# TAKING CARE OF BUSINESS

## (CONFIDENTIAL)

***Business Expansion and Retention Survey***

Survey Number _____ SIC/NAICS _____

Interviewer _____ Date: _____

## GENERAL INFORMATION

Name of Business _____

Street Address _____

P.O. Box _____

City, State, ZIP _____

Phone _____ Fax _____

CEO/Owner/Manager _____

Title _____

# TAKING CARE OF BUSINESS

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Survey Number _____SIC/NAICS _____

**PART I. COMPANY PROFILE**

0010. What form of organization is your business?
1. ____ Corporation
2. ____ Nonprofit corporation
3. ____ Partnership
4. ____ Sole proprietor
5. ____ Family business

0020. When and where was your firm established?
1. ____ Year
2. ____ Place _____

0025. How long has your firm been established in the city?
1. ____ 1-2 years
2. ____ 3-5 years
3. ____ 6-10 years
4. ____ More than 10 years

0030. What is your primary type of business?
(Please select one or more of the fields listed below)
1. ____ Construction
2. ____ Finance
3. ____ Manufacturing
4. ____ Real Estate
5. ____ Retail
6. ____ Service
7. ____ Technology
8. ____ Transportation
9. ____ Wholesale
(Please describe) _____ _____

0045. What is your principal market area? (Enter this as a percentage for each of the following categories. The total of all categories will be 100%)
1. ____ City
2. ____ Trade area (200-mile radius)
3. ____ State
4. ____ National
5. ____ International

0055. What specific product or service does your firm provide? _____
_____

0060. Is your firm minority or female-owned?
1. ____ Yes. 2. ____ No

0080. Do you own or lease this facility?
1. ____ Own 2. ____ Lease

0085. If leased, does your lease expire within:
1. ____ 1 year
2. ____ 2 years
3. ____ 3-5 years
4. ____ More than 5 years

0086. Do you have multiple locations?
1. ____ Yes
2. ____ No
3. If yes, where? _____

0087. Approximately how much building space do you occupy?
1. ____ Less than 1,000 sq. ft.
2. ____ 1,001-3,000 sq. ft.
3. ____ 3,001-10,000 sq. ft.
4. ____ 10,001-50,000 sq. ft.
5. ____ More than 50,000 sq. ft.

0088. Number of acres: _____

0090. Have you made local capital investment in the past three years?
1. ____ Yes 2. ____ No
If yes, what kind of capital investment?
3. ____ Facilities renovation
4. ____ Machinery/equipment
5. ____ Computer(s)
6. ____ Trucks/mobile equipment
Other: _____

0092. Is your present facility and location adequate?
1. ___ Yes 2. ___ No
If no: _____
Acreage requirements: 3. _____
Facility requirements: 4. _____

0094. Have you expanded your business within the past 3 years?
1. ___ Yes 2. ___ No

0096. If yes, was it:
1. ____ at the same location
2. ____ at a new location within the community
3. ____ at a new location outside the community

0098. If the expansion was at a new location, did the old location remain an operative part of your business?
1. ___ Yes 2. ___ No

0100. Are you planning any expansion?
1. ____ Yes 2. ___ No If yes, when?
3. ____ Within 1 year
4. ____ 1-2 years
5. ____ 2-5 years
6. ____ More than 5 years

0102. If you were to expand, how much additional space would you occupy?
1. ____ Less than 1,000 sq. ft.
2. ____ 1,001-3,000 sq. ft.
3. ____ 3,001-10,000 sq. ft.
4. ____ 10,001-50,000 sq. ft.
5. ____ More than 50,000 sq. ft.

0104. If you were to expand, where would you expand?
1. ____ Within city
2. ____ Outside city
3. ____ Outside the region
4. ____ Outside state
5. ____ Not sure

0106. Do you expect your business to:
1. ___ Expand 15% over the next 3 years
2. ___ Expand less than 15% over the next 3 years
3. ____ Remain about the same over the next 3 years
4. ____ Decline over the next 3 years
5. Decline more than 15% over the next 3 years
6. To what do you attribute the expected increase or decline in your business?_____
_____

0107. If the firm has not recently expanded, and does not plan to expand soon, please indicate the primary factor that keeps you from expanding:
1. ____ Land
2. ____ Cost of capital
3. ____ Labor supply
4. ____ market condition
5. ____ Other _____

0108. Have you reduced your business operation in the last 3 years?
1. ___ Yes 2. ___ No

0110. What was the reason for the reduction?
1. ____ Market decline
2. ____ Increased competition
3. ____ Increased cost of production
4. ____ Other: _____

0112. Are you considering relocating your business?
1. ____ Within the city
2. ____ Outside the city
3. ____ Outside the region
4. ____ Outside the state
5. ____ Not considering relocation

0115. Are the following factors adversely affecting your operations? (Check all that apply)
1. ____ Availability of capital
2. ____ Availability of land
3. ____ Availability of suitable building space
4. ____ Availability of labor
5. ____ Labor productivity
6. ____ Commute time for employees
7. ____ Availability of technical personnel
8. ____ Availability of management talent
9. ____ Transportation
10. ___ Access to R&D facilities
11. ___ Access to air transportation
12. ___ Proximity of suppliers
13. ___ Company parking space
14. ___ Traffic congestion
15. ___ Telecommunications
16. ___ Mail services
17. ___ Utility services
18. ___ Energy reliability
19. ___ Utility costs
20. ___ Educational facilities
21. ___ Availability of labor training
22. ___ Crime

0116. Are there technological innovations that would enable you to keep pace with or improve your competitive position or improve your firm's earnings if you were able to utilize them?
1. ___ Yes 2. ___ No

0117. If so, what innovations are critical to your business success? List:

_____

_____

0118. What changes is your business planning for the next 2-3 years? (Check all that apply)
1. ____ Mix of goods and services
2. ____ Expand facility
3. ____ Relocate
4. ____ Add employees
5. ____ Reduce number of employees
6. ____ Change production technology
7. ____ Add product lines/services
8. ____ Other (please describe):_____

_____

0120. What resources (raw materials, components, etc.) is your company dependent on for its operations? Provide annual dollar amount of purchases for each: _____

_____

_____

0121. Which of these resources do you purchase locally? Provide annual dollar amount for each resource: _____

_____

0122. Which ones must you obtain from outside city? Provide annual dollar amounts for each resource:

_____

0124. Where are most of your major competitors located? (Check all that apply)
1. ____ Within the city
2. ____ Elsewhere in the county
3. ____ Outside the city and county

0125. Would you say that your major competitors: (check all that apply)
1. ____ Are making significant inroads
2. ____ Have never been a consideration
3. ____ Are a future threat
4. ____ Have no real impact

0127. Do you import or export products (outside USA)?
1. ____ Import 2. _____Export 3. ____Both

0128. Would a relationship with a foreign country substantially increase the sales of your products or services?
1. ___ Yes 2. ___ No

0129. If so, are you interested in starting or expanding importing or exporting
1. ____ Import 2. _____Export
If yes, what goods or services would this involve?
3. _____

_____

**Part II. Labor**

0130. How many employees do you have?
1. ____ 0-4
2. ____ 5-9
3. ____ 10-19
4. ____ 20-49
5. ____ 50-99
6. ____ 100-249
7. ____ 250-499
8. ____ 500-499
9. ____ 1000+

0131. The average number of full-time employees at this location last year:
1. ____ Less than 10
2. ____ 11-25
3. ____ 26-50
4. ____ 51-200
5. ____ More than 200

0132. The average number of part-time employees at this location this year:
1. ____ Less than 10
2. ____ 11-25
3. ____ 26-50
4. ____ 51-200
5. ____ More than 200

0133. Of total work force, approximately what percentage requires at a minimum:
1. ____ % high school diploma or its equivalent
2. ____ % one year of college courses (30 hours)
3. ____ % associate degree
4. ____ % baccalaureate degree
5. ____ % graduate degree
6. ____ % certificate of training (6 months to a year)

0135: How many of your employees (full time) are in each of the following occupational categories?
1. ____ Professional (engineer, architect, etc.)
2. ____ Managerial (executive, plant managers, etc.)
3. ____ Sales (parts person, salesperson, etc.)
4. ____ Clerical (bookkeeper, clerk, secretary, etc.)
5. ____ Services (guard, cook, waitress, maid, etc.)
6. ____ Agriculture (groundskeeper, gardener, etc.)
7. ____ Machine operative (machinist, welder, etc.)
8. ____ Precision production (plumber, repair, maintenance, etc.)
9. ____ Technical (dental asst., drafter, etc.)
10. ___ Handler/laborer (driver, package handler, etc.)
11. ___ Other: _____

0136. What is your percentage of employee turnover, if known?
1. ____ 0-1%
2. ____ 1.1% - 3%
3. ____ 3.1 – 5%
4. ____ 6% - 10%
5. ___ 10% +

0137. Will your work force over the next year be:
1. ____ Increasing
2. ____ Reducing
3. ____ Other

0140. What is your average pay rate?
1. ____ Management $ _____
2. ____ Non-management $_____

0142. What is the total annual payroll for your business? $ _____

0143. What benefits do you offer employees? (Check all that apply)
1. ____ Medical insurance
2. ____ Profit sharing
3. ____ Retirement plan
4. ____ Vacation and sick leave
5. ____ Other: _____

0144. Where do you get your employees? (Check all that apply)
1. ____ Area vocational schools
2. ____ College/universities
3. ____ Employment agency
4. ____ Job service (TWC)
5. ____ Job training
6. ____ Newspaper ads
7. ____ Other employees
8. ____ Word of mouth
9. ____ Chamber of commerce
10. ___ Other (specify): _____

0146. Have you experienced any difficulties in RECRUITING any of the following categories of employees? (Check all that apply)
1. ____ Professional/managerial
2. ____ Clerical
3. ____ Sales and marketing
4. ____ Heavy equipment operators
5. ____ Skilled technicians
6. ____ Other (specify): _____

0149. Would you like to be contacted about training assistance that is available?
1. ____ Yes 2. ___ No

0150. What is your opinion of the following institutions as sources of new employees?

0152. Local High Schools
1. ____ Favorable
2. ____ Unfavorable
3. ____ No opinion
4. ____ Why? _____

0154. Community College District
1. ____ Favorable
2. ____ Unfavorable
3. ____ No opinion
4. ____ Why? _____

0156. Vocational Technical School
1. ____ Favorable
2. ____ Unfavorable
3. ____ No opinion
4. ____ Why? _____

0158. Local University
1. ____ Favorable
2. ____ Unfavorable
3. ____ No opinion
4. ____ Why? _____

0160. Rate all the following factors as they relate to the RECRUITMENT of employees:
1=Significant 2=Somewhat significant 3=Not significant

1. ____ Remoteness of the area
2. ____ Area skill & labor supply shortages
3. ____ Local training programs
4. ____ Seasonal nature of the work
5. ____ Lack of educational facilities
6. ____ Wage rates
7. ____ Other (specify): _____

0162. Rate all of the following factors as they relate to the RETENTION of employees:
1=Significant 2=Somewhat significant 3=Not significant

1. ____ Remoteness of the area
2. ____ Area skill & labor supply shortages
3. ____ Local training programs
4. ____ Seasonal nature of the work
5. ____ Lack of educational facilities
6. ____ Wage rates
7. ____ Other (specify): _____

## PART III. BUSINESS SERVICES

0170. What importance do you give the following factors in considering remaining, expanding of relocating?
1=Important 2=Somewhat important 3=Not important

1. ____ Labor (Cost, skill, etc.)
2. ____ Transportation (air, rail, roadways)
3. ____ Land (zoning, cost, lease space, etc.)
4. ____ Permit processes
5. ____ Public utilities and services
6. ____ Government programs (assistance, incentives)
7. ____ Locations to other companies
8. ____ Availability of capital (conventional, venture, etc.)
9. ____ Business services (financial, legal, research, etc.)
10. ___ Market access (local, regional, state, national international)
11. ___ Quality of life (environment, recreation, cultural, housing, etc.)
12. ___ Racial, language, ethnic differences
13. ___ State/local taxes
14. ___ Education
15. ___ Supply access (raw materials, components, etc.)
16. ___ Local government
17. ___ Law enforcement (crime rate)
18. ___ Medical services
19. ___ Chamber of commerce
20. ___ News media support
21. ___ Location

0171. What factors listed in Question 0170 do you regard as most ADVANTAGEOUS or favorable to remaining, expanding or relocating within this community? (Specify by number, up to four corresponding factors from the list above)
1. ____
2. ____
3. ____
4. ____

0172. What factors in Question 0170 could DISCOURAGE you from expanding or remaining? (Specify by number up to four corresponding factors from the list above)
1. ____
2. ____
3. ____
4. ____

0175. Have you sought management assistance from any of the following? (Check all that apply)
1. ____ Bank/savings and loan
2. ____ College/university
3. ____ Community college
4. ____ Area vocational technical institute
5. ____ Chamber of commerce
6. ____ State agency
7. ____ Federal agency (SBA, etc.)
8. ____ Attorney
9. ____ Professional consultant
10. ___ Other: _____

0176. Have you received business financing assistance within the last five years from any of the following? (Check all that apply)
1. ____ Bank/savings and loan
2. ____ Accountant
3. ____ Venture capital money
4. ____ Private investor
5. ____ Chamber of commerce
6. ____ State agency
7. ____ Federal agency
8. ____ Family or personal savings
9. ____ Other: _____

0180. Please indicate which of the following problems, if any, you experienced in seeking external financing:
1. ____ Lender reluctant to fund NEW projects
2. ____ Insufficient collateral
3. ____ Insufficient track record in business
4. ____ Insufficient management experience
5. ____ Insufficient credit history
6. ____ Lender reluctant to make working capital loans
7. ____ Insufficiently developed business plan and marketing strategy
8. ____ Inadequate equity contribution
9. ____ Lender's emphasis on larger projects
10. ___ Geographic unavailability of funds
1. ____ Inability of local banks to lend without parent company approval
12. ___ Other (specify): _____

0182. In your opinion, is sufficient financing available through your community financial institutions or other community sources of capital?
1. ____ Yes 2. ____ No

0184. Have you obtained capital outside of your community?
1. ____ Yes 2. ____ No

0186. Please indicate financing currently needed for your business, if any:
1. _____Fixed assets
2. $ _____Amount
3. _____Working capital
4. $ _____Amount
5. _____Other (specify): _____
6. $ _____Amount

0190. Have you looked for marketing assistance from any of the following? (Check all that apply)
1. ____ Bank/savings and loan
2. ____ Private consultant
3. ____ Chamber of commerce
4. ____ State agency
5. ____ Federal agency (SBA, etc.)
6. ____ Marketing club or group
7. ____ Corporate franchise
8. ____ Trade association(s)
9. ____ College/university
10. ___ Other: _____

0195. Have you used any of the following programs for training or financial assistance? (Check all that apply)
1. ____ Jobs tax credit
2. ____ Economic development corporation
3. ____ State university
4. ____ Community college
5. ____ Vocational technical college
6. ____ Other: _____

0200. Are locally available (off-plant site) training programs adequate to train unskilled workers to fulfill your job requirements?
1. ____ Yes 2. ____ No

0201. Are locally available (off-plant site) training programs adequate to fulfill your needs for training supervisory and management categories?
1. ____ Yes 2. ____ No

0202. Do you think productivity (output) of production workers could be improved through additional training to upgrade their skills?
1. ____ Yes 2. ____ No

0203. Do you think your operation could be improved through additional supervisory or management training?
1. ____ Yes 2. ____ No

0204. Do you think your operations could be improved through motivational and attitude training for your employees?
1. ____ Yes 2. ____ No

0210. What were your primary reasons for locating your business here? (Check top four reasons)
1. ____ Family ties
2. ____ Area labor cost
3. ____ Labor supply
4. ____ Quality of life
5. ____ Proximity to market
6. ____ Financial incentives
7. ____ Availability of land
8. ____ Cost of land
9. ____ Availability of raw materials
10. __ Educational system
11. __ Profit potential of area
12. __ Cost of doing business/low startup cost
13. __ Tax rates
14. __ Utility costs
15. __ Other (please describe): _____

_____

0215. For each of the following factors in the community, please indicate the degree of satisfaction as related to the success of your business.
1=Good 2=Fair 3=Poor
1. ____ Roads
2. ____ Sewers
3. ____ Water
4. ____ Police protection
5. ____ Fire protection
6. ____ Solid waste disposal
7. ____ Liquid waste disposal
8. ____ Adequacy of hazardous waste disposal
9. ____ Emergency medical service (ambulance)
10. ___ Medical services (doctor, hospital)
11. ___ Electric utilities
12. ___ Gas utilities
13. ___ Availability of local telecommunications service
14. ___ Quality of local telecommunications
15. ___ Public school system quality
16. ___ Higher education quality
17. ___ Availability of continuing business education
18. ___ Capital availability (conventional, venture, industrial development bonds, etc.)
19. ___ Availability of business services (legal, financial, research)
20. ___ Business networking
21. ___ Building codes
22. ___ City zoning
23. ___ Availability of facility space
24. ___ Cost of facility space
25. ___ Availability of land
26. ___ Land cost
27. ___ Land regulations
28. ___ Adequacy of air transportation
29. ___ Adequacy of rail transportation
30. ___ Automobile traffic flow
31. ___ Roadways adequacy and conditions
32. ___ Public Transportation
33. ___ Permit processes
34. ___ Availability of government assistance and incentives
35. ___ State taxes
36. ___ Local taxes
37. ___ Quality of life
38. ___ Other (please specify):_____

_____

0216. If you indicated a problem above, have you contacted the appropriate agency or office about this problem?
1. ____ Yes 2. ____ No

0218. If yes, was the problem solved?
1. ____ Yes 2. ____ No

0220. Has your business experienced a financial loss due to crime in the past year?
1. ____ Yes 2. ____ No

0220. Have any of your employees been the victim of a crime on or near your premises in the past year?
1. ____ Yes 2. ____ No

0224. Were you satisfied with the police response and assistance?
1. ____ Yes 2. ____ No
3. ____ If not, why not? _____

0226. Are you satisfied with entrance, exit, traffic control, and road conditions around your place of business?
1. ____ Yes 2. ____ No
3. ____ If not, why not? _____

0228. Have you experienced any fire damage at any of your facilities in the last 12 months?
1. ____ Yes 2. ____ No

0230. If yes, was the Fire Department responsive to your call?
1. ____ Yes 2. ____ No

0232. Do you feel that the city's code enforcement efforts are being properly accomplished? (Weeds, litter, maintenance of structures)
1. ____ Yes 2. ____ No

0234. Have you been satisfied with the process of getting a building permit for your business?
1. ____ Yes 2. ____ No

0252. What is the single most significant action that other private and public organizations could do to improve your business?

_____

_____

_____

0254. What can the State do to improve your business?

_____

_____

_____

0260. What is your overall opinion of doing business with the city of _____
1. ____ Excellent
2. ____ Good
3. ____ Fair
4. ____ Poor
5. ____ No opinion

0262. What kind of support do you think the Chamber of Commerce should give?

_____

_____

0264. Are you a Chamber member?
1. ____ Yes 2. ____ No
If not, why not? (Choose all that apply)
3. ____ Dues structure
4. ____ Value received
5. ____ Services provided
6. ____ Leadership
7. ____ Other (please describe): _____

_____

0266. Your opinions are important. Is there anything else you would like to tell us about your business needs or ways we can improve the community's economy?

_____

_____

_____

_____

_____

_____