

Economic Development In
Washington County:
Views From Key Stakeholders

Submitted by

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Introduction

The purpose of this study is to provide a comprehensive picture of the visions of key stakeholders on the county's economic development landscape in 2003 and follow up on an earlier report completed by the University of Wisconsin-Milwaukee's Center for Urban Initiatives and Research (CUIR) in 2001. To do so, a series of surveys and focus groups have been conducted of Washington County residents, business representatives, government officials, educational leaders and college students. The study was led by researchers at the University of Wisconsin-Oshkosh's Center for Community Partnership (CCP) who collaborated with professionals from CUIR in administering the surveys.

The 2001 study highlighted five key findings. They involved (1) support for Washington County's involvement in economic development; (2) varying perceptions of the quality of relations between county and municipal officials on economic development matters; (3) popular endorsement for increasing county's outreach efforts to local governments, educational institutions and businesses; (4) a labor shortage hindering ability of businesses to recruit and retain workers; and (5) influence of technology on business development, including importance of education and training and e-commerce.

This study reexamines each of those issues. It involves four separate surveys. They involve (1) a telephone survey to a random sample of residents, (2) a mail survey to all business firms, (3) a mail survey to county and local government officials (elected and appointed), and (4) a mail survey to selected K-12 and college officials (including elected K-12 school board members). In addition, two focus groups were conducted of selected college students representing Moraine

Park Technical College (MPTC) and the University of Wisconsin-Washington County (UWWC).

Key Findings From Each Study

The next section elaborates on these key findings for each study. The remainder of the report thereafter details the full set of findings for each study. Appendix I contains copies of the survey questionnaires and interview instrument used in the focus groups.

Resident Survey:

1. Residents perceive themselves enjoying a high quality of life.
 - a. 94 percent are somewhat or very satisfied with their overall quality of life although those from lower income households are significantly less satisfied than those with more affluent incomes.
 - b. More than 90 percent of respondents believe that rural amenities – presence of farmland, preservation of natural resources, recreational opportunities, and neighbors and friendly people – are somewhat or very important, and they are satisfied with these amenities.
 - c. Respondents vary on the value placed on urban amenities (employment opportunities, shopping, downtown areas, and cultural events).
 - i. Employment opportunities is deemed the most important item of these four amenities. Compared to women, men are more likely to rate this as important and they tend to be less satisfied with it.
 - ii. More than 80 percent of respondents consider shopping to be very or somewhat important and 90 percent satisfied with it.
 - iii. More than 75 percent of respondents believe that downtown areas in communities and cultural events are very or somewhat important.
 - d. Most surveyed residents (over 90 percent) believe that housing stock (affordable housing and quality of housing) is important.
 - i. Those with lower levels of education and females are more likely to value the importance of affordable housing.
 - e. The overwhelming share of respondents believes that K-12 education and college education are important and they are satisfied with the availability of each.
 - i. Married and unmarried households with children are less satisfied than those without dependent children.

2. Economic Development

- a. More than 60 percent of respondents favor developing all types of industrial development; warehousing is the exception, 44 percent favor its development. Tourism, small-scale farming, information technology and general health care particularly are favored.
- b. About four in five want to protect agriculture from business and residential development.
- c. Almost 55% believe that the rate of residential development has been too fast over the past five years, 43% about just right, and only 2% believing it to be too slow. By contrast, about a third believe that the rate of business development has been too fast, 47% about right, and 6% too slow.

3. Labor Force Patterns

- a. About 58% are settled in their jobs, having worked with their current employer for between 6-20 years. About 22% have worked with their current employer for 5 or fewer years.
- b. 89 percent travel by car with 93 percent of this group traveling alone.
- c. Almost half work within 10 miles of their home with fewer than 10 percent commuting further than 50 miles.
- d. Similarly, about 60 percent travel between 1-10 minutes of their homes with fewer than 10 percent spending more than 45 minutes commuting.
 - i. 3 percent work at home.
- e. A majority does not believe that any of nine listed factors would improve their job satisfaction.
- f. About four in 10 work for an employer that offers on-the-job training, and more than four in five of this group have taken some form of employer-provided job training within the past three years.

4. Internet Usage

- a. More than two-thirds have access to the Internet at their homes.
 - i. 62 percent of this group has dial-up access with another 25% having broadband access.
 - ii. About 36% have made an online purchase during the past year with about 63% of this group having done so either monthly or every other month.
 - iii. 46% have visited a local or Washington County government's website, 50% percent have accessed a state government website, and 51% surfed at the website for a Washington County business.

Businesses Leaders

1. Despite multiple efforts, only 5.5% of the identified businesses in Washington County responded to the survey.
2. Many businesses in Washington County have a long history; in fact 12% have been operating in the county for more than 50 years. More than half have been operating in the county for ten years or more.
 - a. The county attracted 13% of the responding businesses within the past three years.
3. While the majority of businesses are located in business districts or parks, or commercial corridors, nearly a third of responding businesses are located in rural townships.
 - a. When asked to identify the primary reason for the businesses' current location, proximity to highways was identified by 71% of the respondents.
4. Half of the responding firms had gross sales of \$1 million or less. More than a quarter of firms reported sales between \$1 million and \$5 million in the past calendar year.
 - a. Nearly half (46%) of the responding businesses reported that the firm's gross sales increased in the past two years; another 21% reported stable sales (no increase or decrease) and the remaining 26% reported decreasing sales.
5. Retention and attraction of a skilled workforce is of much lower priority to business leaders in 2003 when compared to 2001 survey results.
 - a. In 2003, 61% of business leaders did not have trouble with recruitment and 78% had no problem employee retention.
 - b. For similar questions asked in 2001, 63% of business leaders said that they had difficulty with employee recruitment and 35% had difficulty with employee retention.
6. While more than half of the responding business leaders rated the County's business climate as either excellent or good, there may be reason for some concern.
 - a. Only 7% rated Washington County's business climate as excellent, down 10 percentage points from the survey of County business leaders just two years ago.
 - b. Similarly, while 50% of the responding business leaders rated the County's business climate as good, that is down 20 percentage points from the 2001 survey of businesses.
7. Business leaders were asked to list the top three issues currently confronting their business. The most frequently cited issues were insurance-related (primarily costs), employees (largely behavior, recruitment and training) and general competition.
 - a. Taxes also rated high as an issue confronting Washington County Businesses.

8. Business leaders have a positive short-term business outlook.
 - a. The greatest promise for growth appears to be in the number of customers served, sale of products and technology used for production.
 - b. Short-term (within the next 3 years) growth prospects look the weakest for the number of product lines, mix of goods and services and size of workforce.

9. Business leaders are most satisfied with the local services (police and fire protection), followed by the level of energy availability, telephone services and the transportation network for moving goods.
 - a. They were least satisfied with local taxes.
 - b. Many business leaders were unable to rate their level of satisfaction with a number of factors related to economic development.

10. Most goods produced by Washington County businesses are sold within the Greater Milwaukee region. However, nearly 40% of the products/services bought by these same businesses come from outside the Metro area.

11. The most important factors affecting the local of Washington County businesses are: proximity to major highways and proximity to customers.

12. 50 percent or more of business leaders are unaware of 13 of the 15 identified economic development programs available in Washington County. Furthermore, only one of these programs (training) garnered more than 50 percent of the respondents expressing interest in the program.

Education Leaders

1. A total of 31 respondents returned a completed survey; they represent leaders from K-12 and post-secondary institutions (only one elected school board member)
2. 19 of 30 responses made explicit or implicit reference to job training in describing their organization's mission with 11 making no such reference.
3. In describing objectives for their institution, 87 percent stated it was very important to train students to be conscientious citizens, about three-fourths stated it was very important to train students to be productive in the workforce, 55 percent reported it to be very important for their students pursue further education in a post-secondary institution, and less than 7 percent believed it very important for their institution to promote economic development in Washington County.
4. Two thirds of respondents report that their institution works directly with local businesses to help train some group of students.
 - a. Yet, of this group none claimed that the firms are very knowledgeable about educational and training programs in Washington County.
 - b. Part of this gap could be improved through changes by the firms themselves including:
 - i. Improved communication and collaboration with educational institutions
 - ii. Specific actions for increasing student labor demand such as mentoring, apprenticeships and job shadowing.
 - c. Part of the gap could be improved through changes by the educational institutions including better incentives for staff to work with businesses and better marketing.
5. Schools are more likely to be interacting with business leaders than with their cohorts in other schools or with government officials on matters pertaining to economic development.
 - a. Only a minority is satisfied with the level of frequency with businesses, government officials and other leaders in educational institutions.
6. 60% see a role for their educational institution to be involved in promoting economic development in Washington County, but 55% did not know whether the Washington County Economic Development Division currently helps their education institution meet the needs of local businesses.
 - a. The overwhelming majority favor this county governmental unit pursuing economic development activities providing outlets for networking between local businesses and educational institutions, offering technical guidance and advice on grant writing, and providing a repository of information related to economic development for interested parties.

7. Respondents offered these recommendations for their educational institution to better adapt to help with economic development activities in Washington County:
 - a. Changes in organizational mission
 - b. Better communication (e.g., meetings with departmental staff)
 - c. Better collaboration (e.g., partnerships between schools and businesses)
 - d. Institutional reforms, such as providing staff with time to learn about available resources
 - e. Specific actions for increasing demand for student labor such as apprenticeship hiring and summer programs.

Higher Education Student Focus Groups

1. Moraine Park Technical College
 - a. 8 participants
 - i. 4 females, 4 males
 - ii. All but one over age 23
 - iii. All but one enrolled in one of two vocational tracks – manufacturing and health care with the eighth enrolled in marketing program
 - b. Job unease
 - i. Most were enrolled in program either to secure their current position or to move in a direction better suited for their career interest
 - c. Education was valued in strictly vocational terms for increasing job security and marketability to potential employers
 - i. None were in program due to employer request; initiative came from personal direction
 - d. MPTC is deemed attractive due to “accessibility” (availability of classes, school’s location, competency and activity of instructors)
 - e. Divergent opinions on quality of classroom resources with manufacturing deemed state-of-the-art while health care seemed lacking.
 - i. Those in manufacturing fields were most pessimistic about career prospects while those in health care were most optimistic.
 - f. Most plan to stay in Washington County after graduation, but high housing costs are of concern with most wanting to avoid urban lifestyle.
2. UW-Washington County
 - a. 7 participants
 - i. 5 females, 2 males
 - ii. Of diverse backgrounds based on age, ethnicity/race, and academic interests
 - b. UW-Washington County was deemed attractive based on location (proximity to home), receptiveness for “non-traditional students” (e.g., those home-schooled, older students) and relatively low tuition.
 - i. Administrators and faculty received high praise

- c. Almost every student planned to transfer to a four-year UW institution upon completing studies at UWVC where they could at least earn a bachelor's degree.
 - d. Most planned to live in Washington County afterwards with impediments including perceived low diversity, lack of urban amenities, and lack of meaningful employment opportunities.
3. Significant comparisons between the two groups
- a. MPTC students tended on average to be older with interest in education more directly related to vocational goals.
 - i. UWVC participants felt insulated from economic fluctuations while MPTC participants were striving to insulate themselves from them.
 - b. Student participants from the two schools had little in common apart from geographic location.
 - c. Both institutions are meeting unique consumer demands reflecting different niches in the market for higher education within Washington County area.

Local Officials

1. Nearly all local officials are satisfied with the quality of life in Washington County
 - a. More than 90% of responding government officials are very satisfied or somewhat satisfied with the overall quality of life in Washington County.
 - b. 68% of local officials believe the future of Washington County looks bright.
 - i. City and village officials were more positive about the County's future (93%) than town officials (80%).
 - c. Over 90% of government officials stated that rural character, neighbors/ friendly people, land use/zoning regulations, quality housing, good roads, employment opportunities, and public safety were very or somewhat important to the quality of life in the County.
 - i. Neighbors/friendly people were rated highest (96%) in terms of quality of life.
 - d. Levels of satisfaction tend to be somewhat lower than the importance ratings given to each quality of life measure. For example, neighbors/friendly people and public safety are the only two factors that more than 90% of government officials stated they were very or somewhat satisfied. However, like the importance rankings, more than half of government officials stated they were very or somewhat satisfied with all items related to quality of life in Washington County.
2. More than 65% of responding officials rate the business climate in Washington County as excellent or good.
 - a. 49 percent stated the business climate is excellent or good in their local community.
 - b. Approximately one-third of the government officials stated the business climate is fair in both Washington County and in their local community.

- c. Eighty percent of government officials are very or somewhat satisfied with the mix of businesses in Washington County.
 - i. Government officials are much less satisfied (59%) with the mix of businesses in their local community.
 - d. Dissatisfaction with the mix of business in local communities reaches 49% for city and village officials, versus 33% for town officials.
- 3. More than half of the responding local officials indicated that the rate of business development in their local community is too slow, but residential development is too fast.
 - a. Appointed officials expressed more concern with the rapid rate of residential development in their local communities than elected officials.
 - b. Over two-thirds of town officials rated the amount of residential development in Washington County as too fast versus 45% of city and village officials.
- 4. Preservation of agriculture from both residential and businesses development is a strong sentiment among local officials.
 - a. Nearly three-fourths of government officials strongly or somewhat agree that agriculture should be protected from residential development in Washington County.
 - b. 65 percent of local officials agree that agriculture should be protected from residential development in the respondent's local community.
 - c. More government officials disagree (somewhat and strongly) that agriculture should be protected from business development (36.3%) or residential development (29.8%) in their local communities, than in Washington County; 32.0% and 25.8%, respectively.
 - d. Farmland preservation is of greater concern to town officials than city/village officials.
- 5. More than half of all local officials indicated that they would favor County government promoting development for a wide variety of industries.
 - a. Greatest support is for industries in manufacturing (82.4%), tourism (81.6%), and information technologies (84.0%).
 - i. More than a third of government officials oppose Washington County promoting development for large-scale farming, transportation, warehousing, and arts and entertainment.
 - b. With regards to their local community, 81.5% of government officials favor their community promoting development in information technologies.
- 6. Local officials are most satisfied with the following factors related to economic development in Washington County: energy availability, transportation networks and recreational opportunities.
 - a. They were least satisfied with the amount of property taxes paid for services received, environmental regulations and land use planning processes.

- i. One-fourth of local officials were unable to evaluate broadband telecommunication services.
- 7. Business/job creation, taxes and land use planning were identified as the top economic issues facing both Washington County and local communities in the county.
- 8. Local officials are unaware of most programs and services available for economic development in Washington County.

Comparisons Across the Studies

A total of 14 questions were replicated to some degree in several surveys. The purpose of this final section is to compare and contrast the findings from these questions.

Quality of Life

The surveys done of residents and government officials included three nearly identical questions pertaining to assessments of the quality of life in Washington County.

- Among government officials, over 90 percent were either very or somewhat satisfied with the overall quality of life in Washington County. This closely corresponds to the 94 percent of residents who responded with the same choices to this survey question.
- *Rural amenities.* Both government officials and residents nearly unanimously deem rural amenities to be very or somewhat important with responses ranging from 80 to over 95 percent for the six items under this category. A somewhat smaller percentage responded similarly when asked about their *satisfaction* with each of these items. For only one of these – access to lakes – did the researchers notice a substantial difference of views between the two groups. In this case, government officials (82%) were more satisfied with lake access than were residents (73%).
- *Urban amenities.* A large share of both government officials and residents deem the four urban amenities (presence of downtowns, cultural events, access to shopping and employment opportunities) to be either somewhat or very important. However, residents were substantially more likely to offer this opinion for three of these amenities involving (1) presence of downtowns (2) cultural events and (3) access to shopping. When assessing their *satisfaction* level with each of these amenities, both government officials (59%) and residents (57%) were much less satisfied with the availability of employment opportunities given their near unanimous opinion that this was an important factor to this county's quality of life.
- *Housing stock:* Again, the overwhelming majority of government officials and residents believe that the two amenities comprised in this category of housing stock are either somewhat or very important. While more than 90 percent of both groups deem quality of housing to be very or somewhat important, residents were substantially more likely to say the same about affordable housing compared to the views of government officials (92% versus 74%). Both government officials and residents gave nearly identical satisfaction ratings for these two amenities. However, residents were noticeably less satisfied with the presence of affordable housing (64%) given their above-noted assessment of its importance to their quality of life.
- *Education:* Following similar trends reported above, government officials and residents nearly unanimously believe that education (K-12 schools and post-secondary education) is somewhat or very important. However, there was a 12 percentage point difference between residents (90%) and government officials (78%) with their valuing of post-

secondary education. Government officials tended to be more satisfied with both of these aspects of education in this county compared to residents. Specifically, 79% of government officials and 70% of residents were very or somewhat satisfied with K-12 education, and 79% of government officials and 68% of resident were very or somewhat satisfied with post-secondary education.

- *Economic Development.* Three items comprise this category. The sentiments of government officials and residents were nearly identical on each one. Almost all government officials and residents believe that the quality of roads and land use and zoning regulations are very or somewhat important. A majority (59% of government officials and 56% of residents) report likewise about public transportation. When probed about their *satisfaction levels*, a different theme surfaced. With specific respect to land use and zoning regulations, there was a noticeable decrease in the number of government officials and residents reporting that they were very or somewhat satisfied compared to those reporting that they believe this amenity to be somewhat or very important (93% of government officials rating it as very or somewhat important versus 67% as very or somewhat satisfied; 91% of residents rating it as very or somewhat important versus 69% as very or somewhat satisfied). There was no noticeable change in satisfaction levels for quality of roads compared to the rating of its importance level for either group. Government officials were more satisfied (70%) with public transportation than they were to rate it as importance (59%). By contrast, the importance level (56%) and satisfaction level (59%) of residents towards public transportation was unsubstancially different.
- *Other Local Government Functions.* Almost every governmental official and resident responding to the surveys reported that public safety to be very or somewhat important. By contrast, governments were much less likely to say the same about social services with 68% stating this was very or somewhat important in contrast to 90% of residents who gave such responses to this question item. An overwhelming majority of both government officials and residents were very or somewhat satisfied with both of the amenities comprised in this category with unsubstancial differences in opinions between the two groups.
- *View of the Future.* Residents (80%) are more optimistic than government officials (68%) in agreeing with the statement that the future of Washington County looks bright.

Business Development

There were four identical survey questions asked of residents and government officials regarding their views about business development. These summarize the key comparisons.

Promotion of Developing Particular Industries in Washington County. One survey question asked respondents to assess whether they favored or opposed each of 12 distinct industrial types.

- Residents are most likely to favor small-scale farming (88%) whereas government officials are most likely to favor information technology (81%). Conversely, residents are least likely to favor warehousing (44%) whereas government officials (55%) are least likely to favor transportation.
- Of the 12 industrial types, residents and government officials substantially differed on their opinions towards favoring five of these. They are (1) manufacturing (82% of government officials versus 69% of residents), (2) small-scale farming (77% of government officials versus 88% of residents), (3) transportation (55% of government officials versus 67% of residents), (4) warehousing (60% of government officials versus 44% of residents), and (5) arts and entertainment (62% of government officials versus 76% of residents).

Rate of Business and Residential Development

- Both residents and government officials concur in their concerns with the pace of residential development from 1998 to 2003. Among residents, 54% report that residential development over this period has been too fast compared to 56% of government officials who indicate similarly. Just 2% of residents and government officials report that the rate of residential development during these five years has been too slow.
- A different pattern emerges when these two groups were polled to assess their opinions about the rate of business development from 1998 to 2003. Residents were substantially more likely to report that business development has been too slow (35%) versus too fast (12%). By contrast, government officials were more likely to report that business development was too fast (34%) than too slow (14%).

One nearly identical question was asked of both government officials and business leaders about business development. It concerned their assessment of the quality of the overall business climate.

- 68% of government officials rated the business climate in Washington County as either excellent or good compared to 32% who assessed it as either fair or poor.

- By contrast, business leaders were less positive. 56% of business leaders rated the business climate in Washington County as either excellent or good compared to 44% who rated it as either fair or poor.

Agriculture Protection

The surveys of residents and government officials each included two items to probe views about the need for protecting agriculture from business and residential development. In general, residents were much more concerned about such protection than were government officials. In specific:

- 81% of residents and 63% of government officials agreed strongly or somewhat on the need to protect agriculture from business development.
- 78% of residents and 72% of government officials agreed strongly or somewhat on the need to protect agriculture from residential development.

Satisfaction With Business-Related Factors

Both business leaders and government officials were asked to assess their level of satisfaction with a number of business-related factors. The most compelling finding is the large percentage of business leaders who responded “Don’t Know” to many of these questions. For instance:

- At least 40% of businesses leaders responded “Don’t Know” to 14 of the 35 questions in this section. The highest percentage of “Don’t Know” responses by elected officials was 33%, in response to the question asking them to assess their satisfaction with air service in the county.

For those questions which had a larger share of respondents able to evaluate the factor, business leaders and government officials had similar levels of satisfaction. The one exception was with respect to the amount of services received relative to local taxes paid. Government officials were more satisfied (56% either very or somewhat satisfied) than business leaders (30% either very or somewhat satisfied).

Awareness of Programs and Services Available for Economic Development

Both government officials and business leaders were asked their awareness of 14 identified programs available for economic development in Washington County. The findings reflect two central themes: 1) many available programs are not known to either government officials or business leaders, and 2) business leaders know very little about specific economic development tools available in Washington County. More particularly:

- For local government officials, the economic development program for which they are most aware is state financial programs (72% aware); they are least aware of Fast Trac Entrepreneurial Training programs (26% aware).

- Business leaders are most aware of Service Corp. of Retired Executives SCORE (43% aware) and least aware of the Business Retention and Expansion (BRE) Visitation Program (14% aware).
- Of the 14 programs, more than a third of business executives are aware of only four: SCORE (43%); workforce training (38%); business incubators (34%); and federal financial programs (33%).
- There were only two of the identified 14 economic program (BRE, 28% and Fast Trac, 26%) about which less than one-third of elected officials are aware.

Resident Survey

The purpose of this study is to assess the perceptions of Washington County residents about issues related to economic growth. This research follows up on an earlier study that was conducted in 2001 for the Washington County Planning Department by UW-Milwaukee's Center for Urban Initiatives and Research (CUIR).

In developing this survey, the authors worked closely with Washington County Planning and Parks Department staff, and Economic Development Survey Technical Advisory Committee (EDSTAC). As discussed in greater detail in the next section, this survey focuses on four distinct areas – quality of life, economic development, labor force patterns, and household utilization of the Internet. The subsequent sections of the report describe the findings to each of these areas.

Methodology

This section describes the methodology used in conducting the survey of residents. This includes a discussion of the design of the questionnaire, administration of the surveying by telephone, quality control tests, and methodologies used in analyzing the closed-ended and open-ended data. All procedures were scrutinized and approved by the University of Wisconsin-Oshkosh Institutional Review Board.

Design of the Questionnaire

The design of the survey began with a brainstorming session by EDSTAC members through which they identified general questions they wanted covered by the survey. A review subsequently was done of the questionnaire used in the 2001 study and of questionnaires used in other economic development studies.

Once EDSTAC approved of the questionnaire developed for this study, CUIR translated the document for use with its CATI software. Piloting was subsequently done with final revisions done to the questionnaire in order to maximize the response rate.

The questionnaire consisted of five sections. The first section probed the opinions of respondents on issues relating to quality of life concerns. The second section focused on issues specific to economic growth, including opinions to different types of industrial development, attitudes towards agricultural protection, and perceptions about the overall rate of residential and business growth over the prior five years. The third section examined issues relating to labor force participation, including employment and commuting patterns. The fourth section focused on Internet usage, including prevalence of online purchases. The final section included a variety of questions about the respondents' demographic and socioeconomic characteristics.

Implementation of the Survey

CUIR used their Computer Assisted Telephone Interviewing (CATI) software to implement a random digit dialing methodology. Surveying was done by telephone Monday through Friday during the late afternoon and evening hours, and during the day on Saturdays through most of June 2003. Frequencies were computed of respondent's local community and

compared to 2000 Census data. Following this analysis, an additional round of surveying was done in selected communities to ensure a fully representative sample. Ultimately, 434 households completed the questionnaire.

All data were transformed onto an SPSS database file. Subsequent quality control tests were conducted to confirm the accuracy of data entered. These tests included a series of frequencies for flagging cases with missing values as well as subsequent development of algorithms for treating missing values to particular survey questions.

Data Analysis

There were two types of inferences done in statistically analyzing the data to the closed-ended questions. First, efforts were made to infer from the sample of survey respondents about the combined population of all families in Washington County. To do so, frequencies were computed. Given a total sample size of 434 cases, a conservative margin of error is estimated at less than +/- 5 percent.¹

Statistical tests also were done for comparing specific characteristics of respondents and their households for many closed-ended questions. These included comparisons based on the respondent's age, household type (married versus unmarried, and household with dependent children versus those without), respondent's gender, household income, and respondent's education level. Statistical significance tests on the cross-tabulations were done using a chi-

¹ In actuality, the margin of error varies depending upon the type of variable and the frequencies reported for each value for that variable. Following accepted protocol, the margin of error cited here assumes a binomial variable. This estimate is labeled as "conservative" since this relative frequency yields the highest margin of error possible. Further, in each of these examples, the statistical confidence level equals 95 percent. A lower confidence level coincides with a smaller margin of error.

square sampling distribution statistic and a criterion of a false rejection equal to 0.05 percent. Open-ended data were examined using content analysis. In this type of qualitative methodology, data were initially coded. In some circumstances, codes were merged. Frequencies were subsequently computed and used for interpretation.

Profile of the Respondents

This section provides background information of respondents in profiling their demographic and socioeconomic characteristics. These involve analysis of their housing status, age, household type (marital status, number of dependent children living at home), household income and education level. Information about employment status is discussed in a later section that deals with the labor force participation patterns.

Housing Status

Respondents have lived in Washington County for varying amounts of time. As seen in the table on the following page, 53 percent have lived here for 10 years or less. Another 22 percent have lived in the county for between 11 and 20 years, and almost 25 percent have lived here for a greater amount of time. Among those who have lived in the county for 10 years or less, almost 46 percent have never previously lived in Washington County. Of the other group of newcomers who have previously lived in this county, more than six in 10 have lived outside this area at some point in their life.

Years lived in Current Home

	Percent
0-5 Years	32.1%
6-10 Years	21.0%
11-15 Years	14.3%
16-20 Years	7.9%
21-30 Years	12.7%
Over 30 Years	11.8%
Don't Know	0.2%

The table below illustrates the housing status of respondents. As seen in this figure, more than 85 percent own their homes.

Home Ownership Type

	Frequency	Percent
Own	369	85.2%
Rent	57	13.2%
Other	4	0.9%
Don't Know	3	0.7%
Total	433	

The overwhelming share (85.4 percent) of homeowners live in single-family homes. Another 9.8 percent live in condominiums (see below).

Type of Owned Housing

	Frequency	Percent
Single family	319	86.4%
Condominium	36	9.8%
Other	14	3.8%

Compared to homeowners, renters live in more diverse types of housing arrangements. As seen below, 43.9 percent lives in a multifamily unit, 35.1 percent in single-family homes, and 19.3 percent in a duplex.

For Renters, Type of Housing

	Frequency	Percent
Single family	20	35.1%
Duplex	11	19.3%
Multifamily unit	25	43.9%
Don't Know	1	1.8%

Age is a very sensitive question to ask individuals completing a voluntary survey. To minimize non-responses, respondents were asked to state the year when they were born. Using this information, an estimation was made of respondents' age by subtracting it from 2003. Following an initial analysis of frequencies, a new variable was constructed with four age intervals. As seen below, 10 percent of respondents are between 18 and 29 years old. Another 25 percent are between 30 and 44 years old. About 42 percent are between 45 and 64 years old, and 23 percent are at least 65 years old.

Age

	Frequency	Percent
18-29 Years Old	43	10.1%
30-44 Years Old	108	25.4%
45-64 Years Old	177	41.5%
At Least 65 Years Old	98	23.0%
Total	426	

Household Composition

Respondents live in a variety of households based on their marital status and number of children living in their homes. With respect to the first factor, about 70 percent are married. With respect to the second factor, 56 percent live with at least one child. About 22 percent have no children under the age of 18 years old. Almost 61 percent have between 1 and 2 children under the age of 18 in their home. About 15 percent have three children under 18 years old living in their homes and fewer than 3 percent have more than this number of dependent children in their home.

Using information on marital status and presence of dependent children, a variable was constructed for categorizing four different types of households. This information is summarized in the table below. As seen in this table, twenty three percent of respondents live in unmarried households with no children under the age of 18. Six percent are unmarried with dependent children under 18 years old. About 42 percent are married with no children under 18 years old in their home. Approximately 23 percent are married with children under 18 years old in their home.

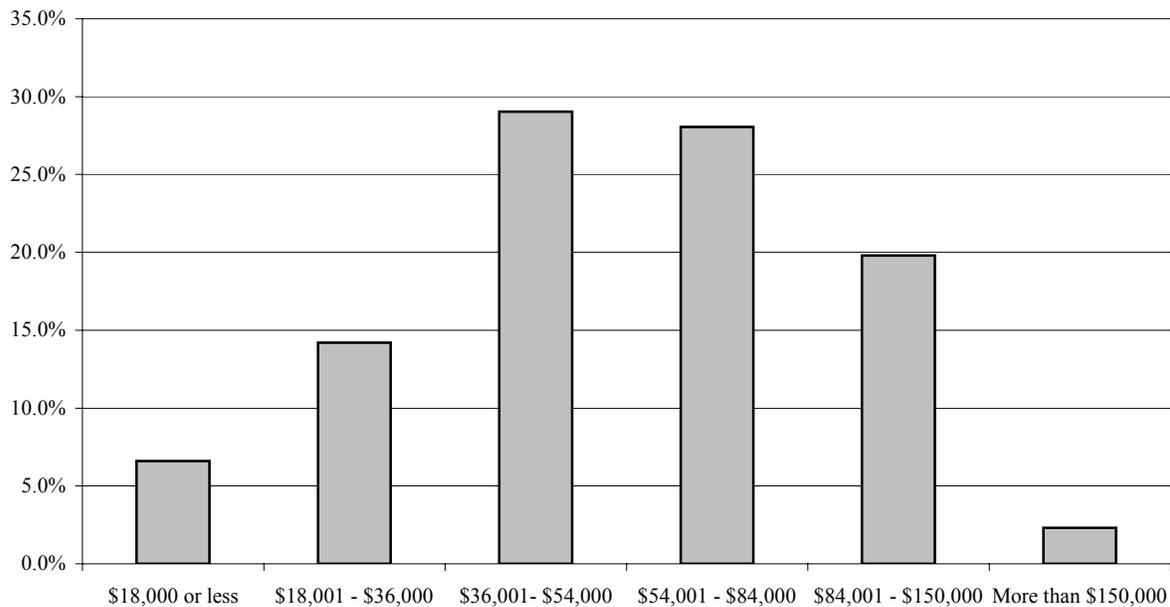
Household Type

	Frequency Percent	
Unmarried household with no children	101	23.4%
Unmarried household with children	27	6.3%
Married household with no children	182	42.1%
Married household with children	<u>122</u>	28.2%
	432	

Gender. Females account for a little more than two thirds of all respondents, representing about 68 percent of the total sample.

Household Income. Respondents live in households with a wide variety of income levels. As seen below, about 7 percent earned less than \$18,000 in 2002. Another 14 percent earned between \$18,000 and \$36,000. The most likely responses are of an individual in a household with an income between \$36,000 and \$54,000 (29 percent of the total sample) and between \$54,000 and \$84,000 (28 percent of the total sample). Almost 20 percent report that their household income was between \$84,000 and \$150,000 with just around 2 percent claiming to have a household income in excess of \$150,000.²

Distribution of Household Income



For conducting the cross-tabulations based on household income in later sections of this report, a new variable on household income was created using just three categories: (1) respondents in households with an income not exceeding \$36,000; (2) respondents in households with an income between \$36,000 and \$84,000; and (3) respondents in households with an income in excess of \$84,000.

Education Level. Respondents were finally asked a series of questions about their educational attainment. There is a great deal of variation with respect to this factor. At one extreme, only about 4 percent lack a high school diploma. Respondents are most likely to report that their highest level of education was graduation from high school. Twenty three percent attended some college but earned no degree. Almost 11 percent have an associate degree, and approximately 16 percent have graduated from a four-year college or university. Around 11 percent possess some form of graduate degree.³

Educational Attainment

Education Level	Frequency	Total Percent	Non-Refused Percent
No HS Diploma	18	4.2%	4.3%
HS Graduate	142	32.8%	34.0%
Some college	97	22.4%	23.2%
Tech or Associate Degree	47	10.9%	11.2%
Bachelor's Degree	67	15.6%	16.0%
Graduate Degree	47	10.9%	11.2%
Refused	<u>15</u>	3.5%	
Total	433		

² Almost 30 percent of respondents either did not answer this question or responded that they did not know their household income.

³ About 4 percent refused to answer this question.

Quality of Life

Respondents were asked three broad questions in probing their perceived quality of life as a resident in Washington County. By and large, they are generally satisfied but have specific concerns, especially among particular subgroups. The section begins by reviewing the results of three general questions about respondents' perceptions of their quality of life. It then proceeds to examine respondent views about the importance and satisfaction level to 14 specific amenities.

General Perceptions

As seen below, 61 percent are very satisfied and another 33 percent are somewhat satisfied with their overall quality of life in Washington County. Fewer than 1 percent report being very dissatisfied. Women are generally more satisfied with their quality of life than are men. Low-income households (i.e., those with incomes not exceeding \$18,000) are less satisfied than those in more affluent circumstances.

Satisfaction With Quality of Life

Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Don't Know/ Not Applicable	Total Responses	
61.2%	33.0%	4.6%	0.9%	0.2%	433	C,D

1 Notes for symbols: C = Respondent's gender; D = Household income

Reflecting this sentiment, almost 72 percent state that they can see themselves retiring in Washington County with only 21 percent indicating otherwise. There were no statistically significant differences observed when this question was analyzed by respondent characteristics.

About four in five think Washington County's future looks bright. Women are more optimistic than men as are those in upper income households (i.e., those earning in excess of \$84,000).

Importance of Specific Amenities

Respondents were probed to ascertain their views related to 19 distinct amenities related to quality of life. These 19 items were sorted into six distinct categories. They are as follows:

1. Rural amenities – rural character, presence of farmland, access to lakes, preservation of natural resources, recreational opportunities, and neighbors and friendly people.
2. Urban amenities --downtown areas in communities, cultural events, and access to shopping, employment opportunities.
3. Housing stock – quality of housing and affordable housing.
4. Education – K-12 education and post-secondary education.
5. Local government activities related to economic development – land use and zoning regulations, quality of roads, and public transportation.
6. Other local government functions – public safety and social services.

Respondents were asked two separate sets of questions in inquiring about their opinions to each amenity. The following table summarizes respondent views about the *importance* of each; this is followed by the table describing respondent attitudes about their *satisfaction* with the same items.

Importance of Specific Amenities Relating to the Quality of Life in Washington County

(In Percentages)

	Very Important	Somewhat Important	Not Important	Don't know/ Not Applicable	Statistically Significant Differences ¹
<i>Rural Amenities:</i>					
Rural character	60.3%	33.0%	5.3%	1.4%	B
Presence of farmland	69.1%	24.0%	6.0%	0.9%	E
Access to lakes	48.7%	31.9%	18.0%	1.4%	A, E
Preservation of natural resources	79.7%	17.3%	1.4%	1.6%	
Recreational opportunities	66.5%	25.2%	7.2%	1.2%	A, B, D
Neighbors and friendly people	85.0%	13.2%	1.4%	0.5%	
<i>Urban Amenities</i>					
Downtown areas in communities	46.7%	33.3%	18.9%	1.2%	B, C
Employment opportunities	77.6%	13.2%	4.6%	4.6%	A, B, C
Cultural events	41.3%	42.7%	14.3%	1.6%	
Access to shopping	54.7%	35.8%	8.8%	0.7%	A
<i>Housing Stock</i>					
Affordable housing	69.3%	22.4%	6.0%	2.3%	B, C, D, E
Quality of housing	79.4%	17.6%	0.9%	2.1%	E
<i>Education</i>					
K-12 education	88.0%	4.8%	3.0%	4.2%	
Colleges and technical schools	72.5%	17.3%	5.1%	5.1%	
<i>Economic Development</i>					
Land use and zoning regulations	63.7%	28.9%	3.9%	3.5%	
Quality of roads	77.6%	21.0%	1.4%	0.0%	A, D
Public transportation	25.9%	30.9%	39.5%	3.7%	B, D
<i>Other Local Government Functions</i>					
Public safety	94.5%	4.6%	0.5%	0.5%	C
Social services	61.4%	28.2%	5.5%	4.8%	C

¹ Notes for symbols: A= Respondent's age; B = Household type; C = Respondent's gender; D = Household income; E = Respondent's educational level. See Appendices 2 – 6 for tabular output of all cross-tabulations for each of these sub-groups.

The discussion here begins with an analysis of the results based on the proportion of respondents rating the amenity as very important. An overwhelming majority ranked each item as either very or somewhat important.

Rural Amenities

As noted above, there were six questionnaire items that directed respondents to assess the perceived importance of distinct rural amenities. These appear in the first six rows in the preceding table. As seen in this table, the overwhelming majority perceives all to be very or somewhat important.

Among the six items, respondents are most likely to rate neighbors and friendly people as a very important factor. Unmarried households with no dependent children are least likely to report rural character as being a very important asset compared to other household types.

More than two thirds deem the presence of farmland to be a very important aspect related to their quality of life. The importance of this aspect differs significantly by education level with it being valued more greatly among the three groups with the least level of education (high school dropouts, high school graduates, and those who completed some college without any degree).

Access to lakes is the only item clustered under the category of rural amenities that fails to garner a majority expressing that this factor is very important. About 49 percent express this view with just 18 percent deeming it as not important. The importance of access to lakes differs by age groups. It is most important for those aged 30-44 years old and least important for those aged 65 years and older. There also are significant differences based on education levels.

Specifically, increased education corresponds with increased importance of this attribute.

Almost 80 percent deem it very important to preserve natural resources in relating to their overall quality of life. There are no statistically significant differences observed for any of the subgroups.

Almost two thirds believe that recreational opportunities are very important to their overall quality of life in Washington County. There are significant differences observed by age, household type and income level. Its importance declines for older age groups, beginning for those aged 45 years old and with a precipitous decline for those aged 65 years and older. Among household types, unmarried households with dependent children are most likely to deem recreational opportunities as very important while married households with no dependent children were least likely to hold this view. Low-income households (i.e., those with incomes not in excess of \$36,000) are least likely to deem this attribute very important when compared to households with greater income.

Eighty five percent of respondents believe that neighbors and friendly people are a very important amenity relating to their quality of life. There are no significant differences based on any of the subgroups.

Urban Amenities

Respondents vary on the importance placed on the four factors clustered under the category of urban amenities. The first factor in this category, downtown areas in communities, is deemed as very important by 47 percent of all respondents. Almost 19 percent believe it is not important. Unmarried households with dependent children value downtown areas the least.

Low-income households perceive it to be of lower importance compared to those with greater incomes.

The attribute deemed most important by respondents involve employment opportunities which was rated as very important by more than three-fourths of the respondents. There are statistically significant differences by age with young adults (those aged 18-30 years old) most likely to deem this as very important while those aged 65 years and older are least likely to have similar beliefs. Among household types, almost all unmarried households with children (96.2 percent) report employment opportunities as very important with married households with no children the least likely to report likewise. Men are more likely to believe this attribute as very important than women.

About 41 percent of all respondents believe cultural events are very important while approximately 14 percent feel it is not important. There are no statistically significant differences observed among any of the subgroups.

Almost 55 percent report access to shopping as very important. Those aged 65 years and older are most likely to rate this as very important with those aged between 30 and 44 years of age least likely to report the same.

Housing Stock

Two items are included in this category – affordable housing and quality of housing. About 69 percent deem affordable housing to be very important, and almost 80 percent claim that the quality of housing is a very important factor.

Statistically significant differences are observed for each item. Educational level is

important for both. For those with a bachelors and graduate degree, affordable housing is perceived of lesser importance compared to those with a lower level of educational achievement. While there also is a statistically significant difference for the variable of quality of housing based on education level, there is no clear pattern for discerning a trend.

There are other statistically significant differences observed on the item for affordable housing. Females believe this item to be more important than were males. The lower the income of a respondent's household, the more likely this person would deem this factor as important. Those with a bachelors and graduate degrees are less likely to rate this item as important in contrast to those with a lower level of educational achievement.

Economic Development

Respondents vary substantially in their perception of the importance of the three items included under the category of economic development. Almost 64 percent believe that land use and zoning regulations are very important with no statistically significant differences observed among any of the subgroups.

About 78 percent reported that the quality of roads is very important. Those aged 30 to 44 years of age were least likely to claim this attribute as very important. Low-income households are most likely to deem this as very important.

Less than 26 percent of respondents believe that public transportation is very important with a greater share (almost 40 percent) believing it not important. Unmarried households (with and without children) are more likely to believe this to be important than married households (with and without children). Low-income households are most likely to perceive this as

important compared to those in higher income groups.

Other Local Government Functions

Almost 95 percent of respondents believe that public safety is very important. Females are more likely to believe this compared to males.

More than 61 percent believe that social services are very important. Females again are more likely to believe this item to be more important compared to males.

Satisfaction with Specific Amenities Relating to the Quality of Life in Washington County
(In Percentages)

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Don't Know/ Not Applicable	Statistical Significant Difference
<i>Rural Amenities</i>						
Rural character	35.9%	48.3%	13.9%	1.7%	0.2%	
Presence of farmland	33.5%	40.7%	18.4%	6.7%	0.7%	C
Access to lakes	32.4%	41.0%	13.8%	8.3%	4.6%	A, B
Preservation of natural resources	31.4%	52.6%	10.0%	3.6%	2.4%	
Recreational opportunities	39.5%	49.6%	7.6%	2.5%	0.8%	A
Neighbors and friendly people	59.5%	31.5%	4.9%	4.0%	0.0%	A, B, C, D
<i>Urban Amenities</i>						
Downtown areas in communities	29.5%	50.6%	14.2%	5.5%	0.3%	
Cultural events	32.1%	53.3%	6.3%	6.6%	1.6%	
Access to shopping	46.4%	44.4%	5.6%	3.6%	0.0%	
Employment opportunities	17.0%	40.5%	18.3%	16.8%	7.4%	C
<i>Housing Stock</i>						
Affordable housing	25.2%	39.0%	18.4%	10.1%	7.3%	
Quality of housing	42.1%	47.6%	5.2%	4.0%	1.0%	D
<i>Education</i>						
K-12 education	40.6%	29.3%	5.8%	4.4%	12.7% ²	A, E
University and Colleges	36.0%	32.3%	5.3%	3.5%	12.7% ³	A, B
<i>Economic Development</i>						
Land use and zoning regulations	17.5%	53.1%	15.7%	11.2%	2.5%	A, B
Quality of roads	43.6%	40.3%	8.9%	7.3%	0.0%	A
Public transportation	19.9%	39.0%	11.8%	16.3%	13.0%	
<i>Other Local Government Functions</i>						
Public safety	62.0%	32.6%	2.8%	2.1%	0.5%	A, E
Social services	34.5%	41.8%	5.4%	4.1%	14.2%	

¹ Notes for symbols: A= Respondent's age; B = Household type; C = Respondent's gender; D = Household income; E = Respondent's educational level. See Appendices 2 –6 for tabular output of all cross-tabulations for each sub-group.

² 7.2% of respondents did not answer this question.

³ 10.2% of respondents did not answer this question.

Satisfaction with Specific Amenities

The table above summarizes the results that respondents provided about the satisfaction with the same amenities. Again, the discussion is organized based on the same set of categories used in the previous section. Not surprisingly, respondents gave more negative assessments about their satisfaction with these same aspects compared to their perceived importance.

More than 84 percent are satisfied to some degree with the rural character in Washington County. There are no statistically significant differences observed for any of the subgroups.

About 74 percent are either very or somewhat satisfied with the presence of farmland. On average, women are more likely to report being satisfied on this item than men.

More than 73 percent are very or somewhat satisfied with access to lakes. Those aged 30 to 44 and 45 to 64 are less satisfied than those younger and older. Unmarried households with no children are most extreme in their views with this group being most likely to be very satisfied and very dissatisfied compared to other groups.

With respect to the item of preservation of natural resources, 84 percent are very or somewhat satisfied. There are no statistically significant differences observed for any of the subgroups.

Almost 90 percent of respondents are very or somewhat satisfied with recreational opportunities. Young adults (those aged 18-29 years old) and those aged at least 65 years old are more likely to be satisfied than those aged between 30 and 44 years old and between 45 and 64 years old.

Approximately 91 percent are satisfied to some degree with neighbors and friendly people. Those aged at least 65 years old are most likely to be satisfied than those of younger

ages. Unmarried households with dependent children are less satisfied with neighbors and friendly people than other household types. Women are more likely to be satisfied to some degree than men. Those with incomes not in excess of \$36,000 are more likely to report dissatisfaction than those in the other two more prosperous income groups.

Urban Amenities

With one exception, respondents are satisfied with urban amenities. More than four in five respondents express being very or somewhat satisfied with downtown areas in communities.

About 85 percent are satisfied with cultural events. Over 90 percent are satisfied to some degree with access to shopping. For all three of these items, there are no statistically significant differences observed for any of the subgroups.

In contrast to the other three items, a smaller percent (about 58 percent) are very or somewhat satisfied with employment opportunities. Women are more likely to report being *somewhat* satisfied on this item compared to men (48.2 percent versus 33.3 percent).

Housing Stock

About 64 percent are either very or somewhat satisfied with affordable housing. There are no statistically significant differences observed on any of the subgroups. Almost 70 percent are satisfied to some degree with the quality of housing. Low-income households are least satisfied compared to the other respondents in the other two income groups. Specifically, more than 20 percent of low-income households are dissatisfied to some degree with the quality of

housing compared to 6.4 percent of middle-income households and 6.0 percent of upper income households.

Education

Approximately 70 percent report being very or somewhat satisfied with K-12 education. Those aged between 18-29 years old and at least 65 years old are more satisfied with this item than those between 30-44 years old and between 45-64 years old.

Almost two-thirds are very or somewhat satisfied with post-secondary education. Those aged between 18-29 years old and at least 65 years of age are more likely to report being very satisfied. Married households with dependent children are least likely to report being very satisfied. Unmarried households with dependent children are most likely to report to be very dissatisfied with 16 percent of this group expressing this viewpoint.

Economic Development

Over 70 percent express being very or somewhat satisfied with land use and zoning regulations with more than 53 percent specifically expressing being somewhat satisfied. Those aged at least 65 years old are most likely to report being *very* satisfied. Those aged 45-64 years old are most likely to report somewhat dissatisfaction with about one in five in this group offering this opinion. Among household types, married households with dependent children are least likely to report being very satisfied with less than 11 percent holding this view. Unmarried households with no dependent children are most likely to report to be very dissatisfied with over 19 percent expressing this belief.

Almost 84 percent were very or somewhat satisfied with the quality of roads. Those aged at least 65 years old are most likely to report being very satisfied. Those aged 18-29 years old are most likely to express dissatisfaction to some degree with more than one in four offering this opinion.

About 20 percent report being very satisfied and another 39 percent expressed being somewhat satisfied with public transportation in Washington County. There are no statistically significant differences observed on any of the subgroups.

Other Local Government Functions

Close to 95 percent express satisfaction to some degree with public safety in Washington County. Women are more likely to hold this view than were men.

More than three fourths of respondents are very or somewhat satisfied with social services in the county. There are no statistically significant differences observed on any of the subgroups.

Economic Development

This section of the report discusses three sets of survey questions. The first set reports on the types of industrial development favored by respondents. The second set reports on respondent views to protecting agriculture from development. The third set describes respondent attitudes on the rate of residential and business development since 1998.

The following table summarizes the findings to the series of questions involving respondents' support for development of specific types of industrial development.

Views on Specific Types of Industrial Development
(In Percentages)

Industry	Oppose	Favor	Don't Know/ Not Applicable	Stat. Signif. Differences
Manufacturing	23.6%	69.3%	7.2%	
Retail and trade	23.8%	73.0%	3.2%	
Tourism	16.2%	81.1%	2.8%	
Small scale farming	9.0%	87.8%	3.2%	C
Large scale farming	32.3%	61.7%	6.0%	C
Information technology	12.9%	80.8%	6.2%	
Transportation	27.0%	66.5%	6.5%	D
Warehousing	49.7%	44.1%	6.2%	
Financial and Insurance	26.6%	68.8%	4.6%	A, E
General health care	16.2%	80.4%	3.5%	D
Specialized health care	17.3%	78.3%	4.4%	
Arts and entertainment	19.9%	75.8%	4.4%	D

¹ Notes for symbols: A= Respondent's age; B = Household type; C = Respondent's gender; D = Household income; E = Respondent's educational level.

As seen in this table, a majority of respondents favor developing all types of industrial development apart from warehousing. More than 80 percent report favoring development of tourism, small-scale farming, information technology and general health care.

There are also statistically significant differences for all subgroups for apart from household types. Women are more likely to favor both small-scale and large-scale farming than

men. Middle-income households are least likely to favor development of transportation. Support for developing general health care coincides with increased income. Low-income households are least likely to support favoring the development of arts and entertainment. Those favoring development of finance and insurance are inversely correlated with age; those without a high school diploma also are least likely to favor developing this sector with close to 28 percent reporting that they do not know what they think.

Farmland Preservation

The following table reports on the survey items discussing respondent views on the protection of agriculture from business and residential development.

Support for Protecting Agriculture from Business and Residential Development
(In Percentages)

	Strongly Agree	Agree	Disagree	Strongly Disagree	DK/ NA
Business development	34.4%	46.9%	11.5%	2.1%	5.1%
Residential development	35.3%	42.5%	14.3%	3.2%	4.6%

More than 81 percent agree that agriculture should be protected from business development. Almost 78 percent believe similarly in protecting agriculture from residential development. There are no statistically significant differences observed for either of these items.

Finally, respondents were probed about their views about the rate of business and residential development since 1998. These results follow.

Views on Rate of Residential and Business Development Since 1998
(In Percentages)

	Too Slow	About Right	Too Fast	Don't Know	Stat. Significant Differences
Residential Development	2.3%	38.8%	54.3%	4.6%	A
Business Development	35.3%	46.9%	12.0%	5.8%	

¹ Notes for symbols: A= Respondent's age.

The majority of respondents believe that the rate of residential development has been too fast with only about 2 percent reporting that it has been too slow. Those aged between 18-29 years old and at least 65 years old are more likely to perceive residential development as too fast with those aged between 30-44 years old and between 45-64 years old more likely to report it as being about right.

By contrast, only 12 percent report that business development has been occurring too fast since 1998 with almost three times that many reporting that it has been too slow and almost 47 percent claiming that the rate of growth has been about right. There are no statistically significant differences observed on this questionnaire item for any of the subgroups.

Labor Force Participation

Fourteen questions were asked of respondents to learn about labor force participation patterns. These offered insights into employment status, place of employment, reasons for commuting outside of Washington County for those who work outside of this county's borders, characteristics about current employment, job satisfaction, commuting patterns and professional development. Each is discussed in turn.

Employment Status

A little more than half (52 percent) were employed at the time of the survey. Of those not employed, almost 33 percent were retired, 14 percent were unemployed and less than 1 percent did not know how to define their employment status.

Of those employed, more than two thirds work full-time, a little more than one in four work part-time, 3.5 percent work on a seasonal basis, and none working in a job sharing arrangement. More than six in 10 work in Washington County with this most likely occurring among those youngest (i.e., those aged between 18-29 years old) or the oldest (i.e., at least 65 years old compared to those between ages 30-44 and 45-64).

For those working outside of Washington County, six follow-up questions were asked of them. The results are summarized below.

Reasons For Commuting Outside of Washington County
(In Percentages)

	Percent Saying Yes	Stat. Sig. Differences
Job pays more in salary than respondent could earn in a job in Washington County	59.6%	
Job provides better benefits package than respondent could earn in a job in Washington County.	41.6%	
Respondent likes job and not interested in change.	61.8%	E
Other household members prefer to live in Washington County.	67.4%	
Respondent enjoys living in Washington so commuting is worth it.	88.8%	
Respondent lives in Washington County because of quality of schools	53.9%	

¹ Notes for symbols: E = Respondent's educational level.

The most likely reason why respondents work outside of Washington County is because they enjoy living in Washington County. Similarly, almost two-thirds have other household members who prefer to live in Washington County. The next likely factor relates to the respondent liking his or her job and not interested in change. There are significant differences in responses to this item based on educational level with those holding a graduate degree most likely to express this view.

Job Satisfaction

Respondents vary in the length of time working with their current employer. Significant differences are observed based on respondent's age, household type and household income. Specifically, those 18-29 years of age are more likely to have been employed for less than 1 year with those 45-64 years of age more likely to work over 20 years. Among household types, unmarried households with no children are most likely to work for less than one year and married households with no children were most likely work for over 20 years. The likelihood of

working with the respondent's current employer for 11-20 years is positively corresponded with income.

Years Employed with Current Employer¹		
	Frequency	Percent
0-1 years	25	14.3
2-5 years	14	8.0
6-10 years	41	23.4
11-20 years	64	36.6
More than 20 years	31	17.7
Total	175	100.0

¹ Statistically significant differences observed based on respondent's age, household type and educational level.

All employed respondents were asked to assess their level of satisfaction in the current work situation. Most are satisfied to some degree. Specifically, almost 49 percent are very satisfied, and another 33 percent are somewhat satisfied. By contrast, 13 percent state that they were somewhat dissatisfied and fewer than 3 percent report being very dissatisfied. Less than 3 percent state that they do not know how to assess their level of satisfaction.

For the 110 respondents expressing that they are not *very* satisfied with their current work situation, an open-ended question was asked to identify potential factors that might increase their job satisfaction. The results are shown in the following table. As seen in this table, the most likely factor relates to higher salary/pay.

Factors for Increasing Job Satisfaction

Factor	Percent
Higher salary/pay	41.8%
Better fringe benefits	16.4%
More job training/professional development	6.4%
More job security	11.8%
More opportunities for advancement	9.1%
Different job/occupation	6.4%
Public transit	1.8%
Other	40.0%
Don't know/ Not applicable	6.4%

Commuting Patterns

Approximately 89 percent primarily travel to work by car. Of this group, almost 93 percent drive alone. About 4 percent work at home (with 89 percent being self-employed). Approximately 4 percent walk to their jobs with almost none doing so by bicycle to their jobs. Approximately 7 percent have used public transportation in the past year. Of those who did not do so, 76 percent state impracticality as a major barrier.

The next two tables provide further insights into commuting patterns. As seen below, respondents vary in the distances traveled from home to work. About 40 percent work at a location that is between 1-10 miles from their home. Another 21 percent work between 11-20 miles. At the other extreme, almost 9 percent travel more than 50 miles to their office.

Miles Traveled to Work from Home¹

	Frequency	Percent
0-1 Miles	17	8.1
1-10 miles	84	39.8
11-20 miles	44	20.9
21-30 miles	26	12.3
31-50 miles	22	10.4
More than 50 miles	18	8.5
Total	211	100.0

¹ No statistically significant differences observed among the subgroups.

The following table summarizes commuting times. Like the results above, the findings here illustrate the diversity in the locations of employment. Those aged 18-29 years old are more likely to work just 1-5 minutes from their home whereas those aged 30-44 years old and 45-64 years old are more likely to work 6-10 minutes or 21-45 minutes. Women tend to work closer to home than men.

Time Traveled to Work from Home¹

	Frequency	Percent
0-1 minutes	6	2.8
1-5 minutes	41	18.9
6-10 minutes	36	16.6
11-20 minutes	50	23.0
21-30 minutes	41	18.9
31-45 minutes	22	10.1
More than 45 minutes	21	9.7
Total	217	100.0

¹ Statistically significant differences based on age and gender.

Professional Development

As seen below, at least 39 percent of respondents work in an organization where their employer offers any type of on-the-job skill training. Significant differences are observed based on education level. In general, respondents with greater education are more likely to have employers providing this training. While not reported in this table, more than four in five (81.2 percent) report having taken advanced of training offered by their employer within the past three years.

Employer-Provided On-the-Job Skill Training¹

	Frequency	Percent
No	117	27.0
Yes	85	19.6
Don't Know	16	3.7
Total	218	50.3

¹ Statistically significant differences based on education level.

The next table documents the results of a survey question asking respondents if they enrolled in any continuing education courses not offered by their employer in the preceding three years. As seen in this table, more than one third (35.3 percent) have taken such courses.

Enrollment in Continuing Education Courses Over Past Three Years¹

	Frequency	Percent
No	127	58.3
Yes	77	35.3
Don't know	14	6.4
Don't know	14	6.4
Total	218	100.0
Total	218	100.0

¹ Statistically significant differences

based on age and education level.

Among the 77 respondents indicating that they have taken a continuing education course, almost 64 percent state that they were satisfied with the course. Another 24.7 percent state that they were somewhat satisfied. Dissatisfaction levels are relatively low with 6.5 percent stating that they were somewhat dissatisfied and 1.3 percent reporting that they were very dissatisfied. Four percent did not know.

Internet Usage

The final section of the survey questionnaire concerns resident use of the Internet. As reported below, more than 69 percent have Internet access at their home. As the respondent's age increases, the likelihood of Internet access in this person's home decreases. Internet access is more likely to exist in married households with dependent children with over 90 percent of this group having this capability. As household income increases, so too does the likelihood of having Internet access.

Prevalence of Internet Access in Residents' Homes¹

	Frequency	Percent
No	132	30.5
Yes	300	69.3
Don't Know	1	0.2
Total	433	100.0

¹ Significant differences based on age, household type, household income and education level.

As seen below, more than six in ten households with Internet access rely on a dial-up telephone modem. Almost one fourth have broadband cable with just 8 percent using broadband satellite or broadband DSL.

Type of Internet Access

Type	Percent
Dial-up telephone modem	61.9%
Broadband cable	24.5%
Broadband satellite	1.0%
Broadband DSL	7.0%
Other	3.0%
Don't know	2.6%

Those with Internet access were probed to inquire about the types of websites visited. A large share of respondents has visited websites for their local and county governments, state government and Washington County businesses.

Access of Selected Washington County Websites
(In Percentages)

Website	Yes	No	Don't Know
Local and county government	46.0%	52.3%	1.7%
State government	49.7%	48.7%	1.7%
Washington County businesses	31.0%	67.0%	2.0%

More than six in 10 have made at least one on-line purchase within the past year (see below).

Online Purchases Over Past Year

<u>Response</u>	<u>Percent</u>
Yes	36.3%
No	62.3%
Don't know	1.3%

The diversity in the prevalence of online shopping for those who reported having done so in the past year is illustrated below.

Prevalence of Online Purchases Over Past Year

<u>Category</u>	<u>Percent</u>
Daily	2.7%
Weekly	7.0%
Monthly	28.3%
Bi-monthly	34.2%
Annually	22.5%
Less than annually	5.3%

Business Survey

One of the primary targets of Washington County's outreach efforts was the business community. Through April and into May 2003, Professors Matthew Birnbaum and Craig Maher, the County's Planning and Parks Department staff and Economic Development Survey Technical Advisory Committee (EDSTAC) developed the survey instrument. Using a database obtained from the Washington County Planning and Parks Department, 4,724 businesses were identified and to each a survey was mailed. The use of mail surveys to elicit feedback from all business leaders in the County on the various topics of interest has both strengths and weaknesses. One of the strengths is that since a survey is mailed to each of the 4,724 identified businesses, it provides the greatest opportunity for input. The key drawback is that the responses are not based on a random sample, which presents greater potential for response rate bias and, therefore, prohibits us from making inferences about the population with a certain degree of confidence.

Unfortunately, even with a significant outreach effort, including articles in local papers and presentations by Brenda Hicks-Sorensen to local associations, 259 businesses returned completed surveys for a 5.5% response rate. Due to the low response rate, statistical inferences are not possible; that is, it is not possible to say with any degree of statistical certainty that the sample of responses are reflective of all business leaders in Washington County.

While the response rate is not ideal, we also believe that the County should not lose sight of the fact that we have important information from 259 business owners/managers in Washington County. The opinions of these individuals cannot be ignored simply because of a relatively low response rate.

The business survey responses will be divided into 6 sections which are consistent with the way that the survey was divided: characteristics of the firm; business planning; workforce-related issues; business climate; industrial clustering and; economic development issues.

Business Characteristics

The following table represents responses to the question that asked business owners/managers to identify their type of business. Retail trade (20%) and manufacturing (14%) were the most frequently identified businesses. In general, the survey findings are consistent with 2000 US Census data suggesting that the responses are not biased by type of industry.

North American Industrial Classifications		
	Frequency	Percent
Agriculture, Forestry, Fishing, and Hunting	5	1.9
Mining	2	.8
Utilities	2	.8
Manufacturing	35	13.5
Administrative	7	2.7
Wholesale Trade	7	2.7
Retail Trade	51	19.7
Arts, Entertainment, and Recreation	7	2.7
Accommodation and Food Services	6	2.3
Public Administration	4	1.5
Finance and Insurance	12	4.6
Real Estate and Rental and Leasing	7	2.7
Professional, Scientific and Technical Services	25	9.7
Professional, Scientific and Technical Services	25	9.7
Management of Companies and Enterprises	4	1.5
Management of Companies and Enterprises	4	1.5
Educational Services	2	.8
Educational Services	2	.8
Health Care and Social Assistance	19	7.3
Health Care and Social Assistance	19	7.3
Transportation	11	4.2
Transportation	11	4.2
Warehousing	1	.4

Information	2	.8
Other	45	17.4
DK-NA	5	1.9
Total	259	100.0

Business Location

The majority of businesses are located in West Bend (35%), Hartford (13%) and Germantown (12%). Compared to the 2001 survey of businesses, the distribution of responses by location is quite consistent with each community being within +/- 2 percentage points. Such findings further validate the representativeness of the survey responses.

Business Location		
	Frequency	Percent
Newburg	1	.4
West Bend	90	34.7
Trenton	4	1.5
Hartford	34	13.1
Richfield	15	5.8
Germantown	32	12.4
Slinger	18	6.9
Polk	8	3.1
Farmington	3	1.2
Barton	7	2.7
Kewaskum	14	5.4
Wayne	2	.8
Jackson	14	5.4
Hubertus	3	1.2
Allenton	1	.4
Addison	5	1.9
Erin	2	.8
Erin	2	.8
DK-NA	5	1.9
DK-NA	5	1.9
Multiple	1	.4
Total	259	100.0

Business Tenure

Many businesses in Washington County have a long history; in fact 12% have been operating in the county for more than 50 years. More than half have been operating in the county for ten years or more. Conversely, the county has attracted 13% of the responding businesses within the past three years.

Business Tenure in Washington County

	Frequency	Percent
Less than 1 year	8	3.1
1-3 years	26	10.0
3-5 years	21	8.1
5-10 years	48	18.5
10-20 years	53	20.5
20-50 years	66	25.5
More than 50 yrs.	31	12.0
DK-NA	6	2.3
Total	259	100.0

Business Location

While the majority of businesses are located in business districts or parks, or commercial corridors, nearly a third of responding businesses are located in rural townships. When asked to identify the primary reason for the businesses' current location, proximity to highways was identified by 71% of the respondents.

Business Location

	Frequency	Percent
Central business district	50	19.3
Central business district	50	19.3
Industrial or Business Park	50	19.3
Industrial or Business Park	50	19.3
Commercial corridor	46	17.8
Commercial corridor	46	17.8
Rural township	83	32.0

Other	27	10.4
DK-NA	3	1.2
Total	259	100.0

Business Type

More than three-fourths (77%) of responding business leaders identified their business as a single unit firm; other responses include the headquarters of a multi-unit firm (9%) and the branch plant or office of a multi-unit firm (9%).

For those firms identified as a branch plant or office, the firm's headquarters was most often located within the Milwaukee Metro area.

Gross Sales

The survey asked business leaders to identify their firm's gross sales in the past calendar year. The results are listed below; half of the firms had gross sales of \$1 million or less. More than a quarter of firms reported sales between \$1 million and \$5 million in the past calendar year.

A very encouraging sign for businesses in Washington County is that nearly half (46%) of the responding businesses reported that the firm's gross sales increased in the past two years; another 21% reported stable sales (no increase or decrease) and the remaining 26% reported decreasing sales.

Gross Sales		
	Frequency	Percent
Less than \$500,000	103	39.8
\$500,000 to less than \$1 million	32	12.4
\$1 mill. to less than \$5 mill.	69	26.6
\$5 mill. to less than \$10 mill.	10	3.9
\$10 mill. to less than \$25 mill.	6	2.3
\$25 million or more	14	5.4
DK-NA	25	9.7
DK-NA	25	9.7
Total	259	100.0
Total	259	100.0

Workforce

Another descriptive measure of firms in Washington County is employment. Over half of the business leaders who completed the survey said that they have less than 10 employees, with 34% employing less than five (see below).

Employees typically (70%) work on a full time basis. Less than a quarter (21%) is employed part-time, 5.5% work $\frac{3}{4}$ time, 3% are seasonal and less than one percent job-share.

Number of Employees		
	Frequency	Percent
1-4 employees	88	34.0
5-9 employees	48	18.5
10-19 employees	54	20.8
20-49 employees	30	11.6
50-99 employees	21	8.1
100-249 employees	5	1.9
250-499 employees	3	1.2
500-999 employees	3	1.2
1000 or more employed	2	.8
DK-NA	5	1.9
Total	259	100.0

Workforce Satisfaction

In general, business owners/managers are satisfied with their workforce; 86% were either satisfied or very satisfied with their workforce.

Workforce satisfaction levels are consistent with 2001 survey response levels where 32% (37% in 2003) of business leaders were very satisfied and 54% (49% in 2003) were satisfied.

Satisfaction with Workforce Quality		
	Frequency	Percent
Very satisfied	96	37.1
Satisfied	128	49.4
Dissatisfied	25	9.7
Very dissatisfied	2	.8
DK-NA	8	3.1
Total	259	100.0

Employee Retention and Attraction

Retention and attraction of a skilled workforce is of much lower priority to business leaders in 2003 when compared to 2001 survey results. In 2003, 61% of business leaders did not have trouble with recruitment and 78% had no problem employee retention. For similar questions asked in 2001, 63% of business leaders said that they had difficulty with employee recruitment and 35% had difficulty with employee retention.

Business leaders were asked how Washington County government could help them address their employee recruitment/retention problems. Given the generally low problems with employee recruitment/retention, it should not be surprising that the majority responded that no help was necessary (69%). A sizable portion (20%) identified education/training needs while another 10% recommended assistance with housing affordability. In 2001, a similar question was asked of business leaders, the responses were: no assistance needed, 53%; education/training, 16.5%; transportation for employees, 8.5%; and housing availability, 6.7%.

Business Planning

A series of questions were asked of business owners/mangers to gauge the business climate in Washington County. The first question in this series asked respondents to evaluate the County's business climate. While more than half of the responding business leaders rated the County's business climate as either excellent or good, there may be reason for some concern. Specifically, only 7% rated Washington County's business climate as excellent, down 10 percentage points from a survey of County business leaders just two years ago. Similarly, while 50% of the responding business leaders rated the County's business climate as good, that is down 20 percentage points from the 2001 survey of businesses.

Washington County Business Climate

	Frequency	Percent
Excellent	17	6.6
Good	127	49.0
Fair	92	35.5
Poor	20	7.7
DK-NA	3	1.2
Total	259	100.0

Issues Confronting Businesses

Business leaders were asked to list the top three issues currently confronting their business. The most frequently cited issues were insurance-related (primarily costs), employees (largely behavior, recruitment and training) and general competition. In addition, taxes rated high as an issue confronting Washington County Businesses.

Compared to the 2001 survey which asked a similar question, labor recruitment and retention were much more important to employers 2001 as compared to 2003. For example, in 2001, a general labor shortage was cited by 24% of respondents as the #1 issue confronting businesses; in the 2003 survey, less than half (11%) of the respondents even mentioned employee-related issues.

Top Issues Washington County Confronting Businesses

	Issues #1		Issue #2		Issue #3	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
Energy-related issues	2	0.8	6	2.3	7	2.7
Economy	19	7.3	18	6.9	13	5.0
Sales (general)	15	5.8	3	1.2	1	0.4
Costs (general)	9	3.5	7	2.7	9	3.5
IT/Telecomm. Issues	3	1.2	3	1.2	2	0.8
Competition (general)	29	11.2	20	7.7	11	4.2
Employee-related issues	29	11.2	21	8.1	20	7.7
Taxes (general)	25	9.7	25	9.7	14	5.4
Government regulations	12	4.6	13	5.0	10	3.9
Insurance-related issues	35	13.5	27	10.4	18	6.9
Local government issues(non-tax related)	8	3.1	4	1.5	6	2.3
Business expansion	4	1.5	2	0.8	2	0.8
Others	34	13.1	75	29.0	97	37.5
Sub-Total	224	86.5	224	86.5	210	81.1
Don't Know/No Answer	35	13.5	35	13.5	49	18.9
Total	259	100.0	259	100.0	259	100.0

Short-Term Business Forecast

In an effort to gauge the County's short-term business climate, we asked business leaders to assess whether they believe the following aspects of their business will increase, decrease or stay the same within the next three years (see below). For three of the seven categories, business leaders are expecting increases (number of customers, sale of products and technology used in production).

The greatest promise for growth appears to be in the number of customers served, sale of products and technology used for production. Short-term (within the next 3 years) growth prospects look the weakest for the number of product lines, mix of goods and services and size of workforce.

Short-Term Business Forecast (In Percentages)

	Increase	Decrease	Stay the Same
Number of customers	63%	12%	22%
Scale of operations	41	10	46
Size of workforce	33	11	52
Sale of products	56	9	23
Number of product lines	29	7	50
Mix of goods and services	30	5	53
Technology used for production	54	1	34

Factors Influencing Development Plans

The following results are based on a question that asked respondents to identify the factors that most negatively impact their organization's development plans. Factors of greatest impact include the economy/market conditions in general (57%), employee benefits (48%), energy costs (41%) and labor quality (32%). Competition, both from the Greater Milwaukee region (34%) and within Washington County (31%) were also important factors affecting business development plans.

Of least concern to organizational development plans were: transportation (4%); material shortages (4%) and antiquated machinery (5%).

Factors Most Affecting Business Development Plans (In Percentages)

31%	Competition within Washington County	4%	Problems with transporting goods and/or services
34	Competition outside of Washington County but within the Greater Milwaukee region	4	Problems for transportation for commuting employees
17	Competition outside of Wisconsin but within the U.S.	11	Interest rates
18	Competition from outside of the U.S.	57	Current market condition/ general state of economy
21	Domestic regulatory constraints	21	Labor supply
41	Energy costs	32	Labor quality
4	Material shortages	27	Employee wages
5	Antiquated machinery	48	Employee benefits
10	Insufficient space	9	Adjacent land uses
9	Other: [healthcare and insurance (n=6), taxes (n=4)]	9	Inadequate broadband telecommunications

Business Closure and/or Relocation

When representatives of firms were asked if they were considering moving, closing or selling their establishments, most (80%) said no to all three questions. However, 8% said that they are considering moving (most of who were considering moving within the same community), 5% were considering closing and 10% were contemplating selling.

When business leaders were asked why they were considering moving, closing or selling the most frequently cited responses were changing market conditions (n=18); high local taxes (n=16); high state taxes (n=15) and; healthcare costs (n=13).

Research and Development

Expenditures for research and development provide an indication of a firm's commitment to innovation and potential for market development. Most businesses (78%) in Washington County spend less than five percent of their company's annual budget on research development. In fact, 39% spend nothing on research and development.

When asked how expenditures on research and development changed over the past two years, the responses were: spending increased (14%); it decreased (7%); no change (68%).

Percent of Annual Budget For Research and Development		
	Frequency	Percent
None	102	39.4
Less than 5%	101	39.0
5-10%	40	15.4
10-20%	3	1.2
More than 20%	7	2.7
More than 20%	7	2.7
DK-NA	6	2.3
DK-NA	6	2.3
Total	259	100.0

Business Climate

The following table represents answers to the question: “Please rate your level of satisfaction with each in Washington County as they affect your business.” In general, business leaders are either satisfied or unable to evaluate each of the 35 factors. Business leaders are most satisfied with local government services; eighty-eight percent are either very or somewhat satisfied with police protection and 86 percent are satisfied with fire protection. Other factors with which business leaders are greatly pleased include energy availability (75% very or somewhat satisfied) telephone services (73%).

Responding business leaders are least satisfied with the amount of local taxes paid relative to services received (58 percent are either very or somewhat satisfied) and public utility costs (47 percent unsatisfied).

It is also important to note that a sizable percentage of business leaders responded “Don’t Know” to a number of the factors. More than one-third of respondents were unable to evaluate 18 of the business-related factors. In fact, more than half of the respondents did not know how satisfied they were with: 1) the availability of technical assistance on economic development from county and local government; 2) the availability of start-up capital; 3) conference facilities; 4) countywide public transportation; and 5) air service.

Satisfaction With Businesses-Related Factors
(In Percentages)

	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
Distinct Private Sector Factors					
Availability of start-up capital	8%	10%	14%	14%	54%
Availability of additional capital	9	10	19	20	43
Conference facilities	4	12	21	13	53
Hotel facilities	4	9	26	20	41
Telecommunications					
Telephone services	9	17	40	23	11
Data telecommunication services	7	15	31	15	32
Broadband telecommunication services	9	14	24	12	42
Energy					
Energy availability	2	8	43	32	14
Public utility costs	17	30	31	10	12
Transportation-related					
Transportation network for moving goods	2	5	27	26	39
Transportation network for commuting employees	4	10	24	17	46
Local public transportation	9	15	21	7	49
Countywide public transportation	6	17	19	7	50
Air service	6	9	19	9	58
Governance					
Relationship with local government (city, town, village)	15	14	40	19	12
Relationship with county government	12	11	38	18	21
Cooperation between local and county governments	14	14	36	10	28
Amount of local taxes relative to services received	24	34	24	6	13

Table Continued:

Satisfaction with Business-Related Factors
(In Percentages)

Planning and Economic Development					
	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
Availability of technical assistance on economic development from county government	9	14	16	2	59
Availability of technical assistance on economic development from local government	10	15	15	2	57
Land use planning processes	13	24	21	3	40
Environmental regulations	13	22	24	3	38
Entrepreneurial development	13	18	24	3	42
Directly Provided Local Government Services					
Sewer and water	7	8	36	26	23
Fire protection	2	2	36	50	11
Police protection	3	3	42	46	7
Education/Workforce Training					
K-12 Education	6	8	34	28	25
Moraine Park Technical College	4	6	30	27	34
UW-Washington County	2	3	31	29	36
Social Support					
Housing availability for employees	2	10	42	16	29
Housing affordability for employees	5	20	34	11	29
Childcare availability for employees	4	15	32	9	41
Cultural resources	4	13	37	15	31
Recreational opportunities	3	7	41	29	21
Medical care and hospitals	5	15	38	24	17

Industrial Clustering

In an effort to gauge the competitive advantage of Washington County businesses, owners/managers were asked: 1) what percentage of products and/or services are sold in various geographical regions and; 2) the percentage of products and/or services bought in various regions.

More than half of the products/services sold by responding businesses are to customers within Washington County. The remaining percentage of goods are sold: outside of Washington County, but within the Milwaukee Metro area (21%); outside of the Milwaukee Metro area, but within Wisconsin (11%); outside Wisconsin, but within the U.S. (13%) and; slightly more than 1% of products/services are sold outside of the U.S.

Slightly more than one-third of the products/services bought for operating purposes come from Washington County; another 27% of the goods/services used by Washington County businesses come from the Milwaukee Metro area. The remaining share of products/services comes from: outside the Milwaukee Metro area, but within Wisconsin (15%); outside Wisconsin, but within the U.S. (22%) and; from outside the U.S. (2%).

Percentage of Products/Services Sold by Region

53.9%	Within Washington County
20.6%	Outside Washington County but within the Greater Milwaukee region
11.2%	Outside Washington County and the Greater Milwaukee region but within WI
13.1%	Outside of Wisconsin but within the United States
1.2%	Outside of the United States

Percentage of Products or Services Bought by Region

34.0%	Within Washington County
27.3%	Outside Washington County but within the Greater Milwaukee region
15.3%	Outside Washington County and the Greater Milwaukee region but within WI
21.6%	Outside of Wisconsin but within the United States
1.8%	Outside of the United States

Factors Affecting Business Location

In general, quality of life, proximity to customers and major highways, and property taxes were the factors most frequently identified as very important to the current location of Washington County businesses. The least important factors identified are the proximity to customers, interaction with other firms in same industry, the presence of market-leading firms and interaction with firms in related industries.

Importance of Factors Affecting the Current Location of Washington County Businesses (In Percentages)

	Very unimportant	Somewhat unimportant	Somewhat important	Very important	DK/NA
Value of land	7%	10%	32%	33%	19%
Property taxes	6	3	24	53	15
Proximity to major highways	4	9	27	49	12
Proximity to suppliers	11	29	30	15	16
Proximity to competitors	20	25	26	14	15
Proximity to services	5	14	39	29	14
Proximity to customers	7	11	21	53	9
Availability of skilled labor	5	7	33	39	16
Quality of life	4	4	26	56	10
Interaction with other firms in same industry	18	25	29	14	15
Interaction with firms in related industries	14	26	29	15	16
Presence of market-leading firms	19	28	20	12	22
Energy costs	6	8	29	44	13
Telecommunications infrastructure	6	11	35	32	15
Information infrastructure	7	15	32	29	18
Entrepreneurial climate	7	17	31	27	18
Training/education infrastructure	7	13	36	27	16

Most Important Factors

The preceding question was followed up by asking business leaders to identify the three most important factors that influenced their firm's current location. The most frequent responses were: proximity to customers (43%); proximity to major highways (32%); property taxes (30%) and quality of life (29%).

Most Important Factors Affecting Business Location

	Frequency	Pct of Responses	Pct of Cases
Value of land	48	7.0%	18.8%
Property Taxes	76	11.1	29.7
Proximity to major highways	81	11.8	31.6
Proximity to suppliers	15	2.2	5.9
Proximity to competitors	21	3.1	8.2
Proximity to services	10	1.5	3.9
Proximity to customers	109	15.9	42.6
Availability of skilled labor	54	7.9	21.1
Quality of life	75	11.0	29.3
Interaction with other firms in same industry	9	1.3	3.5
Interaction with firms in related industry	5	0.7	2.0
Presence of market-leading firms	7	1.0	2.7
Energy costs	46	6.7	18.0
Telecommunications infrastructure	24	3.5	9.4
Information infrastructure	11	1.6	4.3
Entrepreneurial climate	18	2.6	7.0
Training/education infrastructure	16	2.3	6.3
DK-NA	59	8.6	23.0
		-----	-----
Total responses	684	100.0	267.2

Economic Development Programs

Washington County officials were also interested in the extent to which business leaders were aware of and interested in a number of programs and services offered for assisting economic development by the local, state and federal government. Respondents were asked to rate whether they were aware of each and then, for those they were aware, to assess how interested they would be to have them expanded/offered in this county.

Awareness and Interest in Economic Development Programs (In Percentages)

	<i>Are you aware of this program/service?</i>		<i>What is your level of interest in each program/service?</i>	
	Unaware	Aware	Uninterested	Interested
Financial Tools				
Local revolving loan fund programs for manufacturing, service, and related distribution companies	68%	20%	56%	37%
Local revolving loan fund program for retail firms	71	17	64	27
State financial programs	58	31	53	34
Federal financial programs	56	33	51	36
Private investment groups	61	29	64	27
Other Tools				
Technology zones	67	21	64	30
Business incubators	54	34	66	24
Brownfield redevelopment	65	22	72	21
Fast Trac Entrepreneurial Training	66	21	55	36
Service Corp of Retired Executives (SCORE)	45	43	59	32
Business Retention and Expansion (BRE) Visitation Program	73	14	65	32
HOME Consortium	71	15	58	30
Washington County Commuter Express (WCCE)	33	56	62	26
Industry Clusters/ Washington County Cluster Council Initiative	59	29	54	41
Training programs	50	38	40	53

Education Leaders

Education leaders in Washington County's secondary and post-secondary institutions were asked their attitudes and opinions about the importance of and satisfaction with educational initiatives directed at workforce training of their students and local economic development in general. Many of these questions focused on the quality of the partnerships with those from the private sector. The survey was distributed in the summer, and summary results from 31 respondents are presented below. This represents a total response rate of 31% percent from a total target population of 99 individuals who received a copy of the survey by mail.

Based on conversations with the County's Planning and Parks Department staff and Economic Development Survey Technical Advisory Committee (EDSTAC), it was decided that statistical analysis would be limited to interpretation of frequencies to closed-ended questions given the relatively small sample size. Open-ended questions were interpreted using a content analysis.

The following summarizes the results to the series of 20 survey questions. It begins with a profile of the 31 respondents. It proceeds to examining respondent views of the perceived mission of their institution and the relative importance of job training for their students within this mission. It next focuses on issues related to the partnering with the business sector in offering job training to selected students. It then turns its attention to partnering with the private sector as well as other actors in promoting local economic development within Washington County. It finally reports findings on respondent perceptions of the role of Washington County government in promoting economic development activities.

Background Information

Only one of the self-identified 30 respondents was an elected official. The majority (60 percent) worked in an administrative capacity, be it superintendent, college dean, principal or other form of administrator. Almost all others classified themselves as a social worker, counselor or educator.

Respondent Background (n=30)

Position	Frequency	Percent
Superintendent	3	10%
College Dean	3	10%
Principal	7	23%
Administrator	5	17%
Social Worker/ Counselor	7	23%
Teacher/ faculty	3	10%
Other	1	3%
School Board Official	1	3%

Less than one fourth of respondents represented a post-secondary institution. More than one in three worked in a high school. Of the two respondents reporting other, both of these involved schools with middle school and elementary students.

Respondent's Educational Institution (n=31)

Educational Institution	Frequency	Percent
Post-secondary institution	7	23%
Entire K-12 school district	4	13%
High school	11	35%
Middle School	7	23%
Other	2	6%

The diversity in the tenure of employment for the 31 respondents is reported below. About four in 10 worked in their current positions for either less than five years or for at least 10 years.

Years in Current Position		
Years in Current Position	Frequency	Percent
1-4 Years	12	39%
5-9 Years	6	19%
10 or More Years	13	42%

Job Training's Importance in the Educational Institutions

The first survey question in this study was open-ended with respondents asked to describe their educational institution's primary mission. Thirty of the 31 respondents answered the question. Responses were sorted into three categories: (1) *explicit* referencing to the role of job training; (2) *implicit* referencing to the role of job training; and (3) no referencing to the role of job training.

Eight responses made an explicit reference to the role of job training in describing their institution's primary mission. Examples include statements like "education and training for and continuing through life" as well as "... assist individuals in gaining the training and education they need to be competitive employees."

Nine respondents implicitly referred to the role of job training in describing their institution's primary mission. Here are two examples of such statements: (1) "be well prepared

for the next step beyond high school...”; and (2) “educate young adults to be productive members of society.”

Eleven respondents had no statements that addressed the value of job training for their students. Some of these statements spoke narrowly to the role of their institution in developing the intellectual capacities of their students. An example of such a statement comes from this respondent who described the mission of its institution as providing “quality education to every student.” Others were more general in describing their mission but with still no reference to job development. One example comes from this respondent who remarked that the mission of its education institution is to “educate all students ... which reflects human dignity and respect.”

Following up on this open-ended question, a closed-ended question was asked of respondents in which they were asked to assess the relative importance of four objectives in meeting its mission.

Relative Importance of Various Objectives in Institution’s Mission
(In Percentages)

	Very Important	Somewhat Important	Somewhat Unimportant	Very Unimportant	DK/NA
Training students to be productive In the workforce	77.4%	12.9%	3.2%	6.5%	0.0%
Preparing students to pursue further education at a post-secondary institution	54.8	38.7	0.0	6.5	0.0
Developing students to be conscientious citizens	87.1	6.5	0.0	6.5	0.0
Promoting economic development in Washington County	6.5	74.2	12.9	0.0	6.5

The results suggest that education leaders place the greatest value on developing students to be conscientious citizens. More than three in four respondents believe that training students to be productive in the workforce is very important with less than 10 percent believing it to be unimportant to some degree. A majority believes that preparing students to pursue further education at a post-secondary institution is very important with less than 7 percent indicating otherwise. Perhaps unsurprising, respondents placed the least value on the objective of promoting economic development in Washington County. However, while less than 10 percent of the respondents rated it very important, 74 percent of educators rated the promotion of economic development as somewhat important.

Respondents were subsequently asked two sets of questions to further gauge their perceptions about job training. Almost 94 percent stated that their institution was preparing its students for the workforce either very or somewhat adequately with only about 3 percent stating that it was doing so inadequately.

The following table reports on the final survey question in this section that probed respondent views about their sense of the importance of various employee attributes that are considered by their school in preparing its students for preparing to participate in the workforce. As shown in this table, all respondents reported that communication abilities are an important attribute. Between 93 and 97 percent stated likewise about the importance of teamwork skills, fostering of a strong work ethic, leadership abilities and computer competency. The relatively least important attribute involved knowledge of industry-specific industries with only approximately 58 percent deeming this attribute as important.

Importance of Various Employee Attributes Considered by Schools
(In Percentages)

<u>Employee Attribute</u>	<u>Important?</u>
Communication abilities	100.0% Yes
Teamwork skills	96.8 Yes
Fostering of a strong work ethic	96.8 Yes
Competency with computers	96.8 Yes
Leadership abilities	93.5 Yes
Critical thinking abilities	80.6 Yes
Knowledge of industry-specific technologies	58.1 Yes

School-Business Partnerships

Five survey questions were posed to respondents in examining the nature of partnerships between businesses and schools in engaging in job training activities for students. Overall, approximately two thirds of respondents reported that their institution does work directly with local businesses to help train any of its students. Of this group that does work with local businesses, none claimed that these firms are very knowledgeable about educational and training programs available in schools and counties in Washington County. About 45 percent stated the businesses are somewhat knowledgeable. Another 36 percent claimed that businesses are somewhat unknowledgeable and almost 20 percent reported that they did not know.

In following up on this identified gap, respondents were inquired to ascertain two changes that could be done to better increase their knowledge of available education and training programs in schools and colleges in this county. The results from the content analysis to this open-ended question follow. The responses were categorized into three separate themes – communication, collaboration and labor demand.

Respondents' Two Suggested Changes to Better Increase Business Knowledge of County Education and Training Programs (40 responses)

Theme	Frequency	Example 1	Example 2	Example 3
Communication	20 (50%)	School visits	Newsletter	Use of school website
Collaboration	16 (40%)	Business involvement in school curriculums	Better business participation in career fairs	Use of local service organizations and chambers of commerce in fostering school-business partnerships
Labor Demand	4 (10%)	Internships	Mentors	Job shadowing

The twenty responses categorized as communication related to initiatives for improving contact between the schools and businesses. Some of these related to informal networking, such as face-to-face meetings and school visits. Others related to the use of the media, including newsletters, public service announcements and websites. Still others related to organized events, such as school visits by businesses and small group information sharing sessions.

The sixteen responses categorized under collaboration, involved suggestions for improving the school-business partnerships. Some of these related to initiatives for bringing business representatives into the schools for joint activities, such as involvement in school curriculum, private sector participation in in-service days with educators, and collaboration of teachers and business leaders in the teaching of certain classes.

The final five responses related to initiatives for increasing demand of student labor. As seen in the table, these pertained to internships, mentors and job shadowing.

More than seven in ten respondents reported that they were somewhat satisfied with their educational institution's efforts to work with local businesses. When asked what two changes could be done to better their institution's involvement with local businesses to meet student

needs, 32 responses were provided. The next table summarizes the content analysis to this open-ended question.

Changes to Better Institution’s Involvement with Local Businesses (32 responses)

Theme	Frequency	Example 1	Example 2
Partnerships	14 (44%)		
Incentives	8 (25%)	More money to work with businesses	Quicker responses to business input
Education/ Marketing	6 (19%)	“Making more schools aware of business needs”	Public recognition
Labor Market Demand	4 (13%)	Better identification of training opportunities	More and better internships

Responses were broken down under the themes of partnerships, incentives, education/marketing, and labor market demand. Partnerships had the most responses. While not shown in the table, this theme was subdivided into three sub-categories. The first related to responses involving suggestions for partnerships on joint activities such as those for more face-to-face meetings between the two parties and better participation by both groups on various committees. The second involved role reversals, such as educators doing internships in area firms and local business leaders teaching particular classes. The third related to improving lines of communication such as changes in resources to better establish and maintain contacts as well as providing businesses with opportunities for assessing strengths and weaknesses of school training programs.

The second theme related to incentives. Some of these were for more money and/or time to pursue initiatives with businesses. Others related to systematic changes in more promptly responding to business input in school decisions. Still others directed attention at finding

opportunities for businesses to reallocate their resources to place a higher priority on working with area schools.

The third theme concerned activities related to education and marketing. Some of these comments pertained to better needs assessments of local businesses. Others involved better marketing in promoting joint school-business events as well as in public recognition efforts.

Economic Development Partnerships

A series of questions were included in the survey in probing respondent opinions about the quality of partnerships with other educational institutions, businesses and government leaders. Questions were asked about the level of frequency of interactions as well as the satisfaction with this level of activity. Results are summarized below.

Frequency and Satisfaction with Engagement With Other Parties on Economic Development Issues

Partnership	Frequency Level	Satisfaction with Frequency Level
Schools-Schools	16.2% somewhat or very frequently	46% somewhat or very satisfied
Schools-Businesses	74% somewhat or very frequently	37% somewhat or very satisfied
Schools-Government	13% somewhat or very frequently	7.7% somewhat or very satisfied

¹ This was the questionnaire item included in this table with a neutral response for respondents to state that they were neither satisfied nor dissatisfied. Half of the respondents opted for this choice in answering this questionnaire item.

The findings from this table show that school officials are much more likely to be interacting with business leaders than with their cohorts in other schools or government officials on matters related to economic development. These school officials are less satisfied with the frequency level of involvement with government officials than with businesses and other

schools. For all three groups however, only a minority of respondents is satisfied with the frequency level of engagement.

Washington County’s Role in Promoting Economic Development and Workforce Training

About 60 percent of respondents stated that they saw a need for their educational institution to promote economic development in Washington County. Only 21 percent indicated the opposite, with 18 percent stating that they either did not know or that the question was not applicable to them.

As seen in the following table, the majority did not know whether the Washington County Economic Development Division currently helps their educational institution meet the needs of local businesses, or that this was applicable to their circumstance. It is assumed that these respondents do not know about this governmental unit at the time they completed the survey.

Washington County Economic Development Division’s Help to Education Institutions in Meeting Local Business Needs

Response	Frequency	Percent
Yes	12	38.7%
No	2	6.5%
Don’t Know/Not Applicable	17	54.8%

Respondents were asked a follow-up question that asked them to assess their satisfaction level with Washington County government’s efforts to help them meet the needs of local businesses. Again, the majority (71 percent) responded that they did not know or that the

question was not applicable. Another 29 percent reported that they were either very or somewhat dissatisfied. None reported being very or somewhat satisfied.

Respondents were next probed to ascertain their valuation of various activities involving Washington County’s Economic Development Division in assisting the partnering between local businesses and educational institutions. The respondents’ views of their level of agreement or disagreement with specific activities related to this objective are reported below. As seen in the table, the overwhelming share of respondents agree with this county governmental unit pursuing economic development activities that (1) provide outlets for networking between local businesses and educational institutions, (2) offer technical guidance and advice on grant writing, and (3) provide a repository of information related to economic development for interested parties.

**Level of Agreement with Specific Washington County Economic Development Division
Activities for Better Business-Education Partnerships**

	Frequency:	
	Agree	Disagree
Providing outlets for networking between local businesses and educational institutions	30 (97%)	1 (3%)
Offering technical guidance and advice on grant writing.	27 (87%)	4 (13%)
Providing a repository of information related to economic development for interested parties	29 (94%)	2 (6%)

A survey question was included that asked respondents to assess their awareness of Washington County’s development of cluster councils for agricultural businesses and advanced

manufacturing. Less than 23 percent reported being aware of this initiative. A little over half (52 percent) were not aware, and 26 percent stated that they did not know.

The final question in this section of the survey questionnaire was open-ended in directing respondents to offer two recommendations that educational institutions can adopt to better help with economic development efforts within Washington County. A total of 27 responses were offered. The results of the content analysis in analyzing these responses are summarized below.

Recommendations for Educational Institutions to Adopt to Better Help with Economic Development Efforts in Washington County

Theme	Frequency	Example 1	Example 2
Policy/mission	4 (15%)	“Set expectation and model it in higher administration”	“Good schools enhance economic development”
Communication	7 (26%)	“Have more community resources to get the word out”	“Meet with our department”
Collaboration	4 (15%)	“Stronger partnership coordination between area schools and area businesses”	“Involve the school district and its leaders in these efforts”
Education	6 (22%)	“School presentations showing present opportunities”	“Allow staff time to learn about resources available”
Action	6 (22%)	“Apprenticeship hiring site”	“Summer programs”

As seen in this table, responses were grouped into five themes related to (1) policy/mission, (2) communication, (3) collaboration, (4) education and (5) action. The responses were relatively evenly disbursed among each theme. Responses grouped under policy/mission related to suggestions for strengthening the importance of pursuing economic development as an institutional goal. The theme for communication involved responses that suggested increasing the visibility of efforts involving economic development, be they specific to the Washington County government or more general in nature. The theme for collaboration

involved suggestions for more and better partnering of educational institutions with others involved in economic development. Responses categorized under education pertained to comments for increasing the knowledge base about what economic development entails. In addition to the two comments listed in the table, another suggestion involved a request for a survey of the needs of educators to better assist businesses in assisting the development of school curriculums. Finally, the theme of action referred to statements for specific organizational actions. These specifically involved job shadowing, an apprenticeship hiring site, releasing of employers to be more involved with economic development, work study programs, using business leaders as faculty, and hosting events on campuses.

Focus Groups of Students in Washington County Higher Education Institutions

This section of the report discusses findings from two focus groups conducted of students attending Moraine Park Technical College and University of Wisconsin-Washington County. The purpose of these focus groups was to better understand student perceptions regarding the relation of their selected field of study with career prospects in and outside of Washington County.

Methodology

Data for this study were produced through two focus groups conducted in early July of 2003 with students who were attending Moraine Park Technical College and the University of Wisconsin-Washington County. Both focus groups were conducted in-person using a modified nominal group process. Administrative liaisons from the two academic institutions selected respondents for the focus groups with the intent to have broad representation of the general student population at each educational institution.

A semi-structured instrument was used during the interviews. In asking each structured question, respondents were instructed to provide answers in writing on index cards. After a given amount of time had elapsed, a discussion ensued with respondents regarding their answers. Follow-up probes of individual participants were asked accordingly. Each focus group lasted approximately 90 minutes and was held at a location on the campus of each higher education institution. The primary author facilitated each focus group. He was assisted by the two co-authors to this section of the report. One of these individuals sat silently in a corner of the room, taking notes through observation. The other individual was a more active participant although he

also took notes on a flip pad. The notes on the flip pad comprised comments made by participants during the discussion. Participants consequently could observe what was being reported by their peers and also could modify any statement attributed to them. Appendix V provides a copy of the interview instrument used for both focus groups.

Following this process, the transcripts created for each focus group came from three separate sources of note taking: (1) the index cards themselves where respondents wrote down their initial responses; (2) notes taken privately by the silent observer; and (3) notes recorded on the flip chart by the participant-observer. All three authors reviewed the notes before analysis was conducted of them to confirm their reliability. Coding of the notes was done using a content analysis. From the content analysis, distinct themes were created from the codes.

Narratives of these themes are presented in the remainder of this report. The next section discusses the themes generated from the focus group of Moraine Park Technical College students. The subsequent section does likewise for the focus group of students from the University of Washington-County. The final section compares and contrasts findings from both focus groups.

Summary of Moraine Park Technical College (MPTC) Focus Group (July 1, 2003)

There were eight participants in this focus group with an even split of males and females. All but one lived in Washington County. All opted to begin study in this college based on personal initiative rather than by an external demand from an employer or other person. With one exception, all were over the age of 23.

A general theme of job unrest was projected from the group. It appeared as though most of the students were in the program to either secure their current position or in hopes of moving in a direction more suited to their professional interest. Everyone chose to pursue a degree of his or her own desire rather than through an employer mandate. The students were focused and driven toward graduation, possibly due to economic hardship many were facing (three of the eight participants were laid off while two others were working jobs outside of their chosen field).

Education was viewed in vocational terms as a way to further one's career while increasing job security and marketability to potential employers. The main reason for choosing MPTC related to its accessibility. Everyone noted that the instructors were available outside of the classroom. Some noted the location of the school as its main attraction while others noted the availability of night classes. All participants found the administration and faculty at MPTC to be both competent and extremely helpful. However, there were distinct differences of opinion regarding the quality of technical resources available to the students. Those in the manufacturing fields noted state-of-the art equipment and cited this as a reason for selecting this school and field for study. By contrast, those in the health field expressed dissatisfaction with antiquated equipment (especially for nursing). Paradoxically, it was those in the health fields that were most optimistic about their career prospects.

All but one student anticipates staying in Washington County immediately after graduation. In ten years, five of eight anticipate living in the county. The primary reason for wanting to leave centered on real estate. Reasons centered on quality of living with many participants believing affordable lot sizes are too small and at too high of a price, especially within the municipal boundaries of West Bend. A major reason for those wanting to stay involves their sense of already being settled in to the current surroundings and consequently not wanting to deal with the trouble of moving. For those seeking to leave, urban inconveniences (e.g., overcrowding) were noted as a primary reason for leaving.

Summary of University of Washington County (UWWC) Focus Group (July 8, 2003)

While mostly native to Washington County, the seven participants (five females and two males) in the UWWC focus group represented diverse backgrounds. The UWWC participants had markedly diverse areas of study, including pharmacy, nutrition, international relations, education, business administration, zoology, communications, political science, and sociology.

The UWWC participants also had diverse reasons for choosing their current fields of study. These reasons included advice from family members, institutional requirements for transfer to four-year UW institutions, academic interests obtained through work experiences, career changes after first retirement, and simple trial and error.

There were several common themes cited as reasons for having chosen UWWC for study. Several participants had taken time off after high school, were home schooled, or were returning to school after retiring. These students felt UWWC offered an excellent transition to higher education. Several also cited the close proximity to home and the less expensive tuition. All participants found the administration and faculty at UWWC to be both competent and extremely helpful.

Almost every participant in the UWWC focus group planned to transfer to a four-year UW institution where they could earn at least a bachelor's degree before completing their college studies. Most participants also planned to live in the Washington County area or elsewhere in southern Wisconsin after completing their studies. Impediments to these students staying in Washington County long term included the need for more diversity, a desire for a more urban lifestyle, and a lack of meaningful employment opportunities.

Participants felt that Washington County officials need to provide more opportunities for youth beginning prior to high school, bolster job opportunities by attracting quality employers, and better show youth the opportunities in the county and encourage them to stay here. Few were aware of significant opportunities created by formal partnerships their programs had with organizations in their intended line of work. Several students were industrious enough to create or discover their own opportunities.

Significant Comparisons between the Two Groups

While the participants from the MPTC focus group could be lumped into industrial categories of academic study (manufacturing and health care), those from the UWWC focus group were in more diverse field of study coinciding with a liberal arts education. While both groups were diverse in composition, those from MPTC tended on average to be older.

Perhaps the most striking common theme espoused by the UWWC focus group participants was the perceived immunity to the current economic crisis. Several felt their field would be completely unaffected by a declining economy while others felt that their remaining time in school would be sufficient to allow for economic recovery. This was in stark contrast to the MPTC participants who were drastically concerned about the economy and trying to protect or improve their employment status, particularly those in the manufacturing trades. In short, UWWC participants felt insulated from economic fluctuations while MPTC participants were striving to insulate themselves from them.

While one might expect to find common themes and trends between the students of these two institutions of higher education in Washington County, the results proved otherwise. With

the exception of the large majority choosing these schools for their close geographic proximity to their homes along with an interest in staying in the general area long after graduation, the students at the two institutions had little else in common. This may in part be related to the participants tending to be older on average at MPTC. Further study would be required to prove these observations statistically. However, from reviewing the transcripts to each focus group, the differences were striking.

Both academic institutions appear to be meeting unique consumer demands for education reflecting the different missions of the two schools. Based strictly on the information interpreted from these two focus groups, there is no indication of needless overlap between the two institutions. Rather, it appears that both institutions are targeting different niches. For both institutions, the students were generally satisfied with the quality of instruction offered and the support provided by school administrators and other staff.

Local Officials

Government officials in Washington County were asked for their attitudes and opinions about the importance of and satisfaction with the quality of life, business climate, residential and business development, and overall economic development in Washington County and the local communities they represent. The survey was distributed in September and October 2003, to 418 identified municipal and county elected/appointed officials. The initial survey was followed up with a reminder postcard approximately three weeks later. The following findings reflect the opinions of the 126 local government (municipal and county) who returned a completed survey, for a 30% response rate.

As described in the business leaders section, the use of mail surveys to elicit feedback on the various topics of interest to Washington County officials has both strengths and weaknesses. One of the strengths is that since a survey is mailed to every county and municipal official, it provides the greatest opportunity for input. The key drawback is that the responses are not based on a random sample of government officials, which presents greater potential for response rate bias and, therefore, prohibits us from making inferences about the population with a certain degree of confidence.

Based on conversations with the County's Planning and Parks Department staff and Economic Development Survey Technical Advisory Committee (EDSTAC), it was decided that comparisons were to be conducted to test for differences between:

1. elected and appointed officials, and
2. officials from towns versus cities and villages.

While the research team has obliged the County's staff and committee's request, it is important to reiterate that since the survey was not conducted using a random sampling methodology, the ability to talk in terms of statistically significant differences is not permissible.

Finally, given the difference in the survey design used in 2003, it is not possible to compare these results to the 2001 survey of local officials.

Background

Respondents were mostly elected officials (57.1%) and overwhelmingly represented local government (88.9%). The type of local government represented was split between towns (48.4%) and city/villages (42.1%). Additionally, most respondents were male (79.4%) and more than three-quarters of the respondents have lived in Washington County more than 20 years.

Respondent Background (N=126)

	Percent	Frequency
<u>Position</u>		
Elected	40.5%	51
Appointed	57.1	72
NA	2.4	3
<u>Type of Official</u>		
County Govt	7.1	9
Local Govt	88.9	112
NA	4.0	5
<u>Type of Local Gov't</u>		
City/Village	42.1	53
Town	48.4	61
NA	9.5	12
<u>Gender</u>		
Male	79.4	100
Female	17.5	22
NA	3.2	4
<u>Yrs in Washington County</u>		
< 5 yrs	4.8	6
5-10 yrs	9.5	12
11-20 yrs	8.7	11
20+ yrs	76.2	96
Don't Know	0.8	1

Quality of Life

Satisfaction

More than 90% of government officials stated they are very satisfied or somewhat satisfied with the overall quality of life in Washington County. Additionally, 68% stated they feel the future of Washington County looks bright.

Differences. City and village officials are more positive about the County's future (93%) than town officials (80%).

Quality of Life		
	Frequency	Percent
Very dissatisfied	2	1.6
Somewhat dissatisfied	5	4.0
Somewhat satisfied	50	39.7
Very satisfied	66	52.4
Total	123	97.6
DK/NA	3	2.4
	126	100.0

The County's Future Looks Bright^b

	Frequency	Percent
No	14	11.1
Yes	85	67.5
Total	99	78.6
DK/NA	27	21.4
DK/NA	27	21.4
	126	100.0
	126	100.0

^b Responses to this question were different when comparing town officials to city/village officials.

Factors Important to Quality of Life

When asked to rate the importance of items relating to the quality of life in Washington County, each of the 19 factors were rated as either very or somewhat important by a majority of respondents. Over 90% of government officials stated that rural character, neighbors/friendly people, land use/zoning regulations, quality housing, good roads, employment opportunities, and public safety are very or somewhat important. Neighbors/friendly people were ranked highest (96%) as important to the quality of life in Washington County.

The factors rated least important to the quality of life in Washington County were social services (42% responded as somewhat or very unimportant), public transportation (39%), cultural events (35%) and the presence of downtowns (30%).

Differences. Rural character was of greater importance to the County's quality of life for elected officials than appointed officials. Conversely, employment opportunities and public K-12 education are of greater importance to the quality of life in Washington County for appointed officials versus elected officials.

Perhaps not surprisingly, rural amenities (character and presence of farmland) are of greater importance to the quality of life for town officials when compared to city/village officials. City and village officials rate quality housing, good roads, access to shopping, public K-12 education and post-secondary education higher in importance to the County's quality of life than town officials.

Factors that are Important to the Quality of Life in Washington County
(In Percentages)

	Very Important	Somewhat Important	Somewhat Unimportant	Very Unimportant	Don't Know	Diff.
Rural character	59.2%	31.2%	5.6%	3.2%	0.8%	a b
Presence of farmland	56.8	29.6	6.4	6.4	0.8	b
Access to lakes	48.0	32.0	16.0	3.2	0.8	
Preservation of natural resources	64.8	24.8	6.4	3.2	0.8	
Recreational opportunities	43.2	40.8	12.0	4.0	0.0	
Neighbors/ friendly people	64.8	31.2	3.2	0.8	0.0	
Presence of downtowns	28.8	38.4	25.6	4.8	2.4	
Affordable housing	43.2	31.2	18.4	6.4	0.8	
Land use/ zoning regulations	64.5	28.2	4.8	2.4	0.0	
Quality housing	56.8	36.0	7.2	0.0	0.0	b
Good roads	60.0	35.2	4.8	0.0	0.0	b
Public transportation	19.2	40.0	25.6	13.6	1.6	
Employment opportunities	61.6	32.8	2.4	1.6	1.6	a
Cultural events	17.6	46.4	28.0	7.2	0.8	
Access to shopping	20.0	55.2	19.2	4.0	1.6	b
Public safety	66.4	26.4	6.4	0.8	0.0	
Social services	25.6	42.4	20.8	20.8	0.8	
Public K-12 education	58.4	28.0	8.8	2.4	2.4	a,b
Post-secondary education	29.6	48.0	16.8	4.8	0.8	b

^a Difference were identified when comparisons were conducted between elected and appointed officials.

^b Difference were identified when comparisons were conducted between towns and city/village officials.

Satisfaction With Quality of Life Issues

In addition to ranking the importance of items related to quality of life, government officials were also asked to give their level of satisfaction of these same items. The levels of satisfaction are somewhat lower than the importance given. For example, neighbors/friendly people and public safety are the only two factors with which more than 90% of government officials stated they are very or somewhat satisfied. However, like the importance rankings, more than half of government officials stated they are very or somewhat satisfied with all items related to quality of life in Washington County.

Differences. There were no noticeably different responses between elected/appointed officials or town versus city/village officials on questions of satisfaction with quality of life issues.

Levels of Satisfaction to Quality of Life Issues
(In Percentages)

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Don't Know
Rural character	32.8%	53.6%	9.6%	1.6%	2.4%
Presence of farmland	26.4	50.4	14.4	3.2	5.6
Access to lakes	28.8	52.8	6.4	5.6	6.4
Preservation of natural resources	26.4	61.6	4.8	3.2	4.0
Recreational opportunities	36.8	50.4	6.4	0.8	5.6
Neighbors/ friendly people	51.2	42.4	4.0	0.8	1.6
Presence of downtowns	23.2	56.0	12.8	1.6	6.4
Affordable housing	23.2	44.0	21.6	4.8	6.4
Land use/ zoning regulations	20.8	45.6	25.6	5.6	2.4
Quality housing	30.4	57.6	6.4	2.4	3.2
Good roads	37.1	48.4	8.9	3.2	2.4
Public transportation	32.8	36.8	16.8	6.4	7.2
Employment opportunities	11.2	48.0	27.2	7.2	6.4
Cultural events	28.0	52.0	12.8	1.6	5.6
Access to shopping	32.0	53.6	9.6	1.6	3.2
Public safety	49.6	44.8	2.4	0.8	2.4
Social services	35.2	40.8	7.2	3.2	13.6
Public K-12 education	46.4	32.8	7.2	4.8	8.8
Post-secondary education	40.8	38.4	8.8	2.4	9.6

Business Climate

Government officials were asked to rate the overall business climate in Washington County and in their local community. More than 65% stated the business climate in Washington County was excellent or good, and 49.1% stated the business climate was excellent or good in their local community. Approximately one-third of the government officials stated the business climate was fair in either Washington County or in their local community.

Eighty percent of government officials are very or somewhat satisfied with the mix of businesses in Washington County. This is substantially higher than the satisfaction level given to the mix of businesses in the government officials' local community (58.8%). Additionally, over 12% of government officials stated they are very dissatisfied with the mix of businesses in their local community.

Differences. Dissatisfaction with the mix of business in local communities reaches 49% for city and village officials, versus 33% for town officials.

Rating of Overall Business Climate in Washington County and Local Community

	Excellent	Good	Fair	Poor
Washington County	5.6%	62.4%	30.4%	1.6%
Your local community	9.6	39.5	33.9	15.3

Satisfaction with Mix of Businesses in Washington County and Local Community

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very Dissatisfied	Diff.
Washington County	20.0%	60.0%	18.4%	1.6%	
Your local community	16.9	41.9	27.4	12.1	b

^b Differences were identified when comparisons were conducted between towns and city/village officials.

Business and Residential Development

Pace of Development

Government officials were asked how fast they felt business and residential development was taking place both in Washington County and in their local community since 1998. More than half of the respondents indicated that the rate of business development in their communities was too slow but residential development in their communities was too fast. Appointed officials express more concern with the rapid rate of residential development in their local communities than elected officials.

With respect to development in Washington County, more than half of government officials feel that residential development was too fast in Washington County, and that the rate of business development in Washington County was about right. Over two-thirds of town officials rated the amount of residential development in Washington over the past five years as too fast versus 45% of city and village officials.

Rate of Business & Residential Development in Washington County since 1998

	Too Slow		About Right		Too Fast		Diff.
	Bus	Res	Bus	Res	Bus	Res	
Washington County	14.4%	1.6%	51.2%	39.2%	34.4%	56.0%	b
Your local community	51.6	4.8	35.5	40.3	12.1	50.8	a

^a Significant differences were identified when comparisons were conducted between elected and appointed officials.

^b Significant differences were identified when comparisons were conducted between towns and city/village officials.

Farmland Preservation

In addition to the rate of business and residential development, government officials were asked whether they agreed Washington County and their local community should protect agriculture from business and residential development. Nearly three-fourths of government officials strongly or somewhat agree that agriculture should be protected from residential development in Washington County. While agreement was slightly lower to protect agriculture from residential development in the respondent's local community, over half strongly or somewhat agree (65.3%). More government officials disagree (somewhat and strongly) that agriculture should be protected from business development (36.3%) or residential development (29.8%) in their local communities, than in Washington County; 32.0% and 25.8%, respectively.

Differences. Farmland preservation is clearly of greater concern to town officials than city/village officials. Seventy-four percent of town officials agree that agriculture in Washington County should be protected from business development (compared to 57% of city/village officials); 78% of town officials agree that agriculture in their local community should be protected from business development (compared to 44% of city/village officials); and 78% of town officials agree that agriculture in their local community should be protected from residential development (compared to 58% of city/village officials).

**Washington County and Local Community Should Protect Agriculture from
Business & Residential Development**

	Strongly Agree		Somewhat Agree		Somewhat Disagree		Strongly Disagree		Don't Know		Diff.
	Bus	Res	Bus	Res	Bus	Res	Bus	Res	Bus	Res	
Washington County	37.6%	41.1%	25.6%	30.6%	20.8%	17.7%	11.2%	8.1%	4.8%	2.4%	b, b
Your local community	35.5	40.3	23.4	25.0	21.8	16.9	14.5	12.9	4.8	4.8	a

Economic Development

Future Development

Government officials were asked to think about the future of Washington County over the next three years and respond to whether they favor or oppose Washington County and their local communities in promoting development for several types of industries. More than half of all respondents indicated they would favor County government promoting development for a wide variety of industries. Greatest support was for industries in manufacturing (82.4%), tourism (81.6%), and information technologies (84.0%). More than a third of government officials stated they would oppose Washington County promoting development for large-scale farming, transportation, warehousing, and arts and entertainment.

With regards to their local community, 81.5% of government officials stated they would favor their community promoting development in information technologies. Unlike the support shown for Washington County, government officials indicated less support for their local communities promoting large-scale farming (46.8% favor) and transportation (45.2% favor). Overall, government officials tend to support Washington County in promoting development rather than their local communities. There was no industry where government officials favored their local community over Washington County in promoting development.

Differences. Differences in responses between elected and appointed officials were revealed on the following questions: manufacturing (appointed officials are more in favor of Washington County promotion); tourism (elected officials are more in favor of their local community promotion); and finance/insurance (elected officials are more in favor of their local

community promotion).

Differences in responses by city/village officials compared to town officials were numerous. In general, towns were in greater favor of farming (both large and small scale) than city/village officials. City and village officials were more supportive of the following industries:

- manufacturing (local community);
- tourism (local community);
- information technologies (both County and local community);
- transportation (both County and local community);
- warehousing (local community);
- finance and insurance (local community);
- general health care (both County and local community); and
- arts and entertainment (local community).

**Favor/Oppose Washington County and Local Community
Promoting Development in Various Industries
(In Percentages)**

	County Government		Stat. Signif.	Your Local Community		Diff.
	Favor	Oppose		Favor	Oppose	
Manufacturing	82.4%	11.2%	a	68.5%	25.8%	b
Retail and trade	75.2	19.2		73.4	21.0	
Tourism	81.6	13.6		70.2	21.8	a, b
Small-scale farming	76.8	16.8		69.4	22.6	b
Large-scale farming	60.0	34.4	b	46.8	46.8	b
Information technologies	84.0	8.8	b	81.5	11.3	b
Transportation	55.2	37.6	b	45.2	46.0	b
Warehousing	60.0	32.8		50.8	43.5	b
Finance and insurance	74.2	18.5		72.6	21.0	a, b
General health care	76.8	18.4	b	73.4	21.0	b
Specialized health care	74.4	20.0		66.9	25.8	
Arts and entertainment	62.4	32.8		58.1	36.3	b

^a Significant difference were identified when comparisons were conducted between elected and appointed officials.

^b Difference were identified when comparisons were conducted between towns and city/village officials.

Satisfaction With Economic Development

There were several categories of factors related to economic development that government officials were asked to identify their level of satisfaction. For telecommunications, 74 percent of respondents stated they are very or somewhat satisfied with telephone services in Washington County. Only 46 percent are satisfied with broadband telecommunications services and nearly a quarter stated they did not know their satisfaction level.

Over 75% of government officials stated they are very or somewhat satisfied with the energy availability in Washington County and 20% stated they are somewhat or very dissatisfied.

For transportation-related factors, over three-fourths of government officials stated they are very or somewhat satisfied with the transportation network for moving goods. Over 65% indicated satisfaction with public transportation and less than half (45.6%) feel satisfied with air service. However, more than 10% indicated they did not know their level of satisfaction towards the transportation network for moving goods or public transportation, and 32.8% stated they do not know their satisfaction level towards air service.

On issues of governance, a little more than half of government officials stated they are very or somewhat satisfied with the cooperation between local and county government, though 42 percent are not satisfied (somewhat or very). Additionally, less than half (46.0%) of the respondents stated they are satisfied with the amount of property taxes relative to services received and 41.6% were very or somewhat dissatisfied.

More than half of the respondents are satisfied with factors related to planning and economic development in Washington County. Government officials are most satisfied with the availability of technical assistance from local government (74%), more so than assistance

received from County government (57%). A third of the respondents indicated they are somewhat or very dissatisfied with the land use planning process and environmental regulation. And nearly a quarter of respondents stated they are somewhat or very dissatisfied with entrepreneurial development and education/workforce training. More than 12% of government officials stated they do not know their level of satisfaction for technical assistance from County, entrepreneurial development and education/workforce training.

Social support factors enjoyed some of the highest satisfaction levels among government officials. Over 87% stated they are very or somewhat satisfied with the recreational opportunities available in Washington County. Additionally, over 70 percent stated they are very or somewhat satisfied with housing availability for citizens and with the cultural resources in Washington County. One-third of government officials indicated they are dissatisfied with housing for citizens and 25 percent indicated dissatisfaction with cultural resources. However, more than 10% also indicated they do not know their level of satisfaction when it came to cultural resources.

Differences. When responses were compared on the basis of whether or they were from an elected or appointed official, elected officials were found to be more satisfied with:

- cooperation between local and county governments;
- availability of technical assistance from local government; and
- environmental regulations.

The only sizable difference between town and city/village officials was with respect to entrepreneurial development; towns were more satisfied than city/village officials.

Satisfaction with Factors Related to Economic Development in Washington County
(In Percentages)

	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
<i>Telecommunications</i>					
Telephone services	9.6%	14.4%	46.4%	27.2%	2.4%
Broadband telecommunication services	8.0	20.8	30.4	16.0	24.8
<i>Energy</i>					
Energy availability	4.0	16.0	32.8	43.2	4.0
<i>Transportation-related</i>					
Transportation network for moving goods	1.6	10.4	40.0	37.6	10.4
Public transportation	4.0	17.6	32.0	33.6	12.8
Air service	3.2	18.4	24.8	20.8	32.8
<i>Governance</i>					
Cooperation between local and county governments	16.0	26.4	40.0	13.6	4.0
Amount of property taxes relative to services received	18.4	23.2	38.4	17.6	2.4
<i>Planning and Economic Development</i>					
Availability of technical assistance from County government	4.8	23.2	39.2	17.6	15.2
Availability of technical assistance from local (city, village, town) government	3.2	14.4	53.6	20.8	8.0
Land use planning processes	11.2	24.0	43.2	17.6	4.0
Environmental regulations	14.4	23.2	40.8	14.4	7.2
Entrepreneurial development	6.4	17.6	45.6	11.2	19.2
Education/Workforce Training	5.6	16.8	47.2	17.6	12.8
<i>Social Support</i>					
Housing availability for citizens	3.2	16.8	43.2	28.0	8.8
Housing affordability for citizens	8.8	25.6	40.0	17.6	8.0
Cultural resources	1.6	13.6	49.6	24.8	10.4
Recreational opportunities	0.8	8.1	48.4	38.7	4.0

Top Economic Development Issues

Government officials were asked to give their top two economic issues confronting Washington County and their local community. The top six economic development issues from all respondents (combining issue 1 and 2) facing Washington County include:

- business/job creation (27.8%)
- too high taxes (22.1%)
- land use/zoning (21.1%)
- business/job loss (19.3%)
- presence/preservation of farmland (12.4%)
- negative growth/development (10.1%)

The top six economic issues (combining both issue 1 and 2) facing government officials' local communities include:

- business/job creation (38.8%)
- land use/zoning (24.8%)
- too high taxes (21.4%)
- interference from federal, state and local government (13.4%)
- negative growth/development (11.6%)
- housing affordability and availability (10.7%)

Respondents indicated that business/job creation, while a top concern on both lists, was of greater concern for local communities than for Washington County. Business/job loss and preservation of farmland were not as large of concerns confronting local communities as they were for Washington County. Government officials did indicate that federal, state and local

government interference is of concern for their local community, as is housing affordability and availability, but they did not indicate these issues were concerns facing Washington County.

Top Two Economic Issues Confronting Washington County and Local Community

Issue 1	County		Local		Issue 2	County		Local	
	Freq	Pct	Freq	Pct		Freq	Pct	Freq	Pct
Business/job creation	18	18.2	23	22.5	Land use/zoning	10	12.0	12	14.0
Business/job loss	12	12.1	7	5.6	Taxes – too much, too high	10	12.0	13	15.1
Taxes – too much, too high	10	10.1	8	6.3	Business/job creation	8	9.6	14	16.3
Land use/zoning	9	9.1	11	10.8	Presence/preservation of farmland	7	8.4	1	1.2
Growth/development – negatively stated	6	6.1	7	6.9	Transportation – highways	7	8.4	4	4.7
Presence/preservation of farmland	4	4.0	5	4.9	Business/job loss	6	7.2	2	2.3
Housing affordability/availability	4	4.0	5	4.9	Growth/development – negatively stated	5	4.0	4	4.7
Sprawl	4	4.0	2	2.0	Intergovernmental cooperation	4	4.8	1	1.2
Open space preservation/parks	4	4.0	1	1.0	Workforce training/education	4	4.8	2	2.3
Residential development – negative aspects	3	3.0	5	4.9	Housing affordability/availability	3	3.6	5	5.8
Telecommunication – internet, broadband	3	3.0	4	3.9	Interference from government: federal, state and local	3	3.6	9	10.5
Intergovernmental cooperation	3	3.0	2	2.0	Residential development – negative aspects	2	2.4	2	2.3
Interference from government: federal, state and local	3	3.0	3	2.9	Interference from government: local governments and neighbors	2	2.4	1	1.2
Health care	3	3.0	1	1.0	Health care	2	2.4	2	2.3
Workforce training/education	2	2.0	1	1.0	Rural character	1	1.2	3	3.5
Public transportation	2	2.0	1	1.0	Sprawl	1	1.9	1	1.2
Planning	2	2.0	2	2.0	Telecommunications – internet, broadband	1	1.9	1	1.2
Rural character	1	1.0			TIF, BIDs	1	1.9		
Interference from government: local governments and neighbors	1	1.0	3	2.9	Open space preservation/parks	1	1.9		
Annexation			4	3.9	Annexation			1	1.2
Transportation - highways			1	1.0	Planning			4	4.7
TIF/BIDs			1	1.0	Other	5	4.0	4	4.7
Other	5	4.0	5	4.9					
Total	99		102		Total	83		102	

Program Awareness

The last set of questions asked government officials of their awareness of federal, state and local programs and services that assist in economic development. More than half of the respondents are aware of state financial programs (72%), federal financial programs (66%) and private investment groups (54%). Less than half (42%) are aware of the county revolving loan fund program for manufacturing or even fewer for revolving load funds for retail firms (34%).

Less than half of government officials were aware of many other programs and services available for economic development. Only the Washington County Commuter Express (WCCE) and Workforce Training Program were programs with the most awareness from government officials. The programs and services that government officials were most unaware included: Fast Trac Entrepreneurial Training (72.8%), Business Retention and Expansion Visitation Program (71.2%), Technology Zone (63.2%), Industry Cluster Initiative (60.8%), Service Corp. of Retired Executives (SCORE) (56.0%), HOME Consortium (54.0%), and Business incubators (50.4%). It is worth noting that a high percent (19.2%) of government officials stated they did not know how they felt about entrepreneurial development (previous section). Here, they indicate they are unaware of any programs.

Differences. City/village officials were found to be more aware than town officials of the following programs: state and federal financial programs; business incubators; brownfield redevelopment; SCORE; HOME Consortium; and workforce training. When compared to elected officials, appointed officials were more aware of private investment groups, workforce training programs and Washington County Commuter Express. Conversely, elected officials were more aware of the County's Industry Cluster Initiative than appointed staff.

Awareness of Programs & Services for Economic Development
(In Percentages)

	Aware	Unaware	Diff.
Financial Tools			
County revolving loan fund programs for manufacturing, service, and related distribution companies (N=125)	42.4%	56.0%	
County revolving loan fund program for retail firms (N=125)	34.4	64.0	
State financial programs (N=125)	72.0	26.4	b
Federal financial programs (N=125)	66.4	31.2	b
Private investment groups (N=125)	53.6	45.6	a
Other Tools			
Technology zone (N=125)	34.4	63.2	
Business incubators (N=126)	48.8	50.4	b
Brownfield redevelopment (N=125)	49.6	49.6	b
Fast Trac Entrepreneurial Training (N=125)	25.6	72.8	
Service Corp. of Retired Executives (SCORE) (N=125)	42.4	56.0	b
Business Retention and Expansion (BRE) Visitation Program (N=125)	28.0	71.2	
HOME Consortium (N=124)	44.4	54.0	b
Washington County Commuter Express (WCCE) (N=126)	80.0	18.4	a
Industry Cluster Initiative (N=125)	37.6	60.8	a
Workforce Training programs (N=125)	76.0	22.4	a, b

^a Differences were identified when comparisons were conducted between elected and appointed officials.

^b Differences were identified when comparisons were conducted between towns and city/village officials.

APPENDIX I

Definitions of Terms

- **CATI** is the use of computers to automate the key activities of a telephone interviewing facility. It stands for "computer-assisted telephone interviewing." The most important aspect of a CATI system is that it uses computers to conduct the interviews. Because a computer controls the questionnaire, skip patterns are executed exactly as intended, responses are within range, and there are no missing data. And, because answers are entered directly into the computer, data entry is eliminated - data analysis can start immediately.
- **Chi-Square** is a "goodness of fit" statistic used to determine if differences found using sample data can be generalized to the population. The question it seeks to answer is whether patterns found in the data are "real" or due to sampling error.
- **Content Analysis** is a methodology used to analyze open-ended survey questions. The analyst looks at the survey responses for trends in terms or phrases.
- **Cross-Tabulation** is a two-dimensional table that shows frequency distributions for two variables, or survey questions.
- **Margin of Error** is also known as the sampling error. This is the amount of "error" that exists between the sample results and the population. Using mathematical calculations based on a specified margin of error (in the case of the telephone survey +/- 5 percentage points), we can be reasonably confident that the views expressed by the 434 residents (our sample) will be within 5 percentage points of the views expressed by all residents in the county.
- A **Random Sample** refers to a sample of individuals (or in the case of the resident survey, households) who were chosen in such a way that gave everyone an equal chance of being selected.
- **SPSS** stands for "Statistical Program for Social Sciences." This is one of the leading data analysis software packages used in the field of Social Science.
- **Statistical Inference** is the technique(s) used to make generalizations about the population (ex. all residents in Washington County) based on a sample. The statistical technique we used for the residents' survey is called random sampling.
- **Statistical Significance** is a statement used, for our purposes, when the Chi-Square statistic is calculated and reveals that trends found in the sample data can be generalized to the population.

APPENDIX II

Survey Instrument for Residents

Hello, my name is [Interviewer] and I am calling from the Survey Center at the University of Wisconsin – Milwaukee on behalf of Washington County. I'm not selling anything or soliciting for donations. I'm calling because your telephone number was randomly selected to be included in a survey of 400 people about economic development in Washington County. The survey is anonymous - we don't know your name or address - and it will take about 10 minutes.

Do you live in Washington County?

Am I speaking to an adult 18 years of age or older?

I would first like to ask you a couple of questions about the quality of life in Washington County.

How satisfied are you with the overall quality of life in Washington County? Are you:

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied, or
- Very dissatisfied
- DK/NA

I am going to ask a series of questions about things that could have an effect on the quality of life in Washington County.

How important is rural character to the quality of life in Washington County? Is it very important, somewhat important, or not important? [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with the rural character of Washington County? Are you very satisfied, somewhat satisfied, or not very somewhat dissatisfied, or very dissatisfied?
How important is the presence of farmland [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with the presence of farmland
How important is access to lakes [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with access to lakes
How important is preservation of natural resources [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with preservation of natural resources
How important are recreational opportunities [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with recreational opportunities
How important are neighbors and friendly people [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with neighbors and friendly people
How important is having downtown areas in communities [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with downtown areas in communities
How important is affordable housing [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with availability of affordable housing
How important are land use and zoning regulations [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with land use and zoning regulations
How important is quality of housing [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with the quality of housing
How important is quality of roads	→	How satisfied are you with the quality of roads

[IF NOT IMPORTANT SKIP TO NEXT]		
How important is public transportation [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with public transportation
How important are employment opportunities [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with employment opportunities
How important are cultural events [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with cultural events
How important is access to shopping [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with access to shopping
How important is public safety [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with public safety
How important are social services [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with social services
How important is public K-12 education [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with public K-12 education
How important is post-secondary education like colleges or technical schools [IF NOT IMPORTANT SKIP TO NEXT]	→	How satisfied are you with post-secondary education like colleges or technical schools

When you think about the future of Washington County, would you say that the county's future looks bright?

Yes → **IF YES:** Is there anything in particular that makes the future of the county look bright?

No → **IF NO:** What is your greatest concern for the county?

DK/NA

As you think about the future of Washington County, would you favor or oppose having county government promote development of the following types of industries:

	FAVOR	OPPOSE	DK/NA
Manufacturing			
Retail and trade			
Tourism			
Small scale farming			
Large scale farming			
Information technology			
Transportation			
Warehousing			
Financial and Insurance			
General health Care			
Specialized health Care			
Arts and Entertainment			

To what extent do you agree with the following statement? The county should be protecting agriculture from business development. Do you:

Strongly agree

Agree

Disagree, or

Strongly disagree

DK/NA

a. To what extent do you agree with the following statement? The county should be protecting agriculture from residential development. Do you:

Strongly agree

Agree

Disagree, or

Strongly disagree

DK/NA

Thinking about the community that you live in, since 1998 do you think that the rate of *residential development* in your **community** has been:

Too slow

About right

Too fast

DK

Thinking about the community that you live in, since 1998 do you think that the rate of *business development* in your **community** has been:

- Too slow
- About right
- Too fast
- DK

I would now like to ask you some questions about your employment status.

Are you currently employed, unemployed or retired?

- Employed → Are you employed: ___ FT ___ PT ___ Seasonal ___ Job Share
- Unemployed [**SKIP TO Qx**]
- Retired [**SKIP TO Qx**]

In what city, town or village do you work? _____

[IF OUTSIDE WASHINGTON COUNTY]

I am going to list some reasons people give for living in Washington County but commuting outside of the county for work. For each please tell me if it applies to you:

- Your job pays more in salary than you could earn in a job in Washington County.
- Your job provides a better benefits package than you could get in a job in Washington County.
- You really like your job and are not interested in change.
- Other members of your household prefer to live in Washington County.
- You enjoy living in Washington County so much that the commute is worth it.
- You live in Washington County because of the quality of the schools.
- Are there any other reasons? _____

What is your primary occupation? [**ASK OPEN-ENDED**]

In what **industry** is that? [**ASK OPEN-ENDED**]

How many years have you been with your current employer? _____ [**ENTER ZERO IF LESS THAN 1 YEAR**]

When thinking about your work situation, would you say that you are very satisfied, somewhat satisfied or not very satisfied?

- very satisfied
- somewhat satisfied
- not very satisfied
- DK

[IF LESS THAN VERY SATISFIED]

What would make you more satisfied?

[ASK OPEN-ENDED; CHECK ALL THAT APPLY]

- Higher salary/pay
- Better fringe benefits (insurance, paid vacation, paid sick leave, etc.)
- Flexible hours/schedule
- More job training/professional development
- More job security
- More opportunities for advancement
- Different job/occupation
- Public transit

What mode of transportation do you use to travel to work?

- car → **IF CAR:** Do you usually travel alone to work? yes no
 public transportation
 bicycle
 walk
 work at home If yes,
Are you self-employed? Yes [Skip to QX] No [Skip to QX]
 other _____

Approximately how many miles do you usually travel to work? _____

Approximately how much time does it usually take you to get to work? _____

Does your employer offer any kind of job-related training?

- No
Yes
DK

IF YES:

What kind of training does your employer offer?

Have you taken advantage of the training offered by your employer within the past three years?

- No
Yes
DK

IF YES: Where was the training offered? _____

Besides training offered by your employer, have you enrolled in any continuing education courses in the past three years?

- No
 Yes
 DK/NA

IF YES: Where did you enroll? _____

How satisfied were you with the course(s)? Were you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied?

- Very satisfied
 Somewhat satisfied
 Somewhat dissatisfied **IF DISSATISFIED:** Why? _____
 Very dissatisfied
 DK/NA

Have you used public transportation within the past year? [SKIP IF QX= Public Transportation]

- Yes
 No → Why haven't you used public transit? _____

How satisfied are you with public transportation in Washington County?

- Very dissatisfied
- Somewhat dissatisfied
- Somewhat satisfied
- Very satisfied
- DK/Never Used

Do you have access to the Internet at home?

- yes
- no
- DK

IF YES: What type of Internet access is that? Is it:

- Dial-up telephone modem
- Broadband cable (e.g. Road-Runner)
- Broadband Satellite
- Broadband DSL
- Other (please describe) _____

Within the past year, have you accessed the following types of websites?

	No	Yes	IF YES: Which?
Local and county governments	<input type="checkbox"/>	<input type="checkbox"/>	_____
State government	<input type="checkbox"/>	<input type="checkbox"/>	_____
Businesses in Washington County	<input type="checkbox"/>	<input type="checkbox"/>	_____

Have you made any on-line purchases within the past year?

- Yes
- No
- DK

IFYES: How frequently do you shop online?

- daily
- weekly
- monthly
- bi-monthly
- once a year
- less than once a year

On what types of items? (mark all that apply)

- vacation
- clothing
- computer-related
- household appliances
- electronics
- books/music
- restaurant
- other _____

I have just a few more questions.

In what city, town or village do you live? _____

Do you own or rent your home?

- Own
- Rent

What type of housing do you live in? Is it

- Single family **IF SINGLE-FAMILY**: Is that a detached single-unit or a condo _____
- Multi-family **IF MULTI-FAMILY**: : Is that a duplex or apartment complex? _____

How long have you lived at your current home? ____ years

IF less than 10 years:

Prior to your current home, did you live in Washington County

Yes → Have you always lived in Washington County? Yes ___ No ___

No → Where did you live?

- outside Washington County, but in the Milwaukee area
- outside the Milwaukee Metro area, but in Wisconsin
- outside of Wisconsin

What brought you to Washington County? _____

Can you see yourself retiring in Washington County?

- yes
- no
- DK

27a. Please explain _____

28. In what year were you born? 19__

29. Do you have any children living with you?

- No
- Yes

29a. **IF YES:** How many are under the age of 18? _____

30. Are you currently married?

- no
- yes

31. Excluding yourself, how many adults in your household are employed? _____

31a. Do any of them work outside of Washington County?

- no
- yes **IF YES:** How many? _____

31b. Is anyone in your household currently enrolled at Moraine Park Technical College or UW-Washington County?

- no
- yes **IF YES:** How Many? ____ Are they enrolled part-time or full-time? P.T. __ F.T. __

32. What is your highest level of education?

- Less than HS degree
- HS graduate
- Technical/Associate Degree
- Some college
- Bachelor degree
- Graduate degree
- Refused

33. I am going to read you a list of categories to describe household income. Please tell me to stop when I have reached the category that best describes the total income of members of your household.

- \$18,000 or less
- \$18,001 to \$36,000
- \$36,001 to \$54,000
- \$54,001 to \$84,000
- \$84,001 to \$150,000
- More than \$150,000
- Refused
- DK/NA

34. Record gender of respondent

- Male
- Female

APPENDIX III

Survey of Business Leaders

Section I. Business Planning

1. How would you rate the **overall** business climate in Washington County?
 ___ Excellent ___ Good ___ Fair ___ Poor

2. Please list the top three issues **currently** confronting your firm.

1. _____
2. _____
3. _____

3. Please assess whether you believe the following aspects of your business will increase, decrease, or stay the same **within the next three years**.

	Increase	Decrease	Stay the Same
Number of customers			
Scale of operations			
Size of workforce			
Sale of products			
Number of product lines			
Mix of goods and services			
Technology used for production			

4. The following factors can deter the current/future development of a business. Please check the following that **most negatively** impact your organization's development plans. (Check all that apply.)

- | | |
|---|---|
| <p>___ Competition within Washington County</p> <p>___ Competition outside of Washington County but within the Greater Milwaukee region</p> <p>___ Competition outside of Washington County but within the Greater Milwaukee region</p> <p>___ Competition outside of Wisconsin but within the U.S.</p> <p>___ Competition from outside of the U.S.</p> <p>___ Domestic regulatory constraints</p> <p>___ Energy costs</p> <p>___ Material shortages</p> <p>___ Antiquated machinery</p> <p>___ Insufficient space</p> <p>___ Other (please describe)</p> | <p>___ Problems with transporting goods and/or services</p> <p>___ Problems for transportation for commuting employees</p> <p>___ Interest rates</p> <p>___ Current market condition/ general state of economy</p> <p>___ Labor supply</p> <p>___ Labor quality</p> <p>___ Employee wages</p> <p>___ Employee benefits</p> <p>___ Adjacent land uses</p> <p>___ Inadequate broadband telecommunications</p> |
|---|---|
-

Business Moves, Closings, Sales

5. Are you currently considering **moving, closing or selling** this establishment?
 Considering moving
 Considering closing (Skip to Question 7)
 Considering selling (Skip to Question 7)
 None of the above (Skip to Question 8)
6. Where are you considering moving?
 Within this same city, village or town
 Elsewhere in Washington County (please specify) _____
 Elsewhere in Metro Milwaukee area
 Elsewhere in Wisconsin
 Another state in the Midwest
 Elsewhere in the United States
 Another country
 Undecided
7. Why are you considering moving, closing or selling? (Check all that apply.)
- | | |
|---|--|
| <input type="checkbox"/> Retirement | <input type="checkbox"/> Rigid code enforcement |
| <input type="checkbox"/> Changing market conditions | <input type="checkbox"/> High local taxes |
| <input type="checkbox"/> Overcrowded building | <input type="checkbox"/> High state taxes |
| <input type="checkbox"/> No land for expansion | <input type="checkbox"/> Lease expiration |
| <input type="checkbox"/> Transportation problems | <input type="checkbox"/> Housing |
| <input type="checkbox"/> Crime/vandalism | <input type="checkbox"/> Childcare |
| <input type="checkbox"/> Low work productivity | <input type="checkbox"/> Healthcare costs |
| <input type="checkbox"/> Environmental concerns | <input type="checkbox"/> Other (please describe) |

Business Modernization or Expansion

8. Do you have any plans to **modernize or expand** your present building(s) or equipment within the next five years?
 No (Skip to Question 10)
 Yes, plan to modernize or expand within one year
 Yes, plan to modernize or expand in next one to five years
9. What is the **most important** factor in choosing a location for modernization and/or expansion?
 Closeness to suppliers for operating business
 Closeness to customers
 Proximity to competitors
 Labor costs
 Property costs
 Capital/equipment costs
 Energy costs
 Other (please describe) _____

Research and Development

10. What percent of your company's annual budget is dedicated to research and development?
 None
 Less than 5 %
 5-10%
 10-20%
 More than 20%
11. How has this changed over the past two years?
 Increased
 Decreased
 Remained stable

Section II. Workforce-Related Issues

12. Overall, how would you rate your satisfaction with the **quality** of your current workforce?
 Very satisfied
 Satisfied
 Dissatisfied
 Very dissatisfied
13. Has your firm had trouble **recruiting new employees** in the past two years?
 No
 Yes
14. Has your firm had trouble **retaining current employees** in the past two years?
 No
 Yes
15. What opportunities in Washington County would assist you in addressing **recruiting and retention** problems? (Check all that apply.)
 No assistance needed.
 Education/training (please describe)
-
- Transportation for employees
 Childcare
 Housing affordability
 Other (please describe)
-

- 15(a) If you checked the box for **transportation for employees**, would this include a public transit system?
 No
 Yes

Section III. Business Climate in Washington County

16. Please rate your **satisfaction** with each of the following in Washington County as they affect your business.

	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
Distinct Private Sector Factors					
Availability of start-up capital	1	2	3	4	DK
Availability of additional capital	1	2	3	4	DK
Conference facilities	1	2	3	4	DK
Hotel facilities	1	2	3	4	DK
Telecommunications					
Telephone services	1	2	3	4	DK
Data telecommunication services	1	2	3	4	DK
Broadband telecommunication services	1	2	3	4	DK
Energy					
Energy availability	1	2	3	4	DK
Public utility costs	1	2	3	4	DK
Transportation-related					
Transportation network for moving goods	1	2	3	4	DK
Transportation network for commuting employees	1	2	3	4	DK
Local public transportation	1	2	3	4	DK
Countywide public transportation	1	2	3	4	DK
Air service	1	2	3	4	DK
Governance					
Relationship with local government (city, town, village)	1	2	3	4	DK
Relationship with county government	1	2	3	4	DK
Cooperation between local and county governments	1	2	3	4	DK
Amount of local taxes relative to services received	1	2	3	4	DK

16 (Continued). Please rate your **satisfaction** with each of the following in Washington County as they affect your business.

Planning and Economic Development					
	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
Availability of technical assistance on economic development from county government	1	2	3	4	DK
Availability of technical assistance on economic development from local government	1	2	3	4	DK
Land use planning processes	1	2	3	4	DK
Environmental regulations	1	2	3	4	DK
Entrepreneurial development	1	2	3	4	DK
Directly Provided Local Government Services					
Sewer and water	1	2	3	4	DK
Fire protection	1	2	3	4	DK
Police protection	1	2	3	4	DK
Education/Workforce Training					
K-12 Education	1	2	3	4	DK
Moraine Park Technical College	1	2	3	4	DK
UW-Washington County	1	2	3	4	DK
Social Support					
Housing availability for employees	1	2	3	4	DK
Housing affordability for employees	1	2	3	4	DK
Childcare availability for employees	1	2	3	4	DK
Cultural resources	1	2	3	4	DK
Recreational opportunities	1	2	3	4	DK
Medical care and hospitals	1	2	3	4	DK

Section IV. Industrial Clustering

17. Please estimate the percentage of products or services **sold** in each area with the total equaling 100%:
- ___ % Within Washington County
 - ___ % Outside Washington County but within the Greater Milwaukee region
 - ___ % Outside Washington County and the Greater Milwaukee region but within Wisconsin
 - ___ % Outside of Wisconsin but within the United States
 - ___ % Outside of the United States
18. Please estimate the percentage of products or services **bought** for operating your business with the total equaling 100%.
- ___ % Within Washington County
 - ___ % Outside Washington County but within the Greater Milwaukee region
 - ___ % Outside Washington County and the Greater Milwaukee region but within Wisconsin
 - ___ Outside of Wisconsin but within the United States
 - ___ Outside of the United States

19. Please assess how **important** the following factors are for the current location of your business in Washington County.

	Very unimportant	Somewhat unimportant	Somewhat important	Very important	Don't know/ Not applicable
a. Value of land					
b. Property taxes					
c. Proximity to major highways					
d. Proximity to suppliers					
e. Proximity to competitors					
f. Proximity to services					
g. Proximity to customers					
h. Availability of skilled labor					
i. Quality of life					
j. Interaction with other firms in same industry					
k. Interaction with firms in related industries					
l. Presence of market-leading firms					
m. Energy costs					
n. Telecommunications infrastructure					
o. Information infrastructure					
p. Entrepreneurial climate					
q. Training/education infrastructure					

20. From the list in the table above, please identify the **three most important** factors that most influence decisions regarding the current location of your business. (Write in the letter corresponding to the factor and then briefly explain why this is so.)

1. Letter ___ Why? _____
2. Letter ___ Why? _____
3. Letter ___ Why? _____

Section V. Economic Development

21. The following programs and services are offered for assisting economic development by the local, state and federal government. Rate whether you are **aware** of each one. Only for those to which you are aware, assess how **interested** you would be to have them expanded/offered in this county.

	Are you <i>aware</i> of this program/service?		What is your level of <i>interest</i> in each program/service?	
	Unaware	Aware	Uninterested	Interested
Financial Tools				
Local revolving loan fund programs for manufacturing, service, and related distribution companies				
Local revolving loan fund program for retail firms				
State financial programs				
Federal financial programs				
Private investment groups				
Other Tools				
Technology zones				
Business incubators				
Brownfield redevelopment				
Fast Trac Entrepreneurial Training				
Service Corp of Retired Executives (SCORE)				
Business Retention and Expansion (BRE) Visitation Program				
HOME Consortium				
Washington County Commuter Express (WCCE)				
Industry Clusters/ Washington County Cluster Council Initiative				
Training programs				

Section VI. Organizational Attributes

22. Which of the following *North American Industrial Classifications* **best** describes your business?

<input type="checkbox"/> Agriculture, Forestry, Fishing, and Hunting	<input type="checkbox"/> Finance and Insurance
<input type="checkbox"/> Mining	<input type="checkbox"/> Real Estate and Rental and Leasing
<input type="checkbox"/> Utilities	<input type="checkbox"/> Professional, Scientific and Technical Service
<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Management of Companies and Enterprises
<input type="checkbox"/> Administrative and Support and Waste	<input type="checkbox"/> Management and Remediation Services
<input type="checkbox"/> Wholesale Trade	<input type="checkbox"/> Educational Services
<input type="checkbox"/> Retail Trade	<input type="checkbox"/> Health Care and Social Assistance
<input type="checkbox"/> Arts, Entertainment and Recreation	<input type="checkbox"/> Transportation
<input type="checkbox"/> Accommodation and Food Services	<input type="checkbox"/> Warehousing
<input type="checkbox"/> Public Administration	<input type="checkbox"/> Information
<input type="checkbox"/> Other (please describe) _____	

23. In what city, village or town is your business located in Washington County? _____

APPENDIX IV Survey of Education Leaders

1. In your own words, how would you describe the primary mission of your educational institution?

2. How *important* are the following four objectives in meeting this mission?

	Very important	Somewhat important	Somewhat unimportant	Very unimportant	Don't know/ not applicable
1. Training students to be productive in the workforce					
2. Preparing students to pursue further education at a post-secondary institution					
3. Developing students to be conscientious citizens					
4. Promoting economic development in Washington County					

3. Overall, how *adequately* is your institution preparing its students for the workforce?

- Very adequately
 Somewhat adequately
 Somewhat inadequately
 Very inadequately
 Don't know/not applicable

4. Are the following employee attributes *important* considerations for your educational institution in preparing its students for participating in the workforce?

- | | | | | |
|---|------------------------------|-----------------------------|-------------------------|--|
| Knowledge of industry-specific technologies | <input type="checkbox"/> Yes | <input type="checkbox"/> No | | |
| Critical thinking abilities | <input type="checkbox"/> Yes | <input type="checkbox"/> No | Teamwork skills | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Competency with computers | <input type="checkbox"/> Yes | <input type="checkbox"/> No | Leadership abilities | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Fostering of a strong work ethic | <input type="checkbox"/> Yes | <input type="checkbox"/> No | Communication abilities | <input type="checkbox"/> Yes <input type="checkbox"/> No |

5. Does your institution work directly with local businesses to help train any of its students?

- Yes
- No (Skip to Question 6)
- Don't know/ not applicable (Skip to Question 6)

5a. About what percent of students are involved in such training?

- Less than 5 percent
- 5-10 percent
- 10-20 percent
- 20-50 percent
- More than 50 percent

6. How *knowledgeable* do you think that Washington County businesses are about the educational and training programs in schools and colleges in this County?

- Very knowledgeable
- Somewhat knowledgeable
- Somewhat unknowledgeable
- Very unknowledgeable
- Don't know

6a. What two changes can be done to better increase their knowledge of available education and training programs in schools and colleges in this County?

1. _____
2. _____

7. How *satisfied* are you with your educational institution's efforts to work with local businesses?

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know/not applicable

8. What two changes can be done to better your institution's involvement with local businesses in order to meet student needs?

1. _____
2. _____

The next set of questions ask for you to assess the quality of partnerships with other educational, business and governmental leaders in this County.

9. How *frequently* do you engage with other *educational* leaders in Washington County on matters pertaining to economic development?

Very frequently
 Somewhat frequently
 Somewhat infrequently
 Very infrequently
 Don't know/not applicable (Skip to Question 10)

- 9a. How *satisfied* are you with the level of this interaction with other *educational* leaders in Washington County?

Very dissatisfied
 Somewhat dissatisfied
 Neither dissatisfied nor satisfied
 Somewhat satisfied
 Very satisfied
 Don't know/not applicable

10. How *frequently* do you engage with *business* leaders in Washington County on matters pertaining to economic development?

Very frequently
 Somewhat frequently
 Somewhat infrequently
 Very infrequently
 Don't know/not applicable (Skip to Question 11)

- 10a. How *satisfied* are you with the level of this interaction with *business* leaders in Washington County?

Very dissatisfied
 Somewhat dissatisfied
 Neither dissatisfied nor satisfied
 Somewhat satisfied
 Very satisfied
 Don't know/not applicable

11. How *frequently* do you engage with *government* leaders in Washington County on matters pertaining to economic development?

- Very frequently
- Somewhat frequently
- Somewhat infrequently
- Very infrequently
- Don't know/not applicable (Skip to Question 12)

11a. How *satisfied* are you with the level of this interaction with *government* leaders in Washington County?

- Very dissatisfied
- Somewhat dissatisfied
- Neither dissatisfied nor satisfied
- Somewhat satisfied
- Very satisfied
- Don't know/not applicable

The next set of questions pertain to Washington County's role in working with businesses and educational institutions in helping to promote economic development and workforce training.

12. Do you as an individual educational leader see a need for your institution to promote economic development in Washington County?

- Yes
- No
- Don't know/not applicable

13. Does the Washington County Economic Development Division currently help you meet the needs of local businesses?

- Yes
- No
- Don't know/not applicable

14. How *satisfied* are you with the Washington County government's efforts to help you meet the needs of local businesses?

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know/not applicable

15. The following statements involve activities for Washington County's Economic Development Division in helping to build better partnerships between local businesses and educational institutions. For each activity, state whether you *agree or disagree* with this County agency doing this work.

- a. Providing outlets for networking between local businesses and educational institutions
 Agree Disagree
- b. Offering technical guidance and advice on grant writing
 Agree Disagree
- c. Providing a repository of information related to economic development for interested parties
 Agree Disagree

16. Are you aware of Washington County's development of cluster councils for agricultural businesses and advanced manufacturing?

- Yes
- No
- Don't know/not applicable

17. Offer two recommendations that educational institutions can adopt to better help with economic development efforts within Washington County.

- 1. _____
- 2. _____

These final questions are to learn a little bit more about yourself and your educational institution for comparing and contrasting answers from different groups of educational leaders participating in this survey.

18. What is your title?

- Superintendent
- College Dean
- School Board Member/President
- Other. Please describe _____

19. What educational level do you represent?

- Middle school
- High school
- Entire K-12 school district
- Post-secondary institution
- Other. Please describe _____

20. How many years have you served in your current role?

- Less than 1 year
- 1-4 years
- 5-9 years
- 10 years or more

IF LESS THAN 5 YEARS: How long have you been an educational leader in Washington County?

- Less than 1 year
- 1-4 years
- 5-9 years
- 10 years or more

Thank you for your participation in this study. A final copy of this report is expected to be released to the public in the beginning of 2004. If you have any questions or comments about this study, contact Professors Craig Maher or Matthew Birnbaum at (920) 424-3456.

Your response in this survey will help Washington County in its future economic development planning. To learn more about economic development efforts in Washington County, please call Brenda Hicks-Sorensen at (262) 333-4445. Please feel free to make additional comments by attaching a separate sheet of paper.

APPENDIX V

Interview Instrument for Focus Groups of College Students (Moraine Park Technical College and University of Wisconsin-Washington County)

Question 1: Introductions

- 1a) Please describe where you live and work (if employed at all)
- 1b) Please describe your current academic field of study and briefly explain your reason for selecting it.

- 2) Identify the two most important goals you can expect to receive upon completing this academic program.

- 3) What factors have been most important in influencing your course of educational study at this educational institution?

- 4) Are you aware of any formal partnerships between your academic program and your selected profession?

- 5) Where do you see yourself living after graduation and 10 years after graduation?

- 6) What is one recommendation that you would like leaders in Washington County to know to better help young adults like yourself take better advantage of higher education as a way for securing a meaningful career in this county?

APPENDIX VI
Survey of Local Government Officials

1. How satisfied are you with the overall quality of life in Washington County?
 Very satisfied
 Somewhat satisfied
 Somewhat dissatisfied, or
 Very dissatisfied
 Don't know

2. When you think about the future of Washington County, would you say that the *county's* future looks bright?
 Yes
 No
 Don't know

3. Please rate the **importance** of the following items relating to the quality of life in *Washington County*.

	Very Important	Somewhat Important	Somewhat Unimportant	Very Unimportant	Don't Know
Rural character					
Presence of farmland					
Access to lakes					
Preservation of natural resources					
Recreational opportunities					
Neighbors/ friendly people					
Presence of downtowns					
Affordable housing					
Land use/ zoning regulations					
Quality housing					
Good roads					
Public transportation					
Employment					

opportunities					
Cultural events					
Access to shopping					
Public safety					
Social services					
Public K-12 education					
Post-secondary education					

4. For this same list of items, please rate your level of **satisfaction** with each as pertaining to the quality of life in *Washington County*?

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Don't Know
Rural character					
Presence of farmland					
Access to lakes					
Preservation of natural resources					
Recreational opportunities					
Neighbors/ friendly people					
Presence of downtowns					
Affordable housing					
Land use/ zoning regulations					
Quality housing					
Good roads					
Public transportation					
Employment opportunities					
Cultural events					
Access to shopping					
Public safety					
Social services					
Public K-12 education					
Post-secondary education					

5. How would you rate the overall business climate in Washington County and the local community you represent?

	Excellent	Good	Fair	Poor
Washington County				
Your local community				

6. How satisfied are you with the mix of businesses in Washington County and the local community you represent?

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied
Washington County				
Your local community				

7. Thinking about Washington County and the local community you represent, how fast do you think the rate of *business* development has been since 1998?

	Too Slow	About Right	Too Fast
Washington County			
Your local community			

8. Thinking about Washington County and the local community you represent, how fast do you think the rate of *residential* development has been since 1998?

	Too Slow	About Right	Too Fast
Washington County			
Your local community			

9. Do you agree that Washington County and the local community you represent should be protecting agriculture from *business* development?

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
Washington County					
Your local community					

10. Do you agree that Washington County and the local community you represent should be protecting agriculture from *residential* development?

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
Washington County					
Your local community					

11. As you think about the future of Washington County over the next three years, would you favor or oppose having the county and the local community you represent promoting development of the following types of industries?

	County Government		Your Local Community	
	Favor	Oppose	Favor	Oppose
Manufacturing				
Retail and trade				
Tourism				
Small-scale farming				
Large-scale farming				
Information technologies				
Transportation				
Warehousing				
Finance and insurance				
General health care				
Specialized health care				
Arts and entertainment				

12. Please rate your satisfaction with each of the following items related to economic development in Washington Co.

	Very Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know
Telecommunications					
Telephone services					
Broadband telecommunication services					
Energy					
Energy availability					
Transportation-related					
Transportation network for moving goods					
Public transportation					
Air service					
Governance					
Cooperation between local and county governments					
Amount of property taxes relative to services received					
Planning and Economic Development					
Availability of technical assistance from County government					
Availability of technical assistance from local (city, village, town) government					
Land use planning processes					
Environmental regulations					
Entrepreneurial development					
Education/Workforce Training					
Social Support					
Housing availability for citizens					
Housing affordability for citizens					
Cultural resources					
Recreational opportunities					

13. Please list the top two economic development issues confronting Washington County and the local community you represent.

	Washington County	Your Local Community
Issue 1		
Issue 2		

14. The following programs and services are offered for assisting economic development by the local, county, state and federal government. Please check whether you are aware of each one.

	Aware	Unaware
Financial Tools		
County revolving loan fund programs for manufacturing, service, and related distribution companies		
County revolving loan fund program for retail firms		
State financial programs		
Federal financial programs		
Private investment groups		

Q14 Continued: The following programs and services are offered for assisting economic development by the local, county, state and federal government. Please check whether you are aware of each one.

	<u>Aware</u>	<u>Unaware</u>
<u>Other Tools</u>		
Technology zone		
Business incubators		
Brownfield redevelopment		
Fast Trac Entrepreneurial Training		
Service Corp. of Retired Executives (SCORE)		
Business Retention and Expansion (BRE) Visitation Program		
HOME Consortium		
Washington County Commuter Express (WCCE)		
Industry Cluster Initiative		
Workforce Training programs		

Background Questions

15. Are you elected or appointed?

- Elected
 Appointed

16. Are you an official at the county or local level of government?

- County
 Local

17. What local town, village or city do you represent?

18. How many years have you lived in Washington County?

- Less than 5 years 11-20 years
 5-10 years More than 20 years

19. What is your gender?

- Male Female

Thank you for completing the survey. Again, all information provided here will remain confidential to the researchers at the University of Wisconsin-Oshkosh and the University of Wisconsin-Milwaukee, and your identity will remain anonymous when information gets disseminated to the public. If you would like further information about this study, please contact Professor Craig Maher from the University of Wisconsin-Oshkosh at (920) 424-3230.

Your response in this survey will help Washington County in its future economic development planning. To learn more about economic development efforts in Washington County, please call Brenda Hicks-Sorensen at (262) 335-4445 or (800) 616-0446. Please feel free to make additional comments on the space provided below.