

The Urban Affairs Center

**Industrial
Retention
&
Expansion
Survey
Of Firms Located in Toledo's Industrial Core**

Neil Reid
Assistant Professor
Department of Geography and Planning

Rey Boezi
Consultant
R.A. Boezi and Associates, Inc.

Sue Wuest
Research Associate
The Urban Affairs Center

Anthony Allen
Student Intern
The Urban Affairs Center

Mary Bielen
Community Economic Development Specialist
Ohio Sea Grant Extension

With recommendations developed by the R&E Survey Follow-Up Committee

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A Project
Of
The Urban Affairs Center
The University of Toledo
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INTRODUCTION

The retention and expansion of existing businesses is an extremely important contributor to the economic viability and stability of American cities. This is particularly true for cities, which have a recent history of losing employment via the process of business migration. The post-war experience of the majority of inner cities of metropolitan areas located in the Great Lakes region has been the migration of businesses (especially manufacturers) to suburban neighbors or other metropolitan areas in the western or southeastern United States. From the perspective of economic developers, community development corporations, and others concerned with the loss of employment opportunities and tax revenues, an essential issue is identifying and developing strategies that may slow down, stop, or even reverse existing migration trends. Retention of businesses is extremely important. Research has demonstrated that between 40% and 70% of new job growth is generated by existing firms. To this end, an Industrial Retention and Expansion Business Visitation Survey (R&E Survey) was developed by The University of Toledo Urban Affairs Center (UAC). This survey was part of a broader project designed to assess the feasibility of Flexible Manufacturing Networks (FMNs) as an inner city economic development tool. The purpose of the FMN project was to enhance connections between inner city manufacturing firms, Community Development Corporations (CDCs), the market, and the economic development community with respect to industrial retention and expansion. The FMN project was funded primarily by the Joyce Foundation. Primary funding for the R&E Survey came from a HUD special purpose grant secured by Congresswoman Marcy Kaptur.

The R&E survey was carried out by UAC and CDC staff between summer 1995 and summer 1996. The survey was a modified version of one conducted in over 100 Ohio communities by The Ohio State University Extension (OSUE) service as part of The Ohio Business Retention and Expansion Program.

REPORT SUMMARY

RESULTS & CONCLUSIONS

Industrial Retention & Expansion Visitation Survey

The retention and expansion of existing businesses is an extremely important contributor to the economic viability and stability of American cities. Research has demonstrated that between 40% and 70% of new job growth is generated by existing firms. To this end, an Industrial Retention and Expansion Business Visitation Survey (R&E Survey) was developed by The University of Toledo Urban Affairs Center (UAC). This survey was part of a broader project designed to assess the feasibility of Flexible Manufacturing Networks (FMNs) as an inner city economic development tool. The purpose of the FMN project was to enhance connections between inner city small manufacturing firms, Community Development Corporations (CDCs), the market, and the economic development community with respect to industrial retention and expansion. The FMN project was funded primarily by the Joyce Foundation. Primary funding for the R&E Survey came from a HUD special purpose grant secured by Congresswoman Marcy Kaptur.

The R&E survey was carried out by UAC and CDC staff between summer 1995 and summer 1996. The survey was a modified version of one conducted in over 100 Ohio communities by The Ohio State University Extension (OSUE) service as part of The Ohio Business Retention and Expansion Program.

The fifty-eight businesses (see Appendix-Map 1) interviewed for this survey were primarily single-unit firms within the boundaries of the NorthRiver Development Corporation (NRDC) and the RiverEast Economic Revitalization Corporation (REERC). These businesses employ an average of approximately thirty employees. Salaries range from an average of \$7.21 per hour for unskilled workers to \$14.16 per hour for skilled workers. The majority of employees live outside the neighborhoods within which their business is located.

Survey Results

It is probably important to begin by stating that the survey results were, for the most part, very positive. There was a lot of good news. Small Manufacturers are, generally, happy to be located in Toledo and are generally interested in continuing to operate at their present locations. It is likewise encouraging to note that most of the major concerns and issues of the responding firms are already being addressed locally by economic development service providers. In addition, there are many new programs and services being developed to address many of the remaining needs of Toledo's small manufacturing firms. There are, of course, some service gaps that may need to be filled.

The concerns and issues of the respondents of the R&E survey can be broken down into four categories:

- ❖ **Workforce Development Issues**
- ❖ **Need for Expansion Space**
- ❖ **Cost of Operations**
- ❖ **Capacity to Compete in a Changing World Economy**

1. Workforce Development Issues

Employers expressed considerable dissatisfaction with the quality of their labor force in terms of their mastery of both basic and specialized skills. A need to upgrade the reading and writing, basic math, and interpersonal communication skills of employees was expressed. Specialized skills, such as machinery operation and computer skills (e.g. word-processing and computer aided design), were also considered to be unsatisfactory by many employers. One may interpret these findings as an opportunity for the public education system to equip the labor force with the basic academic and vocational skills necessary to be effective and successful in the modern workplace (Table 6).

Employers appear to be willing to train workers hired to entry and semi-skilled positions. Fifty-three of the businesses surveyed provide some type of job training for employees. Fifty-three businesses (out of 58) also indicated that they provide some level of health care benefits for their employees. This was an unexpected finding that suggests that, in today's highly competitive labor market, a comprehensive health care benefits package is essential to retain quality employees.

2. Need for Expansion Space

Surveyed businesses generally consider Toledo to be a good place to do business. However, in these times of expansion and growth, thirty-eight of the fifty-eight businesses surveyed indicated that they plan to either renovate or expand their current place of business. Thirteen businesses plan on closing and/or selling their current business establishment and open a new facility elsewhere. Six of these new facilities will be within the Toledo Metropolitan Statistical Area (MSA). The major reasons for moving were overcrowded buildings, lack of expansion space, and concerns over crime (Tables: 11, 12, 13, 14, & 27).

3. Cost of Operations (Specifically Utility Costs & Worker's Comp Costs)

High utility costs are another major concern for surveyed businesses. One remedy may be to encourage firms to employ more energy efficient equipment. In addition, a well crafted local plan to take advantage of the opportunities presented by the prospect of the deregulation of gas and electric utilities, many offer the potential of significant reductions in industrial utility costs. If, however, utility costs cannot be reduced then we should not be surprised to see a continued migration of Toledo businesses to cheaper utility areas. Such cost-saving strategies are an essential component of being competitive in an atmosphere of intensifying global competition (Table 19).

Worker's comp costs were also identified as a problem for some of the firms.

4. **Capacity to Compete in a New Economy**

Active participation in the global economy is a reality for almost half of the surveyed businesses. Twenty-eight businesses export internationally with Canada, Europe, Latin American, and Southeast Asia as their major export markets. However, international export is not without its difficulties. The most challenging export problems faced by surveyed businesses were restrictive state and/or federal regulations and inadequate knowledge of foreign markets. The State of Ohio Department of Commerce and several regional organizations (e.g. Toledo Area International Trade Association) should be able to provide some assistance to these firms, however, their awareness of such assistance is limited.

Note: The quality of city services emerged as another important issue. We did not list this as a key area of concern because there was some variation in the way respondents ranked specific city services. For example, fire and emergency services were rated very high, while police and street (paving, cleaning, and snow removal) services were rated low (Table 27).

Conclusions

Assisting businesses to improve the viability of their operations at their present location is an important challenge facing our local economic development agents. Although our small businesses have a strong tendency to be loyal to Toledo, they must not be taken for granted. The firms, through their survey answers, have highlighted many areas in which we can improve our ability to retain and support the expansion and attraction of small manufacturing businesses. Their answers tell us that we must direct additional effort toward the following:

1. The improvement of basic education and skill training
2. Lowering utility rates
3. Renovation and/or expansion assistance
4. Relocation assistance where existing site expansion is not possible
5. Dealing with concerns about crime
6. Enhancement of firms ability to be competitive in the global market

LESSONS AND POLICY IMPLICATIONS

Lessons *The R&E Survey and the UAC FMN Project*

If we look closely at the survey responses, they tell us even more. They tell us that we need a more comprehensive and integrated approach to local economic development that are directed toward small manufacturing firms. It may be necessary for us to develop an approach that goes beyond traditional activities such as: real-estate development, incentive programs, marketing, and the provision of financing products. Many other regions and localities have discovered that in order to be effective, they must include the **full integration** of those traditional activities along with:

1. Workforce development for new and existing employees
2. Dealing with high costs of doing business, primarily high utility costs and worker's compensation premiums.
3. Provision of high quality city services. (We must quickly deal with actual and perceived problems.) We currently need to make some improvements in the area of crime prevention. Special police units targeted to industrial areas coupled with an industrial version of Block Watch as well as target hardening (*e.g. lighting and lock and security systems*) for the businesses might be worth exploring.
4. Finding ways to support or enhance the ability of small firms to adapt quickly to the challenges of a new economy with changing global markets. This might include:
 - ❖ Market/customer development assistance
 - ❖ Improving access to technology and innovation (this might be accomplished through the integration of manufacturing technology assistance programs with traditional economic development efforts and ensuring that small firms have access to these services)
 - ❖ Supporting or facilitating collaboration among firms (This might take the form of joint production networks and/or networks that focus on resource and knowledge sharing)
 - ❖ Developing mechanisms for continuous assessment and evaluation of our local industries and using that information to continuously improving our local responses to the needs and challenges of these industries. This would include examining local/regional industry clusters/sectors (geographic concentrations of competing, collaborating and related businesses that drive local economies)

Policy Implications

There is a standard perception among small firm owners that public officials and local economic development professionals think that small manufacturing firms don't contribute much to the overall quality of the local economy. Small firms refer to this as a 'large-firm' bias among economic development professionals. The results of this survey help us understand that Toledo's small manufacturing firms play an important role in our local economy. The firms we interviewed do, in fact, pay their employees decent wages and an overwhelming number of them provide benefits. They export to foreign markets, anticipate growth and expansion of their businesses, and they want to increase their capacity to become even bigger players by learning more about how to compete in our changing economy. This, along with the knowledge that general research has demonstrated that between 40% and 70% of new job growth is generated by existing firms, should lead us to conclude that retaining and growing local small firms is probably a good local economic development priority. But in order to do this we need more detailed information about our local industries and the markets they serve. We need information so that we can craft strategic economic development policy responses that build on the strengths of our local industries and local resources. We do have enough information to know some of the threats to our small manufacturers and we do need to decide how we will craft our future economic development strategies to address those threats.

R&E FOLLOW-UP COMMITTEE REVIEW AND RECOMMENDATIONS

Following THE completion of the survey and the initial draft of the survey report, an R&E Follow-up Committee, made up of representatives from local economic development service providers, was assembled. The committee took on the responsibility of closely examining the survey results and initial recommendations within the context of current local economic development programs and services that are available to small manufacturers. The committee then developed a good understanding of the services that were already available to small firms, the services that were being planned or in development, and the service gaps. The committee's final task was to develop the following series of responses and recommendations.

The following is a list of existing services, planned services, and possible service gaps. The list was developed by the members of the follow-up committee and is based on their experience and knowledge of our local economic development system. However, one thing we learned while conducting the survey and follow-up activities, is that local economic development players don't often effectively communicate with one another or with all relevant segments of the public, therefore it is possible that some specific programs and service providers are missing from the list. If this is the case, it further illustrates the need for more communication and coordination between local economic developers.

1. Workforce Development

Existing Programs:

Entry Level/Basic Skills

- ❖ Toledo Technology Academy of the Toledo Public Schools
- ❖ Greater Toledo School to Work consortium
- ❖ The University of Toledo, Community and Technological College Deal Center (etc.)
- ❖ Whitney Manufacturing Academy, Adult and Continuing Education of the Toledo Public Schools
- ❖ Project Hope, Owens Technical College

Advanced Skills

- ❖ University of Toledo
- ❖ Owens Technical College
- ❖ Center for Manufacturing Excellence
- ❖ Building and Manufacturing Trade Apprenticeship Programs

Planned Programs

- ❖ Private Industry Council is currently evaluating the entire workforce development system for Lucas and Wood Counties—this will result in a better understanding of employer needs, workforce needs and training program availability. The next step will be to redesign the system to ensure that it is meeting the needs of employers and

providing the necessary skills to move people into jobs (and move people up career ladders)

- ❖ Toledo Neighborhood Business Alliance is planning to develop a Toledo Business Resource Center which will, among other things, facilitate access to training services for small firms in its service area.
- ❖ Extension of Whitney Program into other geographic areas (Hoag Center and Woodward H.S.)
- ❖ Northside Industrial Network (a project of the Lagrange Development Corporation)
- ❖ Focus Hope based Program for Toledo will provide pathway from basic skills training programs to higher level skills training for new and existing workers.

Gaps/Problems that yet need to be addressed

- ❖ Once a small firm invests in training for their workforce, they lose their workers to larger firms
- ❖ Smaller firms have less money to invest in training existing and entry level workers
- ❖ Smaller firms have less time to release workers to obtain training.

2. Cost of Operations

Existing Programs

Utility Costs

- ❖ General Utility
 - Rebuild America (NHS)
- ❖ Natural Gas
 - Choice of Gas Providers
 - Rate Education
- ❖ Electricity
 - Rate Education
 - Energy Audits (Toledo Edison)
 - Rate Education for smaller commercial accounts

Worker's Compensation

- ❖ Bureau of Worker's Compensation provides non-regulatory consultants to advise/train companies in a variety of areas that may lead to a reduction of Worker's Compensation premiums.
- ❖ Rate Education
- ❖ Contact information 1-800-OHIOBWC
- ❖ Web page www.OHIOBWC.com
- ❖ Safety and Hygiene Branch Training Facility at MCO

Other Costs

- ❖ Edison Industrial Systems Center (EISC) Assessments (which may lead to reduced operating/production costs which will offset high cost of utilities)

Planned Programs (expected changes)

- ❖ There are efforts targeted at facilitating the formation of groups or networks of small firms to purchase utilities in bulk to get discounts
- ❖ Electric Deregulation

3. Expansion Space and Assistance (at current location or within the City of Toledo)

Existing Programs:

- ❖ Edison Industrial Systems Center-Facilities Planning Program
- ❖ State and Local brownfields Programs
- ❖ CDC programs (help identify sites, act as co-developers, facilitate access to financing programs, and real estate development) (see Appendix-Map 2)
- ❖ City Programs (Enterprise Zone, CRA, Loan Programs, Façade programs, EDL and NEDL) (See Appendix-Map 3)
- ❖ City has several industrial parks with space available (See Appendix Maps 4A-4D)

Gaps/Problems that yet need to be addressed

- ❖ No aggressive local brownfields strategy
- ❖ Lack of sufficient information and data about existing sites
- ❖ Limited stock of existing—inexpensive, usable buildings for manufacturing operations

4. Competitiveness (changing world economy)

Existing Programs

- ❖ EISC (several divisions with many programs that deal with productivity, efficiency, engineering and product/prototype development, etc.)
- ❖ The University of Toledo/Penta County/EISC—ISO/QS program for small firms (State Funded Program)
- ❖ Toledo Public Schools—ISO/QS program for small firms (State Funded Program)
- ❖ ITAC (International Trade Assistance Center located at the Chamber of Commerce)
- ❖ Small Business Development Center (SBDC) (located at the Chamber of Commerce)
- ❖ Manufacturing SBDC (EISC)
- ❖ Various workforce development programs
- ❖ SCORE (Service Corp of Retired Executives)

Gaps/Problems that need to be addressed

- ❖ R&D/venture money for small firms
- ❖ Market trend and market access information and services
- ❖ Economic/Business profile of greater Toledo (adequate updated sector analysis)
- ❖ Business network formation facilitation

Follow-Up Committee Recommendations

1. Locally, we need to redefine economic development in broader terms (we need to include real estate development, workforce development, market development, research and development)
2. We recommend that local economic development service providers hold an evaluation and planning meeting. The purpose of the meeting would be to:
 - ❖ Share information about current and planned programs and services
 - ❖ Identify systematic gaps
 - ❖ Explore ways to fill the gaps
3. The City of Toledo and its economic development partners need to “Articulate a Small Business Development and Support Strategy or Mission” which would result in support of the following types of efforts, programs and policies:
 - ❖ Toledo Business Resource Center (a program of the Toledo Neighborhood Business Alliance and other partners) which is seeking to provide or coordinate (with current service providers) services in the following areas: Market development, marketing, space planning, accounting, legal assistance, procurement, workforce and management training, entrepreneurial support and training, business network facilitation, import export assistance, QS/ISO training, etc.
 - ❖ Make sure that existing financing and assistance programs are accessible to small firms.
 - ❖ Explore the development of an R&D fund or venture capital for smaller firms and smaller projects
 - ❖ Explore the development of complete information/data about existing property and buildings that may be available for development.

4. We recommend that the City of Toledo establish an aggressive brownfields development strategy so that we can deal with brownfields pro-actively and make more land available for industrial uses within the city. We recommend that the City of Toledo position itself so as to better compete in a possible round two of the Federal Empowerment Zone Enterprise Community Program which, initial reports suggest, may favor projects that focus on brownfield recovery strategies.
 - ❖ Support changing State of Ohio brownfield legislation so that it includes support for up-front assessments, prior to purchase of property. (modeled on Michigan legislation)
 - ❖ Explore the possibility of developing some sort of recoverable grant program to support brownfield assessments for potential developers. (Could be modeled on LISC pre-development grant program.)

While the work of the Follow-up Committee is now complete, there is still work to be done. In order to complete the job, another broader group of local economic development agencies, practitioners, and business service providers, many of whom were identified above, should be convened. The charge of this group should be to craft the new policies and strategies necessary to transform our local economic development system into one that is more supportive of Toledo's small manufacturers—the potential growth engines of our local economy.

REPORT OF SURVEY RESULTS

SURVEY METHODOLOGY

Working from five different databases, a list of nearly 300 small manufacturing businesses were identified as potential respondents. The lists included information on firm name, address, telephone number, key contact person, and, in many cases, type of business. The firms were then divided into CDC areas. The newly constructed database was reviewed by CDC staff and others for accuracy and inappropriate firms and erroneous information was deleted. A questionnaire survey was developed to elicit information on a variety of firm characteristics. These include employee training needs, expansion/renovation/relocation plans, international export behavior, knowledge, and use of different business assistance programs, business costs, strengths and weaknesses of current business location, and knowledge of and interest in flexible manufacturing networks. CDCs received an overall orientation to the goals and structure of the survey at a collective meeting. This initial briefing was followed by individual meetings with each CDC to coordinate responsibilities and schedules for conducting site visits. Survey administration training was conducted for volunteers and staff from the following CDCs: River East Economic Revitalization Corporation (REERC), North River Development Corporation (NRDC), Lagrange Development Corporation (LDC), Organized Neighbors Yielding excellence (ONYX), and Neighborhoods-In-Partnership (NIP). (Other CDCs were invited but declined for various reasons.) Each volunteer was assigned several firms and an introductory letter was sent to each firm several weeks in advance by the UAC staff to introduce the purpose of the survey and solicit firm participation. Within two weeks, a call to the business was made to schedule the interview. Usually, two volunteers were involved in each interview, one to conduct the interview and the other to record it. The completed surveys were returned to the UAC staff for database entry and analysis. When business visits were completed, a CDC Review Team was presented with suggestions to follow-up to their site visits. Each CDC was responsible for responding to any immediate concerns of the businesses they visited, as well as for requests by businesses or economic development information. If a survey identified an urgent issue, such as a firm considering relocation, the UAC passed this information on to appropriate personnel in the City of Toledo.

Of the initial 300 firms, approximately 200 firms were retained on the list as potential respondents, 58 surveys were completed. This represents a response rate of approximately 29%, which is quite good. Small businesses, by their very nature, are difficult to contact. Once contact has been made it is often extremely difficult to secure an hour of the owner or plant manager's time. Since business is currently good for them, it is even harder to get the attention of these jacks-of-all-trades. Sending the survey with a letter of introduction and presenting the survey as a University of Toledo sponsored project seemed to work well. A quick, follow-up telephone call to schedule the interview by a CDC staff member, community representative, or an FMN business broker was also helpful in eliciting firm participation. The fact that the caller was often known and respected by the business owner or plant manager further boosted firm participation. Calls by student helpers or other unknown quantities usually met with much less success. Delays in calling usually resulted in the survey recipient forgetting about and/or discarding the survey.

Using CDCs to carry out the survey did present problems. If the CDC was in the business of economic development, and had staff dedicated to this purpose, the process went smoothly. Their cooperation and participation was also easier to obtain since economic development was part of their mission. Where the staff was already burdened with other responsibilities, however, the survey often could not receive a very high priority. REERC, NRDC, and NIP proved to be the most successful CDC participants, though they needed assistance at various times during the course of the interviews.

As stated previously, the survey interviews were not easy to secure. Respondents ranged from businesses who were known to us because they were already participating in the FMN project and whose participation was almost one hundred percent, to businesses previously unknown where the participation rate was below 20%. For instance, in a sample of 45 businesses, 11 were either no longer in business, had moved out of the interviewing area, or were the wrong kind of business (i.e., non-manufacturing or value-added service). Eight firms declined to be interviewed because they were too busy or not interested. The principals of 17 firms could not be reached after several telephone calls and did not return calls. Principals of three firms said they would mail in the surveys and did not, while two surveys were returned by firms without a follow up call. Finally, four interviews were completed in person. If you remove those firms that were not appropriate, the rate of completion was 17%.

The survey was useful for several reasons. 1) It provided interested parties, such as the CDCs, with valuable information about the nature and needs of businesses located within their jurisdiction; 2) it provided a benchmark database against which future surveys can be compared; it provided the businesses with potentially useful federal, state, and local program information and; 3) it provided the Urban Affairs Center with potential FMN participants to include in their FMN firm database.

SURVEY RESULTS

Characteristics of Businesses Surveyed

Two Community Development Corporations (CDCs) accounted for the majority of the businesses surveyed. REERC and NRDC are home to thirty-one (54%) of the fifty-eight businesses that participated in the survey (Table 1). Just over two-thirds (67%) of the surveyed businesses are single-unit firms. The remaining third are almost evenly split between headquarters (17%) and branch plants (15%) of multi-unit firms (Table 2/Appendix-Map 1).

The ages of the businesses surveyed ranged from one year to ninety-nine years. The median start-up date for the surveyed businesses was 1978, while the mean age was 24.5 years. Surveyed businesses are involved in a wide array of activities, including the custom design and manufacturing of picture frames, the manufacture and testing of medical kits, the manufacture of industrial machine control panels, and the processing of scrap metal. Nineteen two-digit and thirty-nine four digit Standard Industrial Classification (SIC) codes are found in the surveyed businesses.

Table 1: Location of Surveyed Businesses

Location	Number	Percentage
REERC	16	28
NRCD	15	26
NIP	5	9
LDC	3	5
ONYX	3	5
TWDA	2	3
Other	14	24
<i>Total</i>	58	100

An examination of the markets served by the surveyed businesses reveals that 41 of them (71%) manufacture products for an end customer (final demand), while 49 (85%) supply other companies with a variety of material inputs (intermediate demand). Thirty-seven businesses (64%) supply both intermediate and final demand markets (Table 3).

Table 2: Establishment Type

Type	Number	Percentage
Single unit firm	39	67
Headquarters of multi-unit firm	10	17
Branch plant of multi-unit firm	9	16
<i>Total</i>	58	100

Table 3: Destination of Output

Destination	Yes	%	No	%	Total	%
Final demand	41	71	17	29	58	100
Intermediate demand	49	85	9	15	58	100
Final and Intermediate demand	37	64	21	36	58	100

Employee Characteristics

The 58 surveyed businesses have 1,742 full-time employees and 153 part-time employees. Semi-skilled workers account for the largest share (31%) of full-time employees, while skilled workers account for the largest share (56%) of part-time employees (Table 4). The average number of full-time and part-time employees per business is 29.7 and 2.6 respectively. Not surprisingly, the average hourly wage rate varies considerably among different job functions. Unskilled employees averages \$7.21 per hour; semi-skilled, \$9.68 per hour (clerical/administrative) to \$33.94 per hour (business owners) (Table 4). Only 14 % of the employees of the surveyed businesses live in the neighborhood where their place of work is located. The majority of the employees (73%) live outside the place of work neighborhood but inside the Toledo MSA. Eight percent live outside the Toledo MSA, but within Ohio, while 5% live outside Ohio (Table 5).

Table 4: Wage Rates

Employee Type	Number		Number		Average Hourly Wage Rate (\$)
	Full-Time	%	Part-Time	%	
Unskilled	201	12	42	28	7.21
Semi-Skilled	536	31	3	2	9.68
Skilled	331	19	86	56	14.16
Clerical/Administrative	216	12	16	10	9.81
Professional	125	7	4	3	19.80
Sales/Technical	114	7	0	0	15.67
Management	189	11	2	1	22.29
Others	12	1	0	0	33.94
<i>Total</i>	<i>1,724</i>	<i>100</i>	<i>153</i>	<i>100</i>	

Table 5: Location of Employee's Residences

Location of Residence	%
Within neighborhood of business	14
Outside neighborhood, but in Toledo MSA	73
Outside Toledo MSA but in Ohio	8
Outside Ohio	5
<i>Total</i>	<i>100</i>

The surveyed businesses were asked to identify types of training needed by their current employees. These needs were categorized into three main types – basic and/or specialized skills, managerial skills, and computer skills. Table 6 shows the number of times a particular training need was mentioned. The greatest need appears to be in the area of basic and/or specialized skills. In particular, the ability of current employees to operate specialized machinery seems to be lacking. Thirty (52%) businesses mentioned this as a gap in their employees' skill base. Elementary skills, such as reading, writing, and basic math, are also in need of upgrading. Twenty-three businesses (40%) identified a need for the upgrading of reading and writing skills among their employees, while 19 businesses (33%) identified basic math skills. Fifteen businesses (26%) see a need to upgrade their employees' interpersonal communication skills. Only two businesses (3%) noted basic accounting skills as lacking in their employees.

With regard to managerial skills, the most frequently mentioned need was for upgrading of employee management skills. Twenty-two businesses (38%) mentioned this. Business planning skills, inventory control skills, record-keeping skills, and financial management skills were mentioned by 19 (33%), 15 (26%), 13 (22%), and 11 (19%) businesses respectively.

The two most commonly cited computer skills lacking in the employees were word processing and spreadsheets; these skills were mentioned by 21 (36%) businesses. Computer aided design skills were mentioned by 19 (33%). Eighteen businesses (31%) noted a lack of database management skills among their employees, while 12 businesses (21%) reported a need for training in computer precision.

Table 7 shows the types of skills and training, which were identified as lacking in interviewees (potential employees) of the surveyed businesses. A comparison of Tables 6 and 7 is interesting as it provides insights into which skills and/or training distinguish successful from unsuccessful job candidates. With regard to basic and/or specialized skills, it is noteworthy that, with one exception, there appears to be little difference between employees and interviewees. For example, specialized machinery operator skills was identified as equally lacking in both employees and interviewees. The same observation can be made for reading and writing skills, basic math skills, and basic accounting skills. A lack of good interpersonal communication skills among employees was identified by only 15 businesses (26%), while a lack of good interpersonal communication skills among interviewees were identified as lacking by 25 businesses (43%). This suggests that good interpersonal communication skills area key determinant of success in the job market.

For all types of managerial and computer skills, current employees appear to be more lacking than interviewees. This is surprising. One would expect that those who are successful in attaining jobs would be better versed in skills such as word processing, database management, and inventory control. The apparent contradiction in these findings has several possible interpretations. Employers obviously know their employees much better than they do unsuccessful job applicants, thus having an intimate knowledge of the employee's strengths and weaknesses. On the other hand, their knowledge of the skills and abilities of unsuccessful job applicants are based upon short-term interactions (the job interview itself) and are considerably less reliable.

Table 6: Training Needs of Current Employees

Need	Number of Times Mentioned	%
<i>Basic and/or Specialized Skills</i>		
Specialized machinery operator skills	30	52
Reading and Writing	23	40
Basic Math	19	33
Interpersonal communications	15	26
Basic accounting	2	3
<i>Managerial Skills</i>		
Employee management	22	38
Business planning	19	33
Inventory control	15	26
Record keeping	13	22
Financial management	11	19
<i>Computer Skills</i>		
Word processing	21	36
Spreadsheets	21	36
Computer aided design	19	33
Database management	18	31
Computer precision	12	21

Table 7: Training Needs of Interviewees

Need	Number of Times Mentioned	%
<i>Basic and/or Specialized Skills</i>		
Specialized machinery operator skills	29	50
Interpersonal communications	25	43
Reading and writing	23	40
Basic math	18	31
Basic accounting	1	2
<i>Managerial Skills</i>		
Business planning	15	26
Employee management	13	22
Inventory control	6	10
Record keeping	6	10
<i>Computer Skills</i>		
Computer aided design	14	24
Spreadsheets	13	22
Database management	13	22
Word processing	9	16
Computer precision	8	14

Given the obvious need for the upgrading of both basic and more advanced skills, the issue of the extent to which the businesses in our survey provide employees with training is an important issue. Fifty-three (93%) of the 57 businesses who answered the question indicated that they did indeed provide some type of job training for their employees (Table 8). Of those businesses that provided training, 31 (58%) provided on-site training only, three (6%) provided off-site training only, while 19 (36%) provided both on-and off-site training (Table 9). The preponderance of on-site training may reflect the difficulty that small businesses have in replacing employees if they go off-site for training.

Health care for employees is provided by 53 (91%) of surveyed businesses (Table 10). The fact that such a high proportion of surveyed businesses provide employee health benefits may be considered surprising. However, this may be a function of the need to retain good employees, as well as be reflective of some vestiges of the concept of small businesses taking care of their own.

Table 8: Provision of Employee Training

Training Provided	Number	%
Yes	53	93
No	4	7
Total	57	100

Table 9: Location of Training

Location	Number	%
On-site	31	58
Off-site	3	6
On- and off-site	19	36
Total	53	100

Table 10: Health Care Provision

Provide Health Care	Number	%
Yes	53	91
No	5	9
Total	58	100%

Renovation, Expansion, and Moving Plans

Thirty-eight of the fifty-eight surveyed businesses (65%) indicated that they had plans to either renovate or expand their current place of business (Table 11), while 13 (22%) have plans to either close or sell their present business establishment and open a new one elsewhere. Seven plants (12%) have no plans for renovation, expansion, or moving.

Table 11: Business Renovation, Expansion and Moving Plans

<u>Proposed Action</u>	<u>Number</u>	<u>%</u>
Renovate or expand	38	66
Move	13	22
No action	7	12
Total	58	100

With regard to expansion of their businesses at their current site, 34 businesses (74%) indicated that they did indeed possess sufficient property to do so if needed (Table 12). The 34 businesses that indicated that they had sufficient space for plant expansion were asked to identify constraints to expansion/renovation (Table 13). The major constraint identified is the need for financial assistance. Sixteen (47%) businesses questioned identified this as a constraint. The need for physical planning assistance was identified by seven (21%) of businesses.

Table 12: Existence of Sufficient Expansion Space

<u>Sufficient Expansion Space</u>	<u>Number</u>	<u>%</u>
Yes	34	74
No	12	16
Total	46	100

Of the 13 businesses that plan to relocate their current business establishment, expansion problems were the most commonly cited reason for the proposed relocation (Table 14). Six (46%) are planning to move because their present building is overcrowded, while four (31%) mentioned a lack of land for expansion. Problems associated with crime were also high on the list of reasons for moving. Four businesses (31%) gave this as a reason.

Table 13: Constraints to Renovation or Expansion

<u>Constraint</u>	<u>Number of Times Mentioned</u>	<u>%</u>
Need financial assistance	16	47
Need physical planning assistance	7	21
No constraints	8	24
Other	4	12

Table 14: Reasons for Moving Establishment

Reason	Number of Times Mentioned	%
Overcrowded building	6	46
No land for expansion	4	31
Crime/vandalism	4	31
Lease expiration	3	23
Low work productivity	2	15
Transportation problems	1	8
Environmental concerns	1	8
Rigid code enforcement	1	8
High local taxes	1	8
Other	5	38

Six of the 13 businesses (46%) who are planning a move will probably remain in the Toledo area. Three (23%) will move out of Toledo, but remain in Ohio. One business (8%) plans on leaving Ohio. Another three (23%) are undecided as to where they will move (Table 15). Eleven (84%) of the declared movers will relocate within one to three years from now. One business (8%) plans on moving within six months, while another will not move for at least three years (Table 16).

Table 15: Proposed Location for New Plant

Destination	Number	%
Elsewhere in current business area	2	15
Another business area in Toledo MSA	4	31
Elsewhere in Ohio	3	23
Outside Ohio	1	8
Undecided	3	23
Total	13	100

The findings presented in Tables 11-16 suggest that small business owners have a strong loyalty to their present location. Loyalties are a function of family and social ties, very often established as a result of generations of a family living in a particular neighborhood. Small business owners are also often victims of industrial inertia. They rarely have the necessary resources to change locations, and only do so when faced with extenuating circumstances that may have detrimental effects on the future viability of their business, such as lack of space for expansion.

Table 16: Timing of Establishment Moving

Timing	Number	%
Within six months	1	8
One to three years	11	84
More than three years	1	8
Total	13	100

To gain further insight into problems facing small manufacturers in Toledo, the surveyed manufacturers were asked to identify the single most specific threat to their businesses (Table 17). The overwhelming response was the challenges associated with adjusting to economic changes and conditions. Fourteen businesses (24%) identified this as the single most specific threat to their business. Small businesses in Northwest Ohio have seen the economic arena in which they participate change in some very fundamental ways during recent years. These include the increasing globalization of the economy (with NAFTA being particularly important for Northwest Ohio), the restructuring of some of the major industries (especially automotive and steel), and the introduction of new technologies and business practices (e.g., just-in-time inventory control). Changes of such a fundamental nature and of such a magnitude may seem overwhelming to small businesses. Yet, if they are to survive, they must rise to the challenge of change and view it as a series of opportunities rather than threats.

Table 17: Single Most Specific Threat to Business

Threat	Number of Times Mentioned	%
Adjusting to economic changes and conditions	14	24
Crime	5	9
Deterioration of surrounding neighborhood	4	7
Lack of trained workers/quality workforce	4	7
High utilities	3	5
Lack of space for expansion	3	5
Street lighting	1	2

Businesses were asked what type of assistance would allow them to either remain in or expand at their present location (Table 18). Assistance with acquiring additional land and/or building space was mentioned by eight (14%) of the 58 businesses. This is consistent with the findings reported in Table 14 which shows that overcrowded buildings and the lack of land for expansion were the most frequently cited reasons for manufacturers moving from their present locations. The need for lower taxes and/or the provision of tax incentives was also identified as a need by eight businesses. The need to reduce electricity rates was also high on the list of the necessary assistance. Six firms (10%) mentioned that a reduction in electricity rates would be helpful to their business remaining competitive at their present location. Concern with utility rates reflects the fact that Northwest Ohio has some of the highest utility rates in the United States. Deregulation of utilities is not far off, however. It has already happened in the natural gas industry, where deregulation is in the process of eliminating Columbia Gas’s monopoly of the local natural gas market. High utility rates and taxes were also frequently mentioned by firms when asked which specific business concerns need to be addressed (Table 19). Twenty-five businesses (43%) said that utility rates needed to be addressed, while 13 businesses (22%) identified taxes. Other key issues, which businesses felt needed attention, were crime (mentioned by 14 businesses, 24%), schools (13 businesses, 22%), and city aid and financial assistance (12 businesses, 21%).

Table 18: Assistance Needed to Remain or Expand at Current Site

Type of Assistance	Number of Times Mentioned	%
Land or building acquisition assistance	8	14
Lower taxes/tax incentives	8	14
Reduce Toledo Edison utility rates	6	10
Improve surrounding area	6	10
Improve financial assistance	4	7
Provide quality employees	3	5
Recognize small businesses	2	3
Improve rail service access	2	3
Cut government regulations	1	2

Export Activity

Twenty-eight (49%) of the surveyed plants are engaged in international export (Table 20).

Twenty-eight businesses (48%) export to Canada, making it the single most important export market. The second most important export market is Europe (17 business, 29%), Latin America (14 businesses, 24%), and Southeast Asia (11 businesses, 19%) (Table 21).

Table 19: Specific Business Concerns That Need to Be Addressed

Concerns	Number of Times Mentioned	%
High Utility Rates	25	43
Crime	14	24
Taxes	13	22
Improved Schools	13	22
City aid and financial assistance	12	21
Clean-up and improvement of surrounding area	8	14
Support and recognition of small businesses	6	10
Reduction of regulations	6	10
Improve city services	6	10
Reduce workers compensation rates	5	9
Provide property for expansion	2	3
Increase parking availability	1	2
Provide better recreational facilities	1	2

Nine of the 28 plants (35%) make direct sales to their target market, while eight plants (31%) use foreign distributors to access overseas markets. A further nine (35%) combine direct sales with use of foreign distributors (Table 22). Nine of the 28 plants (32%) engaged in international export said that they were experiencing problems exporting (Table 23). The two most commonly cited problems were restrictive state/federal regulations and inadequate knowledge of foreign markets. Five of the plants (56%) cited these as problems. Other exporting problems mentioned were those related to product transportation and a lack of export financing. These two problems were mentioned by four (44%) and two (22%) businesses respectively (Table 24).

Table 20: International Export Activity

<u>Export Internationally</u>	<u>Number</u>	<u>%</u>
Yes	28	49
No	29	51
Total	57	100

Table 21: Destination of Exports

<u>Country/Region</u>	<u>Number of Businesses Exporting</u>	<u>%</u>
Canada	28	48
Europe	17	29
Latin America	14	24
Other	3	5
Southeast Asia	11	19
Japan	5	9
Middle East	3	5
Africa	2	3

Table 22: Method of Export

<u>Method</u>	<u>Number</u>	<u>%</u>
Direct sales outside U.S.	9	35
Through foreign distributors	8	30
Direct sales outside U.S. and Through foreign distributors	9	35
Total	26	100

Table 23: Experience Problems Exporting

<u>Problems Exporting</u>	<u>Number</u>	<u>%</u>
Yes	9	32
No	19	68
Total	28	100

Table 24: Problems Exporting

Problem	Number of Times Mentioned	%
Restrictive state/federal regulations	5	56
Inadequate knowledge of foreign markets	5	56
Transportation of product	4	44
Lack of export financing	2	22

Toledo as a Business Location

The vast majority of respondents appear happy with their community as a place to do business. Three plants (5%) considered their community as an excellent place to do business, 42 plants (73%) considered their community as a good place to do business, and 13 plants (22%) considered their community as a fair place to do business. Not a single business considered its community as a poor place to do business (Table 25).

The surveyed plants were asked to rank a variety of business costs as either high or low. The cost most frequently cited as being high was that of public utilities. Forty-nine (85%) plants considered the cost of public utilities to be high. Conversely, only five plants (9%) thought that public utility costs were low (Table 26). Other costs, which were considered high by a significant number of surveyed plants were workers compensation, health care, and a variety of taxes (payroll, corporate, and inventory). Worker's compensation and health care were mentioned as being high by 39 (67%) and 32 (55%) respondents respectively. There were several costs that were considered low by those surveyed. The major low costs were building and transportation, which were mentioned by 24 (41%) and 22 (38%) respondents, respectively (Table 28).

Table 25: Opinion of Community as a Business Location

Opinion	Number	%
Excellent	3	5
Good	42	73
Fair	13	22
Poor	0	0
Total	58	100

Table 26: Business Costs

Business Cost	Number of Times Mentioned			
	High	%	Low	%
Public utilities	49	85	5	9
Worker's Compensation	39	67	6	10
Health care	32	55	7	12
Payroll taxes	28	48	8	14
Corporate taxes	19	33	10	17
Inventory taxes	17	29	8	14
Environmental regulations	16	28	9	16
OSHA requirements	16	28	16	28
Property taxes	10	17	15	26
Building costs	7	12	24	41
Transportation	6	10	22	38

Representatives from the surveyed plants were asked to rate the quality of 29 different services and amenities in their area (Table 27). For each service/amenity, respondents were asked to rank them as excellent, good, fair, poor, or very poor. Respondents were also given a don't know/not applicable option for each service/amenity. For each service/amenity an overall satisfaction score was generated. If a service/amenity was rated as excellent by a respondent, it was given a score of five; if good, a score of four; if fair, a score of three; if poor, a score of two; and if very poor, a score of one. The overall score for a service/amenity is the actual score received as a percentage of the maximum possible score.

Table 27: Quality of Services/Amenities

Service/Amenity	Score	Ranking
Medical care, hospitals, doctors	82.3	1
Emergency medical services	81.5	2
Fire protection	81.1	3
Access to higher education	80.7	4
Natural gas	79.6	5
Proximity to major markets	78.9	6
Water	77.4	7
Proximity to major suppliers	77.1	8
Electrical services	75.4	9
Solid waste disposal	74.5	10
Quality of life	74.2	11
Conference facilities	74.2	11
Hotel facilities	73.6	13
Air service	72.9	14
Telecommunications	72.6	15
Housing opportunities	72.3	16
Natural environment	71.0	17
Recreation facilities	70.6	18
Sewers	70.0	19
Roads, highways, freeways	69.3	20
Technical and vocational training	67.7	21
Police protection	67.6	22
Public transportation	66.0	23
Rail service	65.8	24
Snow and ice removal	64.2	25
Labor force	60.8	26
Street and sidewalk cleaning	60.8	27
Primary and secondary schools	60.5	28
Street repairs	58.9	29

The highest level of satisfaction among surveyed businesses is with emergency services. Medical care (hospitals and doctors), emergency medical services, and fire protection were ranked first, second, and third, respectively. There is less satisfaction with police protection, which was ranked twenty-second out of 29 services/amenities.

Access to higher education also ranked highly, placing fourth. Satisfaction among surveyed businesses with higher education reflects well on the area's major provider, The University of Toledo. There is a lower level of satisfaction with other human resources. Technical and vocational training, labor force quality, and the quality of primary and secondary schools were ranked twenty-first, twenty-sixth and twenty-eighth respectively. The dissatisfaction with technical and vocational training is consistent with respondent dissatisfaction with the specialized machinery skills of their employees (Table 6).

With regard to transportation services, the highest level of satisfaction was with air service, which was ranked fourteenth. Two major airports, Toledo Express and Detroit Metro, serve the Toledo metropolitan area. In addition to providing commercial passenger service, Toledo Express is the hub of Burlington Express, which specializes in overnight/one-day package delivery. Satisfaction with roads, highways and freeways, public transportation, and rail service was somewhat lower. Roads, highways, and freeways ranked twentieth; public transportation, twenty-third; and rail service twenty-fourth. It is perhaps surprising, given Toledo's strategic location at the junction of Interstate-75 and Interstate 80/90, to find roads, highways, and freeways ranked so low. It should be remembered, however, that these rankings are measures of relative, not absolute, satisfaction. Thus, even though roads, highways, and freeways rank twentieth, their score of 69.3 is only 3.9 below that of fourteenth-ranked air services. The relatively low ranking for roads, highways, and freeways could also reflect the possibility that respondents were voicing their opinion on the condition of roads, highways, and freeways. This possible interpretation is supported by the fact that respondents ranked snow and ice removal, street and sidewalk cleaning, and street repairs twenty-fifth, twenty-seventh, and twenty-ninth, respectively. On the other hand, respondents seemed happy with their place of business in terms of its proximity to both major markets and to major suppliers, which ranked sixth and eighth, respectively. This suggests that the dissatisfaction with roads, highways, and freeways reflects concern over the condition of the infrastructure rather than with the level of accessibility that roads, highways, and freeways provide to markets and suppliers.

Mention has already been made of the low rankings of snow and ice removal, street and sidewalk cleaning, and street repairs. Other public services did fare somewhat better. The quality of natural gas, water, electrical services, and solid waste disposal ranked fifth, seventh, ninth, and tenth, respectively.

Leisure and recreation facilities received moderately good rankings. The highest ranking received by a leisure and recreation facility was eleventh (conference facilities) and the lowest was eighteenth (recreation facilities).

Use and Awareness of Economic Assistance and Development Programs

Surveyed businesses were provided with a list of nineteen business-related topics and asked to indicate which ones they had received assistance with during the last three years (Table 28). They were also asked which business-related topics they would like to learn more about. The five topics about which surveyed businesses had received assistance were employee training (18, 31% of surveyed businesses received assistance on this), worker’s compensation (17, 29%), environmental regulations (16, 28%), health care insurance (12, 21%), and employee safety (12, 21%). The number one business topic about which the surveyed businesses would like to learn more is employee training. Fourteen businesses (24%) said that they would like to learn more about this topic.

Table 28: Utilization and Interest in Business Related Topics

Topic	Have Used		Would Like to	
	(last 3 years)	%	Learn More About	%
Employee Training	18	31	14	24
Worker’s Compensation	17	29	8	14
Environmental Regulations	16	28	2	3
Health Care Insurance	12	21	6	10
Employee Safety	12	21	6	10
SBA Programs (other than 504)	8	14	7	12
Writing a Business Plan	7	12	1	2
Loan Application and Preparation	7	12	5	9
Other Insurance, Liability etc.	7	12	2	3
Other Regulations (zoning etc.)	6	10	4	7
Quality Management	4	7	5	9
Consumer Surveying & Market Analysis	3	5	5	9
Tax Planning or Assistance	2	2	1	2
Paper Reduction	2	3	3	5
Minority Business Program	1	2	0	0
Sales Training	1	2	0	0
Computer Training	1	2	0	0
Stress Management	0	0	6	10
OSHA Regulations	0	0	1	2

Surveyed businesses were also provided with a list of twenty-four specific businesses assistance programs sponsored by they city, state, and other agencies (Table 29). Again they were asked to indicate which of these programs they had used in the last three years and which programs they would like to learn more about. Levels of utilization of all of these programs were low. The most heavily used program was Direct Loan 166, a state program. Seven businesses had utilized this program during the last three years. The second most popular program was the state’s Job Creation Tax Credit program, which was used by six (10%) of the surveyed businesses during the last three years. The City’s Enterprise Development Loan Program, with five users (9%), is the third most heavily utilized program. Despite lack of heavy utilization of city, state, and other business assistance programs there does seem to be considerable interest among surveyed firms to educate themselves about the potential benefits. The programs that most surveyed firms indicated that they would like to learn more about were the state’s Job Creation Tax Credit Program, the state’s Export Ohio Program, and the city’s Façade Loan Program. Nineteen businesses (33%) indicated that they would like to learn more about each of these programs.

Table 29: Utilization and Interest in City, State & Business Programs

Program	Have Used (last 3 years)	%	Would Like to Learn More About	%
Direct Loan 166	7	12	10	17
Ohio’s Job Creation Tax Credit	6	10	19	33
Enterprise Development Loan*	5	9	17	29
School-to-work	4	7	7	12
SBA 504 Loan	4	7	13	22
Ohio Enterprise Loan	4	7	16	28
Ohio Industrial Training	4	7	14	24
PIC**	3	5	1	2
Neighborhood Economic Dev. Loan*	3	5	14	24
Community Reinvestment Areas	3	5	14	24
One-stop Business Permit Center	2	3	10	17
Export Ohio	2	3	19	33
Brownfield Legislation**	1	2	0	0
Zoning Law Change Assistance**	1	2	0	0
Façade Loan*	1	2	19	33
Ohio’s Export Tax Credit	1	2	16	28
Enterprise Bond Fund	1	2	10	17
Ohio Research & Dev. Tax Credit	1	2	15	26
VOA Work**	0	0	1	2
Ohio Manufacturer Investment Tax Credit**	0	0	1	2
Port Authority Bonds**	0	0	1	2
Minority Surety Bond	0	0	7	12
Minority Direct Bond	0	0	7	12
Ohio Mini-Loan	0	0	11	19

Unless otherwise indicated, programs are state programs. Programs indicated with a single * are City of Toledo Programs. Those indicated with two ** are neither city nor state programs.

Table 30 reports awareness among surveyed businesses, of two City of Toledo Enterprise Zone Programs. Twenty-eight businesses (48%) indicated an awareness of the real estate property tax abatement program, while 23 (40%) indicated an awareness of the personal property tax abatement program. Sixteen firms (29%) indicated a desire to be provided with more information on City Enterprise Zone Programs.

Table 30: Awareness of City of Toledo Enterprise Zone Programs

Program			Aware			
	Yes	%	No	%	Total	%
Real estate tax abatements	28	48	30	52	58	100
Personal property tax abatements	23	40	35	60	58	100
Desire information on programs	16	29	40	71	56	100

Finally, surveyed businesses were asked about their knowledge of and interest in Flexible Manufacturing Networks (FMNs). For the past three years The University of Toledo Urban Affairs Center has been educating local manufacturers on the potential benefits of participating in FMNs. This survey found that 42 (75%) of the surveyed manufacturers already work collaboratively with other firms to manufacture products that they could not produce by themselves.

Thus, interest in flexible manufacturing networks among surveyed businesses is fairly high. Forty businesses (73%) indicated that they were interested in receiving information on FMNs. Eight businesses (14%) indicated that they would not be interested in receiving information on FMNs. Seven businesses (13%) were unsure, or did not know, what is meant by an FMN (Table 31).

Table 31: Interest in Flexible Manufacturing Networks

	Number	%
Yes	40	73
No	8	14
Not sure what an FMN is	7	13
Total	55	100

APPENDIX – MAPS

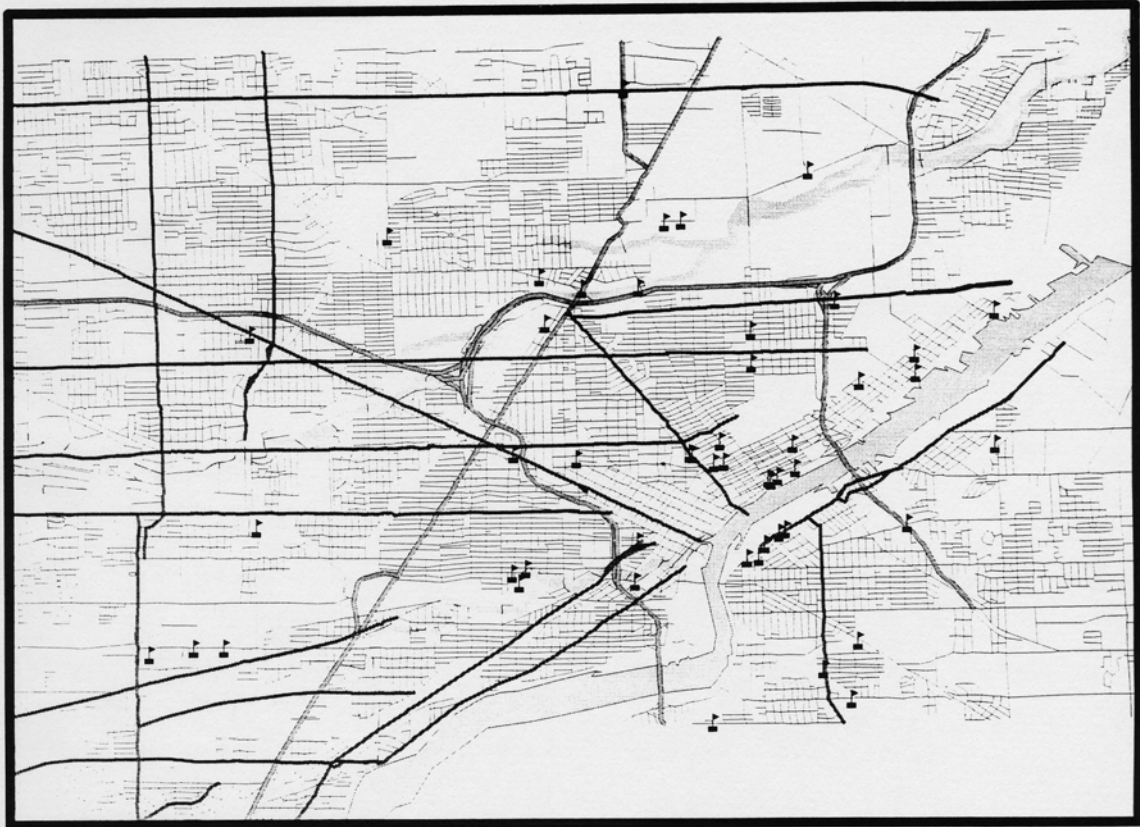
Map 1 Retention and Expansion Survey – Firms Surveyed


Map 2 CDCs with Economic Development Programs

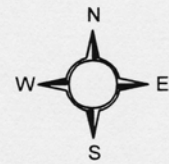
Map 3 Enterprise Zone, Subzone, and Hiring Priority Area with Distribution of Manufacturing
Firms with < 300 Employees

Map 4 Industrial Parks (maps 4A-4D)

MAP 1



 SURVEYED FIRMS

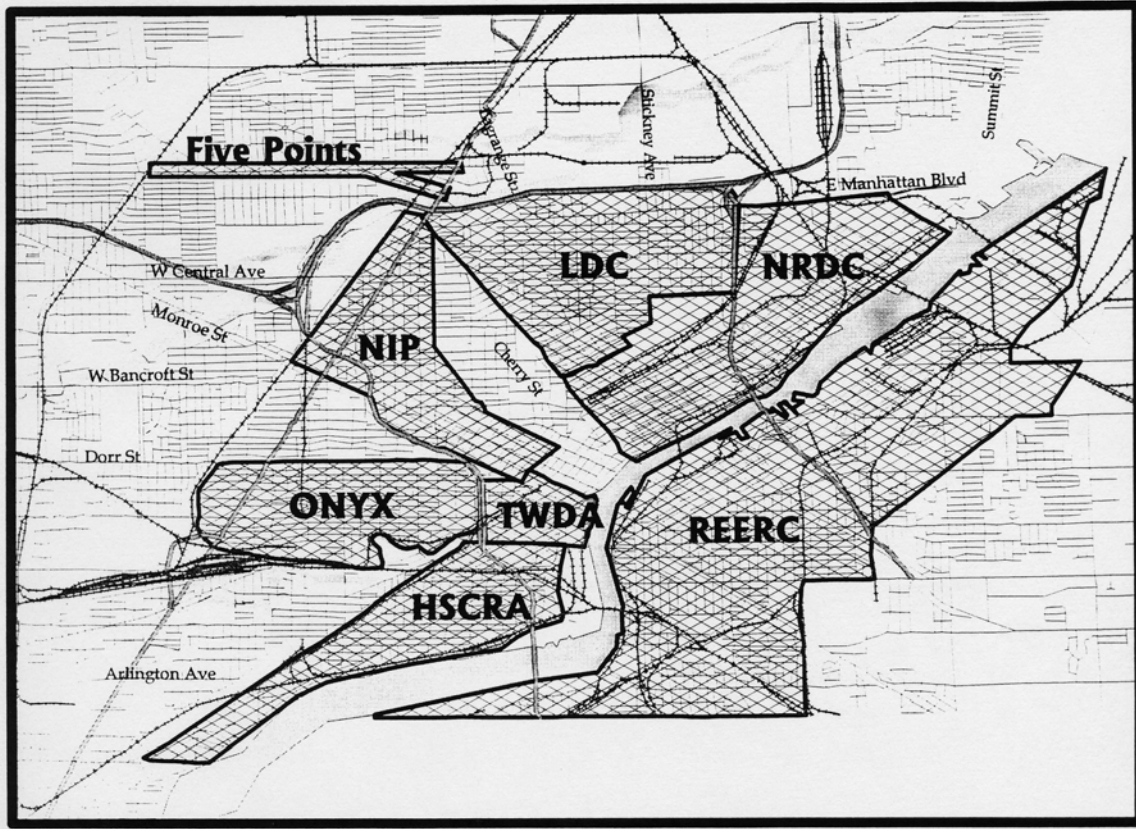


 MAJOR STREETS
 HIGHWAYS
 STREETS
 RIVERS

RETENTION AND EXPANSION SURVEY FIRMS SURVEYED

Map prepared by the Urban Affairs Center (10-97)

MAP 2



MAJOR STREETS
RAILROADS
HIGHWAYS
STREETS
RIVERS

CDCS WITH ECONOMIC DEVELOPMENT PROGRAMS

LDC-LAGRANGE DEVELOPMENT CORPORATION
3601 LAGRANGE ST.
255-8406

NRDC-NORTHRIVER DEVELOPMENT CORPORATION
725 LAGRANGE ST.
243-3204

REERC-RIVEREAST ECON. REVITALIZATION CORP.
615 FRONT ST.
698-2301

HSCRA-HERITAGE SOUTH COMMERCIAL REVIT. CORP.
1841 BROADWAY
241-1071

TWDA-TOLEDO WAREHOUSE DIST. ASSOC.
237 S. ERIE ST.
255-7100

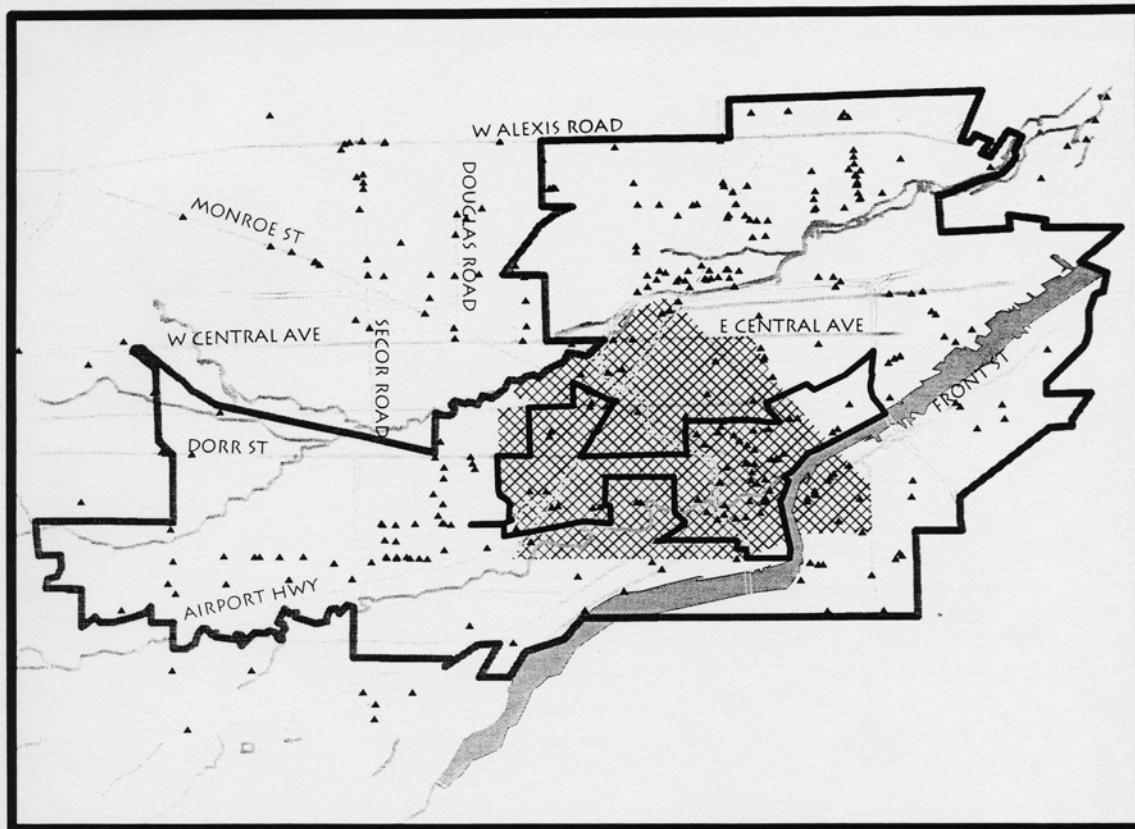
ONYX-ORGANIZED NEIGHBORS YIELDING EXCELLENCE
933 PINEWOOD
244-8666

NIP-NEIGHBORHOODS IN PARTNERSHIP
2272 COLLINGWOOD AVE.
241-9682

FIVE POINTS-FIVE POINTS ASSOCIATION, INC.
1121 W. SYLVANIA
476-8310 OR 476-3703

Map prepared by the Urban Affairs Center (10-97)

MAP 3



- ▲ MANUFACTURING FIRMS WITH <300 EMPLOYEES
- ▭ ENTERPRISE ZONE BOUNDARY
- ▭ SUBZONE PORTION
- ▨ HIRING PRIORITIES AREA

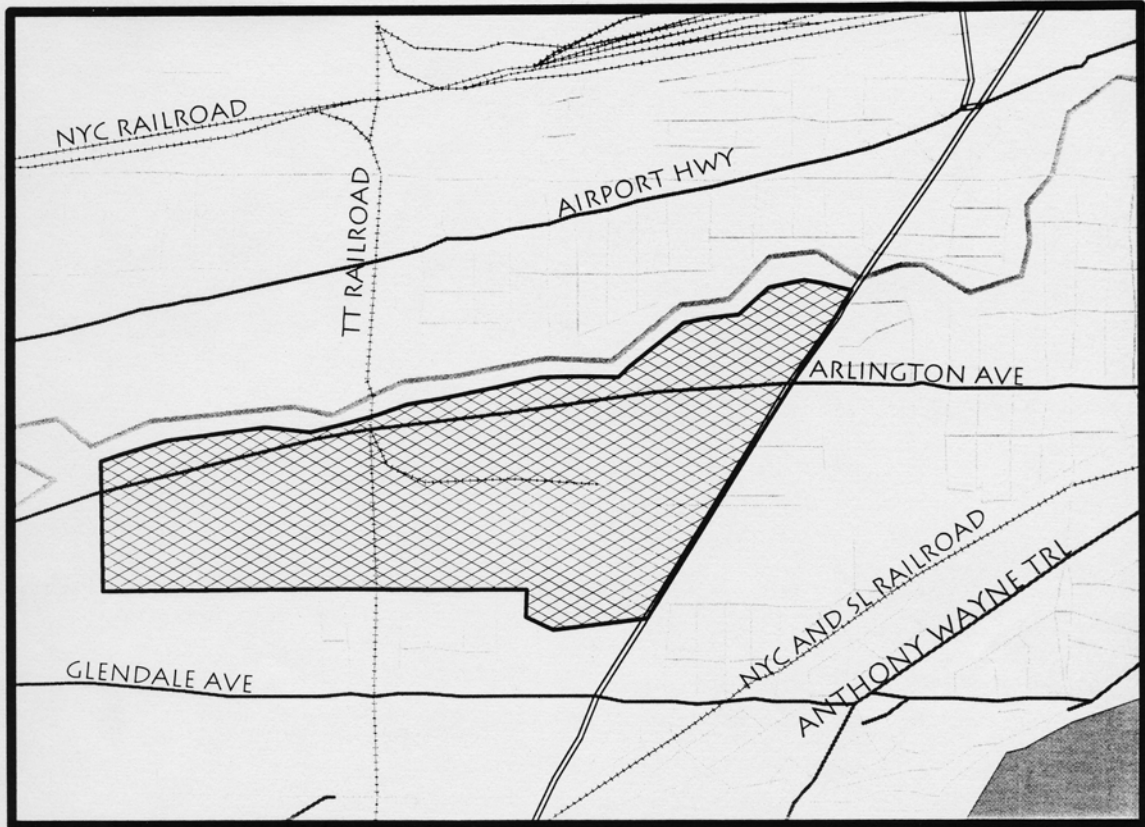


RIVERS
 HIGHWAYS
 MAJOR STREETS

ENTERPRISE ZONE, SUBZONE, & HIRING
 PRIORITY AREA WITH DISTRIBUTION OF
 MANUFACTURING FIRMS WITH <300 EMPLOYEES

Map prepared by the Urban Affairs Center (10-97)


MAP 4A




 ADVANCED TECHNOLOGY PARK

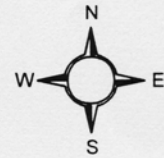
 MAJOR STREETS

 HIGHWAYS

 STREETS

 RAILROADS

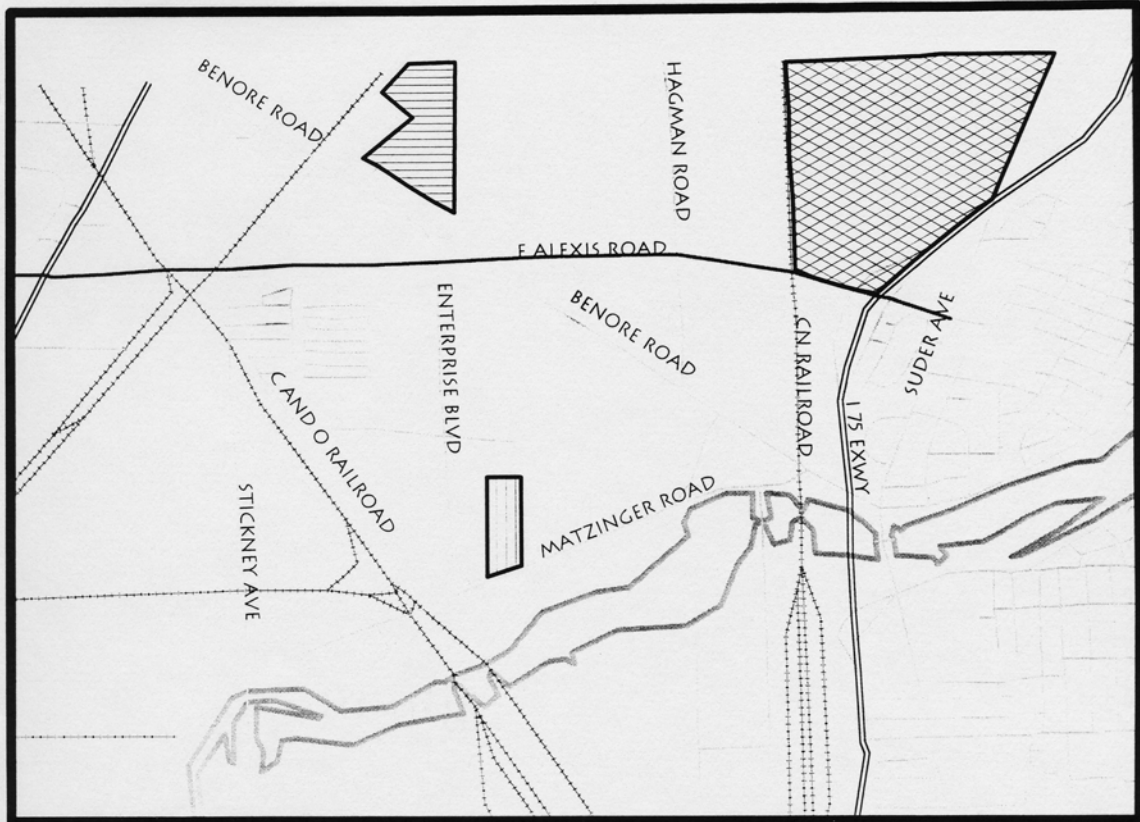
 RIVERS






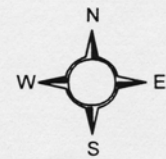
ADVANCED TECHNOLOGY PARK

Map prepared by the Urban Affairs Center (10-97)

MAP 4B



-  SILVER CREEK INDUSTRIAL PARK
-  NORTH CROSS INDUSTRIAL PARK
-  ADVANTAGE INDUSTRIAL PARK

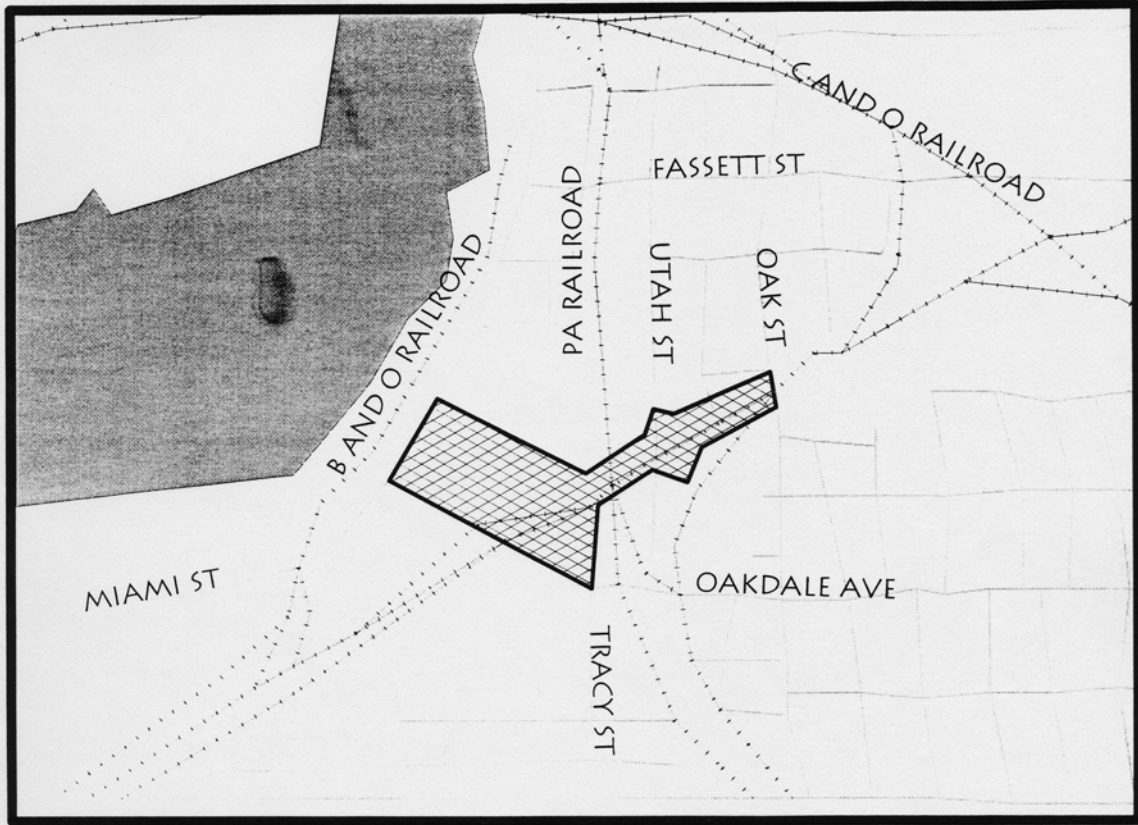


-  HIGHWAYS
-  MAJOR STREETS
-  STREETS
-  RAILROADS
-  RIVERS

NORTHEAST TOLEDO INDUSTRIAL PARKS

Map prepared by the Urban Affairs Center (10-97)

MAP 4C



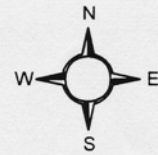
 EAST TOLEDO INDUSTRIAL PARK

 RAILROADS

 HIGHWAYS

 MAJOR STREETS
 STREETS

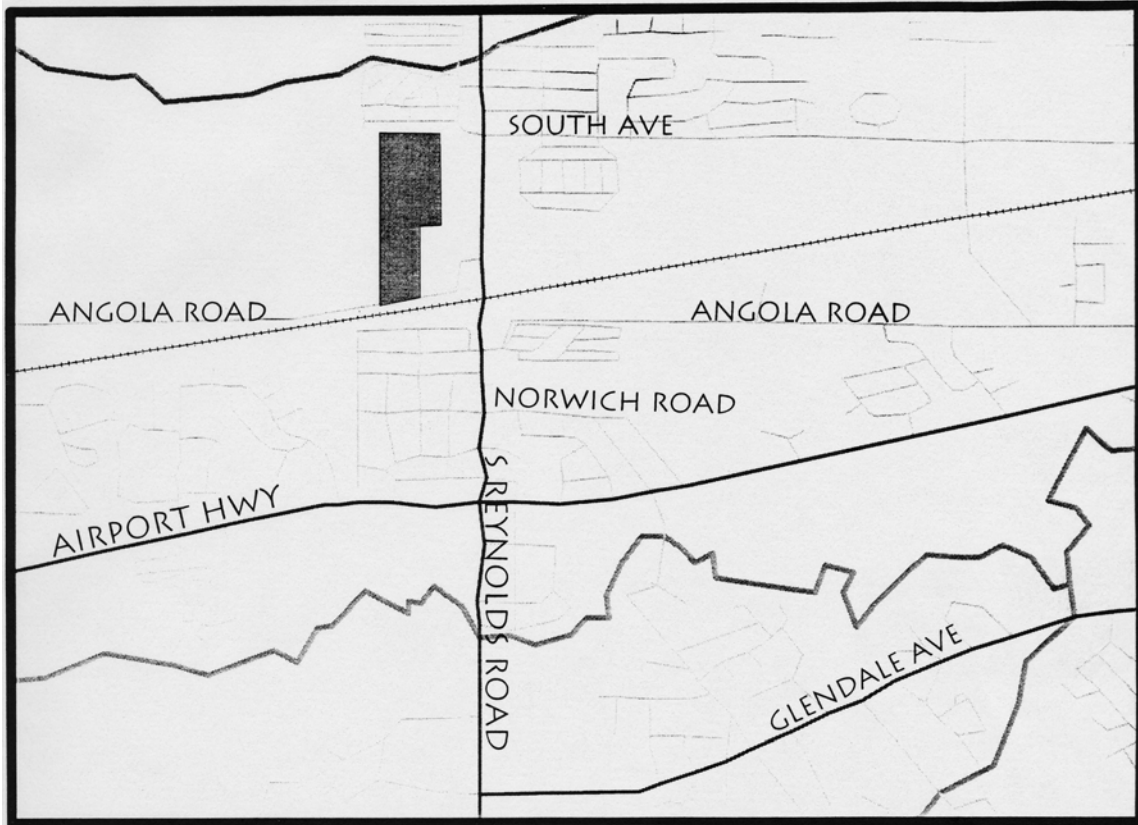
 MAUMEE RIVER





EAST TOLEDO INDUSTRIAL PARK

Map prepared by the Urban Affairs Center (10-97)

MAP 4D



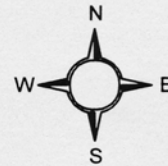
 ANGOLA SOUTH INDUSTRIAL PARK

 HIGHWAYS
 MAJOR STREETS

STREETS

 RAILROADS

 RIVERS



ANGOLA SOUTH INDUSTRIAL PARK

Map prepared by the Urban Affairs Center (10-97)