Discover YOUR Hidden Potential...

Green County

Wisconsin Business Retention & Expansion Study

2007

Green County Development Corporation

Conducted by the Green County Development Corporation in cooperation with the Wisconsin Department of Commerce, in partnership with local community leaders.

TABLE OF CONTENTS

commerce.wi.gov
Wisconsin Department of Commerce

P. O. Box 7970
Madison, Wisconsin 53707
(608) 266-1018
TDD #: (608) 264-8777

Jim Doyle, Governor
Jack L. Fischer, AIA, Secretary

February 2008

I. FOREWORD

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

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

Economic development activities that focus solely on attracting new businesses often yield insufficient returns for the investment. Efforts to retain and expand existing businesses can aid in stabilizing a community's economic base and create an environment conducive to attracting 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 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 Green County Development Corporation demonstrated enthusiastic support for a business retention program; therefore the Department of Commerce agreed to co-sponsor a study in Green 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 Green 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.

Jack L. Fischer, AIA, Secretary
State of Wisconsin Department of Commerce

II. ACKNOWLEDGMENTS

The Wisconsin Business Retention and Expansion Study (WIBRES) -- Green County 2007 was conducted through the joint sponsorship and sustained support of:

Green County UW Extension
Green County Leaders Alumni
Blackhawk Technical College
City of Monroe, Monroe Chamber of Commerce & Industry
City of Brodhead, Brodhead Chamber of Commerce
Village of New Glarus, New Glarus Chamber of Commerce
Village of Monticello, Monticello Business & Professional Association
Village of Brooklyn
Green County Development Corporation
and
Wisconsin Department of Commerce

This study could not have been accomplished without the expertise and cooperation of a variety of individuals. Special gratitude is extended to Green County leaders and the citizens of Green County who volunteered their time and efforts as board and committee members that support these organizations. We wish to thank Susan Wetherington for her assistance with administrative details and Mary Kloepping of The Swiss Colony for her dedication to the data entry process.

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

Anna Schramke - Project Manager
Executive Director
Green County Development Corporation

RETENTION COMMITTEE

Joe Hunter	The Swiss Colony, Inc.
Dave Mosher	Dave Mosher & Associates
Carol Strause	Village of Monticello
Gof Thomson	Bank of New Glarus
Mark Vahlsing, City Administrator	City of Monroe

VOLUNTEERS

Jennifer Amiel*	Fehr-Graham & Associates, LLC
Duane Bell*	VP Buildings
Art Carter, Chairman	Green County Board of Supervisors
Barbara J Clark	Sugar River Bank - Brodhead
Scott Dilley*	Alliant Energy
Greg Engen	Bank of New Glarus
Dennis Everson	Wisconsin Community Bank
Brian Gardner	TDS Telecom
Ric Genthe*	Ric Genthe & Associates
Steve Graber, President	Village of Monticello
Kris Hartwig*	Rainbow Childcare of Monroe Inc.
Audrey Hein*	
Dan Henke	D&H Builders
Anita Huffman	Blackhawk Technical College
Ann Hunter*	The Swiss Colony, Inc.
William Hustad*	SPSI
Patty James*	The Swiss Colony, Inc.
Amanda Kloepping*	The Swiss Colony, Inc.
Warren Laube	Bank Of New Glarus
Jan Lefevre, Alder	City of Monroe
Ron Marsh, Mayor	City of Monroe
Lynn Molinaro*	Dairy Queen Brazier
Jane Monahan*	The Swiss Colony, Inc.
Mike Olson	Bank Of Brodhead
Nicholas Owen, Administrator	Village of New Glarus
Doug Pinnow, Mayor	City of Brodhead

(Continued)

Kari Rosenstiel*	The Swiss Colony
Jan Sanders*	Monroe Clinic
Steve Schneider	Amcore Bank
Jason Smart	The Swiss Colony, Inc.
Nancy Sutherland	The Sutherland House
Matt Urban	Monroe Chamber of Commerce & Industry
John Waelti	Monroe School Board
Tim Wolff	The Swiss Colony, Inc.
Dave Wyttenbach	Union Bank & Trust
Andy Ziehli	Advisory Management & Research Services, Inc.
Marie Zinsli*	Monroe Clinic

(*Green County Leaders Alumni)

WISCONSIN DEPARTMENT OF COMMERCE

David Martens	Area Development Manager Division of Business Development
Geri Petersen	WIBRES Program Manager Division of Housing and 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 sun-belt 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.

Green County was chosen as a project site for several reasons: 1.) There is a significant business base, 2.) The Green County Development Corporation (GCDC) requested that the WIBRES survey project be implemented in the county, and 3.) GCDC expressed confidence in their ability to coordinate the necessary volunteers and administrative support to successfully complete the project.

The Green County Development Corporation Retention Committee assisted with several aspects of the study. The members of the committee represent sponsoring agencies and organizations, city and county government, local educational institutions, and the business community. The functions of the GCDC Retention Committee were to: 1.) Determine if an addendum questionnaire was needed to address community specific issues, 2.) Develop the list of business contacts, 3.) Recommend and obtain survey volunteers to conduct interviews, 4.) Monitor survey responses, 5.) Develop recommendations and follow-up measures based on survey results.

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. Repeat 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 and/or relocation), and thereby set up an early warning system for local action.
5. Acquaint business leaders with assistance available through various economic development programs.
6. Improve the communications bridge between local/county government and the business community.
7. Identify specific concerns and problems of the local businesses and provide solutions to those problems in a swift and effective way.

An overall objective of the business retention and expansion project is related to the process itself. By conducting the study, business executives are provided an opportunity to have their opinions listened to and passed directly on to 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 GCDC Retention Committee reviewed the WIBRES survey instrument to verify it was appropriate for Green 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 are included in the survey. The GCDC Retention Committee developed an addendum questionnaire containing several questions specific to Green County, which were not already asked within the main questionnaire. All addendum responses were added to the database and tallied for analysis.

The retention committee developed a list of businesses to interview. Businesses participating in the study ranged in size from owner operated to as many as 900 employees.

A. DATA COLLECTION PROCEDURES

Interviewers were selected who had experience with the business community. Due to the confidential nature of the survey questions the GCDC Retention Committee gave careful consideration to choosing the individuals who were to perform in this capacity.

The volunteers participated in a training session, which was 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. Surveys were to be completed before the scheduled interview, the interviewers were charged with recording the subjective as well as objective information obtained during the interview.

The Wisconsin Business Retention and Expansion Study questionnaire was distributed to 109 Green 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 62 questionnaires were completed in the county.

B. DATA ANALYSIS

The interviewers returned each completed questionnaire to Anna Schramke, project manager for the survey. Based on the interviewer's written comments and preliminary inspection by the project manager, businesses requiring immediate attention were identified. The Wisconsin Department of Commerce provided a data base and instruction for data entry to be completed by assigned personnel of The Swiss Colony. The data file was then returned to the Department of Commerce for analysis of the objective as well as narrative 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. Also, the names of participating businesses were withheld to protect their identity and were not recorded in the survey database. Once the interviews were completed, only the GCDC Retention Committee 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 Green County targeted a business population consisting of 109 firms; 62 completed the survey questionnaire representing 57% participation.

This section is based on the summary of the 62 survey instruments compiled between January and July 2007. It contains chart illustrations and a brief narrative description highlighting selected items of significance. Additional community specific questions were asked on an addendum to the main questionnaire. Appendix A of this report presents a complete and detailed listing of the questionnaire results for both the main questionnaire and the addendum.

Composite data, which is cited in this report, is a compilation of survey answers collected from other Wisconsin communities during the previous three years. Those communities include the following: Barron, Columbia, Jefferson, Lafayette, Lincoln, and Vilas counties as well as Cross Plains, Middleton, Prairie du Chien, and Stoughton.

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 Green County business interests are diverse with significant segments dealing in food/food products and miscellaneous manufacturing industries. Figure 1 illustrates the top six focuses among the participating businesses. This information can be helpful in guiding business attraction efforts in order to maintain a diverse business base while complementing the existing industries doing business in the county.

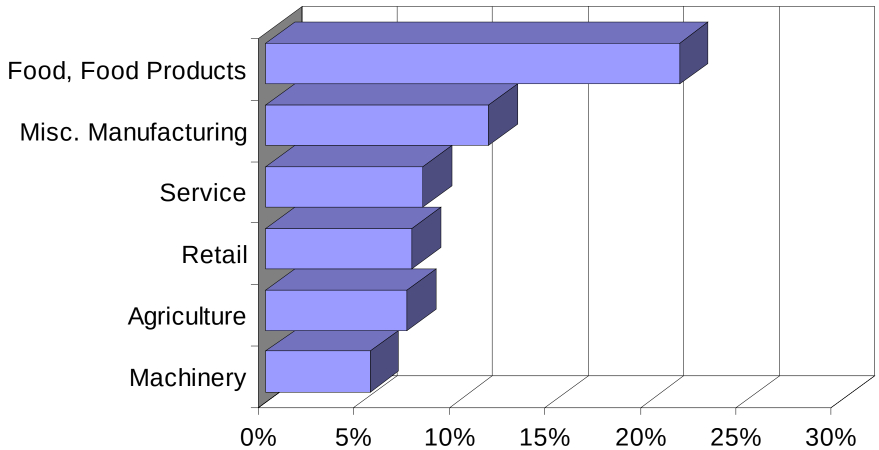

Figure 1 - Types of Business

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 reported the local facility is the headquarters for 72% of the firms. This figure is just two points below the composite average (74%) of other communities surveyed in the past three years. Of the responding businesses, 10% are headquartered elsewhere in Wisconsin, 13% out of state, and five percent outside the United States. Figure 2 shows the distribution of headquarters locations.

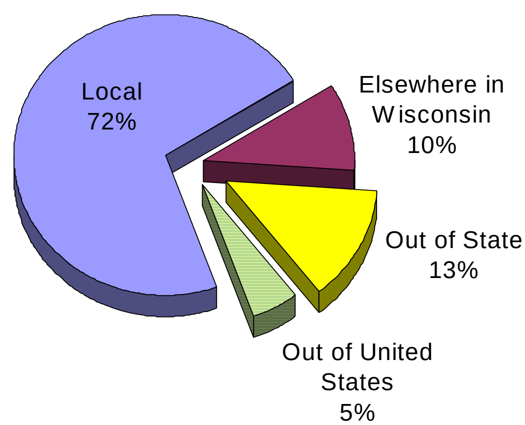

Figure 2 - Location of Headquarters

Of those surveyed, 54% have locations in addition to the local site, compared to a composite average of 48%. More than two thirds (68%) of the businesses are incorporated.

The county has many well-established businesses; 56% have been in business more than 20 years. There is also evidence of new activity as five of the interviewed businesses have been operating fewer than five years. Figure 3 shows business start-up patterns for the Green County business region.

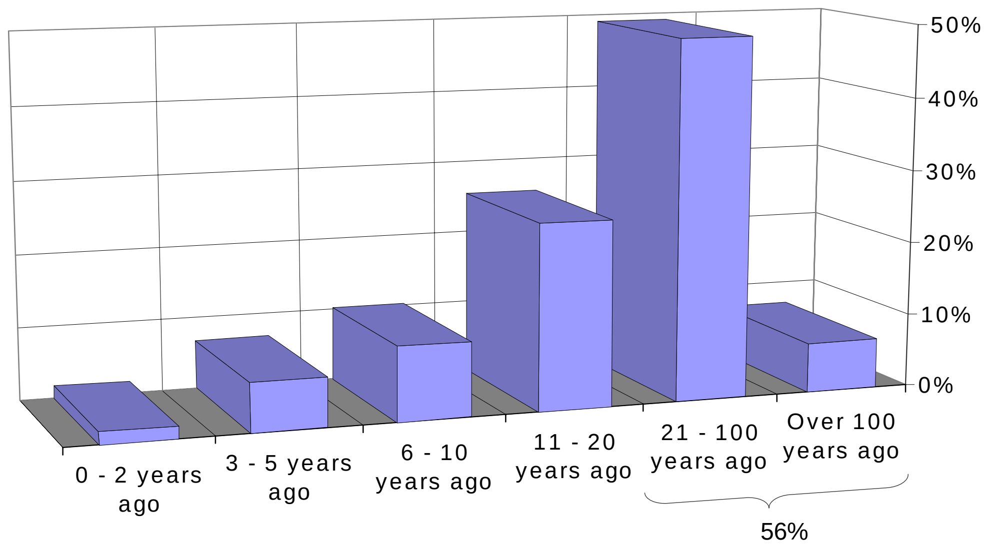

Figure 3 - Year Business Established

Building ownership is a complex issue regarding business retention and expansion. Some businesses may own real estate as a strategy for building owners' wealth. Other companies may acquire real estate to protect a large investment in equipment. High growth knowledge-based companies may not acquire real estate because they expect to outgrow facilities in a short period of time. Figure 4 shows percentages of the Green County businesses that own, lease, or do both. A higher than average percent own their facility, 82% versus a composite figure of 75%. Another 11% lease and seven percent combine ownership and leasing. Of those reporting

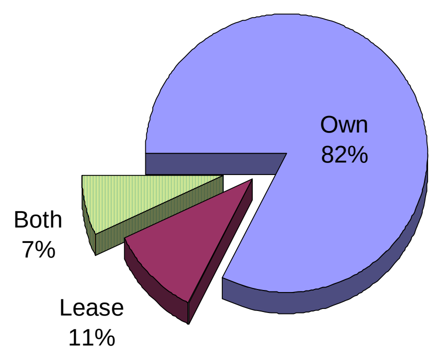

Figure 4 - Facility Ownership

lease expirations, one firm's lease expires within the next two years and one expires between two to five years from now.

The executives were asked to rank 13 factors as they negatively impact the current or future development of the company's product or business activity. The factor they ranked highest in importance is market condition/economy followed by global competition, energy costs and labor quality (see Figure 5). Though the number one factor (market condition/economy) is the same, other selected factors are somewhat different than composite findings in which domestic competition ranked second in importance, regulatory constraints third, and energy costs fourth.

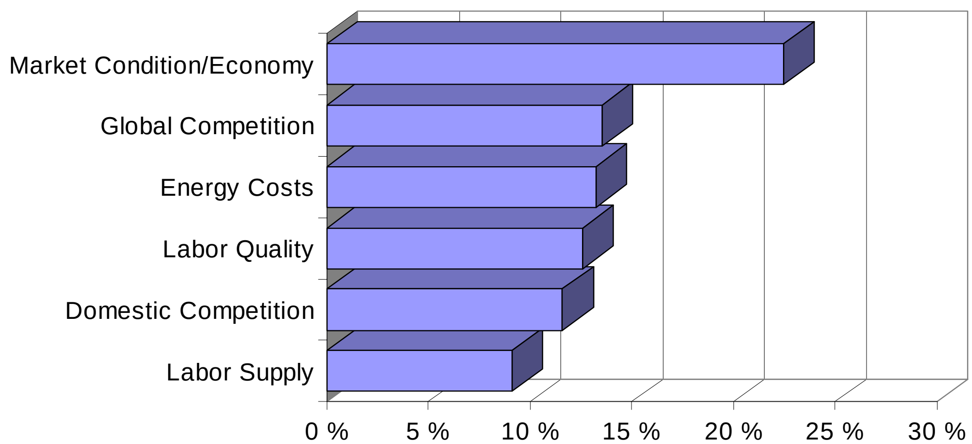

Figure 5 - Negative Factors Affecting Product Development

One of the more critical drawbacks to conducting business in Green County, perhaps now more than in the past due to rising fuel costs, is its location in proximity to suppliers and customers (Addendum, Question A09). The survey participants were asked to identify the geographic location of raw materials and supplies utilized by their business. Tallied results reflect 28% of supplies come from the local area/county, 21% from elsewhere in Wisconsin, 23% from Midwestern states, and 20% from across the nation. Only eight percent of supplies are obtained from overseas locations.

Satisfaction with the method used to transport supplies and finished products may be a factor when a firm decides where to locate. The Green County executives report that most (71%) of their supplies are brought in by truck, 13% by common carrier, and five percent by personal/company vehicle. A small amount of supplies are transported via air, ship, or rail.

The most popular method used to move finished products is truck transportation as well. Sixty-two percent of finished products are shipped by truck, nine percent by common carrier, and 16% by personal/company vehicle, while a smaller portion of finished products are transported via air, ship, or rail. Executives responding to the survey also rated how well the modes of transportation serve their business needs, all shown in Table A. When asked if there is interest in using rail service (Addendum, Question A21), 17% said “Yes” and 77% responded “No.” Six percent of the executives are currently using rail service.

	Excellent	Good	Fair	Poor
Truck	31	24	2	0
Common Carrier	13	25	2	0
Rail	0	2	5	6
Air	2	6	0	5
Ship	1	5	2	4
Personal/Company Vehicle	15	5	1	1

Table A - Methods of Transportation

MARKETS AND CUSTOMERS

Many (59%) of the respondents described the number of customers they serve as increasing while 31% said the number remains stable. However, survey results found 10% described the number of customers they serve as decreasing.

The Green County executives reported nearly a third (31%) of their customers are located within the county. They say 25% are located elsewhere in Wisconsin and 18% throughout the Midwest. Additionally, 22% are located nationally, while a small percentage (4%) of their customers are situated outside of the United States. Figure 6 illustrates the distribution of customers in these locations.

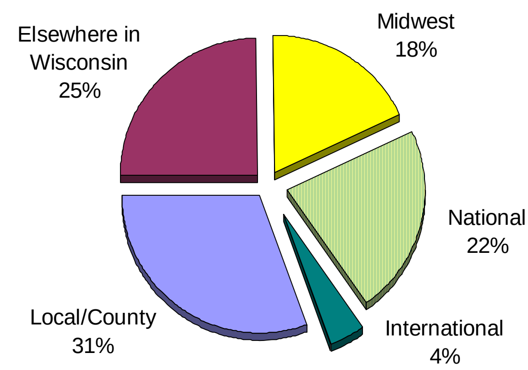

Figure 6 - Customer Location

The Internet has become a vehicle for some of the Green County companies to conduct business sales. Five percent of the businesses reported the Internet is used for more than 50% of company sales. Another three percent use it for 25% to 50% of sales, and 26%

reported up to 10% of sales are conducted over the Internet. Two thirds (66%) of the businesses are not using the Internet as a medium to facilitate any portion of sales.

The executives were asked if they supply finished products directly to the federal, state, or local government. Currently, 19% supply products or services to federal government, 26% to the state, with 30% supplying the local government. The figures for contracting are a little lower in each category than composite averages, which are: Federal - 22%, State - 30%, and Local - 37%. Figure 7 illustrates the percentage of executives who currently hold government contracts and the percentage of executives who are interested in initiating or expanding government contracts. The executives' interest is not as strong as the interest of their counterparts in other Wisconsin communities; 20% of the responding Green County executives are expressing an interest in federal contracts, 33% in state contracts, and 36% in local government contracts. The composite averages for interest in federal, state, and local contracts are 32%, 37%, and 40%, respectively.

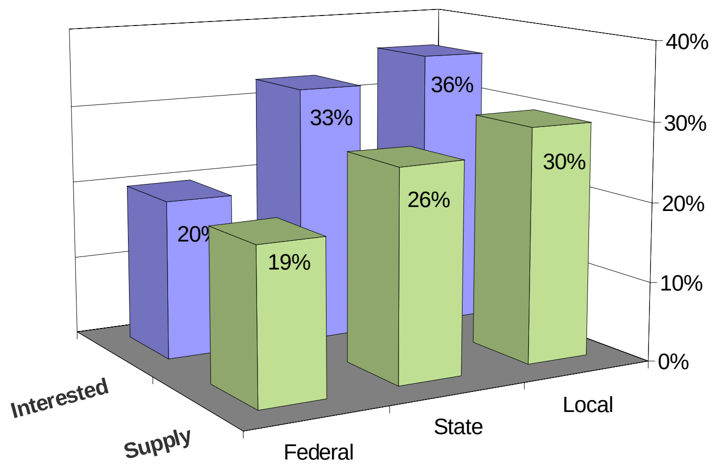

Figure 7 - Government Contracts

COMPETITION

More than half of participants (54%) described their company's market share as increasing and 39% said it is stable. Seven percent of the executives reported a decrease in market share. Perhaps overseas production is a contributing factor; 58% feel overseas production by competitors is increasing (Addendum, Question A05).

The majority of the respondents' competitors are located within Wisconsin (20% within the county and 33% elsewhere in the state). Figure 8 (next page) shows the geographic distribution of competitors by percentage. Fourteen percent of the county's competition comes from Midwestern states and 25% from elsewhere across the nation. Eight percent of the respondents are experiencing international competition. Executives also responded as to how they view their competitors. As illustrated in Figure 9, 20% feel competitors are making significant inroads, while 43% see them as a future threat to their business. Other local executives surveyed (29%) feel competitors have no real impact and eight percent responded that competitors have never been a consideration.

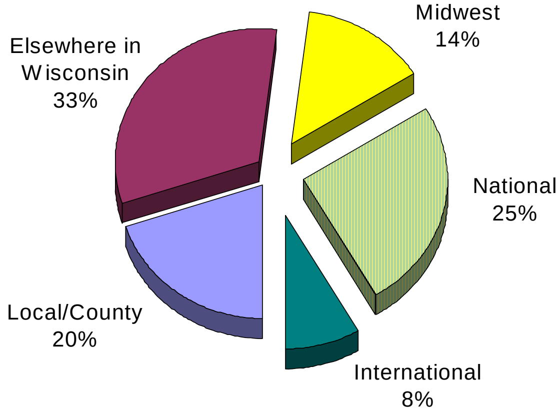

Figure 8 - Competitor Locations

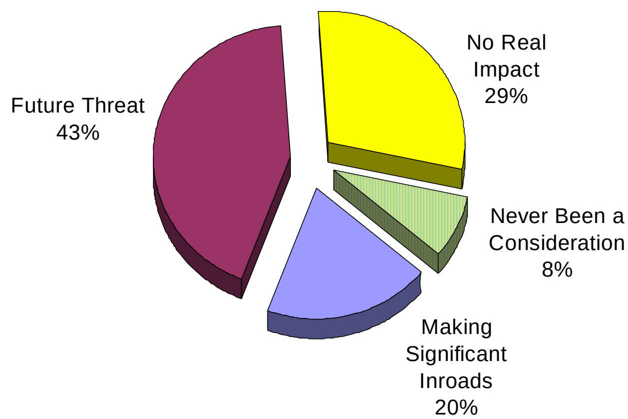

Figure 9 - Competitive Threat

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. Two-thirds (67%) of the responding businesses currently have sufficient property to allow for expansion of their existing building(s), which is very similar to the composite average (66%). Eighteen executives (31%) reported plans to expand an existing building(s) at the site; the composite average is slightly lower at 27%. Expansion plans would add a total of 182,820 square feet to business sites in Green County. Executives were asked when expansion construction would take place; five executives indicated that construction was either now in progress or planned for sometime this year, five reported having plans for expansion next year, and seven others within the next five years.

Survey results indicate 20% of the responding executives (11 firms) have plans for a new building either at the present site or elsewhere in the community. The finding is slightly higher than the composite average, which is 17%. The executives estimate the new building construction would total 244,000 square feet. When asked about a timeframe for new construction, one executive reported construction was in progress at the time the survey was conducted and three stated they plan to build within 2007. Additional data indicate three of the respondents plan to construct new buildings next year and three more within the next five years.

Nearly half (47%) of respondents reported plans to modernize or improve their present building(s) in the near future and 79% plan to improve their equipment. Additionally, the study found that 70% of the respondents said there are technological innovations that they plan to put in place within the next two years.

Of the responding executives, nine percent (five businesses) reported plans to expand their business elsewhere in Wisconsin; this finding is slightly lower than the composite average of 12%. When asked about out-of-state expansion, 16% (nine executives) reported having such plans. The composite average for those with out-of-state expansion plans is 13%, slightly lower, by comparison. Figure 10 demonstrates reported plans for expansions.

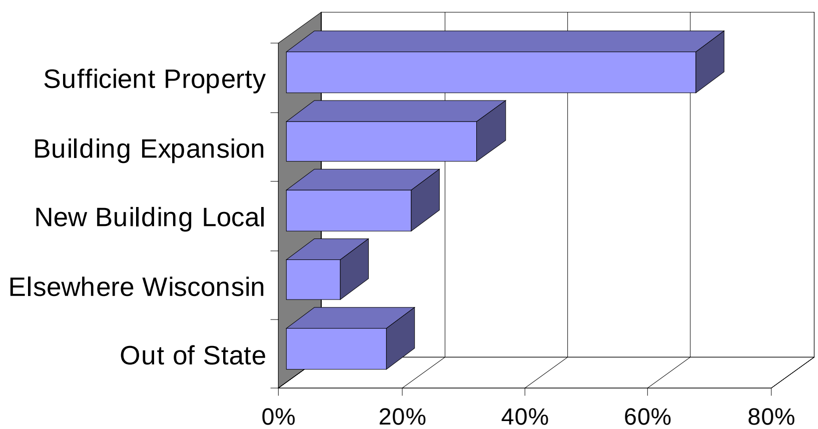

Figure 10 - Expansion Plans

Executives were asked if they have any plans to move. Two of the executives (three percent) reported immediate or future plans to move all or part of the operation to another location; an additional 16% (nine persons) indicated this is a possibility. Further investigation reveals four of the moves would be to another site in the local area/county; however, five would be outside the area. The composite average is eight percent expressing plans to move, with an additional six percent indicating a future move is possible.

As part of their economic development, states attempt to persuade companies to relocate or expand in their state. This survey indicates that 18% of the Green County firms responding report being contacted by another state's representative in an attempt to have the business relocate. This is four points above the composite average (14%). States mentioned most were Illinois, Missouri, and Iowa. To aid with Green County's business attraction efforts, executives provided business types they felt would complement their business operations (Appendix A, Question 10).

When asked to estimate the chances for phasing out or shutting down the operation with no plans for expansion elsewhere, seven Green County business executives said a closing is "Possible", 26 said the likelihood is "Remote", and 25 estimated the probability of shutting down is "Non-existent".

LABOR AND MANAGEMENT

When asked for employee figures, 59 Green County firms responded that they currently employ a total of 4,916 full-time people. The firms range in size from owner operated to as many as 900 employees.

Composite figures indicate part-time positions play an important role in business operations; 75% of surveyed firms statewide reported the use of part-time positions. Green County findings, with 78% percent of the firms utilizing part-time people, are similar to their interviewed counterparts. The total number of part-time employees reported by survey respondents is 2,665. Of firms using part-time workers, the majority (61%) utilize four or fewer with 47% of the executives citing seasonal fluctuations as a factor impacting the quantity of part-time workers. This is very similar to those citing seasonal fluctuations in the composite (45%). Another 40% feel economic fluctuations have an impact, which is very near the composite average of 38%.

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. The Green County business region has experienced more than moderate growth over the past five years and executives anticipate an even more aggressive rate of growth over the next five years. Data gathered from those responding to all five questions in the series about employment (31 firms) reflect the following: Current employment is four percent higher than one year ago and 12% higher than five years ago; the executives anticipate an increase of seven percent next year and an overall increase of 20% five years from now. Business attractions and start-ups will also impact employment figures in the county. The employment history and projection, illustrated in Figure 11, paints a positive picture for the Green County business region.

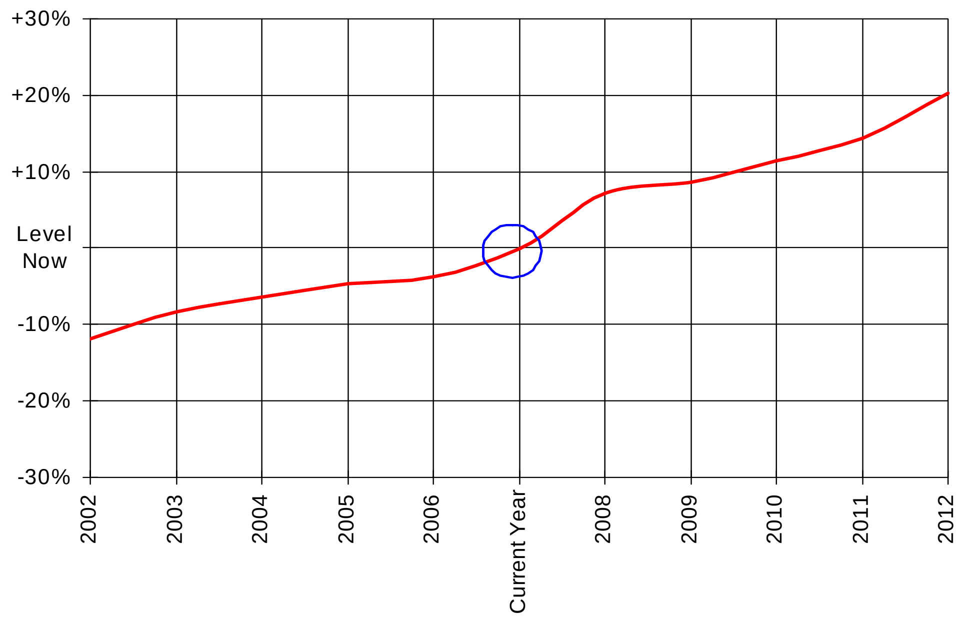

Figure 11 - Ten Year Employment Data

Employee turnover generally is perceived as being a costly problem for employers because of the significant cost of hiring and training. Many respondents (74%) reported a turnover rate from 1%-10%; 10% said turnover is 11% - 25%, and five percent reported more than 25% of their employees leave annually (Figure 12). The most common reasons for turnover

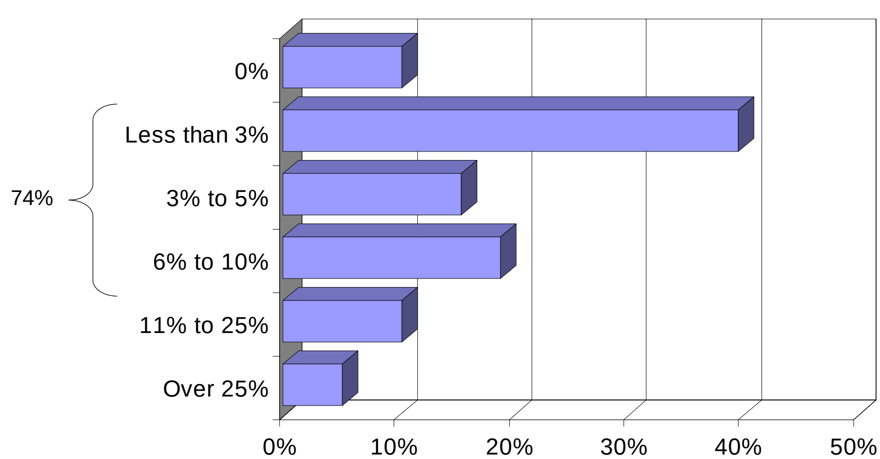

Figure 12 - Turnover Rates

are other opportunities, termination due to performance or work ethic, and career changes. Many (73%) of the respondents stated their employees need skills training to perform their job responsibilities at the required level. In regard to dollars budgeted to training, 64% said the company's investment in training programs is increasing and 36% reported there is no change. A majority of companies (59%) invest less than three percent of their annual sales in employee training.

One source of training has been made available through government sponsored job development programs. The federal government has attempted to get employers to hire disadvantaged unemployed workers by providing financial incentives. When asked if they were familiar with jobs development/training programs sponsored by county, state, or federal government, many (49%) said they were not. Executives rated the programs available as seen in Table B. Some of the Green County businesses (23%) currently work with local schools to provide internships or apprenticeships. An additional 42% say they would be interested in working with Green County School-to-Work Consortium to provide such programs.

Program	Useful	Not Useful	No Opinion
Job Center	49%	22%	30%
WI Mfg. Outreach Center	11%	18%	71%
WI Mfg. Extension Partnership	17%	23%	60%
Technical College	59%	10%	32%
University	42%	18%	39%
Apprenticeship	31%	9%	59%
School-to-Work	45%	11%	45%

Table B - Employee Training Programs Perceptions

EMPLOYMENT OF WORK FORCE

Data was collected to determine which positions employers have the most difficulty filling. The Green County executives reported they are having the greatest difficulty recruiting for professional and technical positions. The survey finds that 58% reported difficulty recruiting staff in this category. Forty-four percent said recruiting workers to fill blue-collar positions is difficult. Employers have the least trouble recruiting office staff, only 14% expressed difficulty. Both blue-collar workers and professional/technical staff are more difficult for area employers to fill than statewide composite averages reflect. Composite figures show, on average, 47% find it difficult to recruit professional/technical candidates to fill vacancies and 38% have trouble finding people to fill blue-collar positions.

Consideration must be given to factors that have an impact on recruiting employees in the state of Wisconsin. As shown in Figure 13, executives believe the most positive factors dealing with recruiting in Green County are the quality of life and cost of living. The factors considered to have the most negative impact are climate and personal taxes. An open-ended question presented on the survey addendum brought responses that indicate wages and benefits are issues that stand out as factors impacting employee retention. While employers were split on whether available housing is a negative or positive factor, they indicated the community's housing stock falls short of meeting the needs of employees mostly with low-income housing and condominiums. Respondents also indicated the area is lacking adequate shopping opportunities, particularly clothing stores.

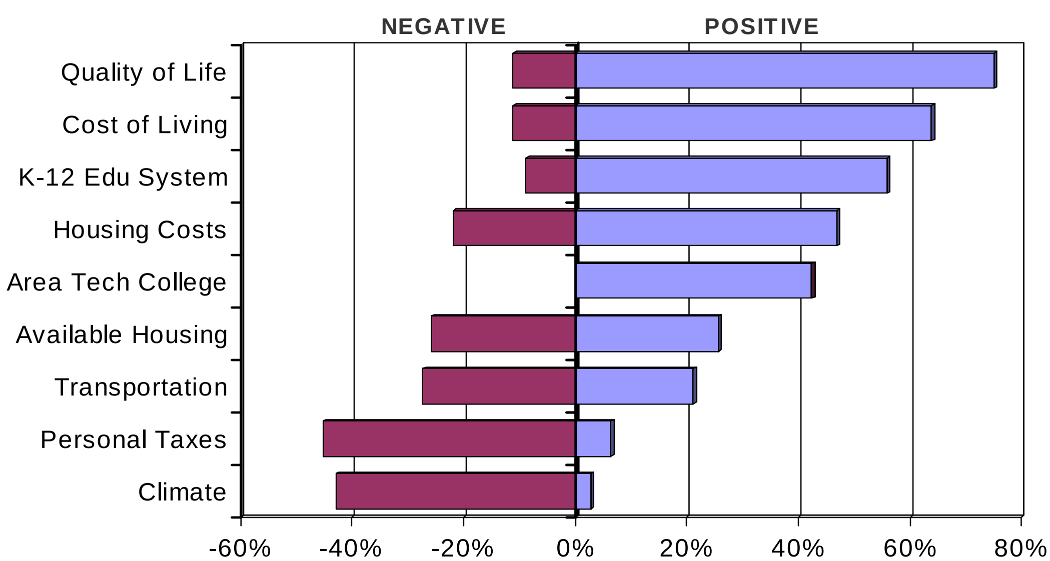

Figure 13 - Factors Affecting Recruiting

Employers report a variety of sources used in seeking new and replacement employees. Word of mouth brings the best results, followed by local newspaper advertisement and Wisconsin Job Service. Additional sources used by area employers include the Internet, private services, the area technical college, the university and/or college (Appendix A, Question 77). A few businesses use a storefront sign to advertise employment opportunities.

The quality of labor management relations can be a key factor when companies are making locale decisions. Figure 14 shows the percentage of the Green County businesses associated with a union (11%). This encompasses nine percent of the total full-time employment base reported by survey participants. The three-year composite shows 10% of firms are associated with a union.

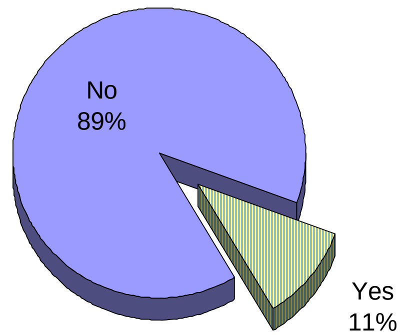

Figure 14 - Labor Unionization

ASSESSMENT OF GOVERNMENT SERVICES

Government services can play a role in the success of a firm's operation in the area. Firms rated their levels of satisfaction with site, environmental, and physical plant services provided by the community. Water pressure and supply provided to the building are expressed as adequate by 96% of the study participants and 96% also responded 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 93% said “Yes.” Satisfaction with data-line service provided in the area is above average by comparison: 93% - Green County versus 81% - composite average. Wireless communication services were reported as adequate by 61%, which indicates there is room for improvement, though the percentage figure is very similar to the statewide composite average.

Crime in the area is slightly lower than what other surveyed communities in the state have reported. Four percent reported employees have been victims of crime near the facility within the past 12 months and 13% said the facility has been the target of vandalism or burglary within the same time period (state composite figures are seven percent and 19%, respectively). Most (94%) said they feel local law enforcement agencies are doing all they can to protect employees and the property. Business executives are quite comfortable with local fire protection capabilities as 100% of the respondents expressed satisfaction.

A few interviewed executives (seven percent) reported serious potholes in pavement near their facility and nine percent have experienced flash flooding on nearby streets. Snow removal is considered to be adequate by 91% of the respondents and 87% are satisfied with street cleaning efforts. A majority (96%) of the executives feel code enforcement efforts are being adequately and evenly applied (Appendix A, Questions 86 through 102 offers a complete list of tallied results).

TRANSPORTATION

The majority of workers drive their own car as their primary means of transportation to and from work, while others (four percent) car pool. Executives reported one percent of employees walk or bike. The survey found that 91% of the executives responded that public transportation is not available to and from the work site; nine percent would like it to be.

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 (71%) use the company automobile for business travel and 77% use their personal vehicles in this capacity. Air travel to and from Chicago is used by 42% of the respondents, 44% travel through Madison Dane County Regional Airport and 27% fly in and out of Milwaukee. A few respondents report use of a private/company plane for business travel. Additional data indicate 17% of the executives expressed interest in a local executive air service.

ECONOMIC DEVELOPMENT PROGRAMS

An effort was made to determine the extent of familiarity 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 viewed as the more useful options available to executives in Green County. A number of executives seem unfamiliar with the array of financing alternatives available to them as many expressed "No Opinion" to the options presented.

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	70%	9%	20%
Targeted Jobs Tax Credit	20%	22%	59%
Small Bus. Admin. Financing	21%	36%	43%
Industrial Revenue Bonds	21%	26%	54%
County/City Revolving Loan Fund	23%	23%	54%
Tax Incremental Financing	37%	23%	40%
WI Housing & Econ. Dev. Authority	10%	28%	62%

Table C - Financing Options Perceptions

Figure 15 shows 34% of the responding executives rated local economic development efforts as excellent (four percent) or good (30%). Another 32% rated it as fair and a rating of poor was given by 19%. The combined rating of excellent and good is 11 points below the composite average, which is 45%. Comparing local findings to the state average indicates that local executives are only somewhat satisfied with the direction taken by those involved in economic development in Green County.

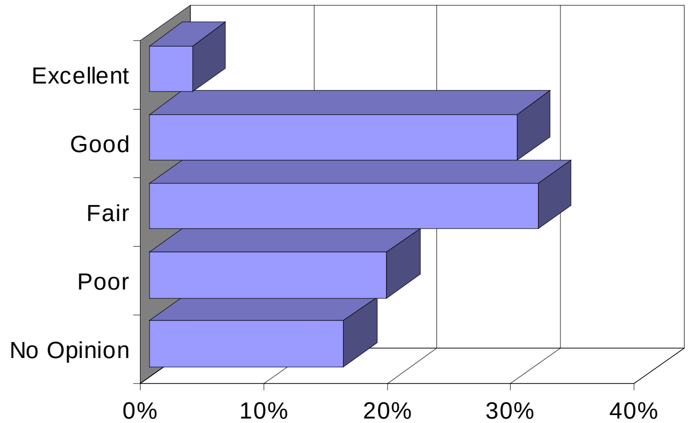

Figure 15 - Local Economic Development

LOCAL GOVERNMENT

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

When asked their opinion of the local government, 63% of the respondents said it is excellent (seven percent) or good (57%); 23% rated it as fair, and a few of the executives (eight percent) rated local government as poor (Figure 16). The combined rating for excellent and good is four points below the 67% composite average.

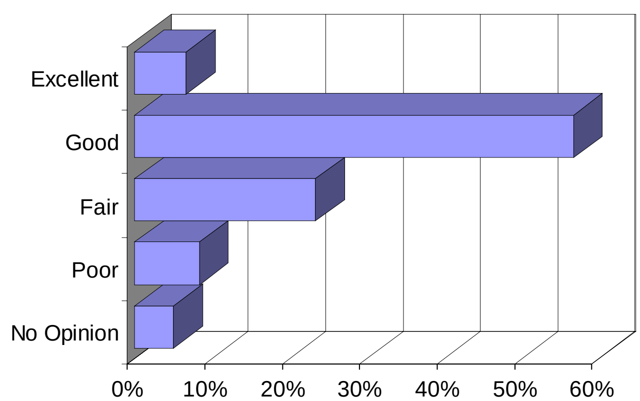

Figure 16 - Satisfaction with Local Government

FINANCIAL MATTERS

The executives were asked to provide several items under the title of financial matters, including how stable sales are for the company. Examined as a whole, this data can help to paint a picture of the business climate in the local area and in the region. Firm sales are reported as increasing by 67% of the respondents. The composite figures are lower at 62%. Others (26%), reported sales are stable while seven percent said sales are decreasing.

Study participants were asked to indicate the percentage of annual sales dedicated to research and development (R&D). An allocation of up-to-5% is indicated by 33% of respondents. Some (21%) reported between 5% -10% is earmarked for R&D and eight percent dedicate 10% - 20%. On the other hand, 38% of responding businesses dedicate nothing to this area.

Figure 17 displays the responses received when the executives were asked to rank the factors they feel most negatively impact their present financial condition. The factor they ranked highest in importance is market condition/economy followed by employee wage/benefits, material costs, and energy costs. Composite findings indicate interviewed executives statewide hold similar views as they selected the same top-four factors. They did, however, rank factors in a little different order giving more importance to energy costs than material costs.

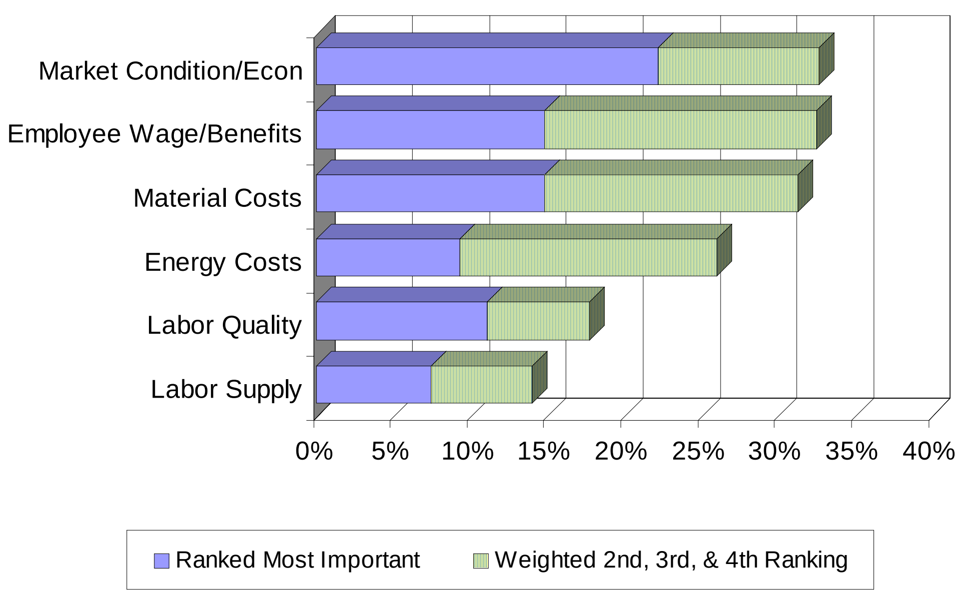

Figure 17 - Factors Adversely Affecting Financial Condition

The executives were asked where the company's primary banking institution is located. Figure 18 shows that 57% of the executives indicated financial transactions for the company are handled locally, 17% said they are handled elsewhere in Wisconsin and 26% indicated most banking is done out of state.

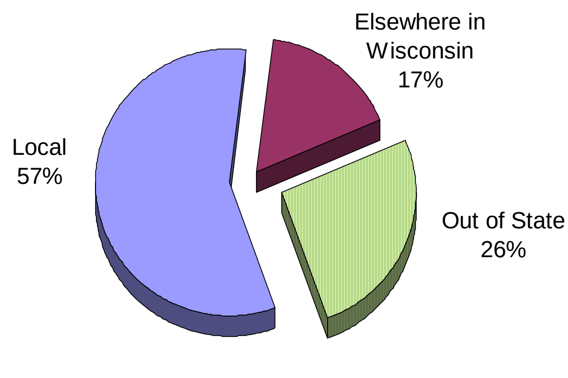

Figure 18 - Primary Bank Locations

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 improvements and expansions. Respondents were to indicate all methods of payment that would be used. As shown in Figure 19, conventional financing and cash flow are the most likely options.

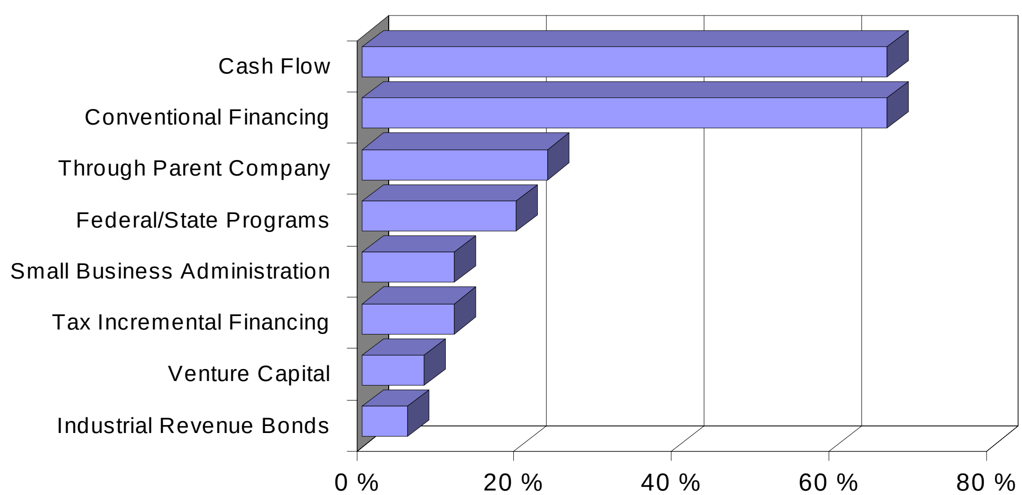

Figure 19 - Preferred Financing Methods

ENERGY MATTERS

Many of the businesses have implemented energy conserving practices, either with facility lighting, heating, or refrigeration; by using methods to recycle water, dairy manure, or waste oil; or by using “Green” construction materials, solar energy for drying, wind power; or driving hybrid vehicles. Data was collected to determine projections in utility needs for the next three years in regard to energy, water, sewer, voice lines, data lines, and wireless service. The largest anticipated increase in is electrical power usage; followed by water, natural gas, and sewer services. Complete results are shown in Appendix A, Question number 119. Some of the executives (34%) reported having an energy-back-up system. Sixteen percent of those responding to the survey reported experiencing difficulties working with local utilities.

COMMUNITY LINKAGE

Community involvement through memberships and affiliations by businesses in local organizations serves to develop a company's ties with the community. Figures indicate the Green County executives are only somewhat involved with the community. Of the respondents, 50% have a membership with the area chamber, which is much lower than the composite average for chamber memberships (73%). Fifty-eight percent are members of other business organizations. Fifty-six percent of the respondents are expressing interest in participating in community organizations.

Location of residence can influence community involvement. Of the executives responding to this survey, 82% indicated they reside in the local area, 16% reported they live elsewhere in Wisconsin, and two percent reported living outside of the state.

OVERALL IMPRESSIONS

The executives were asked to give their overall opinion of their local community and the state as a place to conduct business. As Figure 20 displays, 79% of the responding executives feel the community is an excellent or good place to do business (20% - Excellent, 59% - Good). Additional information shows 18% said their attitude has improved

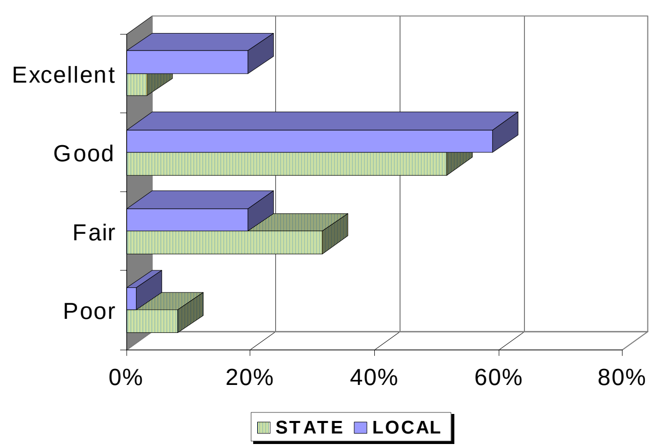

Figure 20 - A Place for Business

over the past two years while 10% say their attitude has deteriorated. When rating the state, 55% of the responding Green County executives said Wisconsin is an excellent or good place to conduct business.

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

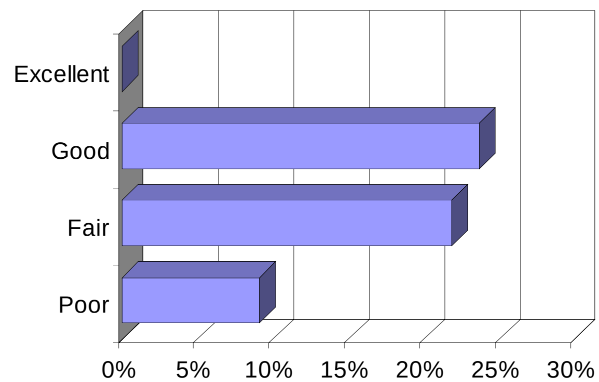

Figure 21 - Department of Commerce Ratings

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

Program	Useful	Not	No
Business Planning Assistance	13%	21%	67%
Financing Programs	11%	19%	70%
Labor Training Programs	13%	21%	67%
Community Development Zones	18%	15%	67%
Main Street Program	13%	18%	68%
International Trade Program	11%	13%	76%

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 labor, growth and expansion, and maintaining or increasing market share. Many additional concerns are listed in Appendix A, Question 134.

The executives were asked about improvements in Wisconsin as a place to do business. Some of the Green County executives (10%) feel the business climate has improved over the past few years, 34% feel conditions have gotten worse, and 49% feel conditions have remained stable.

With regard to the state's *future* business climate, 23% feel conditions will improve, 26% feel they will worsen, while 39% feel conditions will stay the same (all shown in Figure 22). Green County predictions are less optimistic than others surveyed in the state; composite findings for expectations are 31% - Better, 20% - Worse, and 45% - Stay the Same.

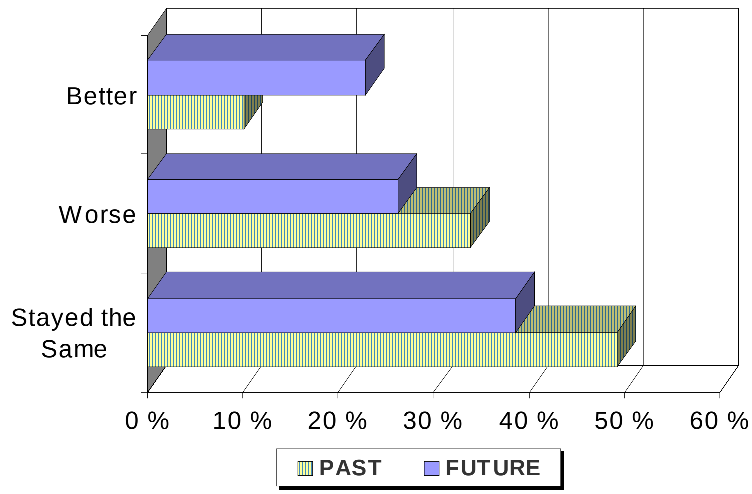

Figure 22 Improvements in Business Climate-Past/Future

VI. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The results of the Green 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 Green County business region is diverse with the largest percentage of those interviewed dealing with food, food products and the miscellaneous manufacturing industries.
2. Nearly three quarters of the interviewed firms (72%) serve as the company headquarters, with 54% stating there are additional facilities located in other communities. Of the businesses responding, 68% are incorporated.
3. More than half (56%) of the interviewed Green County business community has been in business more than 20 years. There is evidence of new business development as well with five businesses originating within the last five years.
4. The top factors negatively impacting the companies' current or future development is market condition/economy followed by global competition, energy costs, and labor quality.
5. Of the interviewed executives, 19% report supplying a portion of their products to federal government, 26% to state government, and 30% locally. Some Green County executives are expressing an interest in initiating or expanding government contracts: 20% - federal; 33% - state; and 36% have local interest.
6. The majority of respondents’ customers reside in the local area. Most of the executives described their customer base as increasing or stable.
7. When asked where competitors are located, the majority of the executives responded they are within Wisconsin. Many of the executives (63%) feel competitors are "making significant inroads" or are a "future threat" to their business.
8. When describing market shares for the companies’ products/services, more than half (54%) reported it is increasing and 39% said it remains stable while seven percent said market share is declining.

9. The study finds that 82% of the businesses responding own the business facility, 11% lease, and seven percent combine ownership with leasing.

10. Many of the businesses (67%) reported having enough property to expand at the present location, and 31% have definite building expansion plans.

11. One fifth of the responding executives (20%) have plans for a new building either at the present site or elsewhere in the community.

10. Building modernizations and improvements within the next two years are included in the plans of nearly one half of the executives (47%) and more than three quarters (79%) have plans to modernize or improve their equipment.

11. Results indicate nine percent of the executives have plans to expand the business in another Wisconsin community; 16% reported plans to expand out of state.

12. The study found that three percent of the executives (two persons) indicated plans to move all or part of the operation, either now or in the future. An additional 16% (nine persons) said a move is possible.

13. Other states have contacted 18% of the interviewed businesses in an attempt to persuade them to relocate.

14. Of the interviewed executives, 59 responded that they currently employ 4,916 full-time people. Data gathered from those responding to all five questions in a series about employment (31 executives) reflect the following: Current employment is four percent higher than one year ago and 12% higher than five years ago. The executives anticipate an increase of seven percent next year and an increase of 20% over the next five years.

15. A total of 2,665 part-time workers are employed by 78% of the executives; 61% employ four or fewer on a part time basis.

16. Employees in professional/technical roles earn an average of $22.34 hourly, while office staff average $13.51 per hour. Highly skilled employees in Green County receive an average hourly wage of $16.44, semi-skilled employees receive an average of $13.46, and unskilled workers receive an average of $10.19.

17. The Green County executives reported they are having the greatest difficulty recruiting for professional/technical employees, the survey finds that 58% reported difficulty. Forty-four percent said they have difficulty recruiting blue-collar workers, and 14% expressed difficulty recruiting office support staff.

18. The executives believe the most positive factors dealing with recruiting in Green County are the quality of life and cost of living. The factors considered to have the most negative impact are climate and personal taxes.

19. Investment in training programs is increasing for 64% of the executives and remains the same for 36%.

20. Of the respondents, 11% report an association with a union, encompassing nine percent of the full-time employment base.

21. The study finds 33% of the executives rated their local economic development efforts as excellent or good, 32% responded "fair," 19% said “poor,” and 16% expressed no opinion.

22. Of the executives responding to this survey, 63% rated their local government excellent or good, 23% responded “fair,” eight percent “poor,” and five percent had no opinion.

23. Responses indicated that 67% of businesses have seen an increase in gross sales, seven percent have seen a decrease, and 26% reported gross sales remain stable. Of those responding to the question regarding research and development, 62% dedicate a portion of annual sales to research and development.

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

25. Of the respondents, one half (50%) are area Chamber of Commerce members, 58% are members of other business organizations, and 56% signified an interest in participating in community organizations.

26. Of the executives responding to this survey, 79% feel their local community is an excellent or good place to do business. The state received an excellent or good rating from 55% of the respondents.

27. The study finds 10% of the executives feel Wisconsin's business climate has improved over the past few years, 49% feel it has not changed, and 34% feel conditions have gotten worse.

28. Where Wisconsin's future business climate is concerned, only 23% of the respondents feel the climate will improve over the next few years, 39% expect it will stay the same, 26% feel conditions will deteriorate, and 12% assert no opinion.

RECOMMENDATIONS

After review and careful consideration of the Green County survey findings, the Green County Development Corporation Business Retention & Expansion Committee in cooperation with the Wisconsin Department of Commerce make the following recommendations to improve the climate for business retention, expansion, and business location.

Profits are the key to the retention and expansion of firms. While the owners of a business might be attracted to an area because it is a nice place to live or to raise a family, a business can only survive if it makes a profit. The owners may be loyal to the community, but if there are impediments to profitability they will close or move their business to a place where they can be profitable.

In a market economy, making a profit is the responsibility of a business's management and its employees, not community groups or governments. However the action of these groups can sometimes help businesses become more profitable, and those actions can thus provide a competitive advantage to the communities that employ them. The community provides a secure and convenient environment in which to do business for the price of the taxes paid to it.

The following goals and strategies are aimed at helping businesses become more profitable and thus able to survive and grow in Green County. The list is a comprehensive response to the key survey observations. With the assistance of key stakeholders, the list has been prioritized, with priority given to those actions that will have greatest impact on the retention and expansion of businesses in Green County.

The goals and strategies will be accomplished by integrating the results in the programs of existing organizations, including but not limited to the Green County Development Corporation (GCDC), the Monroe Chamber of Commerce & Industry, local community development authorities, and others. Progress on the plan will be reviewed annually by the GCDC Business & Expansion Committee.

Goals & Strategies:

Priority Goal #1 – Create a countywide network of community leaders to meet with businesses to facilitate business's ability to be successful in Green County.

Strategies:

- Assist communities to identify and train local leaders who will be part of the countywide network.
- Identify businesses interested in expansion that do not have enough space at their current location and work with them to identify local expansion options.
- Identify businesses planning to expand and determine how we can support the expansion, specifically focusing on how we can encourage it to occur locally.
- Work with businesses that are considering moving and/or consolidating operations to locations outside of Green County to determine what the factors are and how the business might be retained.
- Identify businesses that have the greatest potential for consolidation and/or relocation and work with them to address ways to strengthen their ability to be successful in Green County.
- Identify business looking to improve their facility/equipment and determine how we can support their efforts.
- Identify businesses at risk of being recruited to other states and work with them to address issues affecting their ability to stay in Green County.

Priority Goal #2 – Retain and grow existing businesses by providing them the resources and information needed to expand and grow in Green County.

Strategies:

- Refer businesses to Small Business Development Center services as needed.
- Move forward with conversion of the countywide economic development newsletter to email distribution. Work to expand readership to as many as possible. Utilize newsletter and other publication, i.e. Chamber, etc., to share information beneficial to our business community.
- Provide information about the importance of succession plans and provide additional assistance as necessary.
- Develop and distribute information to businesses on how e-commerce can be an option for expansion of sales.
- Offer a workshop on how to get into e-commerce.
- Provide education on energy saving strategies.

- Maintain a comprehensive listing of all properties and buildings available for sale or lease to enable businesses to expand. Take advantage of Location One Information System (LOIS) by posting the available sites to the website. Monitor the information to assure data is current. Links to LOIS (www.locationone.com) should be provided on appropriate Green County economic development sites.

Priority Goal #3 – Increase the percent of the local labor force trained to meet business labor needs.

Strategies:

- Market existing programs at Blackhawk Technical College (BTC) that match employee labor needs.
- Identify employee labor training needs not met locally via BTC or other sources and determine how to meet those needs.

Priority Goal #4 - Eliminate the current and pending skilled and semi-skilled labor pool shortage.

Strategies:

- Connect more businesses to the Green County School to Work Consortium apprenticeship and internship programs.
- Support the Future Forward! Green County initiatives.
- Market technical college to high school students as post graduation option.
- Involve businesses in developing a program to inform high school students of career opportunities available and educational paths to prepare them for jobs that will meet the future needs of local employers.

Priority Goal #5 – Increase the number of local customers for businesses.

Strategies:

- Develop educational information for businesses that will aid them in developing their own approach to attracting local customers (both individuals and business customers).
- Develop a marketing campaign focused on buying local. Target both the individual and the business as purchasers of local services and goods.
- Establish and market a business incubator for Green County. Work with incubator tenants to ensure they remain and grow their business locally.

Priority Goal #6 - Increase percent of upper/mid-level management professionals to meet business employee needs.

Strategies:

- Market community as an attractive place for professionals to live, work and raise a family.
- Promote the Young Professionals of Green County.

- Develop a “Come Home to Green County” campaign.

Goal #7 – Increase the percent of businesses that think positively about the future of Wisconsin (and Green County) as a place to do business.

Strategies:

- Organize regular meetings between state officials and business representatives.
- Hold open-forum meetings between chambers, local government, and business representatives.
- Promote positive economic development initiatives and activities.
- Educate local community leaders on the importance of economic development.
- Hold a regular countywide economic summit to identify issues, celebrate/share successes and strategize for the future.
- Continue to recognize outstanding businesses and their achievements at the annual GCDC Recognition Dinner.
- Create a PR program that promotes media attention of local business achievements.

Goal #8 – Increase the percent of raw materials/supplies used by businesses that come from local and in-state sources.

Strategy:

- Identify suppliers (start with potential target list from this survey) and develop a plan for attracting those suppliers to the area.
- Develop a list of local suppliers and match raw material needs of local businesses in effort to help keep transportation costs as low as possible.

Goal #9 – Increase the percent of businesses that own their facility/property.

Strategy:

- Identify non-owners, determine when their lease expires, and work with them to develop a plan for ownership (if they have an interest in ownership).

Goal #10 - Increase the percent of businesses familiar with job development and training programs.

Strategies:

- Develop and distribute educational information to businesses.

Goal #11 – Increase the number of businesses initiating and expanding government contracts.

Strategies:

- Identify businesses that align with government contract opportunities.

- Develop and distribute educational/resource information on acquiring/expanding government contracts to the identified businesses. Provide links to websites such as the Business Procurement Assistance Center (federal contracts), WI Department of Administration Vendor Net and WisBuild, Department of Commerce Minority Business Certification program, and the WI Department of Transportation Doing Business - Purchasing Program website.
- Host a business procurement workshop. Invite purchasing agents from the Department of Administration and the Department Transportation as well as the Business Procurement Assistance Center to present contracting information.

Goal #12- Increase the adequacy of wireless communication services for local business needs.

Strategy:

- Conduct a communications gap analysis of the available wired and wireless communication resources and work with local providers to identify strategies for improvement.

Goal #13 - Increase the percent of businesses encouraging civic engagement.

Strategy:

- Promote benefits of the Green County Leaders program.

Goal #14 – Increase the percent of businesses that are members of area chambers of commerce.

Strategy:

- Work with area Chamber leadership to identify ways they can respond to issues noted in the BRE survey and therefore add value to being Chamber members.

APPENDIX A

GREEN COUNTY

SUMMARY OF RESPONSES BASED ON 62 FIRMS

In order to maintain confidentiality, the names of businesses participating in the study were not recorded.

For your convenience, composite data are listed in the far right column throughout this summary. These data are made available for comparison of your county data to statewide averages. The Composite is a compilation of all areas participating in the WIBRES program within the past three years. Composite communities include:

Vilas County
Cross Plains
Stoughton
Prairie du Chien
Lincoln County
Columbia County
Middleton
Jefferson County
Barron County
Lafayette County

In some instances, percentage figures from the Monroe survey group are also listed. These figures appear in the column to the left of the Composite figures.

I. HISTORY AND STATUS OF PRESENT LOCATION

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

			Monroe	Composite
Local	43	71.7%		73.5%
Elsewhere in Wisconsin	6	10.0%		11.8%
Out of State*	8	13.3%		13.3%
Out of United States*	3	5.0%		1.4%

2. Does your firm have multiple locations?

			Monroe	Composite
Yes	33	54.1%	51.6%	48.2%
No	28	45.9%	48.4%	51.8%

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

Executives Responding	31	
Local	7	22.6%
Elsewhere in Wisconsin	14	45.2%
Out of State*	20	64.5%
Out of United States*	8	25.8%

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

Executives Responding	28	
Similar product/service	24	85.7%
Supply to/support local operation	9	32.1%
Local operation supplies/supports them	8	28.6%
Independent business focus	6	21.4%

5. What is the likelihood of consolidating operations?

			Monroe	Composite
Probable	3	10.7%	14.3%	4.2%
Possible	7	25.0%	14.3%	15.1%
Remote	8	28.6%	35.7%	37.2%
Non existent	10	35.7%	35.7%	43.5%

6. When was your firm established?

			Monroe	Composite
0 - 2 years ago	1	1.7%		2.0%
3 - 5 years ago	4	6.8%		4.9%
6 - 10 years ago	6	10.2%		9.3%
11 - 20 years ago	15	25.4%		19.6%
21 - 100 years ago	29	49.2%		55.9%
Over 100 years ago	4	6.8%		8.3%

7. What form of organization does your business have?

			Monroe	Composite
Corporation (S or C)	38	67.9%		71.9%
Cooperative	- -	- -		2.2%
Partnership	3	5.4%		2.6%
Limited Liability Corp.	12	21.4%		11.3%
Limited Liability Partnership	1	1.8%		2.6%
Sole Proprietorship	1	1.8%		6.1%
Other*	1	1.8%		3.4%

* Additional Information in Section XIII.

II. NATURE OF BUSINESS

8. What is the nature of your business?

			Composite
Administration	0.20	0.4%	0.6%
5 Agriculture	4.23	7.4%	2.6%
Chemical, Petroleum, Rubber, Plastics	1.00	1.8%	1.7%
Communication	1.00	1.8%	1.5%
Computer, Computer Software	- -	- -	1.1%
Construction	1.85	3.2%	5.2%
Consulting	0.05	0.1%	1.2%
Distribution	1.75	3.1%	2.9%
Education	- -	- -	1.1%
Electrical, Electrical Equipment	1.05	1.8%	2.6%
Energy	- -	- -	1.1%
Fabricated Metals	1.96	3.4%	4.1%
Financial/Insurance/Real Estate	- -	- -	5 6.4%
1 Food, Food Products	12.35	21.7%	3 10.3%
Hospitality	1.00	1.8%	3.7%
Lumber, Wood Products	1.00	1.8%	3.6%
6 Machinery, Excluding Electrical	3.12	5.5%	0.8%
Medical, Health Care	1.00	1.8%	6 6.0%
2 Misc. Manufacturing	6.67	11.7%	2 10.9%
Paper, Allied Products	- -	- -	0.5%
Primary Metals	1.00	1.8%	0.7%
Printing, Publishing	1.90	3.3%	3.1%
Recreation	- -	- -	2.1%
Research	0.60	1.1%	0.5%
4 Retail	4.38	7.7%	1 11.1%
3 Service	4.69	8.2%	4 10.3%
Stone, Clay, Glass, Concrete	1.00	1.8%	0.6%
Telemarketing	0.10	0.2%	0.0%
Textiles and Apparel	- -	- -	0.2%
Transportation	2.10	3.7%	1.6%
Waste, Recycling	1.00	1.8%	1.1%
Other*	2.00	3.5%	

<u>Question 8 Explanation:</u>

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?

		Composite
Local/County	28.2%	25.3%
Elsewhere Wisconsin	20.8%	24.6%
Midwest	23.0%	21.7%
National	20.3%	22.0%
International	7.8%	6.4%

* Additional Information in Section XIII.

II. NATURE OF BUSINESS

10. Please list suppliers that you would like to have located closer to your facility. Product/Service:

- Asphalt Plant
- Blue cheese
- Box/Paper Manufacturing
- Cement Powder Manufacturing
- Chemical Refinery
- Coke supplier
- Custom large grain blender
- Fabric/material
- Food production
- Material distribution center
- Milk
- Packaging
- Steel Products, Shipping & Crating Supplies
- Steel Supplier
- Tetra Pak representative
- Toothpaste
- Whey supplies

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

Truck	70.8%
Common Carrier	13.1%
Rail	3.3%
Air	0.3%
Ship	2.2%
Personal/company vehicle	5.4%
Other	4.9%

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

Truck	61.5%
Common Carrier	9.4%
Rail	3.5%
Air	0.1%
Ship	1.8%
Personal/company vehicle	15.7%
Other	8.0%

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

	Excellent	Good	Fair	Poor
Truck	31	24	2	- -
Common Carrier	13	25	2	- -
Rail	- -	2	5	6
Air	2	6	- -	5
Ship	1	5	2	4
Personal/Company Vehicle	15	5	1	1

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

		Rankings				
	Factors	One	Two	Three	Four	Total
2	Global Competition	10	2	2	6	20
	Regulatory Constraints	3	2	4	3	12
5	Domestic Competition	6	5	6	4	21
3	Energy Costs	6	5	10	8	29
	Material Shortages	2	4	- -	1	7
	Antiquated Machinery	- -	- -	2	1	3
	Insufficient Space	1	1	- -	3	5
	Transportation Problems	1	- -	2	- -	3
	Interest Rates	1	2	1	1	5
1	Market Condition/Economy	13	10	8	3	34
6	Labor Supply	4	5	6	2	17
4	Labor Quality	5	11	1	5	22
	Employee Wage/Benefits	2	6	7	5	20
	Total Responses	55	53	49	44	201

* Additional Information in Section XIII.

III. PHYSICAL SPECIFICATION OF PLANT

15. Do you own or lease this location?

			Monroe	Composite
Own	47	82.5%	73.3%	75.3%
Lease	6	10.5%	20.0%	20.7%
Both	4	7.0%	6.7%	4.0%

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

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

17. What is the property size of this location?

Total acres: 898

1 acre	9	22.0%
2 acres	2	4.9%
3 - under 5 acres	6	14.6%
5 - under 10 acres	9	22.0%
10 - 25 acres	6	14.6%
26 - 50 acres	4	9.8%
Over 50 acres	5	12.2%

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

Total square feet: 2,908,778

Under 2,500 sq. ft.	6	14.3%
2,500 - 5,000 sq. ft.	5	11.9%
5,001 - 7,500 sq. ft.	1	2.4%
7,501 - 10,000 sq. ft.	2	4.8%
10,001 - 25,000 sq. ft.	8	19.0%
25,001 - 50,000 sq. ft.	7	16.7%
50,001 - 100,000 sq. ft.	6	14.3%
Over 100,000 sq. ft.	7	16.7%

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

Total square feet: 209,280

Under 2,500 sq. ft.	11	55.0%
2,500 - 5,000 sq. ft.	2	10.0%
5,001 - 7,500 sq. ft.	- -	- -
7,501 - 10,000 sq. ft.	2	10.0%
10,001 - 25,000 sq. ft.	4	20.0%
25,001 - 50,000 sq. ft.	- -	- -
50,001 - 100,000 sq. ft.	1	5.0%
Over 100,000 sq. ft.	- -	- -

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

			Monroe	Composite
Yes	45	86.5%	86.2%	92.9%
No	7	13.5%	13.8%	7.1%

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

			Monroe	Composite
Yes	46	85.2%	79.3%	88.3%
No	8	14.8%	20.7%	11.7%

IV. MARKETS, CUSTOMERS

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

			Monroe	Composite
Local/County	30.5%		34.9%	42.9%
Elsewhere in Wisconsin	24.7%		23.1%	22.3%
Midwest	18.4%		12.8%	15.4%
National	22.3%		24.2%	16.7%
International*	4.0%		4.9%	2.7%

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

			Monroe	Composite
None	40	65.6%	64.5%	56.2%
Less than 10%	16	26.2%	29.0%	33.1%
10% - 25%	- -	- -	- -	5.9%
25% - 50%	2	3.3%	6.5%	2.8%
50% - 75%	2	3.3%	- -	1.0%
More than 75%	1	1.6%	- -	1.0%

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

			Monroe	Composite
Increasing	35	59.3%	58.1%	58.4%
Decreasing	6	10.2%	6.5%	11.0%
Stable	18	30.5%	35.5%	30.7%

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

				Monroe	Composite
Federal:	Yes	10	19.2%	17.9%	22.5%
	No	42	80.8%	82.1%	73.9%
	Don't Know	- -	- -	- -	3.7%
State:	Yes	14	26.4%	24.1%	30.4%
	No	39	73.6%	75.9%	66.5%
	Don't Know	- -	- -	- -	3.1%
Local:	Yes	16	29.6%	29.0%	37.2%
	No	38	70.4%	71.0%	59.2%
	Don't Know	- -	- -	- -	3.6%

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

			Monroe	Composite
Less than 10%	17	81.0%	91.7%	
10% - 25%	2	9.5%	- -	
25% - 50%	- -	- -	- -	
50% - 75%	2	9.5%	8.3%	
More than 75%	- -	- -	- -	

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

				Monroe	Composite
Federal:	Yes	10	20.0%	23.1%	32.2%
	No	26	52.0%	46.2%	52.0%
	Don't Know	14	28.0%	30.8%	15.9%
State:	Yes	17	32.7%	44.4%	37.3%
	No	24	46.2%	37.0%	48.0%
	Don't Know	11	21.2%	18.5%	14.8%
Local:	Yes	19	35.8%	46.4%	40.2%
	No	22	41.5%	35.7%	45.0%
	Don't Know	12	22.6%	17.9%	14.8%

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

* Additional Information in Section XIII.

V. COMPETITORS

			Monroe	Composite
29. What percent of your competitors are located in the following areas?				
Local/County	19.9%		21.8%	41.3%
Elsewhere in Wisconsin	32.0%		30.4%	21.8%
Midwest	14.2%		15.1%	12.3%
National	25.5%		25.0%	19.8%
International*	8.4%		7.7%	4.7%
30. What effect are your primary competitors having on your business?				
Making Significant Inroads	10	19.6%	24.0%	19.7%
Future Threat	22	43.1%	48.0%	41.2%
No Real Impact	15	29.4%	24.0%	32.4%
Never Been a Consideration	4	7.8%	4.0%	6.7%
31. How would you describe the market share of your company's products/services?				
Increasing	29	53.7%	48.1%	49%
Decreasing	4	7.4%	7.4%	11%
Stable	21	38.9%	44.4%	39%

* Additional Information in Section XIII.

VI. FUTURE PLANS

			Monroe	Composite
32. Do you own or lease sufficient property to allow for expansion of your building(s) at this location?				
Yes	38	66.7%	65.5%	66.0%
No	19	33.3%	34.5%	34.0%
33. Are you planning any expansion of your existing building(s) at this location?				
Yes	18	31.0%	26.7%	27.2%
No	40	69.0%	73.3%	72.8%
34. If Yes, when do you plan to start construction?				
Now in progress	1	5.6%	12.5%	
This Year	4	22.2%	25.0%	
Next Year	5	27.8%	25.0%	
Within 5 Years	7	38.9%	25.0%	
Beyond 5 Years	- -	- -	- -	
Don't Know	1	5.6%	12.5%	
35. How large would this addition be?				
Total square feet	182,820			
Under 2,500 sq. ft.	2	16.7%	14.3%	
2,500 - 5,000 sq. ft.	3	25.0%	14.3%	
5,001 - 7,500 sq. ft.	3	25.0%	28.6%	
7,501 - 10,000 sq. ft.	1	8.3%	14.3%	
10,001 - 15,000 sq. ft.	2	16.7%	28.6%	
15,001 - 25,000 sq. ft.	- -	- -	- -	
25,001 - 50,000 sq. ft.	1	8.3%	- -	
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	27	47.4%	41.4%	39%
No	30	52.6%	58.6%	61%
37. Do you have plans for a new building on your present site or elsewhere in the community?				
Yes	11	20.4%	10.3%	17.1%
No	43	79.6%	89.7%	82.9%
38. How large will the building be?				
Total square feet	244,000			
Under 2,500 sq. ft.	- -	- -	- -	
2,500 - 5,000 sq. ft.	3	37.5%	- -	
5,001 - 7,500 sq. ft.	- -	- -	- -	
7,501 - 10,000 sq. ft.	2	25.0%	33.3%	
10,001 - 15,000 sq. ft.	- -	- -	- -	
15,001 - 25,000 sq. ft.	- -	- -	- -	
25,001 - 50,000 sq. ft.	1	12.5%	33.3%	
Over 50,000 sq. ft.	2	25.0%	33.3%	
39. When do you plan to start construction?				
Now in progress	1	9.1%	- -	
This Year	3	27.3%	- -	
Next Year	3	27.3%	66.7%	
Within 5 Years	3	27.3%	33.3%	
Beyond 5 Years	- -	- -	- -	
Don't Know	1	9.1%	- -	

* Additional Information in Section XIII.

VI. FUTURE PLANS

				Monroe	Composite
40. Do you have plans to expand elsewhere in the state?					
	Yes	5	8.8%	10.0%	11.8%
	No	52	91.2%	90.0%	88.2%
41. If Yes, where?					
	Within 50 Miles	3	60.0%	66.7%	
	Within 100 Miles	1	20.0%	33.3%	
	Elsewhere in the State	1	20.0%	- -	
42. If Yes, when?					
	Now in progress	- -	- -	- -	
	This Year	1	20.0%	33.3%	
	Next Year	1	20.0%	33.3%	
	Within 5 Years	3	60.0%	33.3%	
	Beyond 5 Years	- -	- -	- -	
	Don't Know	- -	- -	- -	
43. Do you have plans to expand outside the state?					
	Yes	9	16.4%	17.2%	12.8%
	No	46	83.6%	82.8%	87.2%
44. If Yes, where?					
	Executives Responding	8			
	Midwest	3	37.5%	40.0%	
	Sunbelt	- -	- -	- -	
	East Coast	1	12.5%	- -	
	West Coast	1	12.5%	- -	
	Other US*	4	50.0%	60.0%	
	International*	3	37.5%	20.0%	
45. If Yes, when?					
	Now in progress	2	28.6%	25.0%	
	This Year	1	14.3%	- -	
	Next Year	- -	- -	- -	
	Within 5 Years	3	42.9%	50.0%	
	Beyond 5 Years	1	14.3%	25.0%	
	Don't Know	- -	- -	- -	
46. Do you have any plans to modernize or improve your present equipment within the next two years?					
	Yes	45	78.9%	80.6%	74%
	No	12	21.1%	19.4%	26%
47. Are there technological innovations that you plan to put in place within the next two years?					
	Yes	42	70.0%	71.0%	67.4%
	No	18	30.0%	29.0%	32.6%
48. Do you have any plans to move all or part of your operation from this location?					
	Yes	2	3.4%	3.2%	
	No	47	81.0%	80.6%	
	Possible Candidate	9	15.5%	16.1%	

* Additional Information in Section XIII.

VI. FUTURE PLANS

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

			Monroe	Composite
Local	4	44.4%	33.3%	
Elsewhere in Wisconsin	2	22.2%	16.7%	
Midwest	1	11.1%	16.7%	
East Coast	- -	- -	- -	
Sunbelt	- -	- -	- -	
West Coast	- -	- -	- -	
Other US*	1	11.1%	16.7%	
International*	1	11.1%	16.7%	

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

			Monroe	Composite
Now in progress	2	22.2%	16.7%	
This Year	1	11.1%	16.7%	
Next Year	1	11.1%	16.7%	
Within 5 Years	1	11.1%	16.7%	
Beyond 5 Years	- -	- -	- -	
Don't Know	4	44.4%	33.3%	

51. If Yes, why do you plan to move? (Rank the top four in order of priority: 1=Greatest Impact, etc.)

	Rankings				
Factors	*One*	*Two*	*Three*	*Four*	*Total*
Closer to Customer	3	- -	- -	1	4
Closer to Supplier	1	- -	- -	- -	1
Building Overcrowded	1	1	1	- -	3
No Land to Expand	1	- -	- -	- -	1
Labor Costs	1	1	- -	- -	2
Labor Supply	- -	- -	1	- -	1
Energy Costs	- -	- -	1	- -	1
Regulatory Concerns	- -	- -	- -	1	1
Property Taxes	- -	2	- -	- -	2
State Corporate Taxes	1	- -	- -	- -	1
Other*	2	- -	- -	1	3
Total Responses	10	4	3	3	20

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

			Monroe	Composite
Yes	10	18.2%	23.3%	14.0%
No	45	81.8%	76.7%	86.0%

53. Which states had representatives contacted you?
(4) Illinois, (3) Missouri, (3) Iowa, Kansas, Minnesota, Canada, Florida, Arkansas

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

			Monroe	Composite
Probable	- -	- -	- -	1.6%
Possible	7	12.1%	10.0%	9.7%
Remote	26	44.8%	50.0%	36.0%
Non-existent	25	43.1%	40.0%	52.7%

55. If probable or possible, why?
- Consolidation of mfg facilities
- Competition taking over the business
- Cost of operating
- Location at capacity; Remote from rest of business
- Possible loss of business

* Additional Information in Section XIII.

VII. LABOR AND MANPOWER MATTERS

Composite

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

Number of Employees	Five Years Ago	Last Year	Current	Next Year	Five Years from Now
0	2	1	1	1	1
1 - 4	5	4	5	3	2
5 - 9	6	6	8	4	2
10 - 19	10	12	10	10	4
20 - 39	10	10	11	10	12
40 - 69	6	8	7	6	1
70 - 99	2	4	2	1	1
100 - 249	3	8	10	7	6
250 - 499	1	2	3	3	4
500 - 999	1	2	2	2	1
1000 and over	- -	- -	- -	- -	1
Total Employment Size	2,718	4,663	4,916	4,372	4,320
Average Company Size	59	82	83	93	123
Median Company Size	20	25	27	26	33
Number of Executives Responding	46	57	59	47	35
Number of Executives Responding to all questions in this series			31		

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

One	30	53.6%
Two	10	17.9%
Three	12	21.4%
Other*	4	7.1%

62. Do you employ part-time employees?

Yes	45	77.6%
No	13	22.4%

63. If Yes, how many part time employees?

	Staff	Contract	Total	
1 - 4	21	4	25	61.0%
5 - 9	5	1	6	14.6%
10 - 19	4	1	5	12.2%
20 - 39	- -	- -	- -	- -
40 - 69	1	- -	1	2.4%
70 - 99	1	- -	1	2.4%
100 or More	3	- -	3	7.3%
Total part-time employment:	2,641	24	2,665	

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

			Monroe
Yes	20	46.5%	41.7%
No	23	53.5%	58.3%

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

			Monroe
Yes	17	39.5%	47.8%
No	26	60.5%	52.2%

* Additional Information in Section XIII.

VII. LABOR AND MANPOWER MATTERS

66. What percent of your employment is:

		Composite
Professional/Technical	15.4%	24.6%
Office Staff	10.0%	13.1%
Highly Skilled	23.5%	18.5%
Semi-Skilled	34.1%	27.7%
Unskilled	17.0%	16.1%

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	- -	- -	- -	1	3
$8.00 - 9.99	- -	- -	1	1	6
$10.00 - 11.99	1	8	1	8	13
$12.00 - 13.99	1	12	4	11	3
$14.00 - 15.99	3	8	7	11	2
$16.00 - 17.99	3	3	5	3	- -
$18.00 - 19.99	2	1	3	1	- -
$20.00 - 24.99	5	2	5	2	- -
$25.00 - 29.99	4	- -	2	- -	- -
$30.00 - 34.99	1	- -	- -	- -	- -
$35.00 - 39.99	1	- -	- -	- -	- -
$40.00 - 44.99	- -	- -	- -	- -	- -
$45.00 and Over	1	- -	- -	- -	- -
Green Co. Average Wage	$22.34	$13.51	$16.44	$13.46	$10.19
Mean Wage	$21.00	$13.00	$16.00	$13.25	$10.00

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

			Monroe	Composite
Yes	43	72.9%	80.6%	78.9%
No	16	27.1%	19.4%	21.1%

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

			Monroe	Composite
Yes	20	33.9%	38.7%	44.0%
No	39	66.1%	61.3%	56.0%

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

Less than 40%	2	3.4%
40% to 49%	3	5.2%
50% to 59%	7	12.1%
60% to 69%	8	13.8%
70% to 79%	7	12.1%
80% to 89%	7	12.1%
90% to 99%	13	22.4%
100%	11	19.0%

Overall workforce living in the county based on executives responding to questions 56 and 70: 67.2%

VII. LABOR AND MANPOWER MATTERS

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

			Composite
0%	27	47.4%	51.7%
Less than 3%	27	47.4%	44.1%
3% to 5%	2	3.5%	2.9%
6% to 10%	1	1.8%	1.2%
11% to 25%	- -	- -	- -
Over 25%	- -	- -	- -

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

			Composite
0%	6	10.3%	15.7%
Less than 3%	23	39.7%	27.3%
3% to 5%	9	15.5%	16.6%
6% to 10%	11	19.0%	14.7%
11% to 25%	6	10.3%	16.8%
Over 25%	3	5.2%	8.9%

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

			Composite
0%	12	22.2%	26.5%
Less than 3%	28	51.9%	36.4%
3% to 5%	3	5.6%	7.8%
6% to 10%	7	13.0%	8.6%
11% to 25%	1	1.9%	12.1%
Over 25%	3	5.6%	8.4%

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

				Composite
	Executives Responding	55		
	Career change	16	29.1%	22.7%
	College graduation	- -	- -	9.1%
	Job security	2	3.6%	2.4%
1	Other opportunity	25	45.5%	53.7%
	Relocation, spouse/family	10	18.2%	19.8%
	Retirement	6	10.9%	16.7%
	Skills don't align	13	23.6%	19.8%
	Wage/benefits	9	16.4%	21.4%
2	Terminated, performance	23	41.8%	33.6%
3	Terminated, work ethic	16	29.1%	24.7%

75. Are replacement employees difficult to recruit?

				Monroe	Composite
Blue Collar:	Yes	25	43.9%	45.2%	37.7%
	No	25	43.9%	41.9%	46.5%
	Not Applicable	7	12.3%	12.9%	15.8%
Office Support (hourly):	Yes	8	14.3%	17.2%	22.4%
	No	37	66.1%	62.1%	60.3%
	Not Applicable	11	19.6%	20.7%	17.3%
Professional/Technical:	Yes	32	58.2%	63.3%	46.5%
	No	12	21.8%	23.3%	35.5%
	Not Applicable	11	20.0%	13.3%	18.0%

VII. LABOR AND MANPOWER MATTERS

Composite

76. How do the following effect your recruiting?

	Positive	Negative	No Effect
Quality of Life	27	4	5
Cost of Living	23	4	9
Climate	1	15	19
Housing Costs	15	7	10
Available Housing	9	9	17
Personal Taxes	2	14	15
K-12 Education System	19	3	12
Area Technical College	14	- -	19
Transportation	7	9	17
Other*	- -	- -	1

77. How do you obtain replacement employees?

	Best	Also Used
Word of Mouth	33	16
Newspaper	9	32
Internet	2	14
Private Services	1	11
Job Service	3	22
Storefront Sign	- -	5
Area Tech College	- -	10
University/College	1	7
Other*	2	2

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

Yes	25	51.0%
No	24	49.0%

79. Please give your perception of the following.

	Useful	Not useful	No opinion
Job Center	18	8	11
WI Mfg. Outreach Center	3	5	20
WI Mfg. Extension Partnership	5	7	18
Technical college	24	4	13
University	14	6	13
Apprenticeship	10	3	19
School -to-Work	17	4	17

80. Is your investment in employee training programs:

Increasing	36	64.3%
Decreasing	- -	- -
No change	20	35.7%

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

			Composite
0%	2	4.9%	9.9%
0.1% to 3%	24	58.5%	62.5%
3.1% to 5%	8	19.5%	17.5%
5.1% to 10%	6	14.6%	7.0%
10.1% to 15%	- -	- -	0.8%
Over 15%	1	2.4%	2.3%

* Additional Information in Section XIII.

VII. LABOR AND MANPOWER MATTERS

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

			Composite
Increasing	12	22.2%	10.8%
Decreasing	4	7.4%	11.2%
No change	38	70.4%	78.0%

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

Additional RN & LPN, Clinical and Lab stations (locally)
Additional welding
Butchering Meet Cutting School
CNC Machining
Computer - Spreadsheet/Word Processing
Ecological Management
English/Ag classes, Spanish/Ag classes
General retail sales training
Haz WHOPPER (hazard response) Forklift training / Electrical hazards
IT skills
Management, Financials for non-accountants
Managerial development
Metal Fabricating
PLC Training, Programmable logic for process equipment
Programs on Lean & Su signs
Robotics
Safety training
Septic Application training
Skilled trades
Technology related
Truck driving pertaining to local hauling needs, not over the road training
Welding
Welding - TIG

Comments:

I think they offer a nice array
Have good programs
They do a good job. We outsourced ISO 14000 Environmental.

84. Does your firm have a union?

			Monroe	Composite
Yes	6	10.9%	14.3%	10.1%
No	49	89.1%	85.7%	89.9%

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

Less than 10%	1	20.0%
10% to 25%	- -	- -
25% to 50%	1	20.0%
50% to 75%	1	20.0%
More than 75%	2	40.0%

Overall workforce unionized based on executives responding to questions 56, 84, and, if 84 = Yes, 85. 8.7%

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

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

				Composite
	Yes	47	95.9%	96.8%
	No	2	4.1%	3.2%

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

				Composite
	Yes	46	95.8%	89.4%
	No	2	4.2%	10.6%

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

				Composite
	Yes	51	92.7%	93.2%
	No	4	7.3%	6.8%

89. Are data lines provided by in your area adequate for your business communication needs?

				Composite
	Yes	51	92.7%	81.2%
	No	3	5.5%	13.7%
	Not applicable	1	1.8%	5.2%

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

				Composite
	Yes	34	60.7%	61.7%
	No	15	26.8%	23.6%
	Not applicable	7	12.5%	14.7%

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

				Composite
Solid:	Yes	5	8.9%	8.2%
	No	50	89.3%	85.1%
	Not Applicable	1	1.8%	6.7%
Liquid:	Yes	3	5.5%	6.6%
	No	43	78.2%	75.1%
	Not Applicable	9	16.4%	18.3%
Hazardous:	Yes	4	7.3%	5.0%
	No	33	60.0%	66.0%
	Not Applicable	18	32.7%	29.0%

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

				Composite
	Yes	7	12.7%	19.2%
	No	48	87.3%	80.8%

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?

				Composite
	Yes	2	3.7%	6.5%
	No	52	96.3%	93.5%

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

				Composite
	Yes	51	94.4%	91.2%
	No	3	5.6%	8.8%

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

				Composite
	Yes	45	84.9%	77.3%
	No	8	15.1%	22.7%

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

- Coates Rd sign on HWY 69
- Left-hand signals at all major intersections
- Lights on Hwy 69 are not synchronized. You need to speed when the first one changes to make it through the second one.
- Need a controlled intersection on Hwy 69 and 7th Ave (stop & go lights)
- Permanent pedestrian crosswalk signs to lower speed at 1st & 6th Ave corner
- Stop lights at 11th St & Hwy 69
- Uncontrolled intersections in the vicinity are dangerous
- Walmart intersection Need more stop lights

				Composite
97. Do you feel that local fire protection capabilities are satisfactory for your needs?	Yes	56	100.0%	96.9%
	No	- -	- -	3.1%
98. Are there serious potholes in the pavement near to your facility?	Yes	4	7.1%	16.0%
	No	52	92.9%	84.0%
99. Do you experience flash flooding on nearby streets?	Yes	5	9.3%	13.8%
	No	49	90.7%	86.2%
100. Is snow removal adequate on the streets near your facility?	Yes	51	91.1%	92.3%
	No	5	8.9%	7.7%
101. Are the streets near your facility cleaned regularly?	Yes	46	86.8%	85.2%
	No	7	13.2%	14.8%
102. Do you feel code enforcement efforts are being adequately and evenly applied?	Yes	46	95.8%	87.1%
	No	2	4.2%	12.9%
103. Is public transportation available for your employees?	Yes	5	9.1%	34.2%
	No	50	90.9%	65.8%
104. If No, do you want it?	Yes	4	9.1%	14.5%
	No	40	90.9%	85.5%

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

Car	93.7%
Car Pool	4.1%
Bus/Public Transportation	0.2%
Walk / Bicycle	1.4%
Motor Cycle / Snow Mobile / AT	0.6%
Other*	0.0%

* Additional Information in Section XIII.

VIII. ASSESSMENT OF GOVERNMENT RELATIONS, REGULATIONS, AND SERVICES

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

			Composite
Executives Responding	52		
Air Travel to /from Chicago	22	42.3%	
Air Travel to /from Milwaukee	14	26.9%	
Air Travel to /from Madison	23	44.2%	
Bus	3	5.8%	
Amtrak (Rail)	1	1.9%	
Personal Auto	40	76.9%	
Company Auto	37	71.2%	
Other*	4	7.7%	

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

Program	Useful	Not Useful	No Opinion
Local Lending Institutions	38	5	11
Targeted Jobs Tax credit	8	9	24
Small Bus. Admin. Financing	9	15	18
Industrial Revenue bonds	8	10	21
County/City Revolving Loan Fund	9	9	21
Tax Incremental Financing	16	10	17
WI Housing & Econ. Dev. Authority	4	11	24

108. What is your perception of the following organizations?

Program	Useful	Not Useful	No Opinion
Area Chamber of Commerce	29	6	21
Local Econ. Dev. Corp.	19	8	23
County Econ. Dev. Corp	32	5	15

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

			Composite
Excellent	2	3.5%	8.7%
Good	17	29.8%	36.7%
Fair	18	31.6%	23.5%
Poor	11	19.3%	14.4%
No Opinion	9	15.8%	16.7%

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

5 - Business attraction:
- Additional retail business recruitment
- Attract businesses that will use our services
- Attract companies needing trucking
- Bring in more manufacturing
- More aggressive in attracting companies with skill labor
- Promote business park - forget "Montesion Gardens"
- Village needs to partner with Chamber to retain & seek more retail stores in the downtown and NOT promote Hwy 69 for retail

3 - Business retention:
- Increase focus on business retention
- Continued focus on business retention vs. new development
- Recruit additional business into the community bringing possibility of added households with families needing employment opportunities on a varied scale of interest and qualifications

(Continued)

* Additional Information in Section XIII.

Composite

Miscellaneous:
- Back town - No cooperation from VP town
- Build spec. buildings for development
- Communication, better
- Focus on employment opportunities, i.e. increasing skilled employee base
- Financing
- Install a railhead
- Job recruitment assistance
- More people should be out visiting the businesses on site
- Taxes, reduce
- Use some common sense!
- Workers Comp legislation

Comments:
- Effort is fine, No results
- Getting better - but a long way to go
- Not familiar enough with mission to answer

111. What is your opinion of the following?

	Satisfied	Dis-satisfied	No Opinion	Doesn't Apply
Planning Commission	25	5	19	3
Board of Zoning Appeals	17	3	30	2
Municipal Engineering Staff	22	5	19	6
Municipal Assessor's Staff	19	3	24	6
Health Inspector	14	1	28	9
Building Inspector	27	5	17	3
Fire Inspector	43	1	6	2
Public Works Department	35	5	9	3
City Administrator	21	3	21	7
Police Department	46	2	3	1
Fire Department	49	- -	3	- -
Elected Officials	29	6	16	1

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

			Composite
Excellent	4	6.7%	13.3%
Good	34	56.7%	53.2%
Fair	14	23.3%	22.8%
Poor	5	8.3%	6.6%
No Opinion	3	5.0%	4.1%

113. What improvements would you recommend?
- Bring in manufacturing jobs, Growth
- Common sense approach to problems
- Communication with businesses
- More commitment to econ. development - incentives
- More control over large business development
- More courage to make sound decisions. Less delegating to consultants to do issue studies at tax payer expense. This may simply be a vehicle to deflect criticism related to decisions.
- More retail business
- My instance, less self motivated efforts with the city alder persons
- Need a little competition for some offices
- Need to focus on future - how to keep people in community, need good paying jobs
- New leadership for a more reasoned, comprehensive & calm plans for Village economic development
- Proactive communication
- Restructure council to 4 Wards - 2 at large seats!
- Support area businesses, Provide for growth (Walmart, etc.)

IX. FINANCIAL MATTERS

114. Are your firm's gross sales:

			Composite
Increasing	39	67.2%	62%
Decreasing	4	6.9%	9%
Stable	15	25.9%	29%

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

			Composite
None	20	38.5%	36%
Less than 5%	17	32.7%	39%
5% - 10%	11	21.2%	17%
10% - 20%	4	7.7%	5%
Over 20%	- -	- -	2%

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	51	
Conventional Financing	34	66.7%
Federal/State Programs	10	19.6%
Through Parent Company	12	23.5%
Venture Capital	4	7.8%
Cash Flow	34	66.7%
Industrial Revenue Bonds (IRB)	3	5.9%
Small Business Administration (SBA)	6	11.8%
Tax Incremental Financing (TIF)	6	11.8%
Other*	3	5.9%

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

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

			Composite
Local	31	57.4%	69%
Elsewhere in Wisconsin	9	16.7%	18%
Out of State*	14	25.9%	13%
Out of U.S.*	- -	- -	0%

* Additional Information in Section XIII.

X. ENERGY MATTERS

Composite

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

Program	Increase	Decrease	No Change
Oil	2	1	24
Natural Gas	19	1	26
Propane Gas	6	1	25
Electricity	31	- -	22
Water	21	- -	25
Sewer	18	- -	26
Voice Lines	15	- -	33
Data Lines	15	- -	32
Wireless Service	15	- -	27

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

			Composite
Yes	20	34.5%	25.1%
No	38	65.5%	74.9%

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

			Composite
Yes	9	15.5%	12.5%
No	49	84.5%	87.5%

122. Comments regarding utilities:

Electric & natural gas tariffs continue to increase significantly.
Electrical service had fluctuations in power
Good
Need competition on gas supply
Need to modernize available services
Storm Water Tax is bunk!!!
Storm water fee is outrageous
Stray voltage, Alliant
TDS is very slow to extend new lines, usually more than 3 months!
TDS not too impressive
We do everything possible to reduce energy usage and/or follow utility company's advice on how to reduce costs
Would like Alliant Energy to meet with them

XI. COMMUNITY LINKAGE

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

			Composite
Yes	28	50.0%	72.6%
No	28	50.0%	27.4%

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

			Composite
Yes	31	58.5%	47.2%
No	22	41.5%	52.8%

125. Are you interested in participating in community organizations?

Yes	25	55.6%
No	20	44.4%

126. Where is your residence?

Local/County	46	82.1%
Elsewhere in Wisconsin	9	16.1%
Outside Wisconsin*	1	1.8%
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?

			Monroe	Composite
Excellent	12	19.7%	20.0%	28.2%
Good	36	59.0%	50.0%	50.4%
Fair	12	19.7%	30.0%	15.3%
Poor	1	1.6%	- -	5.5%
No Opinion	- -	- -	- -	0.6%

128. What do you see as positive?

Monroe:

7 - Labor; Labor supply; Good work force; Good work ethic (3); Quality of service
7 - People (2); Great dedicated people; Friendly (2), Flexible; Helpful;
3 - Schools; Good schools (2)
2 - Small town; Small town feel
Location/Logistics
Attractive, clean community
Beautiful area
Community promotion and programs
Friendly business owners, Business owners know you
Good community
Know who you're dealing with
Medical facility
Monroe
Safety
Working with city management

Others surveyed in Green County:

7 - People (2); Excellent neighbors; Friendly; Good people; Most people are friendly and easy to work with; Integrity
5 - Community: Calm, peaceful - good place to raise family; Great place to live; Quality of life; Find ways to make things work; Community promotes itself
5 - Work force (2); Good workforce; Good area to hire; Draw people from rural background as labor
4 - Location (3); Central location, proximity to cheese producers
2 - Support; Good support services
2 - Small town (2)
Government & GCDC Assistance
Monroe school district
Other cheese factories
Raw materials: Purchase grains local
Recreation
Safe area
Schools
The bringing of tourists and visitors to our community
VG Image
Wide variation of growing business

129. What do you see as negative?

Monroe:

8 - Growth; Economic growth poor; Lack of economic growth; Limited growth (business & population); Little growth; Slow growth, particularly business growth; Lack of growth of tax base
2 - School system; Schools declining
2 - Industry, lack of; Not enough industry
2 - Taxes

(Continued)

	Monroe	Composite

Labor pool
Help for existing business, lack of
Limited hours (especially on the square)
Limited selection
Local economy seems depressed
Raw material costs
Remote
Restaurants
Shops
Small town feel
Non-business city leaders
Weather
WI Government
Would be good to have a railhead nearby

Others surveyed in Green County:
3 - Growth: Not much growth; How to continue to grow and move forward; Stagnation on Main St.
3 - Roads/Highways; Transportation - "59 goes nowhere"; Street design in industrial areas;
2 - labor; Finding people to work
2 - Location (2)
City Council
Community is fractured between old & new
Dissention between retail business owners
Electric
Lack of amenities to attract professionals
Low income
No public transportation
Privacy, lack of
Small town minds
Taxes
Very conservative

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

	Monroe	Monroe %	Composite
Excellent	2	3.3%	12.0%
Good	31	51.7%	50.5%
Fair	19	31.7%	28.3%
Poor	5	8.3%	7.9%
No Opinion	3	5.0%	1.2%

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

	Monroe	Monroe %	Composite
Better	6	10.2%	12.4%
Worse	20	33.9%	26.2%
Stayed the Same	29	49.2%	53.5%
No Opinion	4	6.8%	7.9%

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

	Monroe	Monroe %	Composite
Better	13	22.8%	30.6%
Worse	15	26.3%	19.5%
Stay the Same	22	38.6%	44.8%
No Opinion	7	12.3%	5.1%

XII. OVERALL IMPRESSIONS

Monroe | Composite

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

Monroe:

13 - Taxes: Reduce income & property taxes; Tax Credits; Lower/reduce taxes (5); Tax decrease; Offer tax incentives (2); More incentives to outside businesses; Offer greater financial incentives to existing businesses; Targeted tax conclusions

2 - Environmental regulation, reduce; Less DNR red tape

Compete with states

Elect more republicans to office, don't elect judges who are anti-business

Fix budget problems - spend less,

Grants to create jobs

Liability, reduce

Local economic development efforts

Making "healthy Wisconsin" fair for all business owners

Stop raiding industry funds for the general fund, i.e. transportation fund for safety fund, etc.

Support economic development growth initiatives

Support of schools, more

Temper employment laws

Try keeping the cost of doing business in Wisconsin low

Others surveyed in Green County:

6 - Reduce taxes; Lower taxes; Spend less/taxes; Stop using business for tax base; Tax incentives; Promote MFG Tax incentives

Business development: Become more proactive in recruiting & retaining industry

Elect candidates of State Gov't that understand business

Energy development, promote

Go outside country to push our products

Hold line on property and personal income taxes

Increase tourism budget

More action/follow-through on issues

Put constraints on tree-huggers

Realize WI does not stop in Madison

Regulation: More favorable H.R. regulations

Workmans Comp. legislation

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

Monroe:

7 - Labor; Quality labor pool; Labor quality; Technically trained workforce; Professional employees; Recruitment of skilled staff; Number of people

4 - Market share - maintaining/increasing business; We need to gain market share; Increase market share by taking away from competition; New customer expansion

3 - Insurance - health care; Healthcare cost; Medical insurance

3 - Cost of doing business; Energy costs; Fuel cost

2 - Competition; Increased competition

2 - Expansion of business; Expansion - we will need more space and we have run out of property

2 - Milk costs vs. cheese price; Milk prices, cheese prices

2 - Raw material supply; Stable raw material costs

Ability to add additional services

Bring new opportunities to Monroe

Catalog industry growth is limited

Changing technology

Economy, the

Healthcare reimbursement

(Continued)

Monroe	Composite

Internet use
Keeping enough work for the clients
Liability insurance
Return on R&D investments
Sales diversification

Others surveyed in Green County:

6 - Growth (2); Planning for growth and expansion; Growth challenges; Working capital to support facility expansion; Generating adequate cash flow to fund growth
4 - Competition (2); Foreign competition; Competition within a shrinking market in the USA
3 - Labor market opportunities; Finding good employees; Recruiting & retaining workforce
2 - Keeping costs under control; Energy costs
2 - Employee insurance; Employee health insurance
2 - Health care increase; Federal & State contracts are not meeting expenses for Medicare and Medicaid participants
2 - Interest rates(2)
2 - Material costs; Keeping material costs down
2 - Milk prices; Milk pricing
2 - Regulation: Environmental regulations on dairy manure management and application; Wisconsin State Inspection Program - meat
2 - Taxes; Constant increase in Doyle taxation
Grain prices
Increasing our sales rather than relying so heavily on tourism
Shrinking customer base

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

	Monroe	Monroe %	Composite
Excellent	- -	- -	3.3%
Good	13	23.6%	32.4%
Fair	12	21.8%	20.1%
Poor	5	9.1%	4.0%
No Opinion	25	45.5%	40.2%

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

Program	Useful	Not Useful	No Opinion
Business Planning Assistance	5	8	26
Financing Programs	4	7	26
Labor Training Programs	5	8	26
Community Development Zones	7	6	26
Main Street Program	5	7	26
International Trade Program	4	5	29

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

A lot of good ideas, but are we acting on them?
Brownfield Program is good
Communicate to existing businesses what programs they have available
Create more awareness for businesses as to what programs/services are available to help businesses.
Get new blood - Get rid of good old boys club, they have the mindset of a university and they are 10 years behind
Get out & meet with small business
Have never done so
Keep eye on Doyle Administration, their small business taxes driving business out
Not familiar with working with this dept.
Offer programs that can help
We need to know what is offered to help us - Don't know about programs listed [in 136]

XIII. ADDITIONAL DETAIL ON SELECT QUESTIONS

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

Out of State

- Illinois
- Alabama
- Iowa
- Missouri
- New Jersey
- Pennsylvania
- Tennessee

Out of United States

- Barbados, West Indies
- Canada
- Ireland

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

Out of State

- 6 - Illinois
- 2 - Nebraska
- 2 - Tennessee
- 2 - Texas
- Alabama
- California
- Colorado
- Georgia
- Indiana
- Iowa
- Kansas
- Michigan
- Minnesota
- Missouri
- New York
- North Carolina
- Oregon
- Pennsylvania

Out of United States

- 3 - Canada (Quebec, Ontario)
- 2 - Mexico
- Brazil
- Denmark
- Dusseldorf, Germany

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

- 501C3

II.08 What is the nature of your business?

- Health Care Long term care, housing, assisted living
- Wholesale

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

- Canada
- Germany
- Indonesia

XIII. ADDITIONAL DETAIL ON SELECT QUESTIONS

IV.22 What percent of your customers are located in the following areas?
- Worldwide
- Mexico/China

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

Other US
- Idaho
- TX
- Utah

International
- Canada, Mexico
- Europe
- Mexico

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

Other US
- No responses

International
- India

VI.51 Do you have any plans to move all or part of your operation from this location? Why?
- Local economic growth
- Sell merge

VII.77 How do you obtain replacement employees?
- Applications on File
- Industry of organizations
- Our own website
- Trade Pubs

VIII.106 Which of the following means of transportation are regularly used for business purposes?
- Company Airplane
- Company Trucks
- Private Air/Monroe

IX.116 How would your firm pay for or finance technological innovations, expansions, and modernizations?
- County/loan fund
- Revenue Bonds (Tax Exempt)

IX.117 What are the most important factors, if any, negatively impacting your company's present financial condition?
- Material/supply quantities
- Sales tax
- Taxes on timberland
- Workers Comp cost!

XI.126 Where is your residence?

Outside Wisconsin
- IL

Outside United States
- No responses

ADDENDUM

A01. Please rate the following consumer services as they relate to meeting the needs of your employees. (1=Needs fully satisfied, with many choices, 2=Basic needs satisfied, 3=Some needs satisfied, but limited choices, 4=Needs not met by local service providers.)

	# 1	# 2	# 3	# 4
Groceries	26	12	6	1
Hardware & Building Supplies	10	23	11	1
Clothing	4	11	14	16
Financial & Insurance Services	24	14	3	2
Health Services	18	19	7	1
Child Care	18	16	7	- -
High Speed Internet Service	15	19	4	5
Recreational Opportunities	16	12	14	3
Restaurants	13	8	18	5
Other	- -	- -	- -	- -

A02. Please rate the availability of Green County's housing stock. (1=Excellent, 2=Good, 3=Fair, 4=Poor)

	Excellent	Good	Fair	Poor
Apartments	3	28	2	2
Condominiums	1	10	13	7
Low Income Housing	1	8	17	5
Middle Income Housing	6	23	5	1
Executive Housing	5	11	9	5
Senior Housing	7	14	9	1
Other:	- -	- -	1	- -

A03. Please rate the quality of Green County's housing stock. (1=Excellent, 2=Good, 3=Fair, 4=Poor)

	Excellent	Good	Fair	Poor
Apartments	1	26	6	2
Condominiums	3	19	7	2
Low Income Housing	2	12	13	3
Middle Income Housing	1	26	8	1
Executive Housing	3	19	7	3
Senior Housing	6	16	8	2
Other	- -	1	- -	- -

A04. What are the top two issues affecting your ability to retain employees? (ie drug related problems, child care, adult care, transportation, trailing spouse employment, wages, benefits, etc.)

Monroe:

4 - Trailing spouse employment; Spouse employment (2); difficulty finding professional spouse a job (locally)
5 - Wages & Benefits (4); Benefits (3); Wages & benefits attract to small town; Compensation; Competing with higher wages in Dane county
2 - Labor: Labor costs; Skills capability,
2 - Location: Greater job opportunities in larger metros; Competitive job market within traveling distance/wages
2 - Transportation
2 - Work ethic of younger employees; Employee attitudes regarding work, attendance
Childcare
Drug related problems
Education
Hours of employment
Language/cultural differences with Hispanic employees

(Continued)

Maintaining interest in positions
Material costs
Recreational opportunities
Schools

Others surveyed in Green County:

21 { 13 - Benefits (11); Qualified people want benefits; Health insurance
8 - Wages }

2 - Wages & benefits hard to compete with Madison employers; Wage & benefits compared to Dane Co.
2 - Labor supply - currently have 50% Hispanic; Hispanic workforce - political
2 - Location; Location too far from city amenities
2 - Work ethic; Work ethic of younger employees; Work Ethic - young employees have an attitude, "what are you going to do for me?" before they even interview
Bi-lingual supervisor
Child care
Competition from the Madison labor market
Cost of living
Drug related problems
Local qualified drivers
Tough job
Transportation
3 - Nothing; No problem; Retention is not a big problem

A05. Is overseas production by competitors increasing, stable, or decreasing?

Increasing	22	57.9%
Stable	15	39.5%
Decreasing	1	2.6%

A06. What is your company's fastest growing geographic market?

Monroe:
2 - Global
2 - Local; Green County & vicinity
2 - Midwest
2 - National
2 - Northern Wisconsin
2 - Southern Wisconsin
All are the same - United States
Asia
Canada
Central Wisconsin
East Coast
Far East
Mexico
Northern Green County
Northern Illinois
South America

Others surveyed in Green County:
4 - West; West Coast; Western US (2)
3 - Midwest
3 - Monroe area; Local; N Green Co
2 - Dane County
California
Asia
East Coast
Milwaukee
National
NW Chicago
Rock County
South America
South USA
Tri-state

A07. What are the top two challenges facing your company?

Monroe:
8 - Competition (3); Competitive pricing; Discount competition; Off-shore competition; Foreign competition; Keeping business in the US - Be competitive with China/Mexico
4 - Customers: New customer growth (catalog market not growing); Customer count; Maximizing business potential from current customers & gaining new business from potential, but not current customers; Customer perception

(Continued)

3 - Labor; Manpower/recruiting; Shortage of qualified local employees; Recruiting
Cash flow
Cheese prices, milk prices
Controlling costs
Decreased local revenue
Economy, the
Energy cost - price of oil affects materials, utilities, trucking
Energy costs
Fees
Fuel cost
Growing the business through profitable means
Maintaining market share
Mechanization of packaging and other hand work
Milk price vs. cheese price
Operating costs, increasing - labor/raw materials
Price distribution due to federal systems
Product development: Cost to develop market leading new products
Profit
Profitability
Raw material supply
Regulatory environment
Reimbursement/healthcare uncertainty
Sales diversification
Taxes
Warehousing: Shortage of local warehousing and cold storage
Weather (related to ag production)

Others surveyed in Green County:

6 - Cost of doing business; Runway bus--Staying ahead of packaging, postage & paper costs; Fuel costs; Cost of raw materials; Keeping overhead costs down; Holding down expenses; Metal prices
4 - Competition (2); Global competition; Increasing competition for business available
3 - Growth; Property for expansion & growth; Working capital for expansion
2 - Labor supply; Low labor pool for professional and skilled work force
2 - Shrinking market; Shrinking US market
Affordable land for housing
Area is too conservative
Commodities
Customer base
Developing a base other than tourism
Increase sales
Increasing profit margin
Industry consolidation of distribution tier
Insurance
Maintain edge
Marketing
Milk pricing (Class 3)
Quality of product
Reimbursements from Fed & State Gov't not meeting expenses
Safety attitude of employee - understand importance of safety
Shipping at ALL times of the year
State Meat Inspection Program
Taxes
Trucking opportunities in local area
Waste treatment
Whey supply
Zoning & restrictions

ADDENDUM

A08. What is the connection between your company's success and its location in the Green County region?

Monroe:

6 - Labor: Pull from Northern IL labor pool; Quality of workforce; Good labor supply; Great employees; Dedicated workforce, Monroe-Best facility for productivity compared to other plants; Work ethic of local employees
3 - Raw materials: Local availability of raw materials; Local corn; Good milk supply
95% of business is from manufacturers located in Green County or surrounding
Accessibility to community residents
Approximately 40-45% of our workforce has been with us for over one year.
[Business was purchased] - Wanted equipment & customers, not location
Community participation
County seat
Culture - cheese making heritage and good work ethics. Marketing the heritage and history to customers.
Good family environment
Highway frontage/proximity to state highway system
Historical - located here since 1845
In the past, many cheese factories located in green county, not so much any longer
Local/founder's hometown
Original US location
Schools
Strong dairy industry

Others surveyed in Green County:

7 - Location: Proximity to Madison; Close to Madison/Chicago; Location in US (central Midwest) for suppliers etc.; …. located on HWY 11; Centrally located for business; Corn grown next door, milk transport - to Juda - close 3 miles trucking; We feature Green Co [products] for tourists and day-trippers - Our shop's location in downtown... Everyone can find us.
Availability of recreational facilities, biking, golfing, hiking
Customer base
Good local cheese factories to process high quality milk to cheese
Good work environment
Historic
Local business connected to farm community, New Glarus pleasant place for customers to spend time
Local community support and utilization of services
Our reputation for service appears to be deemed an asset by Green County residents
Quality labor force & work ethic
Support for local government
Tourism
Work force availability
3 - None; Nothing; Now very minimal!

A09. What are the most critical drawbacks to your company being located in the Green County region?

Monroe:

6 - Location; Majority of suppliers are located 100+ miles from facility; Location to railroad loading station (for shipping containers); Distance from potential customers located in Northern Wisconsin; Remote; Remoteness from other US locations, remoteness from O'Hare
3 - Labor: Shortage of skilled labor; Skilled labor; Limited workforce
3 - Growth: Lack of local growth in economy - tax base is not increasing; Lack of growth in economy; No minimal population growth, decrease/stagnant retail business
2 - Taxes
3 - Transportation; Transportation - rail access - road corridor access; Transportation cost
2 - Population: Lack of population growth; Aging population

(Continued)

Geography covered by our companies footprint
In the past, many cheese factories located in green county, not so much any longer
Labor costs - Benefits cost
Size of industrial customers, number of larger industrial customers
Space/buildings (buildings to move into)
Weak telecommunication
Weather - winter

Others surveyed in Green County:

- 5 - Labor supply; Availability of professional and skilled workers (nurses!); Hispanic population not located in immediate area; Competition for employees from Dane Co.; More difficult to get quality employees
- 5 - Transportation (2); Location from interstate; Not on rail; Roads - transportation bring in customers
- 4 - Location; Business not being located in a city with a higher population base for both employee and a customer base; Location (recruiting top notch people); Location too far from city amenities
- 2 - Taxes: State Taxes; Property taxes too high, personal taxes not, real estate taxes

Attitude of whey suppliers
Bad reception
Competition: Increasing competition - custom packagers
Decline in tourism
Everybody sells [product]
Lack of customers
Lack of manufacturing
Negative public opinion on large scale dairy
Poor sales in Sugar River Valley
Small minds
Very few trucking opportunities
Workers Comp

- 3 - None (2); Nothing

A10. What factors, if any, inhibit your ability to grow?

Monroe:

- 4 - Labor force (2); Attract employees to smaller community; Lack of skilled staff (MDs); Limited skilled workforce (local); Cost of recruitment (move to Monroe)
- 2 - Competition; Competitive pricing

Decrease/stagnant retail business
Lack of work for clients (sub-contracts)
Need new business & customers
No minimal population growth
Product development: Cost to develop market leading new products
Regulations: Unreasonable & stifling equipment regulations from USDA & State
Some testing services limit growth (raw milk)
Space: Not much space to add on to building
Steel/materials costs
Technology
Zoning

(Continued)

ADDENDUM

Others surveyed in Green County:

3 - labor: Small labor pool; Jobs are very hard and dirty - can't find people to work; Finding quality people
Age
Cash
Competition
Financing
Green County government's future involvement in WI family care may have a negative impact on facilities such as ours located in Green County
Increase profit
Lack of customers to this location
Land
Local trucking opportunities
Location
Need to lower long-term debt
No desire
Purchase land
Regulatory issues - especially Fed & State levels
Space
State inspection program not permitting out-of-state mail order
Working capital
2 - None; Nothing

A11. Has your attitude toward doing business in Green County changed during the past two years?

Improved	9	17.6%
Deteriorated	5	9.8%
Stayed the same	37	72.5%

A12. Would you like to explain your response to question 11?

Government doesn't respond well
Government/community eager to assist our growth
Green County has the best, most dedicated people
Growth is a bit scary as we need to find additional skilled employees
I was not familiar with Green County business until 1 year ago.
Inability to attract manufacturing business
I've lived here 12 years
New zoning rules, New zoning board
No growth, Nothing has really changed
The county is not the problem, it is state laws & location of customers
We stay positive - have opportunity to grow business, We like Monroe

A13. Does your company have a plan to transition management/ownership?

Our plan is complete & in place.	14	29.2%
We are currently working on it.	14	29.2%
We have not considered this issue.	13	27.1%
Decisions made elsewhere, local management not part of discussions	7	14.6%

A14. Would you be interested in utilizing a local executive air service?

Yes	8	17.0%
No	39	83.0%

A15. Would you be interested in cooperating with the Green County School to Work Consortium in providing programs such as apprenticeships and internships?

We currently cooperate with area schools	10	23.3%
Yes	18	41.9%
No	15	34.9%

ADDENDUM

A16. Do you feel the area offers adequate facilities for business meetings?

Yes	28	66.7%
No	14	33.3%

A17. Do you work with local contractors?

Yes	46	100.0%
No	- -	- -

A18. If Yes, what has your experience been?

Good experience with all	16	34.8%
Most good to work with	30	65.2%
Many difficult to work with	- -	- -

A19. Comments on your experience working with local contractors:

Appear to be flexible, reasonable rates
Generally positive
Good: Excellent response, delivery, etc.
Had couple bad experiences with non-paying contractors, mostly good
I only use local
If I need something fixed on a Sunday @ 12:00 AM, I will be taken care of - Use local, Stay local
Limited experiences. Poorly trained. Not "cutting edge"
Okay
Periodically locals bid out jobs not qualified to perform
Prefer to do business with local companies, They... do not understand the need to stay competitive
Slow response
Some do not want to compete; have the attitude that we owe it to them to use them because they are local. We have saved a lot of money on occasion by shopping a wider area.
Very good personal service
Very positive!
We try to stay local

A20. Is there anything your company is doing related to energy efficiency, alternative energy usage, etc? Please explain.

Always - We work with utility companies weekly/monthly - Huge overhead cost to Orchid
Basic energy conservation methods in place
Energy conservation happens on many levels
Energy efficient lighting Programmable thermostats
Energy efficient lighting in new building
(Green) Floor joists, Walls sections are environmentally friendly
Have used Alliant Energy's "Shared Savings Program"
Install efficient technologies
Lighting upgrades, Waste water treatment
Looking at options with architect/engineer on building renovations & new construction with energy savings
Managing energy costs
Off peak hours, High efficient motors
Programmable thermostats, Contract heating fuel
Purchasing energy efficient equipment such as refrigerators (when possible)
Recently worked with WE Energies to obtain lower cost user classification
Recycle water
Replacing lighting
Sand reclamation from dairy manure to be re-used for bedding
Solar films to dry wood
Upgrade lighting & motors
Use waste oil heat

(Continued)

We try to reduce usage through engineering changes & conservation
We turn off storage coolers when not needed
Wind generator
Wind power, Hybrid cars
Working with Alliant on increasing energy efficiency with alternative lighting
Yes, always looking to reduce costs
Yes, this became one of the planks of our mission last year - electricity conservation, meter conservation in particular

5 - No (4); Not at this time

A21. Are you interested in using rail to receive supplies or ship finished goods?

I currently use rail	3	5.8%
Yes, but I do not have access to rail at my current location	5	9.6%
Yes	4	7.7%
No	40	76.9%

A22. Which of the following best fits your schedule for viewing the results of this study?

Morning	19	48.7%
Noon	2	5.1%
Afternoon	8	20.5%
Evening	2	5.1%
Other	8	20.5%

A23. Other comments:

I am displeased that they cut all the trees down along T/104 North of Brodhead. I think the area is a great place to live and raise a family. Young unmarried people don't like the area.
May need to draw city water in future, not sure at this time
Too long

GREEN COUNTY

commerce.wi.gov

Wisconsin
Department of Commerce