

Wisconsin Business Retention and Expansion Survey

Barron County
August 19, 2005

Echo Lake



Sponsored by the
Barron County Economic Development Corporation
(BCEDC)



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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 and expansion 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 business. 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 that 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 business. Therefore, the retention and prosperity of existing businesses is extremely vital to the economic stability and growth of any community.

The Barron County Economic Development Corporation demonstrated enthusiastic support for a business retention program; therefore the Department of Commerce agreed to co-sponsor a study in Barron 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 municipal efforts to improve Barron 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.

Mary Burke, Secretary
State of Wisconsin Department of Commerce

II. ACKNOWLEDGMENTS

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

Barron County Economic Development Corporation
Barron County Economic Development Office
Barron Electric Cooperative
Barron County-UW Extension
Community Bank of Cameron
Cooper Engineering
Cumberland Federal Bank
First National Bank of Barron & Rice Lake
First National Bank of Chetek
Sterling Bank – Barron & Chetek
Village of Prairie Farm
Village of Turtle Lake
Jennie-O-Turkey Store
Manpower, Rice Lake

and

Wisconsin Department of Commerce

This study could not have been accomplished without the cooperation and expertise of a variety of individuals. My gratitude is extended to the Barron County Economic Development Board of Directors, who participated as interviewers and taskforce members. And, to the Barron County-UW Extension staff for their help in the distribution and dissemination of the survey's results.

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. The participating businesses are listed in Appendix A of this report.

David Miller - Project Manager

Executive Director, Barron County Economic Development Corporation

Director, Barron County Economic Development

Interviewers and Taskforce Members

Randy Albrecht	Private Sector Representative – Barron Jennie-O-Turkey Store
Bill Bell	Turtle Lake – Village Administrator
Andrew Dane	UW - Extension
Marlene Gargulak	County Board Representative – Rice Lake
Terry Gerber	Cameron Representative – Community Bank
Scott Hickok	Dallas Representative – Chibardun Telephone
Kelly Hoff	Prairie Farm Representative – Hoff Accounting & Financial Services
Merlin Kreger	County Board Representative – Chetek
Bruce Markgren	Rice Lake Representative – Cooper Engineering
Jim Metcalf	Chetek Representative – Sterling Bank
David Miller	Barron County Economic Development Corporation
Vern Peterson	Rice Lake Representative
Bruce Rasmussen	Barron Representative – First national Bank of Barron
Michelle Scalzo	Private Sector Representative – Manpower
Dallas Sloan	Immediate Past President – Barron Electric Coop.
Laurie Tarman	Turtle Lake Representative – Springer Eyecare Center
Bill Waldvogel	Cumberland Representative – Cumberland Federal Bank
Tom Yeakley	Private Sector Representative – Barron Jennie-O-Turkey Store
Sue Zahrbock	County Board Representative

Wisconsin Department of Commerce

Bill Lehman	Area Development Manager Division of Business Development
Geri Petersen	WIBRES Program Manager Division of Community Development

III. INTRODUCTION

BACKGROUND

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, it is necessary for businesses to respond to these changes in a timely 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 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. The significance of dedicated leadership and well-funded economic development programs has never been greater than in challenging economic times such as today.

Many Wisconsin business executives have been inundated over the last several years by aggressive campaigns from other states (particularly the sunbelt 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, which 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 on 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 state initiatives.

Barron County was chosen as a project site for several reasons: 1.) There is a significant business base; 2.) The Executive Director of the Barron County Economic Development Corporation and its Board of Directors, determined to update industry and labor market information throughout the county, requested that the WIBRES survey project be implemented in the county; and 3.) The BCEDC expressed confidence in their ability to coordinate the necessary volunteers and administrative support to successfully complete the project.

A task force was established in the community by the Barron County Economic Development Board of Directors. The members of the task force were drawn from city and county government, local educational institutions, and the business community. The functions of the task force were to: 1.) Determine if an addendum questionnaire was needed to address community specific issues, 2.) Develop the list of business contacts, 3.) Monitor survey responses, 4.) Develop recommendations based on survey results, and 5.) 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. Re-studies also serve as a follow-up; indicating how economic changes have impacted the business community, determining current needs and plans, and verifying past situations have been corrected. 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, closure, 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 municipal representatives 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 & METHODOLOGY

The task force reviewed the WIBRES survey instrument to verify it was appropriate for Barron County's business region. 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

Both objective and subjective questions were included in the survey. A short form of the questionnaire containing several key questions was developed for use by respondents unable to complete the long form. All completed short forms were evaluated, but not entered into the database.

A. DATA COLLECTION PROCEDURES

The Barron County WIBRES survey was conducted in two parts. One part was of the Rice Lake area, the other included all additional communities in the county. For each study group, interviewers were selected who had experience with the business community. Due to the confidential nature of the survey questions and the fact that the overall success of the project was heavily dependent upon the effectiveness of each volunteer, the task force members gave careful consideration to choosing the individuals who were to perform in this capacity.

The volunteers participated in training sessions, which were conducted by the Wisconsin Department of Commerce. The training session is designed to orient the interviewers to the business retention program, the survey instrument, the interview process, and the strict confidentiality of the project. The interviewers were charged with collecting completed questionnaires and recording information obtained during the interview.

Questionnaires were distributed to 106 Barron County businesses accompanied by a letter explaining the program and urging each individual 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 66 main questionnaires were completed in the county. At the time the study was conducted, businesses participating in the study ranged in size from two to 814 employees.

B. DATA ANALYSIS

The interviewers returned completed questionnaires to David Miller or Vern Peterson, project managers for the survey. Based on the interviewers' written comments and preliminary inspection, businesses requiring immediate attention were identified. After data entry was completed, the data files were returned to the Wisconsin Department of Commerce for summary and analysis of the objective as well as narrative survey responses.

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 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 Barron County targeted a business population consisting of 106 firms; 66 firms completed the survey questionnaire representing 62% participation.

This section is based on the summary of the 66 survey instruments compiled between December 2003 and January 2005. It contains chart illustrations and a brief narrative description highlighting selected items of significance. Appendix A of this report lists participating businesses and 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 two years. Those communities include the following: Berlin, Neenah, Douglas County, Juneau County, and Shawano County.

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%.

NATURE OF BUSINESS

The Barron County business interests are diverse with a significant percentage of business focus in miscellaneous manufacturing. Figure 1 illustrates the top six product 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.

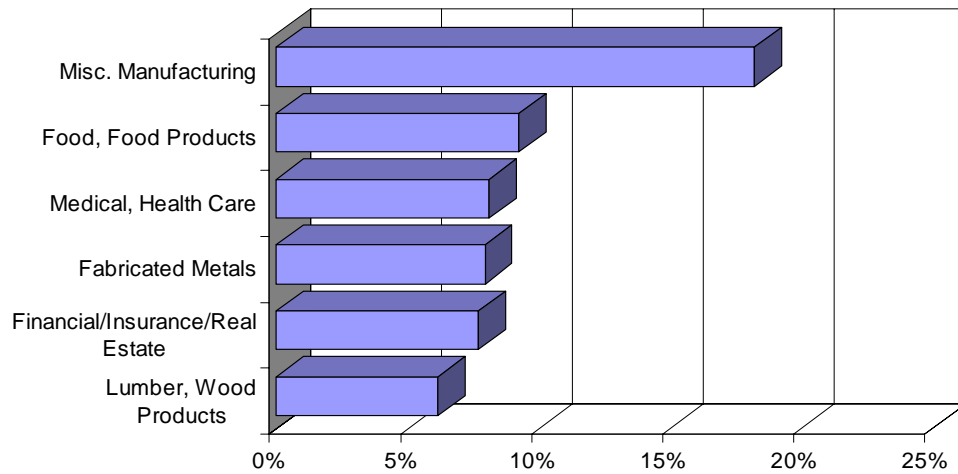


Figure 1 - Types of Business

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. Respondents report the local facility is the headquarters for 67% of the firms.

This figure is 11 points below the composite average (78%) of other communities surveyed in the past two years. Of the responding businesses, 13% are headquartered elsewhere in Wisconsin, and 20% out of state.

Figure 2 shows the distribution of headquarters locations.

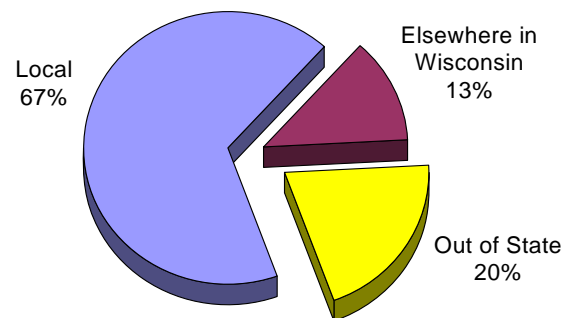


Figure 2 - Location of Headquarters

Of those surveyed, 56% have locations in addition to the local community site, compared to the 42% composite average. Two respondents indicated they might be consolidating operations. More than three quarters (85%) of the businesses are incorporated.

The interviewed Barron County business community is very well established; 75% of the businesses have been in operation more than 20 years. There were no new start-up companies in the study; two have been in business less than 10 years. Figure 3 shows business start-up patterns for the Barron County business region.

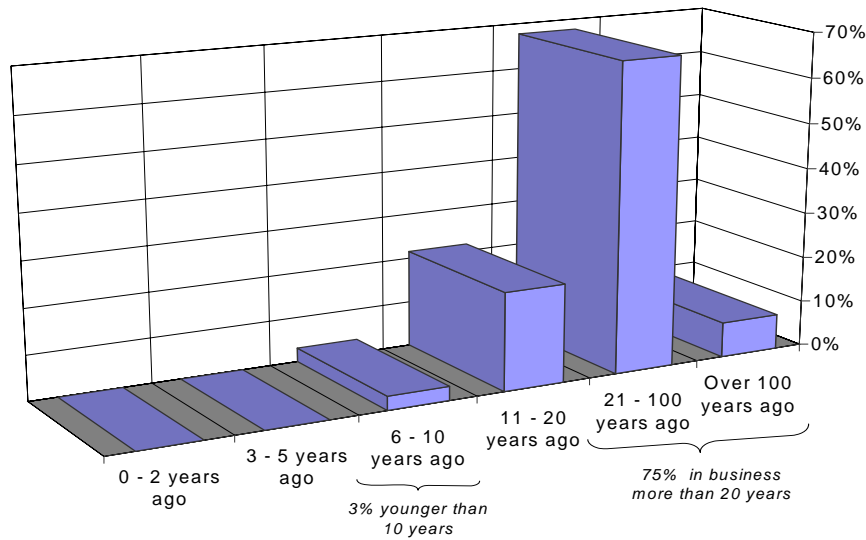


Figure 3 - Year Business Established

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 the percentage of the Barron County businesses that own, lease, or do both. Six companies report leases that are to expire within the next two years and one other within five years. Two others say their leases are good for 6 - 10 years. Composite ownership averages are as follows: 73% own, 21% lease, and 6% combine ownership and leasing.

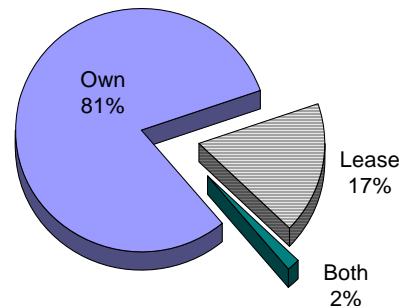


Figure 4 - Facility Ownership

The executives are asked to rank thirteen factors as they negatively impact the current or future development of the company's product; i.e. business activity. The factors they rank highest in importance are market condition/economy and regulatory constraints. (See Figure 5.) Other's statewide placed many of the same factors at the top of the list, but in a little different order; while they ranked market conditions/economy first, they ranked domestic competition as the second most important factor.

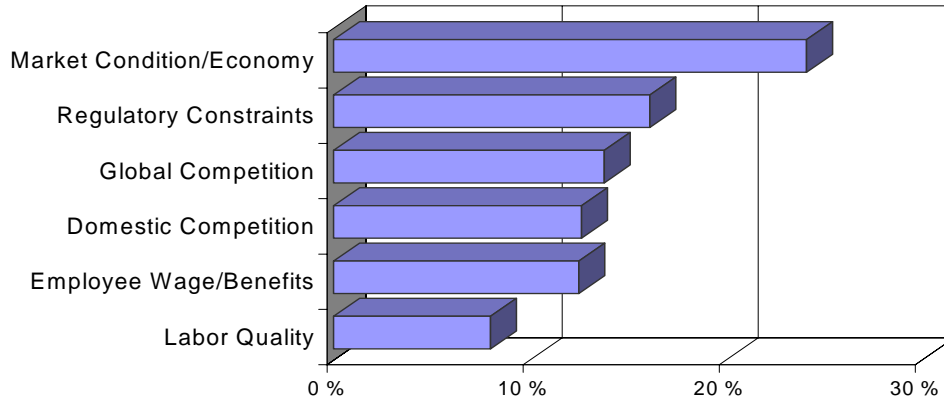


Figure 5 - Negative Factors Affecting Product Development

Survey participants were asked to identify the geographic locations of raw materials and supplies utilized by their business. Talled results show 15% of supplies come from the local area/county, 15% from elsewhere in Wisconsin, 32% from mid-western states, and 26% from across the nation. Another 12% 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. The Barron County executives report that 71% of supplies are transported via truck, 18% by common carrier, and 4% by personal/company vehicle. A small amount of supplies are transported via air, ship, or rail. The most popular method used for transporting finished products is via truck as well; 61% of finished products are shipped via truck, 13% common carrier, and 16% move by personal/company vehicle. Small portions of supplies are transported via air, ship, or rail. Table A illustrates how well the modes of transportation serve the companies' needs.

	Excellent	Good	Fair	Poor
Truck	24	26	3	1
Common Carrier	29	20	3	1
Rail	2	0	1	8
Air	4	4	5	5
Ship	2	2	1	7
Personal/Company Vehicle	22	3	1	3

Table A - Methods of Transportation

MARKETS AND CUSTOMERS

A majority (69%) of the respondents describe the number of customers they serve as increasing while 24% say the number remains stable. However, the data show that 6% describe the number of customers they serve as decreasing.

The Barron County executives report more than one third (39%) of their customers are located in the local area. They say 23% are located elsewhere in Wisconsin and 13% are located throughout the Midwest.

Additionally, 23% are located nationally, while a small percentage (2%) of their customers are situated outside of the U.S.

Figure 6 illustrates the distribution of customers in these locations.

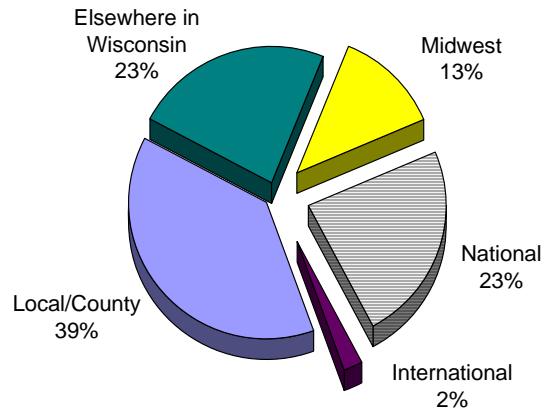


Figure 6 - Customer Location

The Internet has become a vehicle for some of the Barron County companies to conduct business sales. While 59% say none of their sales come from Internet transactions, 39% report up to 10% of sales are conducted over the Internet. Two percent report the Internet is the vehicle used for 10% to 25% of sales.

The executives are asked if they supply finished products directly to the government. Currently, 27% supply products or services to federal government, 41% supply to the state, with 58% supplying the local government. The figures for federal, state and local contracts are all higher than the composite averages of 16%, 26%, and 37% respectively. Figure 7 illustrates the percentage of executives who currently supply to government and the percentage of executives who are interested in initiating or expanding government contracts.

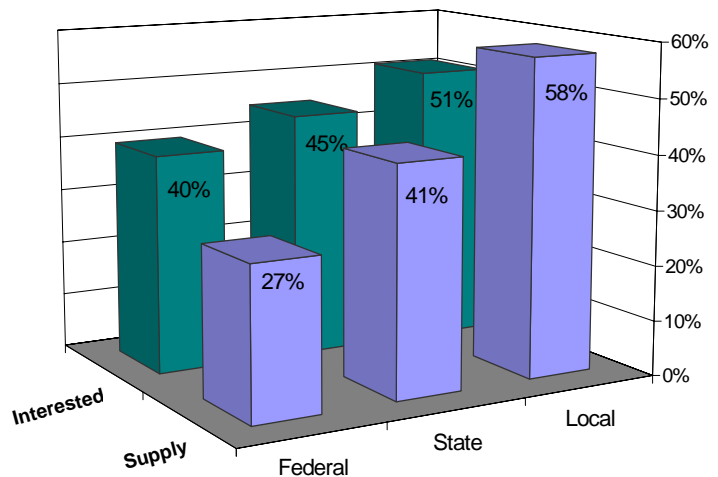


Figure 7 - Government Contracts

The executives' interest in expanding government contracts is also higher than the interest of their counterparts in other Wisconsin communities; 40% of the responding Barron County executives are expressing an interest in federal contracts, 45% in state contracts, and 51% in local government contracts. The composite averages for interest in federal, state, and local contracts are 27%, 33%, and 41% respectively.

COMPETITION

A very positive 51% of survey participants describe their company's market share as increasing and 38% say it is stable. Still, 11% report a decrease in market share.

The majority of the respondents' competitors (30%) are located within the county; additionally, 23% are located elsewhere within the state. Figure 8 shows the percentage of competitors in these and other locations. Some respondents (7%) are feeling the impact of international competition.

Barron County executives also responded as to how they view their competitors. Nearly one quarter (24%) feel competitors are "making significant inroads" and another 42% see them as a "future threat" to their business (see Figure 9). Statewide, 17% said they felt competitors were making significant inroads and 34% saw them as a future threat. Other local executives surveyed (24%) feel competitors have "no real impact" and 10% respond that competitors have "never been a consideration."

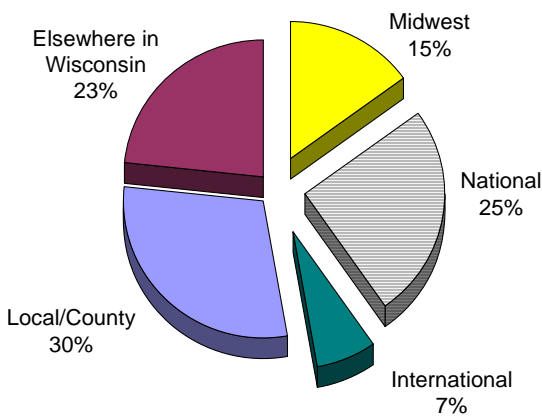


Figure 8 - Competitor Locations

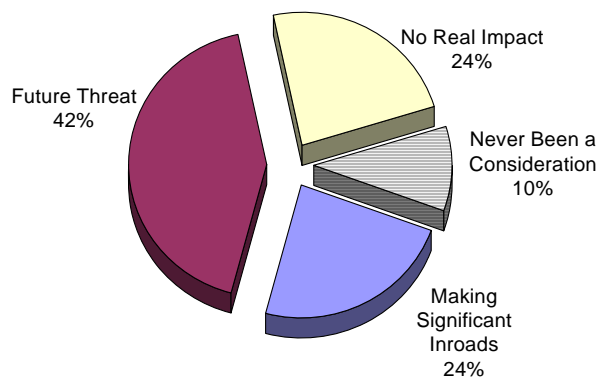


Figure 9 - Competitive Threat

BUSINESS GROWTH AND EXPANSION PLANS

Executives interviewed in the study hold top-level positions and are familiar with future plans. Many shared ideas related to potential growth and expansion of their business operations at the present site or some other location. Many (76%) of the responding businesses currently have sufficient property to allow for expansion of their existing building(s), which is much higher than the composite average (60%). Fifteen respondents (24%) report plans to expand an existing building(s) at the site; the composite average is 23%. Expansion plans would add a total of 248,760 square feet to business sites in Barron County. Executives were asked when expansion construction would take place. Two indicated that construction is now in progress. Nine respondents reported having plans for expansion within the next five years and another beyond five years. Two others who expressed expansion plans were unsure of the timeframe.

Survey results indicate 19% of the responding executives (12 firms) have plans for a new building either at the present site or elsewhere in the community. This is very near the composite average, which is 18%. The executives estimate the new building construction would total 518,000 square feet and four stated they planned to build within the current year (2004). Additional data indicates that one respondent plans to erect the new building(s) next year. Five of those with new-building plans intend to begin construction within the next five years. One respondent reporting new-building plans was unsure of the date construction would begin.

Many Barron County executives are making up-grades to improve efficiency and enhance their competitive edge. More than one third (34%) report plans to modernize or improve their present building(s) now or in the near future and 80% plan to improve their equipment. The study found that 80% of the respondents say there are technological innovations that they plan to put in place within the next two years.

Of the responding executives, 15% (9 firms) say they plan to expand their business elsewhere in Wisconsin; this finding is very similar to the composite average of 14%. When asked about out-of-state expansion, 16% (10 executives) report having such plans. The composite average for those with out-of-state expansion plans is 10% (slightly lower, in comparison). Figure 10 (next page) demonstrates the executives' reported expansion plans.

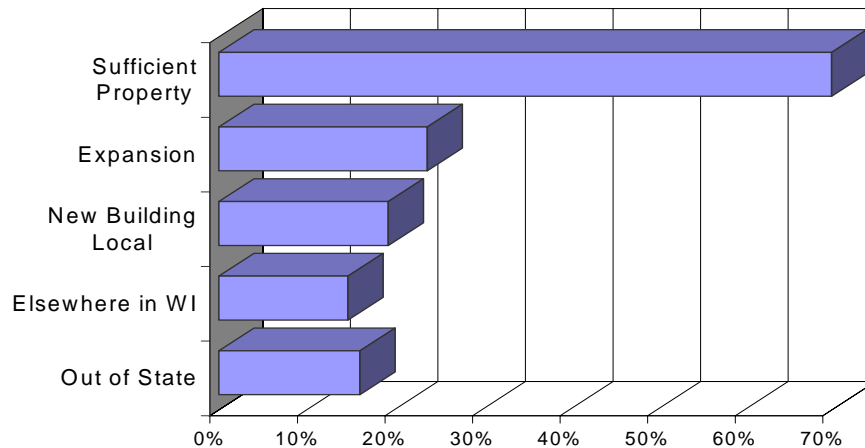


Figure 10 - Expansion Plans

Seven of the responding Barron County executives (11%) report immediate or future plans to move all or part of the operation to another location; four of the moves may not be a concern as supplemental information gathered indicates the moves would be to another local site. However, the other three plan to move all or part of the business outside of the county. Additionally, 6% indicate moving is a possibility. The composite average for companies with definite plans to move is somewhat less in comparison; 6% reported relocation plans and 8% indicated moving was a possibility.

As part of their economic development, states attempt to persuade companies to relocate or expand in their state. This survey indicates that 22% of the Barron County firms surveyed report being contacted by another state's representative in an attempt to have the business relocate. This is 12 points above the composite average (10%). A variety of states were listed; those mentioned most frequently were South Dakota, Texas and North Carolina.

When asked to estimate the chances for phasing out or shutting down the operation with no plans for expansion elsewhere, 9% of the executives (six persons) said it is "possible," 39% said the likelihood is "remote" and 52% estimate the probability of shutting down as "non-existent."

LABOR AND MANAGEMENT

When asked for employee figures, 64 Barron County businesses responded that they currently employ a total of 5,668 full-time people. The companies range in size from two to 814 employees.

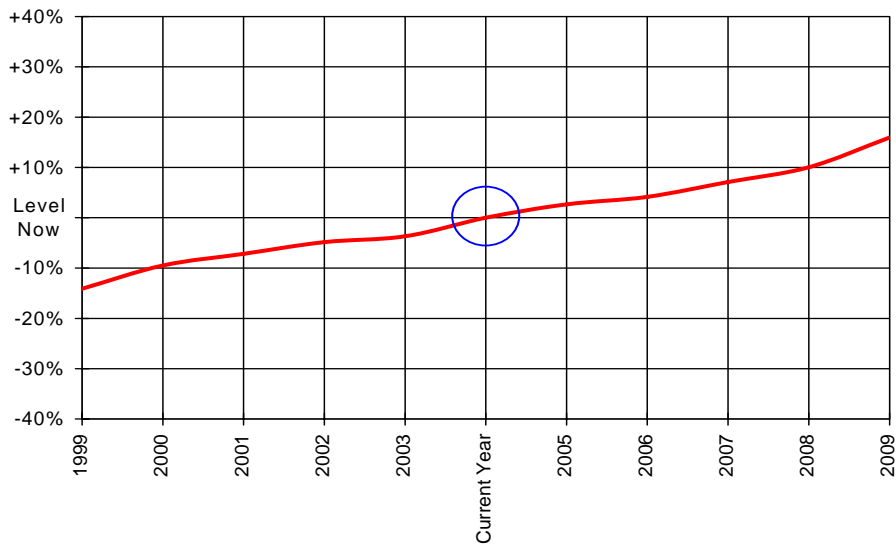


Figure 11 - Ten Year Employment Data

A series of questions was asked about employment history and projections over a ten-year period, from five years ago to five years into the future. As shown in Figure 11, survey findings indicate there has been upward growth over the past five years and the executives anticipate an encouraging rate of growth over the next five years. Data gathered from those responding to all five questions in the series about employment (36 firms) reflects the following: Current employment is 4% higher than one year ago and 14% higher than five years ago. The executives project an increase of 3% next year and an overall increase of 16% over the course of the next five years.

Part-time employees play an important role in business operations; 78% percent of the surveyed firms utilize part-time people, a finding very similar to their interviewed counterparts statewide. The total number of part-time employees reported by survey respondents is 766. Of firms using part-time workers, the majority (62%) utilize four or fewer with 47% of the executives citing seasonal fluctuations as a factor impacting the quantity of part-time workers. This is somewhat different than those citing seasonal fluctuations in the composite (38%). Another 37% feel economic fluctuations have an impact, which is near the 41% composite average.

The Barron County executives were asked to supply the average overall wage for various positions. The average hourly rate offered by employers in Barron County for professional/technical staff positions is \$22.02 and \$11.92 hourly for office staff. The average rate offered for highly skilled positions is \$16.34 per hour; semi-skilled positions average \$11.82 hourly; and rates for unskilled positions average \$9.78 per hour.

The executives report 82% of their employees reside within the county. 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 Barron County executives who responded to the question regarding total annual turnover rates, 66% report a turnover rate of between 1-10%; 13% from 11-25%, and 8% have an annual turnover of over 25% of their employees, all shown in Figure 12. Employers find the most common reasons for employee turnover are other opportunities and termination due to performance or work ethic.

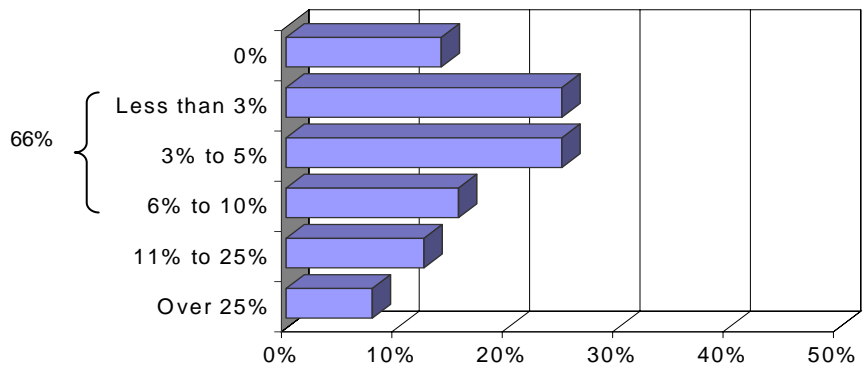


Figure 12 - Turnover Rates

The survey indicates that 84% of the executives state their employees need skills training in order to perform their job responsibilities at the required level, which is higher than the composite average (77%). In regard to dollars budgeted to training, 60% say the company's investment in training programs is increasing; the other 40% report there is no change. A majority of companies (68%) invest less than 3% 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 such training programs sponsored by county, state, or federal government, more than a third (38%) said they were not. See Table B for program ratings.

Program	Useful	Not Useful	No Opinion
Job Center	49%	16%	35%
WI Mfg. Outreach Center	10%	2%	88%
WI Mfg. Extension Partnership	10%	0%	90%
Technical College	73%	6%	21%
University	52%	9%	39%
Apprenticeship	36%	9%	55%
School-to-Work	38%	7%	55%

Table B - Employee Training Programs Perceptions

EMPLOYMENT OF WORK FORCE

Data was collected to determine the positions employers have the most difficulty filling. The Barron County executives report they are having the greatest difficulty recruiting for professional/technical positions. The survey finds that 44% report difficulty in filling positions at this level. Difficulty recruiting for blue-collar positions is expressed by 34% of the respondents, and 19% say office support staff positions are hard to fill.

Consideration must be given to factors that have an impact on recruiting employees in the state of Wisconsin. As shown in Figure 13, the Barron County executives believe the most positive factors dealing with recruiting are the quality of life and K-12 education system. The technical college and the cost of living in the area are also seen as positive factors by more than half of the respondents. The factors considered to have the most negative impact are personal taxes, climate and available housing.

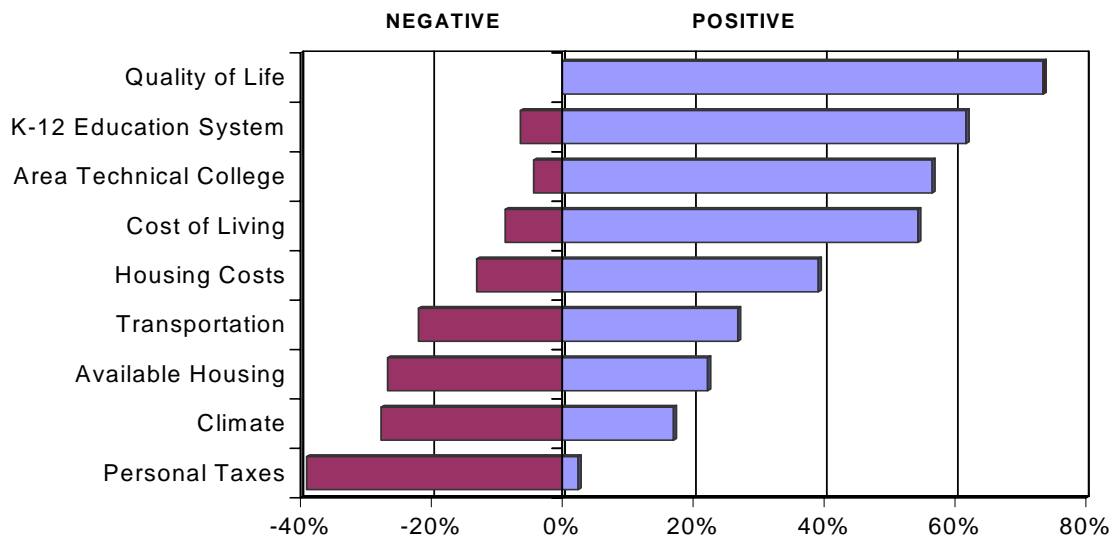


Figure 13 - Factors Affecting Recruiting

Employers report a variety of sources used in seeking new and replacement employees. Word of mouth and local newspaper advertisement are considered the best sources. The most frequently used second-choice options include Job Service, the Internet and the area technical college. (See Appendix A, Question 77.)

The quality of labor management relations can be a key factor when companies are making local decisions. A higher percentage of the Barron County firms are associated with the union than state composite figures reflect. The two-year composite shows 11% of firms are associated with a union, while 17% of Barron County firms are involved with a union (see Figure 14). Union involvement encompasses approximately 13% of the total full-time employment base in Barron County.

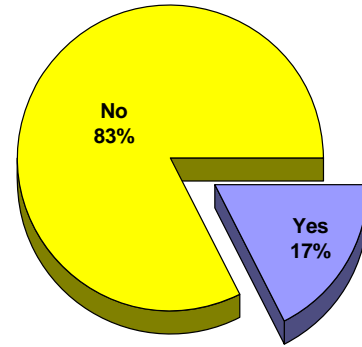


Figure 14 - Labor Unionization

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 is expressed as adequate by 100% of the study participants. Ninety-two percent respond they are satisfied with storm water drainage and sanitary sewer services.

When asked if voice lines provided by the local phone company are adequately meeting business communication needs 100% said, "Yes." Data lines provided in the area are considered adequate by 94% of the executives, whereas, as lesser 77% feel wireless communication services are adequate.

Crime in the area, overall, is lower than what other surveyed communities in the state have reported. Only 3% report that employees have been victims of crime near the facility within the past 12 months and 23% say the facility has been the target of vandalism or burglary within the same time period. State composite averages are 6% reporting crime near the facility and 31% vandalism or burglary. Nearly all of the Barron County executives interviewed (94%) feel local law enforcement agencies are doing all they can to protect employees and property. Satisfaction with local fire protection capabilities is expressed by 98% of respondents.

Some (19%) report serious potholes in the pavement near their facility and 8% experience flash flooding on nearby streets. Snow removal is considered to be adequate by 94% of the

respondents, and 85% are satisfied with street cleaning efforts. Twenty-five percent of the survey participants are not satisfied with the present configuration of traffic lights, one-way streets, and stop signs in the area. A majority (90%) 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 results.)

TRANSPORTATION

The majority of workers drive their own car as their primary means of transportation to and from work while 1% walk or bike. The survey found that 63% of the executives responded that public transportation is not available to and from the work site; 6% would like it to be available.

The importance of public transportation services used for business travel is suggested by the degree of usage. This study found many of the surveyed firms (68%) use the company automobile for business travel and 83% use personal vehicles in this capacity. Many of the executives report air travel through Minneapolis-St. Paul while others utilize Eau Claire Lakes Airport, Rice Lake Regional, Cumberland Municipal, and/or the Duluth Airport.

ECONOMIC DEVELOPMENT PROGRAMS

An effort was made to determine the extent of familiarity or personal contact the firms had 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 Barron County. Many responses of No Opinion were given, which could indicate the executives are unfamiliar with the array of financing alternatives open to them.

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	74%	12%	14%
Targeted Jobs Tax credit	16%	16%	68%
Small Bus. Admin. Financing	25%	35%	40%
Industrial Revenue Bonds	19%	26%	55%
County/City Revolving Loan Fund	26%	21%	52%
Tax Incremental Financing	28%	23%	49%
WI Housing & Econ. Dev. Authority	19%	26%	55%

Table C - Financing Options Perceptions

Local executives are somewhat satisfied with the direction taken by those involved in economic development in Barron County. Figure 15 shows that 37% of the responding executives rate local economic development as excellent or good, 29% rate it as fair, and a rating of poor is given by 18%. The combined excellent and good rating is eight points below the composite average, which is 45%. Several executives offered ideas for stimulating business growth and attraction. A variety of other suggestions to improve efforts were made as well (see Appendix A question 110).

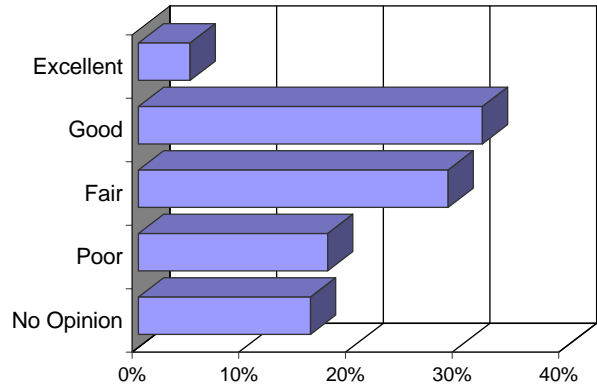


Figure 15 - Local Economic Development

LOCAL GOVERNMENT

The same effort was made to determine the level of contact the executives have with the various local boards and their degree of satisfaction. A high degree of satisfaction is a good indicator of a strong community. The fire department, the police department, and the fire inspector receive the highest satisfactory ratings from the executives in Barron County. The complete results are shown in Appendix A, Question 111.

When asked their opinion of the local government, 59% of the respondents say it is excellent or good and 38% give it a rating of fair (illustrated in Figure 16). Few of the executives (2%) rate local government as poor. The combined rating for excellent and good is three points above the 56% composite average. Executives were given the opportunity to suggest ways to improve local government.

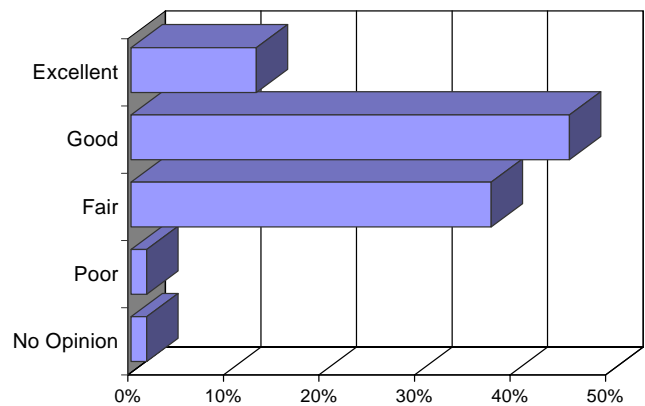


Figure 16 - Satisfaction with Local Government

Their recommendations are listed in Appendix A question 113.

FINANCIAL MATTERS

The executives were asked to provide several items under the title of financial matters, including how stable sales are for the company. Firm sales are reported as increasing by 66% of the respondents, a finding more favorable than the statewide average of 59%. Others (26%) report sales are stable while 8% say sales are decreasing.

Study participants were asked to indicate the percentage of annual sales dedicated to research and development (R&D). Forty-one percent indicated an allocation of up to 5% while 17% reported that 5% -10% goes for R&D and 7% dedicate 10% - 20%. On the other hand, 34% of responding firms dedicate nothing to this area. Research and development budgeting may not be applicable for some business types taking part in the survey.

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 rank highest in importance is market condition/economy, followed by employee wage/benefits, material costs, and labor quality. In the two-year composite findings, market condition/economy ranked first, with employee wage/benefits second (the same top two factors as Barron County executives selected), however, energy costs was ranked third by others statewide and property/liability insurance costs fourth.

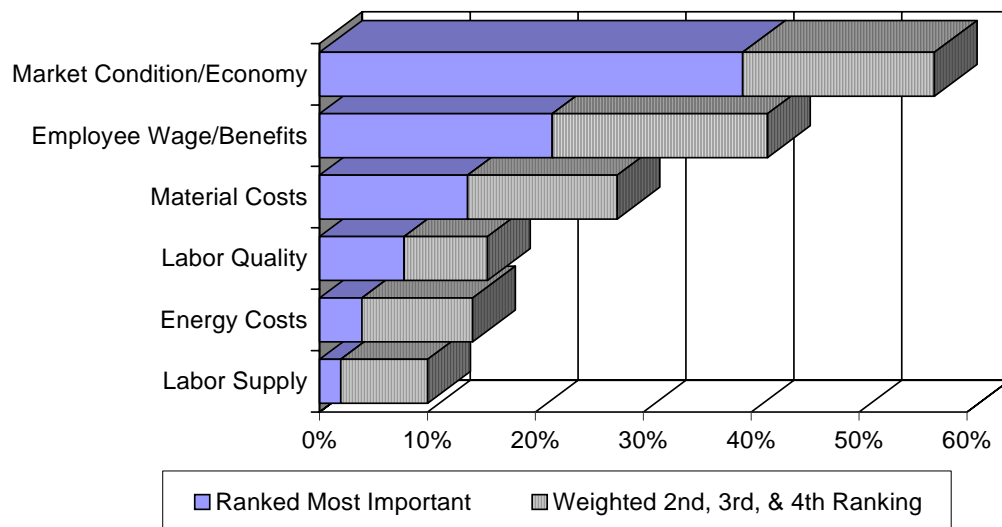


Figure 17 - Factors Adversely Affecting Financial Condition

The executives were asked where the company's primary banking institution is located. Figure 18 shows that 61% of the executives indicate financial transactions for the company are handled locally, 18% say they are handled elsewhere in Wisconsin and 21% indicate most banking is done out of state. Banking locations could be determined by headquarter locations. (Note: Headquarter locations were reported as: 67% local, 13% elsewhere in Wisconsin, and 20% out of state.)

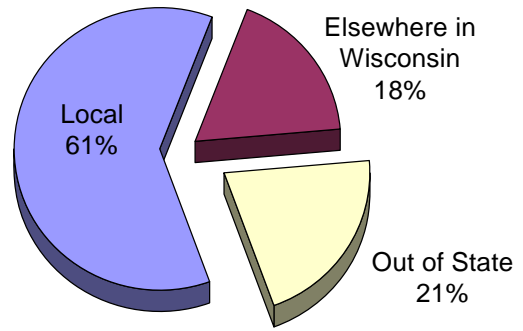


Figure 18 - Primary Bank Locations

Economic conditions influence company development and expansion. As reported in this Major Findings section, under the heading of Future Plans, many of the executives intend to expand, build, modernize or improve equipment and 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 the most likely options.

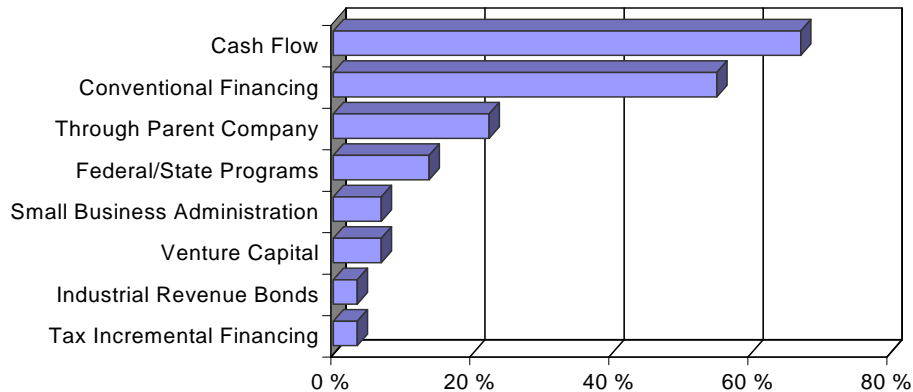


Figure 19 - Preferred Financing Methods

ENERGY MATTERS

Data was collected to determine projections in utility needs for the next three years. Executives indicated how business needs might change in regard to energy, water, sewer, voice lines, data lines, and wireless service. Several (24 executives) anticipate an increase

in their consumption of electricity in the next three years. Communication needs are also an area of anticipated change; increases are expected in the need for voice lines, data lines and wireless services. The complete results are shown in Appendix A, Question number 119. Almost one third of the executives (32%) report having an energy back-up system. A few respondents (11%) report having experienced difficulties in working with local utilities.

COMMUNITY LINKAGE

Community involvement through memberships and affiliations by businesses in local organizations serve to develop a company's ties with the community. Figures indicate the Barron County executives are more involved with the community than the average of others statewide. Of the respondents, 75% have a membership with the Chamber of Commerce, which is much higher than the composite average of 55%. Over half (51%) of the executives are members of other business organizations, which is also higher than the composite average (42%). Many (57%) of the Barron County executives are expressing interest in participating in community organizations, which is near the composite average of 54%.

Being a resident of the local community can be a determining factor in community involvement. Of the executives responding to this survey, 95% indicated they reside in the local area, 3% reported that they live elsewhere in Wisconsin, and 2% 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, 80% of the responding executives feel the community is an excellent or good place to do business. The composite average for an excellent or good rating is 71%. When rating the state as a place to do business, 63% of the responding

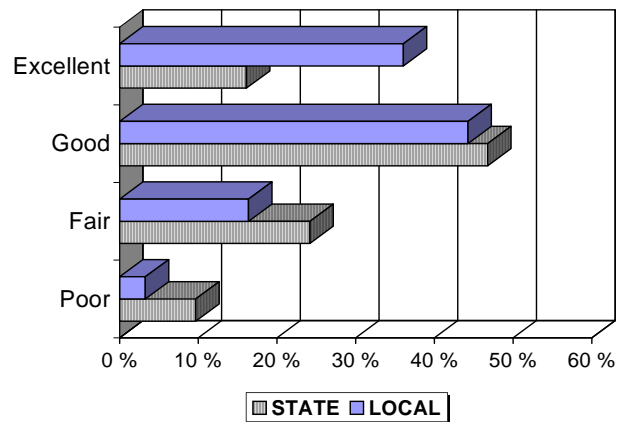


Figure 20 - A Place for Business

Barron County executives give it a rating of excellent or good. The composite figure for an excellent or good rating for the state is 62%.

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.

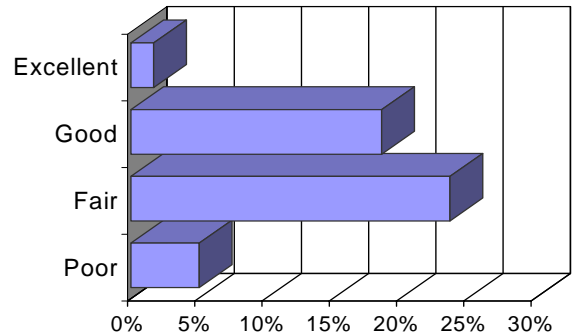


Figure 21 - Department of Commerce Ratings

The Department of Commerce Division of Economic Development administers several programs in 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. The program they rate as most useful is the state’s Main Street Program.

Program	Useful	Not Useful	No Opinion
Business Planning Assistance	- -	14%	86%
Financing Programs	7%	14%	80%
Labor Training Programs	13%	13%	74%
Community Development Zones	- -	16%	84%
Main Street Program	24%	9%	67%
International Trade Program	5%	17%	79%

Table D - Administered Programs Perceptions

When asked about key issues facing the firm in the next 3-5 years, the most frequently given responses were related to health insurance and benefits costs. Comments are listed in Appendix A, Question 134.

The executives are asked about improvements in Wisconsin as a place to do business. As Figure 22 shows, only 10% of the Barron County executives feel the business climate has

improved over the past few years, 56% feel conditions have remained stable, and 24% feel conditions have gotten worse; another 10% of the respondents expressed they had no opinion on the matter.

With regard to the state's *future* business climate, 30% feel conditions will improve, 48% feel they will stay the same, while 20% feel conditions will worsen. Barron County predictions are a slightly more optimistic than others surveyed in the state; composite findings for expectations are 27% "improve," 40% "stay the same," and 22% "worsen."

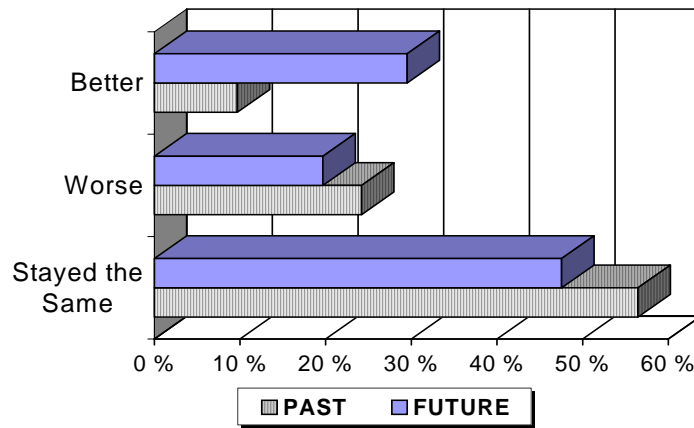


Figure 22 Improvements in Business Climate-Past/Future

VI. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The results of the Barron 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 Barron County business region is diverse with the largest percentage of those interviewed dealing with miscellaneous manufacturing.
2. More than two thirds of the interviewed firms (67%) serve as the company headquarters, with 56% stating there are additional facilities located in other communities. Of the businesses responding, 85% are incorporated.
3. The interviewed Barron County business community had its largest period of company start-ups 21 - 100 years ago.
4. The top factors negatively impacting the companies' current or future development are market condition/economy and regulatory constraints.
5. Of the interviewed executives, 27% report supplying a portion of their products to federal government, 41% to state government, and 58% locally. Barron County executives are expressing an interest in initiating or expanding government contracts: 40% - federal; 45% - state; and 51% have local interest.
6. More than one third of respondents' customers reside in the local area. Most of the executives describe their customer base as increasing or stable.
7. Over one quarter of the competition experienced by in the county comes from other local businesses. International competition is reported by a few. Two thirds of the executives feel competitors are "making significant inroads" or are a "future threat" to their business.
8. A majority of executives describe market shares for the companies' products/services as increasing or stable. Some (11%) say it is decreasing.
9. The study finds that of the Barron County businesses responding, 81% own the business facility, 17% lease, and 2% combine ownership with leasing.
10. Many of the businesses (76%) reported having enough property to expand at the present location, and 24% have definite expansion plans.
11. Of the responding executives, 19% have plans for a new building either at the present site or elsewhere in the community.
12. Some of the executives (34%) have plans to modernize or improve their present building(s) within the next two years, and 80% have plans to modernize or improve their equipment.
13. Results indicate 15% of the executives have plans to expand the business in another Wisconsin community; 16% reported plans to expand out of state.

14. The study found that 11% of the executives (seven persons) indicated plans to move all or part of the operation, either now or in the future. An additional 6% say a move is possible.
15. Other states have contacted 22% of the interviewed businesses in an attempt to persuade them to relocate.
16. Of the interviewed executives, 64 responded that they currently employ 5,668 full-time people. Data gathered from those responding to all five questions in a series about employment (36 executives) reflects the following: Current employment is 4% higher than one year ago and 14% higher than five years ago. The executives anticipate an increase of 3% next year and an increase of 16% over the next five years.
17. A total of 766 part-time workers are employed by 78% of the executives.
18. Employees in professional/technical roles earn an average of \$22.02 hourly, while office staff average \$11.92 per hour. Highly skilled employees in Barron County receive an average hourly wage of \$16.34, semi-skilled employees receive an average of \$11.82, and unskilled workers receive an average of \$9.78.
19. The Barron County executives report they are having the greatest difficulty recruiting for professional and technical positions. The survey finds that 44% report difficulty recruiting in this area. Just over one third (34%) say they have difficulty recruiting for blue-collar workers, and 19% express difficulty recruiting for office support help.
20. The Barron County executives believe the most positive factors dealing with recruiting are the quality of life and K-12 education system. The factors considered to have the most negative impact are personal taxes and climate.
21. Investment in training programs is increasing for 60% of the executives and remains the same for 40%.
22. Of the respondents, 17% report an association with a union, encompassing 13% of the full-time employment base.
23. The study finds 37% of the executives rate their local economic development efforts as excellent or good, 29% responded "fair," 18% said "poor," and 16% expressed no opinion.
24. Of the executives responding to this survey, 59% rated their local government excellent or good, 38% responded "fair," 2% "poor," and 2% had no opinion.
25. The vast majority of businesses say gross sales are increasing or remain stable. Others (8%) report decreasing sales. Two-thirds of the businesses dedicate a portion of annual sales to research and development.
26. Twenty-four respondents anticipate an increase in electricity needs in the next 3 years. Others expect increased needs for communications services: 24 – voice line usage, 28 – data lines, and 20 – wireless services.
27. Two factors most negatively impacting the firms' present financial condition are market condition/economy and employee wage/benefits.
28. Of the respondents, 75% are Area Chamber of Commerce members, 51% are members of other business organizations, and 57% signify an interest in participating in community organizations.

29. Of the executives responding to this survey, 80% feel their local community is an excellent or good place to do business. The state received an excellent or good rating from 63% of the respondents.
30. The study finds 10% of the executives feel Wisconsin's business climate has improved over the past few years, 56% feel it has not changed, 24% feel conditions have gotten worse, and 10% express no opinion.
31. Where Wisconsin's future business climate is concerned, 30% of the respondents feel the climate will improve over the next few years, 48% feel it will stay the same, 20% feel conditions will deteriorate, and 3% assert no opinion.

RECOMMENDATIONS

Information gathered from the survey questionnaires and interviews enabled the committee to key in on the most commonly voiced concerns and suggestions. In response, the committee developed the following recommendations to be implemented cooperatively with the Barron County Economic Development Corporation (BCEDC), the Barron County Economic Development Office (BCEDO), UW Barron County Campus, University Extension (UWX), Wisconsin Indianhead Technical College (WITC) of Rice Lake, and Barron County jurisdictions. The recommendations can be categorized into six areas:

1. Business Retention, Expansion and Startup
2. Communication and Technology
3. Economic Development Marketing
4. Workforce Development, Training and Education
5. Capital Resources
6. Infrastructure

BUSINESS RETENTION, EXPANSION AND START-UP

Continue to target diversified businesses in the county's attraction efforts.

Over 708,760 square feet of expansions are projected within five years. Assist businesses planning expansions and provide assistance to meet their needs.

* May 2005: 100,000 sq. ft. expansion announced by a Rice Lake company

Of the surveyed businesses, 80 percent indicated they are planning to modernize their equipment within the next two years. Assist these businesses and advise them of the state programs that are available for equipment improvements.

Although several businesses reported it was "possible" they would phase-out or shut down, the reasons included were "labor costs", "capital access" and "owner retirement". In order to assure minimal loss of commerce due to retirement, an agency representative should meet with retiring business owners identified to offer assistance with succession planning. The BCEDO will continue to work with these businesses and provide county, state and federal programs that may assist with their needs.

Forty-one (66%) of the businesses surveyed indicated that gross sales were increasing; 16 reported gross sales were stable and 5 others indicated a decrease in gross sales due to market conditions and the overall economy. The BCEDO will remain in contact with the businesses that indicated a decrease as the market and economy improve.

There were significant increases projected in utility needs by the respondents including electricity, voice lines, data lines and wireless services. The BCEDO will continue to work with the county's utilities, telecommunication companies and municipalities and provide services needed to meet the needs of the businesses.

Continue to be the central contact for countywide economic development inquiries and pass along such inquiries when they become jurisdiction-specific. Continue to work with the WI Department of Commerce, Forward WI, the West Central Regional Planning Commission, countywide economic development entities, and municipalities, regarding start-ups, retention, and business expansion or relocation business contacts.

Advise business contacts of the new programs now available through the State of Wisconsin, including the Wisconsin Entrepreneurship Network (WEN) and the Core Legislation of Act 255; the Wisconsin Innovation Network (WIN) and the Angel Investing Network. Develop a system to communicate information on grant and loan programs available through the state that are designed to foster new and expanding businesses. Communicate entities available to assist with business planning development; i.e., the Barron County Economic Development Office, Local Units of Government, State of Wisconsin Department of Commerce, Small Business Development Center, Wisconsin Women Business Initiative Corp., CAP Services, etc.

Continue to use the Location One Information system (LOIS) as a county directory that lists existing buildings and land available for development and to use LOIS as an element of the county's recruitment toolkit for start-ups, expansions, and relocations to the county.

Continue to work to enhance and expand retail and service industries to support county businesses.

Encourage local communities and/or economic development group(s) to monitor businesses that are leasing their facilities in effort to meet their expansion/growth needs.

Inform the local communities of municipal services and infrastructure concerns identified by the study and encourage them to establish a systematic approach to ensure appropriate follow-up and correction.

COMMUNICATIONS and TECHNOLOGY

Concerns were raised by businesses that their communities are unaware of their needs or are unresponsive to them. Businesses weren't always aware of the resources available through local, county and state agencies. The following action steps will be implemented to address these issues.

COMMUNICATIONS

Continue to be the central contact for countywide economic development inquiries and pass along such inquiries when they become jurisdiction-specific. Continue to work with state (Department of Commerce, Forward WI), countywide economic development entities, and municipalities regarding start-ups, retention, and expansion or relocation business contacts.

Maintain and promote open and free lines of communications between local government officials, key community people and organizations, and industrial leaders in regards to problems with municipal services and infrastructure.

The "Location One Information System (LOIS) will be used as the county's directory of existing buildings and sites available for development as a communications tool.

The Barron County Economic Development Corporation (BCEDC) will continue to sponsor its annual Business Awards Banquet (the eleventh annual banquet will be held in the Rice Lake area in April of 2006) to inform area businesses of economic development efforts and successes and to recognize four businesses in four separate categories.

Develop a media plan for communicating projects and accomplishments of economic development organizations, area businesses and communities.

TECHNOLOGY

The need for increased wireless services was expressed by 20 businesses and 28 indicated an increased need in data lines. The BCEDO will continue to work with the county's utilities, telecommunication companies and municipalities to provide services needed to meet the needs of the businesses.

The BCEDO will develop strategies for building technology-based business to support the needs of existing businesses, through its continued relationship with the Wisconsin Innovation Network (WIN), WITC and UW Barron County.

Continue to update and upgrade technological paths through the Barron County Economic Development website (www.barroncounty.com) and introduce an email based newsletter that will feature regional and statewide technology initiatives.

The BCEDO will continue to work with the state's technology initiatives including the Wisconsin Technology Council, the Wisconsin Innovation Network (WIN), and the Wisconsin Entrepreneurship Network (WEN) as elements of the county's technology enhancement efforts.

ECONOMIC DEVELOPMENT MARKETING

Continue the public awareness/education campaign aimed at promoting economic development through presentations to civic groups, regular articles in area newspapers/bulletins that focus on development issues, and press releases that publicize development related successes and opportunities in the county.

Develop and promote the county and its communities for recruitment of new businesses and employees through the annual "Barron County Economic Development Integrated Marketing Communications Plan" to include the following:

>An Integrated Marketing Communications (IMC) program that will focus on five goals.

- Increasing the awareness of Barron County and its Economic Development Opportunities
- Building awareness and support among local, regional and statewide influencers
- Increasing the business base of the county
- Improving the employment in Barron County
- Building relationships with those audiences to actively engage them in advancing Barron County Economic Development (Corporation)

(The following elements are included in the annual plan.)

>National Media Advertising Q1-4

>Local Media Advertising Q1-4

All advertising includes text pertaining to all of the county's industrial parks by specific jurisdiction and specific industrial park name with the jurisdiction. Depending on space available, some of the ads show the number of acres available in each of the parks. (Advertising elements of the ads are included in this report.)

>Production of new and updated Collaterals, Q1-4

>Web Portal Q1-4

The official Barron County website (www.co.barron.wi.us) continues to provide a direct link to the Barron County Economic Development Website.

(www.barroncounty.com). Barron County.com continues to provide a direct link to the **new** Rice Lake Economic Development website with hyperlinks directly to industrial park information and Rice Lake contacts.

The website also offers updated information and links to the industrial parks throughout the county.

>Geographic Targets: Chicago and the Twin Cities

>Industry Attraction (Ongoing)

Technology, Forest Products, Metal Fabrication, Plastics, Distribution, Tourism and technologically advanced companies in Agriculture and Dairy will continue to be a focus in the county.

>Use of the ADZ-Agriculture Development Zone (Ongoing)

>Direct Mail Q1-2 (Ongoing)

Although the counties to the south have a distinct advantage of proximity to the Twin Cities markets, Barron County has unique, natural, quality-of-life attributes that differentiate it from those counties.

Drawing on the attractiveness of the county's lakes and woods environment, this program will attempt to identify land and fixed property owners in the Chief Executive Officer, Owner, or Principal categories of companies located outside of Barron County. This will be accomplished through property locator data within Barron County.

The county's database of property owners will be reviewed on three initial thresholds:

- (1) Land and fixed property values in excess of seven hundred and fifty thousand dollars
- (2) Land and fixed property values in excess of five hundred thousand dollars
- (3) Land and fixed property values in excess of two hundred and fifty thousand dollars

As in the 2005 program for 2006, a marketing postcard will be mailed to each entry matching the above criteria, outlining all the industrial parks and industrial land in the county by jurisdiction, by acreage available, by local and county incentive programs available. The card will also announce the dates of the 2006 trade shows where the BCEDC/BCEDO will be exhibiting.

>Promotional Q1-4 (Ongoing and New)

Events: Governors Conference; Superior Days; ITBEC Conference; WEDA Conferences
Rice Lake-"Salute To Industry"; Local Events; Educational Seminars; Others to be announced.

>Forward WI

Marketing, Call events, Resources

Annual Call Trips (MN and IL): Under the previous leadership, Forward WI provided at least two call trips each year. The recently appointed President of Forward, Pepi Rudolph, has given no indication to divert from the schedule. These two-day trips are expensive, but can be beneficial. The IMC and marketing plan will include a review of each of the trips and their worthiness. There are other avenues to explore such as specialty shows like the annual

“Lake Home and Cabin Show” held in the Twin Cities, Chicago and Milwaukee, which may provide more of an appropriate venue for marketing Barron County.

>Regional and Local Partnerships

“Magnificent 8” NW WI Regional Marketing effort including eight counties with similar assets and opportunities to market.

Wisconsin Innovation Network - (WIN) Northwest Region

NW WI ITBEC (International Trade, Business and Economic Development Council)

(<http://www.northwestwisconsin.com/>)

Economic Development Commission

Tourism Development and Promotion Commission

West Central Regional Planning Commission

Association through ITBEC and the NW Regional County Consortium

Forward WI

Northwest Regional Planning Commission (ITBEC Connection)

Development corporations and Chambers representing individual county jurisdictions

County Jurisdictions

Wisconsin Department of Commerce

Wisconsin Housing and Economic Development Authority (WHEDA)

Impact Seven

UW-Extension

Barron County Realtors

The Barron County Business Community

WORKFORCE DEVELOPMENT, TRAINING AND EDUCATION

Provide WITC-Rice Lake and UW Barron County Campus with requested educational and training needs identified in the survey, including: CAN and ADN Nursing Training, Quality Control, Basic Math, Communication, Leadership, Problem Solving, machine Tool, Medical lab Technician, Acme Training at the campus, Food Safety Manufacturing and Growth through Changes.

Note: Similar responses indicated in the countywide Labor Market Study (2005) included: Business Planning, Advertising/Marketing, Employee Training/Hiring, Business Marketing Analysis, Internet & ECommerce, Identifying Customers through local Demographics and Marketing Trends.

Continue and expand small business workshops to provide opportunities to develop entrepreneurial skills and other programs available to assist in the expansion of existing businesses and the development of new businesses. A three-session overview on “How to Start a Business” will be offered at WITC-Rice Lake on October 11, 18 and 25, 2005. The course is designed to develop planning, organizing, financing and management functions

needed to start a small business. Included are research methods and identification of the resources to create, develop, and implement solutions to problems. Students will also develop appropriate strategies to initiate or maintain a small business. Three separate sessions will cover this entrepreneurship outline. Each session will provide integral and different content needed to start your own small business. In addition to the elements related in the official course description, information will include strategies for business plans, marketing, structuring your business, tax regulations, programs for minorities and women entrepreneurs, and more. The sessions will include PowerPoint presentations and handouts for take-home use.

Over 51 percent of the surveyed businesses expressed an interest in pursuing government contracts. A Government Contract seminar was held in 2004 (simultaneously to obtaining survey data). Additional seminars are planned as future events.

Provide businesses with information on educational and training resources available at the local, county and state level.

Assist with workforce agencies and businesses to develop employee training and retention programs noting the skill deficiencies identified in the survey.

Assist local educators, including high schools, technical colleges and universities as to the employment and training needs of local businesses.

CAPITAL RESOURCES

Advise businesses requiring funding for start-ups and expansions of the various funding resources available on a local, county, regional and statewide basis.

Emphasize use of the Revolving Loan Funds (RLF) available from the county and its jurisdictions.

Continue to work with communities to leverage Tax Increment Financing, local banks, state and federal programs and other financial resources to provide needed incentives to assist business expansions and recruitment.

Continue to explore development Angel investor networks, Venture Capital and relationships with the Wisconsin Innovation Network (WIN), the Wisconsin Entrepreneurship Network (WEN) and the Wisconsin Inventors Network.

Encourage local communities to continue to provide financial support to businesses by agreeing to sponsor industrial revenue bonding and applications for federal and/or state business financial assistance.

Expand local revolving loan programs and explore the feasibility of new programs to provide financial incentives to businesses. Emphasize the use of local Credit Unions and their assistance programs when lower amounts of capital are needed.

Capitalize these programs with TIF allocations, money generated from federal or state programs, and/or public private partnerships developed with local financial institutions.

Encourage local banks to develop strategies for working with small businesses that promote start-ups, expansion, and retention.

Job Center Partners will prepare a list of employer related financial services available for job retention, incumbent worker training, etc.

INFRASTRUCTURE

A need for traffic lights, controlled traffic flow and signage were general concerns throughout the county. A task force should direct these concerns to the leadership in the respective Cities and Villages.

APPENDIX A

BARRON COUNTY SUMMARY OF RESPONSES BASED ON 66 FIRMS

- 3M
- AMSCO
- American Excelsior Co.
- Ardisam, Inc.
- Automated Building Components Inc.
- BFI
- Badger Steel & Fabricating Inc.
- Barron Electric Cooperative
- Barron Medical Center
- Cedar Crest Ice Cream
- Cedar Glass and Door, LLC
- CenturyTel
- Chermack Machine Inc.
- Chibardun Telephone Cooperative, Inc.
- Chronotype Publishing Co.
- Community Bank
- Comstock Dairy Enterprises, Inc.
- Cooper Engineering Company, Inc.
- County Materials Corp.
- Cumberland Clinic, S.C.
- Cumberland Federal Bank
- Cumberland Memorial Hospital and
Extended Care Unit, Inc.
- Dairy State Bank
- Deutsch's Inc.
- FG Products, Inc.
- First National Bank of Barron and Rice Lake
- Intruder, Inc.
- JJ Woodworks LLC
- Johnson Truck Bodies
- Koser Iron Works, Inc.
- L&M Gazebos
- Lakeview Medical Center
- MANPOWER
- Marshfield Clinic - Indianhead and
Lakewoods Family Centers
- Mastercraft Industries, Inc.
- McCain
- McKenzie Supply & Equipment Ltd.
- Mechanical Specialties Inc.
- Norswiss Farms
- Nth, Inc
- Parker Hannifin Corporation
- Paul's Sheet Metal, Inc.
- Primera Foods Corp
- Rice Lake Air Center
- Rice Lake Auto Supply, Inc.
- Rice Lake Glass & Door
- Rice Lake Printery, Inc.
- Rice Lake Utilities
- Rice Lake Weighing Systems, Inc.
- S & S Glass and Door
- SANMINA-SCI
- SENECA Foods Corp
- SNG Precision Manufacturing Inc.
- Schmelke MFG
- Shadow Plastics, Inc.
- Springer Studios
- St. Croix Casino & Hotel
- Stein Bros. Steel
- Thomas Precision Machining, Inc.
- US Bank
- Viking Brewing Co.
- Viking Coca Cola, Rice Lake
- W.A. Roosevelt Co.
- WE Energies
- Wild River Ducts DBA Midwest Ducts
- Xcel Energy

I. HISTORY AND STATUS OF PRESENT LOCATION

1. Where is your firm's corporate headquarters located?			
	Local	43	67.2%
	Elsewhere in Wisconsin	8	12.5%
	Out of State*	13	20.3%
	Out of United States*	--	--
2. Does your firm have multiple locations?			
	Yes	37	56.1%
	No	29	43.9%
3. Where?			
(Executives are asked to indicate all that apply. Percentages are based on multiple responses.)			
	Executives Responding	37	
	Local	14	37.8%
	Elsewhere in Wisconsin	27	73.0%
	Out of State*	20	54.1%
	Out of United States*	6	16.2%
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	34	
	Similar product/service	31	91.2%
	Supply to/support local operation	3	8.8%
	Local operation supplies/supports them	3	8.8%
	Independent business focus	6	17.6%
5. What is the likelihood of consolidating operations?			
	Probable	--	--
	Possible	2	5.9%
	Remote	15	44.1%
	Non existent	17	50.0%
6. When was your firm established?			
	0 - 2 years ago	--	--
	3 - 5 years ago	--	--
	6 - 10 years ago	2	3.1%
	11 - 20 years ago	14	21.5%
	21 - 100 years ago	44	67.7%
	Over 100 years ago	5	7.7%
7. What form of organization does your business have?			
	Corporation (S or C)	55	84.6%
	Cooperative	2	3.1%
	Partnership	1	1.5%
	Limited Liability Corp.	3	4.6%
	Limited Liability Partnership	--	--
	Sole Proprietorship	1	1.5%
	Other*	3	4.6%

II. NATURE OF BUSINESS

8. What is the nature of your business?

Administration	0.20	0.3%
Agriculture	1.10	1.7%
Chemical, Petroleum, Rubber, Plastics	1.05	1.6%
Communication	3.15	4.9%
Computer, Computer Software	0.50	0.8%
Construction	1.90	2.9%
Consulting	1.05	1.6%
Distribution	2.55	3.9%
Education	--	--
Electrical, Electrical Equipment	0.90	1.4%
Energy	2.80	4.3%
Fabricated Metals	5.15	8.0%
Financial/Insurance/Real Estate	5.00	7.7%
Food, Food Products	5.98	9.2%
Hospitality	--	--
Lumber, Wood Products	4.00	6.2%
Machinery, Excluding Electrical	0.65	1.0%
Medical, Health Care	5.25	8.1%
Misc. Manufacturing	11.80	18.2%
Paper, Allied Products	--	--
Primary Metals	1.50	2.3%
Printing, Publishing	2.00	3.1%
Recreation	--	--
Research	--	--
Retail	2.51	3.9%
Service	3.10	4.8%
Stone, Clay, Glass, Concrete	0.50	0.8%
Telemarketing	--	--
Textiles and Apparel	--	--
Transportation	0.56	0.9%
Waste, Recycling	0.70	1.1%
Other*	0.80	1.2%

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	15.0%
Elsewhere Wisconsin	14.6%
Midwest	32.3%
National	25.8%
International	12.2%

II. NATURE OF BUSINESS

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

Product/Service:

Wood Supplier	Glass
Electric Generation	Wax
Molded Plastic Manufacturer	Flowers

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

Truck	71.4%
Common Carrier	18.0%
Rail	3.3%
Air	0.7%
Ship	3.0%
Personal/company vehicle	3.7%
Other	--

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

Truck	60.9%
Common Carrier	13.0%
Rail	0.3%
Air	0.9%
Ship	0.3%
Personal/company vehicle	16.0%
Other	8.6%

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

	Excellent	Good	Fair	Poor
Truck	24	26	3	1
Common Carrier	29	20	3	1
Rail	2	--	1	8
Air	4	4	5	5
Ship	2	2	1	7
Personal/Company Vehicle	22	3	1	3

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	10	2	3	1	16
Regulatory Constraints	8	7	8	3	26
Domestic Competition	5	9	5	1	20
Energy Costs	3	2	5	4	14
Material Shortages	1	1	3	4	9
Antiquated Machinery	--	--	2	1	3
Insufficient Space	1	3	1	1	6
Transportation Problems	--	--	2	1	3
Interest Rates	2	3	1	3	9
Market Condition/Economy	12	12	8	6	38
Labor Supply	3	1	5	2	11
Labor Quality	2	6	5	5	18
Employee Wage/Benefits	6	6	2	10	24
Other	4	2	--	--	6
Executives Responding	57	54	50	42	

III. PHYSICAL SPECIFICATION OF PLANT

15. Do you own or lease this location?

Own	51	81.0%
Lease	11	17.5%
Both	1	1.6%

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

0 - 2 years	6	66.7%
3 - 5 years	1	11.1%
6 - 10 years	2	22.2%
11 - 20 years	--	--
Over 20 years	--	--

17. What is the property size of this location?

Total acres:	1,350	
1 acre	6	12.0%
2 acres	6	12.0%
3 - under 5 acres	16	32.0%
5 - under 10 acres	8	16.0%
10 - 25 acres	11	22.0%
26 - 50 acres	1	2.0%
Over 50 acres	2	4.0%

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

Total square feet: 3,140,950

Under 2,500 sq. ft.	2	3.8%
2,500 - 5,000 sq. ft.	7	13.2%
5,001 - 7,500 sq. ft.	3	5.7%
7,501 - 10,000 sq. ft.	6	11.3%
10,001 - 25,000 sq. ft.	11	20.8%
25,001 - 50,000 sq. ft.	7	13.2%
50,001 - 100,000 sq. ft.	7	13.2%
Over 100,000 sq. ft.	10	18.9%

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

Total square feet: 184,440

Under 2,500 sq. ft.	3	17.6%
2,500 - 5,000 sq. ft.	5	29.4%
5,001 - 7,500 sq. ft.	1	5.9%
7,501 - 10,000 sq. ft.	4	23.5%
10,001 - 25,000 sq. ft.	3	17.6%
25,001 - 50,000 sq. ft.	1	5.9%
50,001 - 100,000 sq. ft.	--	--
Over 100,000 sq. ft.	--	--

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

Yes	60	96.8%
No	2	3.2%

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

Yes	52	85.2%
No	9	14.8%

IV. MARKETS, CUSTOMERS

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

Local/County	38.5%
Elsewhere in Wisconsin	23.1%
Midwest	12.7%
National	23.4%
International*	2.3%

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

None	35	59.3%
Less than 10%	23	39.0%
10% - 25%	1	1.7%
25% - 50%	--	--
50% - 75%	--	--
More than 75%	--	--

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

Increasing	43	69.4%
Decreasing	4	6.5%
Stable	15	24.2%

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

Federal:	Yes	15	27.3%
	No	37	67.3%
	Don't Know	3	5.5%
State:	Yes	24	41.4%
	No	31	53.4%
	Don't Know	3	5.2%
Local:	Yes	34	57.6%
	No	22	37.3%
	Don't Know	3	5.1%

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

Less than 10%	29	78.4%
10% - 25%	4	10.8%
25% - 50%	3	8.1%
50% - 75%	--	--
More than 75%	1	2.7%

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

Federal:	Yes	19	39.6%
	No	22	45.8%
	Don't Know	7	14.6%
State:	Yes	21	44.7%
	No	20	42.6%
	Don't Know	6	12.8%
Local:	Yes	26	51.0%
	No	18	35.3%
	Don't Know	7	13.7%

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

Product/service: No Responses

V. COMPETITORS

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

Local/County	29.6%
Elsewhere in Wisconsin	23.2%
Midwest	15.2%
National	25.2%
International*	6.9%

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

Making Significant Inroads	14	23.7%
Future Threat	25	42.4%
No Real Impact	14	23.7%
Never Been a Consideration	6	10.2%

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

Increasing	31	50.8%
Decreasing	7	11.5%
Stable	23	37.7%

VI. FUTURE PLANS

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

Yes	48	76.2%
No	15	23.8%

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

Yes	15	23.8%
No	48	76.2%

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

Now in progress	2	14.3%
This Year	--	--
Next Year	--	--
Within 5 Years	9	64.3%
Beyond 5 Years	1	7.1%
Don't Know	2	14.3%

35. How large would this addition be?

Total square feet 248,760

Under 2,500 sq. ft.	--	--
2,500 - 5,000 sq. ft.	4	36.4%
5,001 - 7,500 sq. ft.	--	--
7,501 - 10,000 sq. ft.	1	9.1%
10,001 - 15,000 sq. ft.	2	18.2%
15,001 - 25,000 sq. ft.	3	27.3%
25,001 - 50,000 sq. ft.	1	9.1%
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	21	34.4%
No	40	65.6%

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

Yes	12	19.4%
No	50	80.6%

38. How large will the building be?

Total square feet 518,000

Under 2,500 sq. ft.	--	--
2,500 - 5,000 sq. ft.	1	12.5%
5,001 - 7,500 sq. ft.	--	--
7,501 - 10,000 sq. ft.	2	25.0%
10,001 - 15,000 sq. ft.	1	12.5%
15,001 - 25,000 sq. ft.	--	--
25,001 - 50,000 sq. ft.	--	--
Over 50,000 sq. ft.	4	50.0%

VI. FUTURE PLANS

39. When do you plan to start construction?	Now in progress	--	--
	This Year	4	36.4%
	Next Year	1	9.1%
	Within 5 Years	5	45.5%
	Beyond 5 Years	--	--
	Don't Know	1	9.1%
40. Do you have plans to expand elsewhere in the state?	Yes	9	14.8%
	No	52	85.2%
41. If Yes, where?	Within 50 Miles	3	33.3%
	Within 100 Miles	2	22.2%
	Elsewhere in the State	4	44.4%
42. If Yes, when?	Now in progress	1	11.1%
	This Year	--	--
	Next Year	3	33.3%
	Within 5 Years	5	55.6%
	Beyond 5 Years	--	--
	Don't Know	--	--
43. Do you have plans to expand outside the state?	Yes	10	16.1%
	No	52	83.9%
44. If Yes, where?	Executives Responding	10	
	Midwest	7	70.0%
	Sunbelt	2	20.0%
	East Coast	2	20.0%
	West Coast	1	10.0%
	Other US*	--	--
	International*	2	20.0%
45. If Yes, when?	Now in progress	1	10.0%
	This Year	1	10.0%
	Next Year	1	10.0%
	Within 5 Years	5	50.0%
	Beyond 5 Years	1	10.0%
	Don't Know	1	10.0%
46. Do you have any plans to modernize or improve your present equipment within the next two years?	Yes	49	80.3%
	No	12	19.7%
47. Are there technological innovations that you plan to put in place within the next two years?	Yes	48	80.0%
	No	12	20.0%

VI. FUTURE PLANS

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

Yes	7	10.9%
No	53	82.8%
Possible Candidate	4	6.3%

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

Local	4	44.4%
Elsewhere in Wisconsin	2	22.2%
Midwest	1	11.1%
East Coast	--	--
Sunbelt	1	11.1%
West Coast	--	--
Other US*	1	11.1%
International*	--	--

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

Now in progress	--	--
This Year	4	44.4%
Next Year	1	11.1%
Within 5 Years	3	33.3%
Beyond 5 Years	--	--
Don't Know	1	11.1%

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

(Rank the top four in order of priority: 1=Greatest Impact, etc.)

	Rankings				
<i>Factors</i>	<i>One</i>	<i>Two</i>	<i>Three</i>	<i>Four</i>	<i>Total</i>
Closer to Customer	2	1	--	1	4
Closer to Supplier	--	--	2	--	2
Building Overcrowded	1	2	--	--	3
No Land to Expand	1	--	2	--	3
Access/Egress Problems	--	--	1	--	1
Crime/Vandalism	--	--	--	--	--
Labor Costs	3	--	--	--	3
Labor Supply	--	2	--	--	2
Energy Costs	--	1	--	--	1
Regulatory Concerns	--	1	1	--	2
Rigid Code Enforcement	--	--	--	--	--
Property Taxes	--	--	2	1	3
State Corporate Taxes	--	1	--	2	3
Personal Income Taxes	--	--	--	--	--
Other*	4	--	--	--	4
 Executives Responding	 11	 8	 8	 4	

VI. FUTURE PLANS

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

Yes	14	21.5%
No	51	78.5%

53. Which states had representatives contact you?

(3) South Dakota, (3) Texas, (2) North Carolina, Virginia, South Carolina, North Dakota, Tennessee, Nevada, Nebraska, Kansas, Iowa, California, Arizona

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

Probable	--	--
Possible	6	9.2%
Remote	25	38.5%
Non-existent	34	52.3%

55. If probable or possible, why?

Labor cost Completed products can be outsourced for less than material costs
Capital access
Frivolous lawsuits
Owner will retire

VII. LABOR AND MANPOWER MATTERS

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

to	Five	Last	Current	Next	Five
60.	Years	Year		Year	Years
	Ago	Year		Year	from Now
Number of Employees					
0	--	--	--	--	--
1 - 4	3	4	5	5	2
5 - 9	9	7	7	4	4
10 - 19	11	14	17	16	11
20 - 39	10	9	10	8	9
40 - 69	8	9	9	6	3
70 - 99	2	--	--	1	1
100 - 249	3	6	7	6	5
250 - 499	6	7	8	7	6
500 - 999	1	1	1	--	--
1000 and over	--	--	--	--	--
Total Employment Size	4,460	5,049	5,668	4,266	3,903
Average Company Size	84	89	89	80	95
Median Company Size	30	25	25	23	24
Number of Executives Responding	53	57	64	53	41
Number of Executives Responding to all questions in this series			36		

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

One	40	62.5%
Two	10	15.6%
Three	10	15.6%
Other*	4	6.3%

62. Do you employ part-time employees?

Yes	51	78.5%
No	14	21.5%

63. If Yes, how many part time employees?

	Staff	Contract	Total	
1 - 4	26	5	31	62.0%
5 - 9	7	--	7	14.0%
10 - 19	3	1	4	8.0%
20 - 39	--	2	2	4.0%
40 - 69	2	1	3	6.0%
70 - 99	2	--	2	4.0%
100 or More	1	--	1	2.0%
Total part-time employment:	656	110	766	

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

Yes	24	47.1%
No	27	52.9%

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

Yes	19	37.3%
No	32	62.7%

VII. LABOR AND MANPOWER MATTERS

66. What percent of your employment is:

Professional/Technical	21.2%
Office Staff	16.3%
Highly Skilled	23.0%
Semi-Skilled	24.8%
Unskilled	14.8%

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	--	--	--	--	--
\$6.00 - 7.99	--	--	--	3	4
\$8.00 - 9.99	--	5	--	7	8
\$10.00 - 11.99	--	17	2	8	12
\$12.00 - 13.99	2	11	5	7	3
\$14.00 - 15.99	5	7	10	8	1
\$16.00 - 17.99	4	2	4	3	--
\$18.00 - 19.99	4	--	4	--	--
\$20.00 - 24.99	8	--	7	--	--
\$25.00 - 29.99	9	--	1	--	--
\$30.00 - 34.99	3	--	--	--	--
\$35.00 - 39.99	2	--	--	--	--
\$40.00 - 44.99	1	--	--	--	--
\$45.00 and Over	--	--	--	--	--
Average Wage	\$22.02	\$11.92	\$16.34	\$11.82	\$9.78
Mean Wage	\$20.48	\$11.64	\$15.75	\$11.81	\$10.00

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

Yes	52	83.9%
No	10	16.1%

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

Yes	35	54.7%
No	29	45.3%

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

Less than 40%	3	4.6%
40% to 49%	--	--
50% to 59%	3	4.6%
60% to 69%	3	4.6%
70% to 79%	6	9.2%
80% to 89%	13	20.0%
90% to 99%	21	32.3%
100%	16	24.6%

Overall workforce living in the county based on executives responding to questions 56 and 70 82.1%

VII. LABOR AND MANPOWER MATTERS

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

0%	30	46.2%
Less than 3%	30	46.2%
3% to 5%	3	4.6%
6% to 10%	2	3.1%
11% to 25%	--	--
Over 25%	--	--

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

0%	9	14.1%
Less than 3%	16	25.0%
3% to 5%	16	25.0%
6% to 10%	10	15.6%
11% to 25%	8	12.5%
Over 25%	5	7.8%

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

0%	14	22.2%
Less than 3%	21	33.3%
3% to 5%	8	12.7%
6% to 10%	6	9.5%
11% to 25%	7	11.1%
Over 25%	7	11.1%

74. What is the most common reason for employee turnover?

(Respondents are asked to indicate all that apply. Percentages based on total responses.)

Executives Responding	63	
Career change	13	20.6%
College graduation	3	4.8%
Job security	--	--
Other opportunity	34	54.0%
Relocation, spouse/family	20	31.7%
Retirement	13	20.6%
Skills don't align	11	17.5%
Wage/benefits	10	15.9%
Terminated, performance	23	36.5%
Terminated, work ethic	22	34.9%

75. Are replacement employees difficult to recruit?

Blue Collar:	Yes	22	34.4%
	No	34	53.1%
	Not Applicable	8	12.5%
Office Support (hourly):	Yes	12	18.8%
	No	46	71.9%
	Not Applicable	6	9.4%
Professional/Technical:	Yes	28	44.4%
	No	26	41.3%
	Not Applicable	9	14.3%

VII. LABOR AND MANPOWER MATTERS

76. How do the following effect your recruiting?

	Positive	Negative	No Effect
Quality of Life	36	--	13
Cost of Living	25	4	17
Climate	8	13	26
Housing Costs	18	6	22
Available Housing	10	12	23
Personal Taxes	1	16	24
K-12 Education System	29	3	15
Area Technical College	26	2	18
Transportation	11	9	21
Other*	--	3	8

77. How do you obtain replacement employees?

	Best	Also Used
Word of Mouth	29	26
Newspaper	24	29
Internet	5	26
Private Services	1	9
Job Service	3	27
Storefront Sign	--	3
Area Tech College	3	21
University/College	--	10
Other*	--	3

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

Yes	39	61.9%
No	24	38.1%

79. Please give your perception of the following.

	Useful	Not useful	No opinion
Job Center	25	8	18
WI Mfg. Outreach Center	4	1	36
WI Mfg. Extension Partnership	4	--	36
Technical college	38	3	11
University	24	4	18
Apprenticeship	16	4	24
School -to-Work	16	3	23

80. Is your investment in employee training programs:

Increasing	38	60.3%
Decreasing	--	--
No change	25	39.7%

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

0%	1	2.3%
0.1% to 3%	30	68.2%
3.1% to 5%	6	13.6%
5.1% to 10%	4	9.1%
10.1% to 15%	--	--
Over 15%	3	6.8%

VII. LABOR AND MANPOWER MATTERS

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

Increasing	4	6.5%
Decreasing	8	12.9%
No change	50	80.6%

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

- AC Electrical
- Acme Training at the campus
- Basic Math, Communication, Leadership, Problem Solving
- Civil Engineering Technology
- Food Safety Manufacturing
- Growing through change
- Heating
- HUAC Techs
- Lean Manufacturing
- Machine tool course
- Medical Career
- Medical Laboratory Technician
- More CNA and ADN Nursing Training
- More Hands On
- Quality
- REAL Machine Tool Program
- Stay with mechanical and construction
- Technical
- Technical & supervisory
- Welding - FRP production tech. refrigeration

84. Does your firm have a union?

Yes	11	17.5%
No	52	82.5%

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

Less than 10%	--	--
10% to 25%	1	9.1%
25% to 50%	1	9.1%
50% to 75%	2	18.2%
More than 75%	7	63.6%

Overall workforce unionized based on executives responding to questions 56, 84, and, if 84 = Yes, 85. 13.0%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

86. Is the water pressure and supply provided to your building adequate?	Yes	61	100.0%
	No	--	--
87. Are you satisfied with the storm water drainage and sanitary sewer services provided by your local government to your site?	Yes	55	91.7%
	No	5	8.3%
88. Are voice lines provided by the local phone company adequate for your business communication needs?	Yes	62	100.0%
	No	--	--
89. Are data lines provided by in your area adequate for your business communication needs?	Yes	58	93.5%
	No	3	4.8%
	Not applicable	1	1.6%
90. Are wireless communication services provided in your area adequate for your business needs?	Yes	47	77.0%
	No	8	13.1%
	Not applicable	6	9.8%
91. Is waste disposal a problem at your local site?			
	Solid: Yes	10	15.9%
	No	48	76.2%
	Not Applicable	5	7.9%
	Liquid: Yes	8	12.7%
	No	42	66.7%
	Not Applicable	13	20.6%
	Hazardous: Yes	7	11.3%
	No	34	54.8%
	Not Applicable	21	33.9%
92. Has your facility been the target of vandalism or burglary within the last twelve months?	Yes	14	22.6%
	No	48	77.4%
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 twelve months?	Yes	2	3.2%
	No	61	96.8%
94. Do you feel that local law enforcement agencies are doing all they can to protect your employees/property?	Yes	59	93.7%
	No	4	6.3%
95. Are you satisfied with the present configuration of traffic lights, one-way streets, and stop signs in the area?	Yes	48	75.0%
	No	16	25.0%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

96. If No, what would you like to see changed?

A stoplight at the 4 corners (this is the main intersection in Cumberland)
 A stoplight at the corner of the Ford Dealership and the Cenex Truck Stop
 Bad crosswalks
 Better crosswalk and general traffic control.
 Charles St. (East of Bundy St.) should be closed to improve security. City stopped maintaining this street.
 Highway 8 has ripples and is difficult for trucks and trailers (to operate on)
 Knapp Street and Hwy. 48 - Need Lights!
 Lights at Knapp and Hammond
 More controlled intersections.
 Pioneer & Hwy. "O" there should be a right hand turn lane only when traveling west.
 Planned construction of another street to college will help reduce accidents.
 Proposed alternate to Main Street placed.
 Should have least one set of traffic lights
 Timing on lights seems off.
 Traffic entering
 Traffic light at Division and 18th

97. Do you feel that local fire protection capabilities are satisfactory for your needs?

Yes	61	98.4%
No	1	1.6%

98. Are there serious potholes in the pavement near to your facility?

Yes	12	18.8%
No	52	81.3%

99. Do you experience flash flooding on nearby streets?

Yes	5	7.8%
No	59	92.2%

100. Is snow removal adequate on the streets near your facility?

Yes	60	93.8%
No	4	6.3%

101. Are the streets near your facility cleaned regularly?

Yes	52	85.2%
No	9	14.8%

102. Do you feel code enforcement efforts are being adequately and evenly applied?

Yes	53	89.8%
No	6	10.2%

103. Is public transportation available for your employees?

Yes	23	36.5%
No	40	63.5%

104. If No, do you want it?

Yes	2	5.7%
No	33	94.3%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

105. What percent of your employees use the following means of transportation to get to work?

Car	98.0%
Car Pool	0.7%
Bus/Public Transportation	0.2%
Walk / Bicycle	0.7%
Motor Cycle / Snow Mobile / AT	0.4%
Other*	--

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

Executives Responding 60

Note: Rice Lake Air travel info excluded, locations not specified.

Air Travel to /from Duluth Airport	1	1.7%
Air Travel to /from Eau Claire Airport	5	8.3%
Air Travel to /from Minneapolis-St. Paul	17	28.3%
Bus	--	--
Amtrak (Rail)	--	--
Personal Auto	50	83.3%
Company Auto	41	68.3%
Other*	8	13.3%

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

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	37	6	7
Targeted Jobs Tax credit	6	6	25
Small Bus. Admin. Financing	10	14	16
Industrial Revenue bonds	8	11	23
County/City Revolving Loan Fund	11	9	22
Tax Incremental Financing	12	10	21
WI Housing & Econ. Dev. Authority	8	11	23

108. What is your perception of the following organizations?

Program	Useful	Not Useful	No Opinion
Area Chamber of Commerce	34	7	13
Local Econ. Dev. Corp.	23	9	17
County Econ. Dev. Corp	25	7	18

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

Excellent	3	4.8%
Good	20	32.3%
Fair	18	29.0%
Poor	11	17.7%
No Opinion	10	16.1%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

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

Airport:

Aviation user facilities

(City) Sewer and Water at airport

Develop displays (business development opportunities) at Rice Lake Airport More corporate users

Business attraction/growth:

Aggressive pursuit of manufacturers

Attract contract warehouse company

Better technology to attract non-manufacturing business

City could develop a more positive approach to new business & competitive operations.

More searching for companies needs to occur.

Need to provide economic incentives to attract industry & new business -- lot of competition out there.

One point of contact with authority to speak on behalf of Rice Lake.

Promote growth of industry, especially white collar, high tech

Promotion of Industrial Park

Provide more than "lip service" -- Show an interest in a potential customer's needs and requirement.

Recruit retail as well as industrial new business

Tax deferred development

The smart growth -comprehensive plan should have been done 10-15 years ago.

Utilities-incentives

Work with prospective newcomers in business, don't push them away due to signage restrictions etc.

Misc.:

Better planning for long term

Clearly defining the role and how they could help

Community reinvestment funds should go for more than bus trips to New York

Fight/help to keep Rail. North industrial park is being designed for hi-tech manufacturing (no rail).

Get banks involved in actually putting cash into local efforts

Local/County focus on industry. Need more [focus] to service and general business.

Low interest development

More active county economic development

More involvement and Broader Mission

Stick to long range planning.

Taxes are too high.

Village of Dallas government is excellent to work with

111. What is your opinion of the following?

	Satisfied	Dis-satisfied	No Opinion	Doesn't Apply
Planning Commission	22	7	22	8
Board of Zoning Appeals	20	5	29	5
Municipal Engineering Staff	13	3	29	14
Municipal Assessor's Staff	14	4	30	11
Health Inspector	14	1	32	12
Building Inspector	31	3	18	7
Fire Inspector	41	1	12	5
Public Works Department	35	1	15	8
City Administrator	22	7	20	9
County Administrator	21	2	30	5
Police Department	50	1	6	1
Fire Department	51	--	5	2
Elected Officials	33	8	15	2

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

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

Excellent	8	13.1%
Good	28	45.9%
Fair	23	37.7%
Poor	1	1.6%
No Opinion	1	1.6%

113. What improvements would you recommend?

Continue to work to balance expenditures to minimize tax increases.

County Board Chair needs to step aside or let the Administrator do the job hired for

Cut taxes

Encourage local business to buy from us and govt.

Fire the city administrator

Get meaningful projects completed

Less spending.

Listen to people

Long range planning.

Mayor needs to have authority over City Administrator and be a full-time job.

More consistency.

More pro-active to developers, not making them feel like they are burdening you.

Need property tax reform, not budget cuts

New business to retain people

Proactive in providing growth of companies

Support industry's interests to expand or reduce costs to preserve jobs in the city and county as well as increasing efforts to attract in new businesses.

They could stop by & ask if there was anything they could do for [us] - even introduce themselves

Work with manufacturers to aid in sales within community.

IX. FINANCIAL MATTERS

114. Are your firm's gross sales:

Increasing	41	66.1%
Decreasing	5	8.1%
Stable	16	25.8%

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

None	20	34.5%
Less than 5%	24	41.4%
5% - 10%	10	17.2%
10% - 20%	4	6.9%
Over 20%	--	--

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	58	
Conventional Financing	32	55.2%
Federal/State Programs	8	13.8%
Through Parent Company	13	22.4%
Venture Capital	4	6.9%
Cash Flow	39	67.2%
Industrial Revenue Bonds (IRB)	2	3.4%
Small Business Administration (SBA)	4	6.9%
Tax Incremental Financing (TIF)	2	3.4%
Other*	6	10.3%

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	4	4	2	4
Labor Supply	1	5	2	1
Transportation	--	--	--	2
Interest Rates	1	1	4	--
Energy Costs	2	4	6	4
Material Costs	7	8	5	1
Local Property Taxes	--	2	4	5
State Corporate Income Taxes	1	1	2	1
Federal Corporate Income Taxes	2	--	3	2
Market Condition/Economy	20	12	3	1
Employee Wage/Benefits	11	10	9	4
Property/Liability Ins. Costs	2	2	1	8
Other*	7	1	2	2

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

Local	38	61.3%
Elsewhere in Wisconsin	11	17.7%
Out of State*	13	21.0%
Out of U.S.*	--	--

X. ENERGY MATTERS

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

	Increase	Decrease	No Change
Oil	3	--	39
Natural Gas	17	1	36
Propane Gas	4	1	38
Electricity	24	1	33
Water	14	2	40
Sewer	14	2	39
Voice Lines	24	2	29
Data Lines	28	3	25
Wireless Service	20	2	29

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

Yes	20	31.7%
No	43	68.3%

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

Yes	7	11.1%
No	56	88.9%

122. Comments regarding utilities:

Positive:

- Electrical-excellent
- Good financial status.
- Good organization, well run. Keep it independent of the City Council.
- Good Service.
- Great to work with and very responsive to our needs.
- Very good to work with.

Concerns:

- Brief electrical power outages
- Power fluctuation and outages, flickers.
- Utilities could be more pro-business.

Misc.:

- Gas pipeline was purchased by larger Parent Co who can't cope with slow rate of use and has reneged on putting gas line into town.
- I was promised consideration for installing an electric generator.
- Is it for sale?

XI. COMMUNITY LINKAGE

123. Is your firm a member of the Area Chamber of Commerce?	Yes	44	74.6%
	No	15	25.4%
124. Is your firm a member of any other business organization in the local area?	Yes	30	50.8%
	No	29	49.2%
125. Are you interested in participating in community organizations?	Yes	29	56.9%
	No	22	43.1%
126. Where is your residence?	Local/County	59	95.2%
	Elsewhere in Wisconsin	2	3.2%
	Outside Wisconsin*	1	1.6%
	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	22	36.1%
Good	27	44.3%
Fair	10	16.4%
Poor	2	3.3%
No Opinion	--	--

128. What do you see as positive?

- 6 - Education system (2); Local schools; Good education; Educational options--until the schools run out of money; Public education
- 5 - Community; Small town; Hometown closeness; Good family environment
- 5 - Quality of life
- 4 - People(2); Great people (2)
- 3 - Labor quality; Strong work ethic (2)
- 3 - Safe (2); Low crime rate
- 2 - Clean; Cleanliness
- 2 - Diversity of business; Land use, variety of business
- Adequate Services
- Draw business from local retailers
- Electric rates fair
- Gov. utilities
- Growth
- Infrastructure in place
- Labor available
- Large market area
- Location.
- Looking for new business
- Natural surroundings
- Our customers are busy, so we are busy
- Resources, we work with Aspen
- Rice Lake some growth
- Rural attitudes
- Small, easy access to everyone and anything
- Support from local people
- Taxes, trying to cut
- The new interchange at Highway 53 & D
- TIF Program
- Tourism
- Transportation
- Variety
- We have some dedicated individuals
- Willing to work with us

129. What do you see as negative?

- 11 - Taxes (5); Taxes, extreme; High taxes (3); High reliance on property taxes to fund schools and city government (2)
- 5 - Labor; Caliber of Workers; Qualified workers; Labor market; Labor availability and quality
- 2 - Failing retail; Poor retail
- 2 - Health insurance costs, we can't afford it; Health care costs
- 2 - Remote
- 2 - Traffic; Trucks-Semis
- 2 - US Govt regulations; Extreme Regulation
- Business costs
- Casino -- No other industry

(Continued)

XII. OVERALL IMPRESSIONS

Change regulations from the state
 City cooperation and support
 Elected officials support of industry
 Ethnic crime
 Financial institutions too specialized out of our market
 Gov't reimbursement for healthcare services (Non local)
 Health care options.
 How do we build more business and keep people local?
 Implicit fear of competing with chain stores
 Legal atmosphere
 Limited growth
 Local governments not working together - city, township, county
 Need strong employers
 Perceived Anti-Business attitude
 Public transportation
 Rail, threat of losing rail service
 Relative non-progressive attitudes
 Representation in Madison
 Restrictive zoning
 Spending dollars on wrong areas in some cases
 To much of a shopping area, not manufacturing
 Variety, lack of
 Weak economy
 Weather, extreme

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

Excellent	10	16.1%
Good	29	46.8%
Fair	15	24.2%
Poor	6	9.7%
No Opinion	2	3.2%

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

Better	6	9.7%
Worse	15	24.2%
Stayed the Same	35	56.5%
No Opinion	6	9.7%

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

Better	18	29.5%
Worse	12	19.7%
Stay the Same	29	47.5%
No Opinion	2	3.3%

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

20 - Taxes; Control taxes; Lower/reduce taxes (7); Hold tax rate (2); Tax reform; Tax relief - business and personal (3). Lower property taxes. Provide tax credits to growing businesses; Reduced taxes, support of sizes of businesses; Total tax within state; Taxes-high ranking in US standing - A poor sales point

7 - Tax incentives (3); Tax incentive to buy more capital equipment; Better tax incentives - Less fuel and power taxes; Retooling tax incentives; Tax breaks--do not really know

5 - Regulation: Limit the scope of power of PSC, DNR and local governments. Reduce government interference. Reduce government regulations/paper work. Streamline regulatory staff and laws; Reign-in the PSC, DOR and DNR

(Continued)

XII. OVERALL IMPRESSIONS

Balancing State Budget
Become a right-to-work state
Business retention: Direct more effort toward existing business
Cost of government, reduce. Reduce state payroll, programs
Get spending under control
Have a governor who won't cut deals with environmentalists
Health insurance costs
Help to control work comp cases - shift more of this burden to employees
Improve reimbursement to healthcare facilities
Job Creation incentives
Limit state and city spending
Manufacturing incentives
More Business incentives
Need to be supportive rather than restrictive
State systems integration -- Do something about workmans comp. & small org.
Stop anti-agriculture legislation
TORT REFORM
Unemployment low
Utility: Strive for major electrical infrastructure and generation additions and upgrades
Workforce education, increase

134. What are the key issues facing your firm in the next three to five years?
- 15 - Health Insurance/benefits costs (11); Other insurance (2); Rising insurance costs (2)
 - 13 - Labor; Labor shortage (2); Labor supply; Employee/labor quality (3); Employee department; People and training; Retaining good employees; Shortage of healthcare workers; Supply of good employees; Finding qualified workers
 - 11 - Government regulations (3); DNR legislation concerning water and wastewater; Regulatory constraints; Over regulation of the state PSC in a highly competitive marketplace; Cost of environmental compliance; US Food Policy; Government interference; Regulatory issues; Environmental
 - 6 - Taxes (5); State & local taxes
 - 5 - Competition; Staying competitive; Competition from large unregulated companies; Global/Foreign competition (2)
 - 3 - Economy, overall (2); General economic conditions
 - 3 - Interest rates (2); Rising interest rates
 - 3 - Growing community; Growth and diversification; Handling growing pains
 - 2 - Energy costs; Rising energy costs
 - 2 - Reimbursement declining. Reimbursement levels of insurance and government programs.
 - 2 - Wages and benefits.
 - Access to capital
 - Building distributor customer base. Building profit margins.
 - Cost reduction to remain competitive and sustain business (jobs).
 - Equipment costs
 - Expanding
 - Facility relocation
 - Financing
 - Free trade and off shore sourcing
 - Freight
 - Fuel and energy cost
 - Increasing our customer base to become more profitable again
 - International trade
 - Labors Costs
 - Lawyers writing laws for lawyers - Activist judges
 - Location
 - Material costs

(Continued)

XII. OVERALL IMPRESSIONS

Municipal budgets, state/federal transportation budgets
 Need construction to continue
 Negotiating Union Labor Contract w/Teamsters
 Newsprint increases in price
 Physician recruitment
 Power supply costs
 Reimbursement, poor
 Retirement and succession planning
 Space of facility
 Staying profitable
 Work Comp. etc.
 Work moving to "low GEO's" like Mexico, China and India

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

Excellent	1	1.7%
Good	11	18.6%
Fair	14	23.7%
Poor	3	5.1%
No Opinion	30	50.8%

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

Program	Useful	Not Useful	No Opinion
Business Planning Assistance	--	6	37
Financing Programs	3	6	35
Labor Training Programs	6	6	34
Community Development Zones	--	7	37
Main Street Program	11	4	31
International Trade Program	2	7	33

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

Be Pro Business
 Commerce needs to focus on working with small firms that can grow
 Get information out to small business on what the Wisconsin Department of Commerce has to offer
 Get more information out to educate business as to what's available to them for assistance programs. I didn't know any of these existed.
 Get rid of staff
 Help business with real issues and real (Non-political) support
 How To seminars - importing; dealing with customers; international paperwork
 Increase communication to existing businesses on how they could provide support and assistance
 Keep business in Wisconsin. On at least 2 occasions they contracted out of state -- wasn't necessary
 Local and regional marketing
 Make me aware of the programs state has available to me. How do I get help in various areas?
 May be expanding.... Will need help with financing resources; needs education on options available
 More communication from WI Dept of Commerce would be helpful - Brochures
 More effort directed to small business
 Need to initiate an outreach program
 Simplify CBED so that borrowers know state is sincere about local economic development--eliminate the red tape
 Too much bureaucracy
 Would like to be aware of programs

XIII. ADDITIONAL DETAIL ON SELECT QUESTIONS

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

Out of State

- 3 - Minnesota
- Arizona
- Arlington, TX
- Charlotte, NC
- Cleveland, OH
- Louisiana
- Marion, NY
- Texas

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

Out of State

- 4 - Minnesota
- Colorado
- CT
- IA
- Illinois
- NC
- NJ
- Upper Michigan
- Washington State
- Multiple
- 22 States
- Most states

Out of United States

- Mexico
- Global
- Worldwide
- 44 Countries

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

- Municipal Government
- Nonprofit 501c3
- Tribal Government

II.08 What is the nature of your business?

- Technology/Networking
- Water/ Waste water

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

- 3 - Canada
- 2 - China
- Europe
- Overseas

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

Canada

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

- International
- Mexico

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
MN

VI.51 Do you have any plans to move all or part of your operation from this location? Why?
Rail Siting Necessary
Combine with our other offices
1) Existing building is not set-up right; 2) no loading dock; 3) more favorable lease agreement; 4) Energy costs
Consolidation-additional capacity-growth

VII.77 How do you obtain replacement employees?
Employees

VIII.106 Which of the following means of transportation are regularly used for business purposes?
Rental Cars
Company Delivery Truck
4 - Air-Rice Lake Regional
Air travel-Cumberland Airport
Corp Jet

IX.116 How would your firm pay for or finance technological innovations, expansions, and modernizations?
MRB, innerfund
Tax exempt financing
Private Financing Alternate, Economic Development Loans
Very creatively since banks can't cope
Supplies lease
Private funds

IX.117 What are the most important factors, if any, negatively impacting your company's present financial condition?
Regulation State/Federal
Health Insurance Costs, Local Taxes
Slow paying clients
Government reimbursement
Teamsters Union
Regulatory constraints.
Reimbursement
Canadian competition
Regulatory uncertainty
Weather
Legal costs
Health Insurance

XI.126 Where is your residence?
Outside Wisconsin
owner lives in Minnesota