	62	92.5%	89.1%

85. If Yes, what percent of your work force is unionized?

Less than 10%	- -	- -	
10% to 25%	- -	- -	
25% to 50%	- -	- -	
50% to 75%	3	50.0%	
More than 75%	3	50.0%	

Overall workforce unionized based on executives responding to questions 56, 84, and, if 84 = Yes, 85.	13.5%	16.5%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

86. Is the water pressure and supply provided to your building adequate?

			Composite Data
Yes	65	94.2%	96.4%
No	4	5.8%	3.6%

87. Are you satisfied with the storm water drainage and sanitary sewer services provided by your local government to your site?

			Composite Data
Yes	65	94.2%	88.7%
No	4	5.8%	11.3%

88. Are voice lines provided by the local phone company adequate for your business communication needs?

			Composite Data
Yes	62	88.6%	95.4%
No	8	11.4%	4.6%

89. Is broadband or high-speed Internet service provided in your area adequate for your business communication needs?

			Composite Data
Yes	53	73.6%	87.7%
No	11	15.3%	8.9%
Not applicable	8	11.1%	3.4%

90. Are wireless communication services provided in your area adequate for your business needs?

			Composite Data
Yes	46	64.8%	63.6%
No	12	16.9%	21.6%
Not applicable	13	18.3%	14.8%

91. Is waste disposal a problem at your local site?

				Composite Data
Solid:	Yes	6	8.5%	8.8%
	No	60	84.5%	87.5%
	Not Applicable	5	7.0%	3.8%
Liquid:	Yes	2	2.9%	6.2%
	No	50	72.5%	76.6%
	Not Applicable	17	24.6%	17.2%
Hazardous:	Yes	- -	- -	5.2%
	No	42	60.9%	66.2%
	Not Applicable	27	39.1%	28.5%

92. Has your facility been the target of vandalism or burglary within the last 12 months?

			Composite Data
Yes	14	19.4%	21.6%
No	58	80.6%	78.4%

93. Have you or any of your employees been the victim of a crime (i.e., mugging) within a quarter mile of your facility during the past 12 months?

			Composite Data
Yes	4	5.6%	3.1%
No	68	94.4%	96.9%

94. Do you feel that local law enforcement agencies are doing all they can to protect your employees/property?

			Composite Data
Yes	70	98.6%	92.2%
No	1	1.4%	7.8%

95. Are you satisfied with the present configuration of traffic lights, one-way streets, and stop signs in the area?

			Composite Data
Yes	62	88.6%	79.3%
No	8	11.4%	20.7%

* Additional Information in Section XIII.

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

Composite Data

96. If No, what would you like to see changed?
The following recommendations were given by respondents of the Osceola study:
- Hwy 35 & M intersection
- Hwy 34 & 243 intersection
- Move stop lights to 243/35 intersection
- The corner of M, 35 & 243 needs to be aligned
- Depot Rd, M, 243 is a problem in spring/summer
- Intersection of County Rd M & HWY 35 - VERY bad
- Put STOP signs at Cascade & 2nd
- Lighting after 10:00 p.m.
- Sidewalk for children
- Dairy Queen area is a mess
- Turn lane

				Composite Data
97. Do you feel that local fire protection capabilities are satisfactory for your needs?				
	Yes	71	98.6%	100.0%
	No	1	1.4%	- -
98. Are there serious potholes in the pavement near to your facility?				
	Yes	- -	- -	21.0%
	No	72	100.0%	79.0%
99. Do you experience flash flooding on nearby streets?				
	Yes	2	2.8%	15.6%
	No	69	97.2%	84.4%
100. Is snow removal adequate on the streets near your facility?				
	Yes	71	100.0%	89.4%
	No	- -	- -	10.6%
101. Are the streets near your facility cleaned regularly?				
	Yes	67	93.1%	81.7%
	No	5	6.9%	18.3%
102. Do you feel code enforcement efforts are being adequately and evenly applied?				
	Yes	63	95.5%	83.6%
	No	3	4.5%	16.4%
103. Is public transportation available for your employees?				
	Yes	2	2.9%	31.9%
	No	68	97.1%	68.1%
104. If No, do you want it?				
	Yes	4	6.8%	17.4%
	No	55	93.2%	82.6%
105. What percent of your employees use the following means of transportation to get to work?				
	Car	96.5%		93.1%
	Car Pool	0.6%		2.5%
	Bus/Public Transportation	- -		0.4%
	Walk / Bicycle	2.4%		3.1%
	Motor Cycle / Snowmobile/ATV	0.6%		0.8%
	Other*	- -		0.1%

* Additional Information in Section XIII.

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

Composite Data

106. Which of the following means of transportation are regularly used for business purposes?

Executives Responding	65	
Air Travel to/from Minneapolis-St Paul	18	27.7%
Air Travel to/from Eau Claire	- -	- -
Air Travel to/from Duluth	- -	- -
Bus	- -	- -
Amtrak (Rail)	- -	- -
Personal Auto	57	87.7%
Company Auto	27	41.5%
Other*	2	3.1%

107. What is your perception of the following financing options?

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	50	2	8
Targeted Jobs Tax Credit	4	9	33
Small Bus. Admin. Financing	16	6	28
Industrial Revenue Bonds	6	6	32
County/City Revolving Loan Fund	11	5	31
Tax Incremental Financing	16	7	28
WI Housing & Econ. Dev. Authority	9	4	32

108. What is your perception of the following organizations?

Program	Useful	Not Useful	No Opinion
Area Chamber of Commerce	38	10	15
Local Econ. Dev. Corp.	29	4	25
County Econ. Dev. Corp	16	8	34

109. How would you rate local municipal economic development efforts?

Excellent	7	9.9%	9.1%
Good	23	32.4%	32.5%
Fair	21	29.6%	24.4%
Poor	6	8.5%	18.1%
No Opinion	14	19.7%	15.9%

110. How could these efforts be improved to better meet the needs of your company?

7 - Communication; Better communication; Better effort getting information out; More information; Better effort getting info out (from organization); Need to give businesses more info on what is available; Become aware of what is out there, we would be interested in learning about development efforts

Advertise the community (Not enough promotion of town)
Be more aware of possible assistance and programs
Bring in more businesses
Business owners should be allowed to vote if they don't live in the village
Demand is down since MN… tax law charges that were favorable to development
Get people more involved with efforts
Important for Osceola to bring more people in to the community - visitors and people who stay and live in the community
Educate prospects on potential funding availability
Economy needs to improve and massive healthcare reform defeated

* Additional Information in Section XIII.

(Continued) Composite Data

Expansion of airport - industrial
Find time to meet with them
Help with marketing products and services
I have a good customer base…. based on service…. I don't look to any organization to build my business
I would have welcomed any support - but got none when I started
It is just starting up, so we'll see how it goes
Join local businesses together to have greater choice to get better health care that have locals DC's, MD's, hospital, dental as providers
Less paper work
Knowledge of programs available, issue is timeframe for response
More homestead, not so many rentals
More incentives for small downtown businesses to maintain appeal of the business district
More recruitment for downtown businesses
Need a targeted marketing effort to build awareness, so word of mouth can happen
Offer more assistance, make it more available
Our board, mainly the head guy needs to think retail more
Promote manufacturing as a solid career
Schedule meeting when requested
Signage
Sign outside Osceola letting people know businesses in town
Signs to promote businesses
There's not enough effort
Using local resources more efficiently

111. What is your opinion of the following?

	Satisfied	Dis-satisfied	No Opinion	Doesn't Apply
Planning Commission	26	3	31	5
Board of Zoning Appeals	16	- -	42	7
Municipal Engineering Staff	17	4	37	7
Municipal Assessor's Staff	15	- -	41	9
Health Inspector	19	- -	37	9
Building Inspector	30	2	30	3
Fire Inspector	43	1	20	1
Public Works Department	39	2	20	4
City Administrator	41	5	14	5
County Administrator	14	6	37	8
Police Department	53	2	9	1
Fire Department	53	- -	12	- -
Elected Officials	31	11	20	3

112. Overall, what is your opinion of local government in this community?

			Composite
Excellent	9	12.7%	10.9%
Good	39	54.9%	50.6%
Fair	15	21.1%	26.9%
Poor	1	1.4%	7.2%
No Opinion	7	9.9%	4.4%

113. What improvements would you recommend?

Positive comments:

- Appreciate Neil's leadership
- Highly qualified government officials
- None
- Village was helpful with issues

Suggestions:

- Conservatism
- Development of core leadership throughout the arms of elected govt. - greater community interest, participation in local government, become more progressive
- Clean-up business next to our plant. People think it is our plant, it is not. Eye sore.
- Get out to visit companies other than the 'Big Dogs' (Northwire, Polaris) feels like once in community not called or not heard
- Less police enforcement
- More local control/responsibility. Less reliance on engineers, lawyers, consultants.
- More recruitment of business
- Most business friendly. City based on hoops needed to jump through for businesses.
- Need more to offer on weekends to get & keep people here, otherwise Osceola is pretty non-eventful town
- Parking ramps
- Start Over
- Stronger chamber
- Village Board [need to] make decisions in a timely fashion. Decision of local government to offer liquor license to grocery store.
- Village Board needs to make decisions in timely fashion. Wasn't happy with Osceola Board to give liquor license to grocery store.
- Work with business & community

IX. FINANCIAL MATTERS

114. Are your firm's gross sales:

			Composite Data
Increasing	24	34.8%	63%
Decreasing	22	31.9%	10%
Stable	23	33.3%	27%

115. What percent of the company's annual sales are dedicated to research and development?

			Composite Data
None	28	42.4%	40%
Less than 5%	29	43.9%	43%
5% - 10%	4	6.1%	12%
10% - 20%	2	3.0%	4%
Over 20%	3	4.5%	1%

116. How would your firm pay for or finance technological innovations, expansions, and modernizations? (Executives are asked to indicate all that apply. Percentages are based on multiple responses.)

Executives Responding	60	
Conventional Financing	39	65.0%
Federal/State Programs	6	10.0%
Through Parent Company	10	16.7%
Venture Capital	2	3.3%
Cash Flow	42	70.0%
Industrial Revenue Bonds (IRB)	1	1.7%
Small Business Administration (SBA)	4	6.7%
Tax Incremental Financing (TIF)	2	3.3%
Other*	1	1.7%

117. What are the most important factors, if any, negatively impacting your company's present financial condition? (Rank up to four: 1 = Most Important, etc.)

	Rated 1	Rated 2	Rated 3	Rated 4
Labor Quality	1	- -	3	1
Labor Supply	- -	- -	- -	4
Transportation	1	- -	2	2
Interest Rates	3	3	2	4
Energy Costs	2	5	13	6
Material Costs	4	6	7	1
Local Property Taxes	5	6	2	6
State Corporate Income Taxes	1	3	5	1
Federal Corporate Income Taxes	- -	5	2	2
Market Condition/Economy	40	5	1	1
Employee Wage/Benefits	5	14	6	2
Property/Liability Ins. Costs	- -	3	- -	5
Other*	2	2	- -	1

118. Where is your company's primary banking institution?

			Composite Data
Local	52	73.2%	67%
Elsewhere in Wisconsin	6	8.5%	15%
Out of State*	13	18.3%	17%
Out of U.S.*	- -	- -	1%

* Additional Information in Section XIII.

X. ENERGY MATTERS

119. Do you anticipate a change in utility needs at your facility in the next three years?

Program	Increase	Decrease	No Change
Oil	2	- -	38
Natural Gas	12	2	48
Propane Gas	1	- -	43
Electricity	16	3	47
Water	12	- -	53
Sewer	11	- -	54
Voice Lines	13	1	51
High-Speed Internet	18	- -	43
Wireless Service	18	- -	41

120. Do you have an energy back-up system?

Yes	10	14.5%	19.5%
No	59	85.5%	80.5%

121. Have you experienced any difficulties in working with local utilities?

Yes	6	8.6%
No	64	91.4%

122. Comments regarding utilities:

Cost:

- Costs keep going up
- Phone company is way out of line on prices
- They are high
- Security deposits are extremely excessive for new companies. Sewer also excessive, need possible credits.
- Rates are too high for service received - continuous downtime incurred due to power outs, etc.

Service:

- Good Service
- Phone company delivers poor customer service
- Brief power outages lock-up laser
- Poor DSL service
- Slow to respond to outages

Quality:

- Our water in town is gold & yellow
- Water quality sometimes less than perfect

XI. COMMUNITY LINKAGE

123. Is your firm a member of the area Chamber of Commerce?

Yes	43	64.2%	63.2%
No	24	35.8%	36.8%

124. Is your firm a member of any other business organization in the local area?

Yes	25	36.8%	50.2%
No	43	63.2%	49.8%

125. Are you interested in participating in community organizations?

Yes	35	54.7%
No	29	45.3%

126. Where is your residence?

Local/County	50	73.5%
Elsewhere in Wisconsin	11	16.2%
Outside Wisconsin*	7	10.3%
Outside United States*	- -	- -

* Additional Information in Section XIII.

XII. OVERALL IMPRESSIONS

127. What is your overall opinion of the local community as a place in which to do business?

Excellent	18	26.1%	26.1%
Good	43	62.3%	51.5%
Fair	7	10.1%	18.2%
Poor	1	1.4%	3.3%
No Opinion	- -	- -	0.9%

128. What do you see as positive?

Quality: (Total 15)
- 3 - Quality of life
- 2 - Rural atmosphere
- Curb appeal
- Good roads
- It's pretty - quaint
- Natural attractions
- Natural beauty
- Natural resources
- Neat & clean downtown area
- River town appeal
- Riverbank
- Waterfall

Location: (Total 11)
- 3 - Airport location; Proximity to MSP/Airport
- 2 - Our location
- 2 - Location relative to the Twin Cities
- Valley location
- ACCESS
- Gateway access to Hwy. 8 and 94
- It is in Wisconsin and not in MN

Business: (Total 10)
- Availability of land
- Community back up
- Community is local
- Good service. Knowing the people you are dealing with.
- Industrial park availability
- Knowing business owners
- Personal service
- Strong networking
- Tourism
- Traffic

Amenities: (Total 9)
- 3 - Good school system
- Excellent schools
- Access to goods & services (grocery, hardware store, gas stations, etc.)
- Good community
- Housing
- Health care providers
- Train

(Continued)

Size: (Total 8)
- 2 - Small town atmosphere
- A nice growing community that is friendly and safe
- Growth
- Population
- Population growth
- Slightly growing area
- Small hometown atmosphere

Labor: (Total 7)
- 2 - Great work ethic
- Adequate labor supply
- Honest - hardworking people
- Labor force
- Labor force, semi-skilled
- Quality labor

People: (Total 5)
- Friendly
- Good people
- Great people
- People, good tradition
- The people

Local government: (Total 3)
- City support
- Proactive leadership
- Want to be proactive

129. What do you see as negative?

Business: (Total 13)
- Apathy of some business owners
- Industrial Park expanding too much without community to support it -- Business & Housing???
- Lack of community signage (i.e. lit sign listing events)
- Lack of complementary businesses
- Lack of quantity of industrial businesses/employers
- Lack of support from Village and Banks
- Local business not committed to use of local business for professional services
- Loss of Motorbooks
- No new businesses coming in. Main street is 'dying'.
- Not as much money to spend as in the cities
- Park land for new business or expansion
- Shortage of industrial development
- Turnover of businesses

Amenities: (Total 8)
- Not enough retail options
- No clothing store
- Increased retail business needed
- Lack of retail
- Not enough retail stores (e.g. no clothing stores anymore)
- Have more to do on weekends
- Lack of good restaurants
- Lack of selection - other businesses

(Continued)

Government/Chamber: (Total 6)
- All the benefits seem to go to new businesses - not to existing
- Chamber of commerce structure
- Lost Forward WI
- Lost state pro business attitude
- Make it difficult to be proactive
- Small thinking, afraid of new ideas

Location: (Total 6)
- Distance from major airport
- Distance to major highway - freeway
- Location from the Twin Cities
- Locations
- Proximity to others
- Somewhat remote location for shipping

Economy: (Total 5)
- Economic condition
- Economics
- Overall economy
- Slow growth
- Unemployment rate - customer count is down

Labor: Total 2)
- Technically skilled labor
- Labor availability

Miscellaneous
- Difficult to do local business due to costs
- Financial needs
- High prices
- High rental density (residential)
- High taxes, high insurance costs
- Lack of tourist promotion
- Old vacant buildings on Keller Avenue
- Parking
- Sprawl of residential housing
- Transportation cost
- Turnover of people

130. What is your opinion of the State of Wisconsin as a place in which to do business?

Excellent	10	14.5%	14.0%
Good	39	56.5%	45.7%
Fair	18	26.1%	26.5%
Poor	1	1.4%	9.1%
No Opinion	1	1.4%	4.6%

131. Over the past few years, would you say that as a place to do business, Wisconsin has gotten:

Better	5	7.4%	11.1%
Worse	22	32.4%	28.1%
Stayed the Same	35	51.5%	52.2%
No Opinion	6	8.8%	8.6%

132. Thinking about Wisconsin as a place to do business in the next few years, do you expect it to get:

Better	18	27.3%	24.1%
Worse	17	25.8%	24.4%
Stay the Same	23	34.8%	42.7%
No Opinion	8	12.1%	8.9%

XII. OVERALL IMPRESSIONS

133. How do you think Wisconsin can become more pro-business in the next three to five years?

Taxes: (Total 16)

- 11 - Reduce/lower taxes
- 2 - Tax incentives
- Keep small business taxes low
- Lower property taxes
- Provide tax credits for new businesses
- Reduce taxes on businesses
- Review tax structure for small businesses
- Tax credits, tax relief

Government: (Total 6)

- Change in "Business Attitude."   Local Dept. of Commerce advocate - no northern office.
- Cut government spending (waste) and needless programs
- New governor, state legislators
- Pass legislation to bring development back to this state
- Small government
- Vote in a Republican
- Vote out the liberator in Madison

Regulation: (Total 5)

- Allow mining
- Less government regulations
- Less regulation
- Quit with the health insurance requirements
- Reduce fees
- Reduce regulatory expectations
- Remain liberal in governing bodies, leaving easier channels to develop businesses, less red tape

Healthcare: (Total 2)

- Healthcare plans
- Provide health insurance

Miscellaneous:

- Bank incentives
- Decrease unemployment
- Encourage more local (state) producers/farmers
- Improve reimbursement under Medicaid program
- Invite new retail and industrial to settle here
- Low cost of doing business
- More incentives to get into your own business
- New bridge in Stillwater
- Offer grants to small businesses
- Small business incentives, association

134. What are the key issues facing your firm in the next three to five years?

Economy: (Total 20)

- 13 - Economic conditions/economy
- Economy issues. Varying workload demand & need to adjust workforce accordingly.
- 2 - Economy, housing
- Strength of county and it's surrounding industrial businesses
- Economy - retail
- Economy - building trade
- National/Local economic challenges

Competition: (Total 10)

- 3 - Competition
- 3 - Local competition
- 2 - Global/International competition
- Domestic competition
- Regional competition

(Continued)

XII. OVERALL IMPRESSIONS

Healthcare: (Total 10)
- Health care increases
- 3 - Health Insurance
- Insurance
- Healthcare being forced on us
- Negative effects of national health care program
- Health benefit costs
- Reimbursement

Labor: (Total 10)
- 3 - Employees
- Labor costs
- Employee benefits (other than health insurance)
- Skilled employees
- Work Force
- Human capitol
- Recruitment of professional staff
- Recruitment of primary care physicians

Taxes: (Total 9)
- 5 - Taxes
- Taxes - Wisconsin 12th highest - Government agencies need to spend less
- Property taxes
- Government, State, Local - taxes
- Tax increase

Growth: (Total 7)
- Catching up with growth
- Financing $400,000 clean room installations, need for new growth
- 1. Growth & Technology change 2 . Controlled costs
- Expansion
- Expansion / remodeling
- Population growth
- Space

Regulation: (Total 5)
- Government monitoring/control
- Government regulation
- Over regulation
- Washington D.C. policies
- Washington D.C.

Unemployment: (Total 3)
- Unemployment
- Unemployment rates
- Unemployment rate leading to less consumer spending

Miscellaneous:
- 2 - Energy costs
- Cash flow
- Cash flow loss
- Collecting accounts receivable
- Create jobs
- Customer moving to Asia
- Debt reduction
- Decreased local grant opportunity
- Gas prices
- Finding buyer & retirement
- Focus on the service and deliver to the client as expected
- If local farmers can keep growing/going

(Continued)

- Loss of local business to Wal-Mart & Menards
- Marketing & development
- Material Cost
- Milk supply
- No major issue for firm - survived this economic time - have good capital
- Parking spaces
- Price of raw materials/gas
- Process technology needs might be something to face (e.g., powder or injection vs dip molding)
- Programs
- Raw material pricing
- Retaining sales
- Serving local needs, topics
- Tourism
- Transportation funding

135. What is your overall opinion of the Wisconsin Department of Commerce?

Excellent	- -	- -	3.5%
Good	16	24.6%	29.8%
Fair	10	15.4%	15.4%
Poor	1	1.5%	4.5%
No Opinion	38	58.5%	46.8%

136. What is your perception of the following State of Wisconsin Department of Commerce administered programs?

Program	Useful	Not Useful	No Opinion
Business Planning Assistance	5	2	47
Financing Programs	9	5	39
Labor Training Programs	5	3	46
Community Development Zones	6	4	44
Main Street Program	16	5	37
International Trade Program	3	4	47

137. What suggestions or recommendations do you have for working with the State of Wisconsin Department of Commerce?

- Have government take care of our infrastructure & law & order & let business have the freedom to make it or fail with less
- I got screwed by the gal that worked with Osceola on the Downtown Historic District
- Look at bringing in complementary retail businesses into Osceola - example - a flooring store
- Lower property taxes and cut wasteful spending. Assist small businesses to weather this economic recession.
- Make it easier
- Need Regional Administrator who is strong & approachable
- Open to ideas
- Open up more assistance for small businesses
- Stay up to speed with technological advancements and solicit for their production within the same
- Suggest more public service information on what you do
- The existing tools are ineffective
- Understanding rural economics
- We are closer to the Twin Cities market - disconnected from Madison

ADDENDUM.

Other Polk County businesses: Is managing waste streams a critical issue for your business?

Yes	5	23.8%
No	16	76.2%

Osceola businesses completed addendum questions specific to the community. See Osceola report for summary of addendum responses.

XIII. ADDITIONAL DETAIL ON SELECT QUESTIONS

I.01 Where is your firm's corporate headquarters located?

Out of State

- 3 - Minnesota
- Plymouth, Minnesota
- Princeton, Minnesota
- Roseville, Minnesota
- Arkansas
- Illinois
- New Holland, Pennsylvania
- North Dakota
- Overland Park, Kansas
- St Louis, MO

Out of United States

- Malaysia

I.03 Does your firm have multiple locations? Where?

Out of State

- 9 - Minnesota
- 3 - All 50 states
- 1 - Iowa
- 2 - South Dakota
- 2 - Texas; El Paso, Texas
- California
- Indiana
- Nebraska
- New York
- North Dakota
- Pennsylvania

Out of United States

- 2 - Mexico
- 2 - Singapore
- England
- Canada
- World wide

I.07 What form of organization does your business have?

- 501(C)3 - non-profit
- 501c3

II.09 What percent of raw materials/supplies utilized by your business come from the following areas?

- 2 - Canada
- China

IV.22 What percent of your customers are located in the following areas?

- Canada
- Central America

VI.44 Do you have plans to expand outside the state? Where?

Other US

- Minnesota

Out of United States

- Asia

XIII. ADDITIONAL DETAIL ON SELECT QUESTIONS

VI.49 Do you have any plans to move all or part of your operation from this location? Where?

Other US

- No responses

Out of United States

- China
- Asia

VI.51 Do you have any plans to move all or part of your operation from this location? Why?

- Building sold
- Health Insurance costs
- Material costs
- Prefer to own
- Road Improvements to buy us out

VII.77 How do you obtain replacement employees?

- Headhunter
- Hiring kiosk
- Radio
- Temp Services

VIII.106 Which of the following means of transportation are regularly used for business purposes?

- Business Flights to OEO

IX.117 What are the most important factors, if any, negatively impacting your company's present financial condition?

- Debt
- Government/insurance companies
- Health Insurance Costs
- Weather/Seasonal
- 3rd party reimbursements

XI.126 Where is your residence?

Outside Wisconsin

5 - Minnesota

POLK COUNTY

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