

TOWN OF FLORENCE

BUSINESS RETENTION AND EXPANSION REPORT

2012



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Introduction

In early 2012, Town of Florence Economic Development realized there was no formal system of addressing the needs and concerns of the local business community. Other economic development organizations, such as the Greater Florence Chamber of Commerce and Florence Main Street Program, were present to assist businesses, but channels of communication between these organizations and the Town of Florence were not meeting the needs of the business community.

Leadership from Town of Florence Economic Development, the Greater Florence Chamber of Commerce, and the Florence Main Street Program counseled on how these three organizations could best meet the diverse needs of the Florence business community, while properly addressing concerns raised by business owners. It was decided that a formal business retention and expansion program should be implemented within the Town of Florence, with the foundation of this program being laid in a formal study based off a business survey. The purpose of the survey would be to understand the local business climate, as well as the attitudes and perceptions of local business owners, within the local economy. Survey questions would be designed to address issues of business assistance; strengths and weaknesses within the local economy; barriers to growth; opportunities for improvement or growth within the community; and formally addressing municipal and community services.

Survey design for this report was created through a collaborative effort between the Town of Florence, Greater Florence Chamber of Commerce, and Florence Main Street Program. Other community surveys were referenced during the creation of the survey to implement best practices and reduce duplication of effort. The final survey format was approved by the Florence Business Retention and Expansion Committee. The survey was designed to give business owners the ability to speak freely about their concerns, allowing complete anonymity in the reporting process. To ensure anonymity of the business owner, there was a single point-of-contact for the collecting of all survey-related data. Raw data was only viewed by members of the Florence Business Retention and Expansion Committee, and answers that would unduly identify a business or ownership of a business interest were modified to only include the root concern or issue. Correlated data, devoid of master response sheets that identify business owners or interests, was made available to various staff members of the Town of Florence and members of the community.

The information found in this report outlines the findings of the business retention and expansion survey conducted in and around the Town of Florence in Pinal County, Arizona. Surveys were performed between February and May 2012, with a total of 82 businesses participating in the survey process. All information found herein was gathered to inform the Town of Florence Town Council about the needs, concerns, weaknesses, strengths, and general characteristics of the

business community. This information is also to be utilized to assist the Greater Florence Chamber of Commerce, Florence Main Street Program, and other entities with ties to the local business community for purposes of economic development.

Businesses were selected for participation in the business survey if they met the following criteria: 1) The business is located within the geographic boundaries of incorporated Florence; 2) The business has a current business license through the Town of Florence for the specific business interest to be surveyed; 3) Primary business operations are run either through a storefront location or home-based office. All surveyed businesses were identified for contact through a master business license list provided by the Town Clerk's office.

Business Retention and Expansion Committee

To ensure an efficient and professional survey reporting process, the Florence Business Retention and Expansion Committee was created. Members of this committee included local business owners, executive leadership of community economic development organizations, and the Florence citizenry. The committee's primary purpose was to advise the Town of Florence Economic Development Coordinator in ways and means to improve the survey process, but also undertook the following responsibilities: approved the final draft of the business survey; addressed 'red flag' issues throughout the survey process; gave suggestions and approved the final format and content of the business retention and expansion report; and acted as channels of communication to other members of the business community to ensure businesses participated with and read the results of the survey.

The committee was composed of the following individuals:

Damon Anderson – General Manager, Florence Holiday Inn Express and Suites

Scott J Bowles – Economic Development Coordinator, Town of Florence

Harold Christ – Business Owner, The Windmill Winery

Gem Cox – Business Owner, Florence Coin-Op Laundry

Jennifer Evans – Manager, Florence Main Street Program

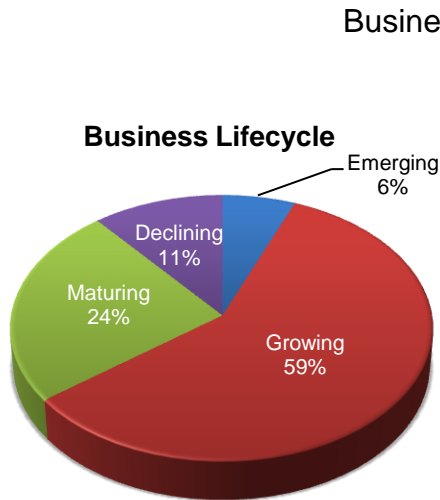
Susan Kerestes – Executive Director, Greater Florence Chamber of Commerce

Jim Popp – Florence Citizen

Russ Woodmansee – Business Owner, Florence True Value Hardware

Florence Businesses

Of the 82 businesses surveyed 47 (57%) state their primary market being the local area of Florence, Arizona. Only 26 (32%) cater to a regional audience while 9 (11%) focus on a national market. None of the businesses surveyed focus operations for international markets.



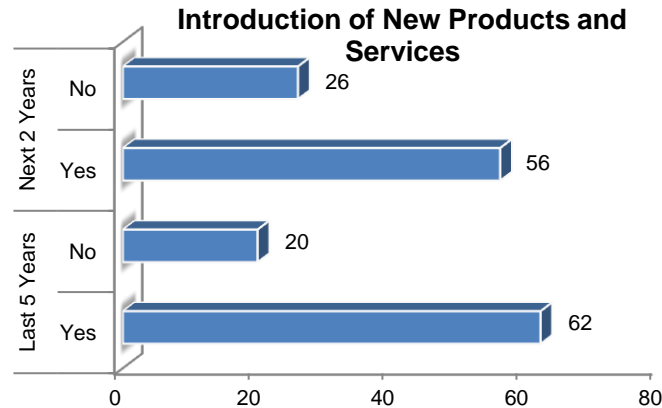
Businesses were also asked about the lifecycle of their primary products and services. A total of 48 (59%) businesses stated that their business operations were growing, meaning the owner was introducing new products and services that were successfully attracting additional customers. Only 20 (24%) businesses stated that their operations were maturing. These businesses are neither growing nor declining, but are streamlining products and services to meet the needs of an established customer base. Very few businesses, only 5 (6%), stated that they were emerging in the market and attempting to establish a customer base, and 9 (11%) businesses claimed operations were declining and losing customers.

In conjunction with the business lifecycle, businesses were also asked whether their sales were increasing, stable, or decreasing. It was expected in the current stagnant economy that sales would be suffering, but 45 (55%) businesses stated that sales were actually increasing. A total of 26 (32%) businesses stated that their sales remain stable while 11 (13%) cited a decrease in sales. The latter correlates very closely to the number of businesses who stated their operations were declining.

Business Changes

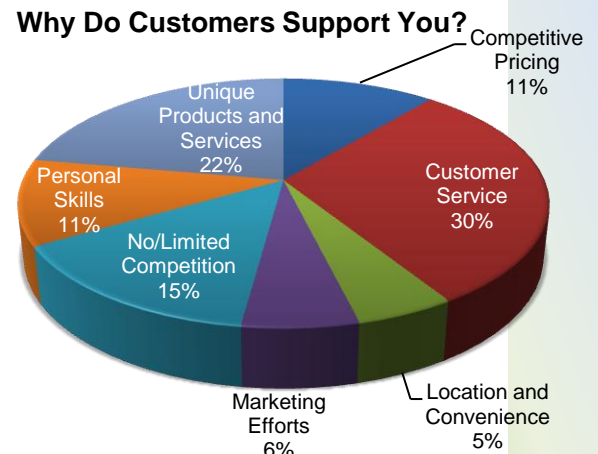
A series of questions were posed to Florence businesses to gauge various types of business changes within their organization. Monitoring change within the business community can help identify a healthy, stagnant, or suffering local economy.

Businesses were asked if they had introduced new products and services in the past five years and whether they planned to introduce any within the next two years.



A clear majority of local businesses have introduced new products and services into their business, and many of these businesses plan to introduce new capabilities in the future. Roughly a quarter of businesses stated that their business model is not dependent upon the addition of new products or services.

The existence of a rural economy with limited service providers can explain why some businesses exercise the practice of limiting the scope of services provided in their operational structure. To support this, businesses were also asked why their customers purchased goods and services from their place of business instead of purchasing the same goods from their competitors. Of the responses given, 42% gave answers that supported a business model focused on a rural economy with limited introduction of new products and services (i.e. Unique Products and Services; No/Limited Competition; and Locational and Convenience).



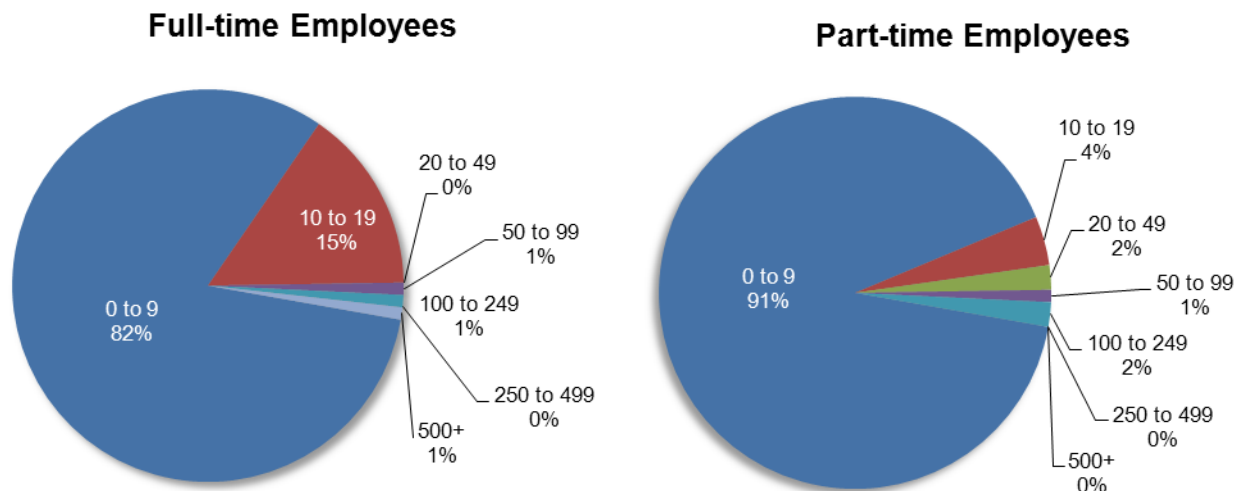
Businesses were also asked whether their company had experienced any change in management in the last year, or whether management was expected to change in the next 18-months. Only 14 businesses (17%) stated they had experienced changes in management, showing great stability of the local management base. The reasons for changes in management include change of business ownership (6 or 43%), appointment of new business managers (5 or 36%), and the retirement of current management (3 or 21%).

Business Workforce

One of the keys to any successful business is the availability of a competent workforce. It has long been argued that Florence has an abundance of jobs due

to the presence of the prisons and various public-sector employment options, but this does not address the key issue of available labor.

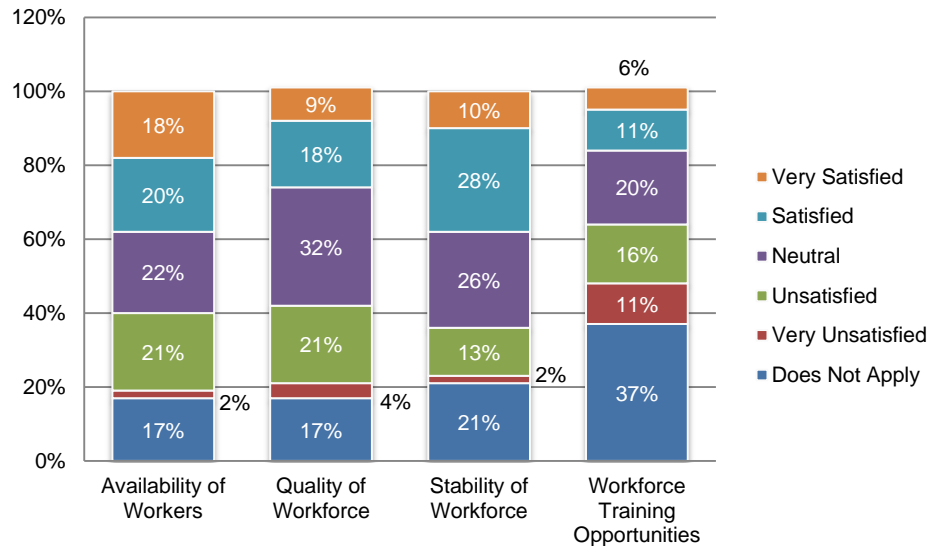
Businesses were asked a series of questions gauging the current availability of labor and skills of the current workforce environment. Businesses were also asked series of questions about their own business operations and how much labor supply they demand.



It does not come as a surprise that a majority of businesses surveyed stated that they employ mostly 0 to 9 full-time and part-time employees (82% and 91% respectively). This finding is indicative of the small-business environment that is prevalent throughout Florence. There were also an increased number of employers who hired 10 to 19 full-time employees (15%). Other categories for numbers of employees could increase if other large employers, such as the public and private prisons, were taken into consideration.

Businesses were also asked to rate various aspects about the local workforce using the following scale: Does Not Apply, Very Unsatisfied, Unsatisfied, Neutral, Satisfied, and Very Satisfied. These questions were meant to measure the opinions and perceptions of local business owners to gauge whether a sufficient local workforce was present to meet the basic labor needs of area businesses. When asked about the availability of workers, business owners appeared equally split between every point of the scale, with exception of very unsatisfied (2%). Most businesses find the availability of workers to be neutral (22%), with unsatisfied (21%) and satisfied (20%) following closely behind. When asked about the quality of workforce, most businesses stated their opinion was neutral (32%), with larger numbers also stating they were unsatisfied (21%) and satisfied (18%). Businesses were almost equally split in their opinion about the stability of workforce being satisfied (28%) and neutral (26%). The issue of workforce training opportunities, or venues and opportunities for employers to train their

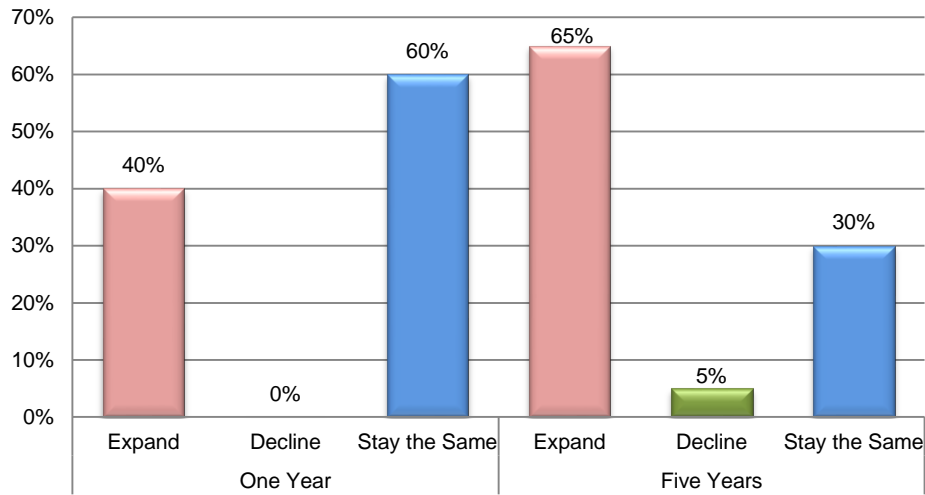
workforce, met some confusion as many businesses stated that this type of service is not offered in the community or training is done in-house (37%). Businesses were equally split in their opinions of workforce training being very unsatisfactory and satisfactory (11%).



When asked if there were specific employee skills or qualifications that are difficult to find in Florence, half of respondents stated there was no problem while the other half stated there was a problem. When asked to specify the specific skill or qualification that is difficult to find in Florence, businesses provided a long list of very specific items. The top responses were the following skills and/or qualifications: Customer Service Skills (19%), Professionalism/Integrity (16%), Trade Professionals (15%), Basic Computer Skills (11%), and Medical Professionals (10%). It should be noted that the top two skills/qualifications are not education-based. Basic training can be provided by businesses through policy, education, or discipline to increase the level of customer service skills and professionalism/integrity. Other ancillary organizations, such as the Chamber of Commerce, could provide training courses outlining the basics of customer service and professional conduct. The other qualifications/skills listed do require some type of professional training or certification, and will vary from each qualification or skill that is required by the individual business. Trade professionals, such as handymen, barbers, electricians, and plumbers, require attendance at trade schools and, oftentimes, apprenticeships to further specialize a specific craft. The field of medical professionals requires extensive secondary education, something that cannot be accomplished with the local resources of the community.

A topic that has been of great local discussion, especially in the midst of the economic recession, has been the employment capabilities of the local business community. Businesses were asked whether they expected employment to expand, decline, or stay the same in the coming year and in the next five years.

Employment Projections



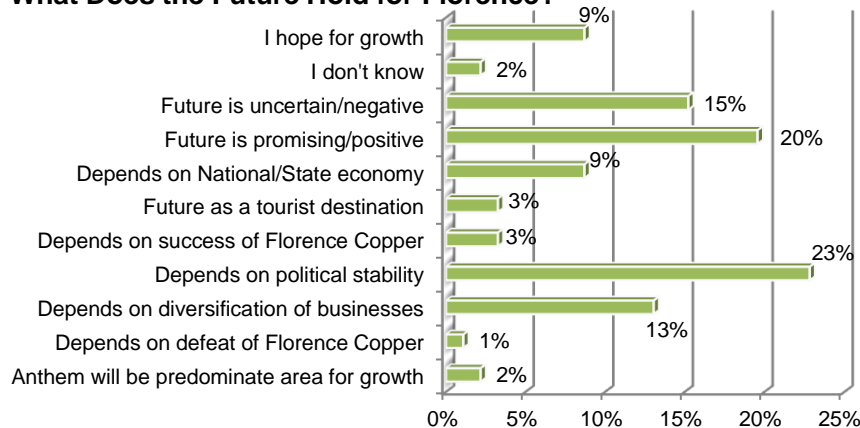
For the coming year, a majority of businesses stated they expect employment levels to stay the same (60%) while a large number (40%) stated they expected to see expansion of their workforce. No businesses stated they expected employment to decline in the coming year. In the next five years, businesses showed great optimism as a majority stated they expected employment at their place of business to expand (65%). Some businesses expected their employment base to remain unchanged (30%) while a very small number of businesses stated they may see a decline in their workforce (5%).

Local Business Environment

Florence Business Community Strengths

This section focuses on the perceptions and opinions of local businesses as to the strengths and weaknesses of the Town of Florence as a place to do business. Businesses were initially asked what they believed the future held for the economy of Florence.

What Does the Future Hold for Florence?



A majority of responses received were prefaced with the term “*depends on*”, showing a certain degree of uncertainty about the future of Florence’s economic state. The largest response stated that the future of Florence’s economy depended on the political stability of the community (23%). Other similar responses stated the future of the economy depended on diversification of businesses (13%) and the state of the national and state economies (9%). Roughly 1/3 of respondents stated that the future was either positive (20%) or negative (15%) for the economy of Florence.

Businesses were also asked what they believed the strengths of Florence were, specifically as a place to do business. Many businesses stated there were multiple strengths of the community as a place to do business, which meant a wide spectrum of answers gathered. The greatest strengths outlined by the business community were the small-town atmosphere of Florence (19%); Florence being County Seat of Pinal County (11%); the presence of a large commuter population (9%); Florence being both a unique and historic community (7%); and the numerous prison facilities and loyal customer base garnered an equal number of votes (6%).

As a follow-up, businesses were asked what was the single best attribute, quality, or amenity about operating a business in the Town of Florence. This question did result in some duplication of answers from the previous question. Businesses agreed that the small-town atmosphere was also a great attribute about operating a business in Florence (28%). Businesses also stated that the

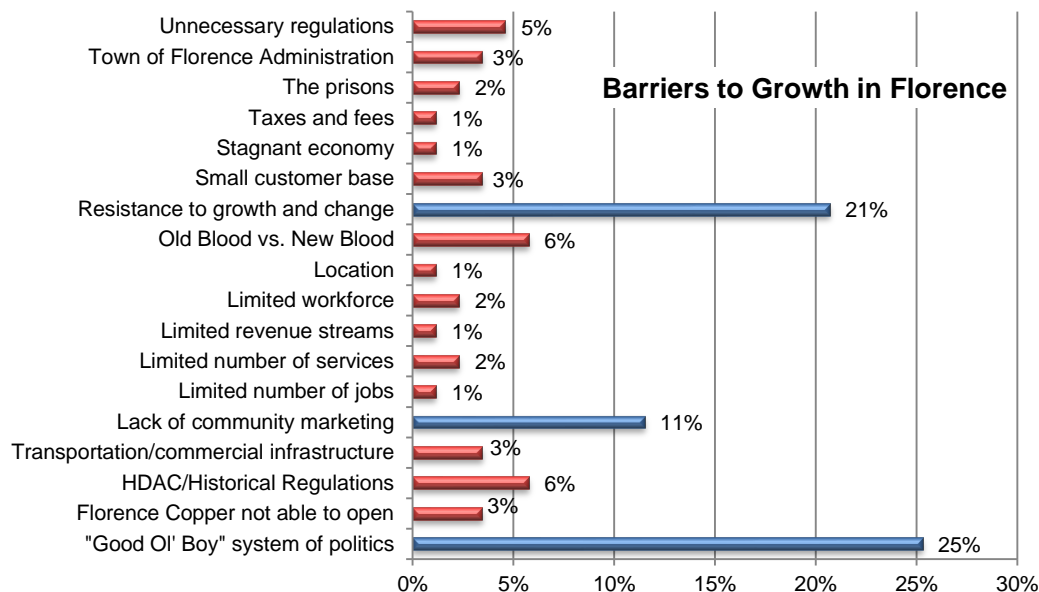
people (16%) and loyal clientele (12%) were important to their operating a business locally. Some businesses also stated that the opportunity for growth was advantageous to operating a business in Florence.

Florence Business Community Weaknesses

Businesses were also asked a series of questions to gauge the opinions and perceptions of what may be considered the weaknesses of the local economy. The first question businesses were asked was to provide suggestions on how they believe the health of Florence's economy could be improved. Businesses provided a number of responses, but the two highest grossing responses included the need to attract additional businesses and service into the community (19%) and for the community to actively market its history and services (14%). Other responses included the need to diversify the employment base of Florence (9%), Downtown/Main Street redevelopment efforts (6%), and additional resources for new businesses in our community (6%).

Businesses were also asked directly what they thought the weaknesses of Florence are, specifically as a place to do business. The lack of services and amenities within the community was the greatest weakness of the community (12%), followed closely by marketing/outreach to local businesses (11%) and the perception of Florence not being receptive to growth or change (11%). Businesses also stated they felt there was a presence of a "Good Ol' Boy" system of politics (9%) and that Florence generally had a small number of consumers to patronize their operations (8%).

To build further upon the perceived weaknesses of Florence as a place to do business, questions were also asked to discover whether there were any specific barriers to growth in Florence. A total of 65 businesses surveyed (79%) stated that they believed there were specific barriers to growth in the Town of Florence.



These businesses were asked to specify what they believed accounted for a barrier to growth within the community.

A quarter of businesses who stated there were barriers to growth in Florence point to the presence of a “Good Ol’ Boy” system of politics as the main barrier (25%). Another large majority of businesses stated a barrier of resistance to both growth and change within the community (21%). Surprisingly, issues such as the stagnant state and national economy, limited employment opportunities, and local taxes and fees only garnered a small number of responses (1%). Businesses did point out that unnecessary regulations from the Town of Florence (5%) and specific historical regulations from the Historic District Advisory Commission (6%) acted as a barrier to growth.

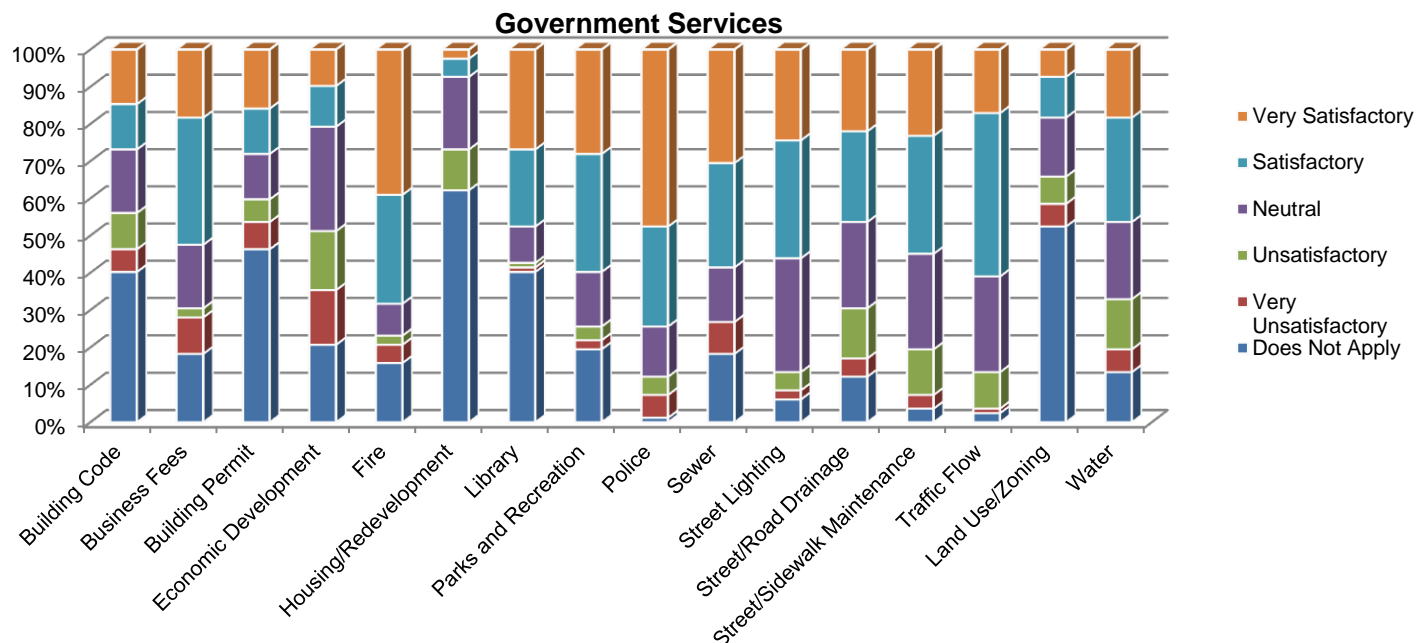
Overall, nearly half (46%) of the businesses who believe there are barriers to growth point to either elected officials or the reception of the community as the main obstacle. In addition to the barrier resistance to change and growth, some businesses pointed out a similar issue but titled it as “Old Blood versus New Blood” (6%). When asked to explain, businesses stated there are generational Florence citizens who are distrusting of those who, like them, were not born and raised in the community.

Government and Community Services

Businesses were asked to rate a variety of both Town of Florence (governmental) and Florence community services and amenities that may, or may not, relate directly to their business operations. The scale in which businesses were asked to rate these services ranged from *Very Unsatisfactory*, *Unsatisfactory*, *Neutral*, *Satisfactory*, and *Very Satisfactory*. The option of *Does Not Apply* was also given.

Government Services

Businesses were given a list of 16 Town of Florence-related services to rate. Some of the services relate directly to a specific department (e.g. Police or Fire), whereas other specify services within various Town departments (e.g. Building Code Compliance as a service of Community Development).

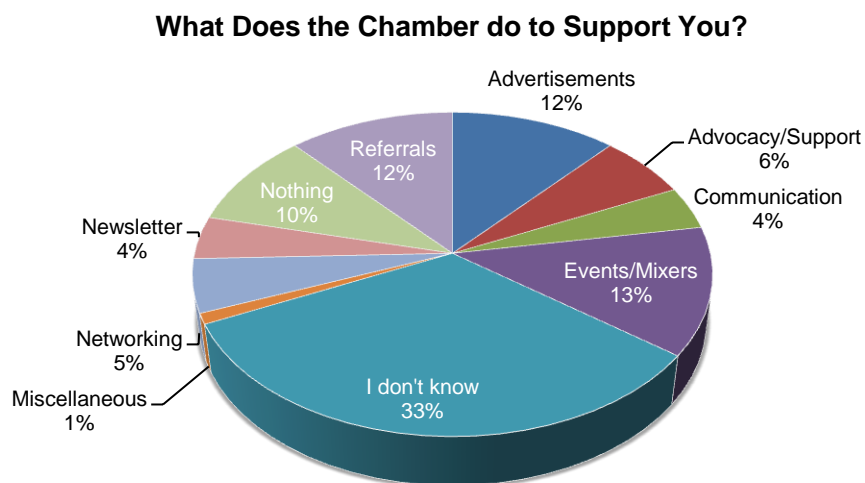


Of the services that the Town of Florence provides, *Library*, *Fire*, and *Police* services make up the highest rated average scores. For purposes of calculation, the category *Does Not Apply* was not given consideration in the final scoring of the services. A few categories (*Building Code*, *Building Permit*, *Housing/Redevelopment*, *Library*, and *Land Use/Zoning*) had a substantial number of businesses who stated that this service did not apply to their business operations. The lowest performing service, *Economic Development Programs*, had a large number of businesses who stated that the performance of this service was performing at both an unsatisfactory and very unsatisfactory level.

Under *Economic Development Services* are the Town of Florence economic development administrative staff, The Greater Florence Chamber of Commerce, and the Florence Main Street Program. When businesses were asked why they rated these services at an unsatisfactory/very unsatisfactory level, most stated that the services offered by these individual organizations are not communicated efficiently (36%). Another large portion of businesses stated that no economic development-related programs even exist within the Town of Florence (27%). Other responses included businesses feeling that these organizations are too focused on their own self-interest (15%), that the services are not organized (12%), and that the services are limited (9%).

These same businesses were then asked a series of questions regarding the various economic development programs and services that are currently available within the community, namely The Greater Florence Chamber of Commerce and the Florence Main Street Program. All businesses were asked whether they were members of either organization, with 18 (22%) reporting they were members of the Florence Main Street Program and 47 (57%) reporting they were members of The Greater Florence Chamber of Commerce.

All chamber of commerce operations are advocacy-based toward business operations within a given geographic area, regardless of membership. Paying members of chamber of commerce organizations receive additional benefits, such as advertising and networking opportunities, which are not afforded to non-members. Additional questions were posed regarding the operations of The Greater Florence Chamber of Commerce to gauge whether Florence businesses understood the operational capacity of their local chamber.



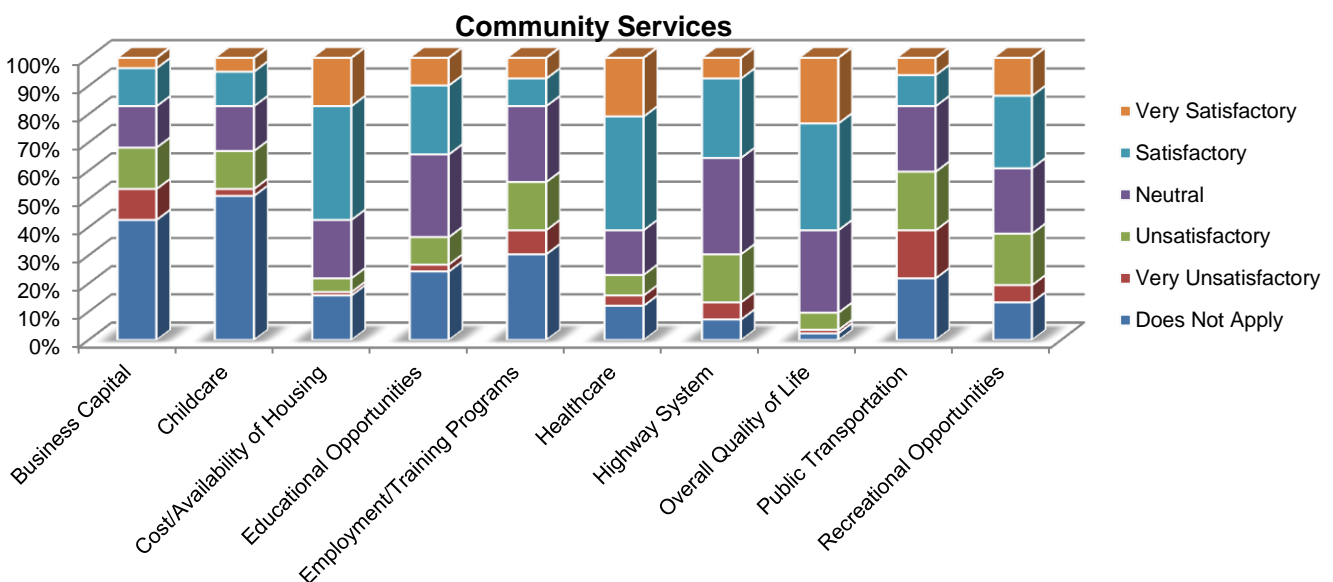
It becomes clear that roughly half of the businesses surveyed understand some of the operations and services of the local chamber of commerce, while the other half does not know (33%) or believes they do nothing (10%). Businesses recognized that chamber events and mixers (13%) were helpful to their business

operations, while a similar amount of businesses (12%) recognized chamber-based advertisements and referrals as a boon to their operations.

Businesses were also asked what The Greater Florence Chamber of Commerce could be doing to assist Florence-based businesses prosper. A majority of the respondents (23%) admitted they did not know what their local chamber could do to help them in their business operations. Other businesses stated the chamber needed to focus additional time and resources to marketing the community (20%) and businesses/services within the community (17%). Businesses were also equally split in their desire to have the chamber hold additional events and work to improve the efficiency of their organization (9%).

Community Services

Businesses were also given a list of ten community services to rate. Some of these services related to amenities commonly found in communities that assist business operations (e.g. Public Transportation and Availability of Business Capital). Others are not within the community's immediate control but still have a major bearing on the local business environment (e.g. Highway Systems).



The same method to calculate the average scores of *Government Services* was also utilized to calculate the scores of *Community Services*. The three scores that gathered the highest ratings were *Cost and Availability of Housing*, *Overall Quality of Life*, and *Healthcare*. Both the *Availability of Business Capital* and *Childcare* had a large number of businesses state that these services did not apply to them. There were two community services that received an average score of lower than 3, those being *Availability of Business Capital* (2.72) and *Public Transportation* (2.59).

When asked about their rating of the *Availability of Business Capital*, a majority of businesses stated that there are limited or no options for affordable and competitive financing in Florence (67%). Other businesses stated that there is absolutely no low-interest financing available (14%), or the resources that are available are not communicated to the business community (10%). With *Public Transportation*, a majority of businesses stated that these services are not communicated to the business community (34%). Nearly a quarter of the respondents stated they did not even know public transportation existed in Florence (23%). An equal number of respondents (20%) stated that there are limited options available and that the Pinal Central Xpress needs additional routes to better serve the community.

Recommendations

As stated previously, this report was conducted to gauge the *opinions and perceptions* of the business community. Though some of the perceptions or opinions presented in this report may not adequately or accurately reflect the true nature of the business or political environment of the Town of Florence, perception is still a powerful figure in the overall equation of economic development.

Based on the opinions and perceptions provided by a large number of Florence-based businesses, the following recommendations are given for consideration of Town of Florence administrative personnel, elected officials, and auxiliary organizations who work in conjunction with the community to encourage and promote economic development activity.

Economic Development Programs

Various economic development programs that have direct or secondary oversight from the Town of Florence are failing to meet the expectations of the Florence business community. These programs include Town of Florence Economic Development, The Greater Florence Chamber of Commerce, and the Florence Main Street Program. Though separate from each other, these organizations have the same common goal of advancing the economic landscape of the community.

The Greater Florence Chamber of Commerce

- ✓ Initiate a permanent program or temporary campaign to communicate organizational services and capabilities to the business community in a more efficient manner. When nearly half of businesses surveyed do not know what the organization does for local businesses, there is an opportunity present to better meet the needs of the business community and potentially grow membership within the organization.
- ✓ The Greater Florence Chamber of Commerce should continue to streamline their organizational structure through Board appointments, activities, and outreach efforts. Recently, the Chamber has made great strides in reorganizing their professional Board to better represent the many diverse interests of the Florence business community. Members of the Chamber Board should be strong advocates to all Florence businesses, which includes bringing valid concerns and issues to applicable administrative and political figures in the Town of Florence.
- ✓ There should be a presence of executive leadership and, if applicable, Board members of auxiliary economic development organizations at Town Council meetings. Updates regarding chamber activities, special events,

and news from the business community should be given periodically during calls to the public. If necessary, the Chamber should give presentations and/or reports to the Town Council between their quarterly reporting to the Town of Florence.

Town of Florence Economic Development

- ✓ This section of Town of Florence services received the lowest average scoring from survey respondents. The largest single complaint regarding this service was due to a lack of communication informing the business community of incentives and assistance programs available to them. Economic development staff needs to improve channels of communication to both the business community and auxiliary economic development programs and services to ensure unified messages are delivered to the business community.
- ✓ The development of an economic development portion of the Town of Florence website is paramount. Currently there is no section of the Town of Florence website dedicated to informing current and potential business owners about demographics, regulations, fees, service sectors (both existing and desired), or services available. The execution and proper maintenance of a professional economic development website would help alleviate many of the concerns expressed by the business community. This tool would also assist business owners interested in locating to the Florence-area gather the necessary information to gauge whether this community is a suitable fit for their operations.
- ✓ Allocation of both energy and resources needs to be executed in the field of community marketing. Currently, very little community marketing is performed in the Town of Florence. A competent professional in the field of marketing should be addressed to see what sectors of the community should be marketed to ensure the highest return on investment for any resources to be spent. Potential marketing subjects include tourism of historical and natural resources; recruitment of potential businesses to fill needed service gaps in the community; outreach to industry-specific job creators to encourage diversification of the employment base; and injecting additional resources and ideas into existing community events to capture additional visitors to the community.

Florence Main Street Program

- ✓ Since this organization is an advocate to Main Street-area businesses, businesses were not asked specific questions regarding the operations of this specific economic development service.

- ✓ Starting in early 2012, the Florence Main Street Program partnered with local businesses to plan and execute familiarization (FAM) tours. To-date, two tours have been conducted to target travel writers and tour bus companies. These events have been extremely successful in exposing the Town of Florence in a very positive light to individuals and businesses centered in the tourism industry. It is recommended that the Town of Florence seriously explore the leveraging of resources to ensure these types of community marketing activities continue to occur on a regular basis. Currently, Florence business owners are leveraging all of the associated costs of these events.
- ✓ Due to the Town of Florence decision to not extend funding to this program beginning fiscal year 2014, it is suggested that this program begin seeking additional funding sources if they desire to continue operations within the Town of Florence. During the current fiscal year, executive leadership and Board members from the Main Street Program should develop a contingency plan if this organization is to disband due to lack of proper funding. This contingency plan should include direction to Town of Florence Economic Development and The Greater Florence Chamber of Commerce to ensure their service coverage is incorporated through the activities and programs of other economic development programs in the community.

Town of Florence Political Leadership

In many questions throughout the survey, businesses pointed to political leadership lacking an understanding of the community's business environment. Multiple businesses also stated that the prosperous future of the community depends largely on the political stability of the community. In order to reverse these perceptions, elected officials of the Town of Florence may consider the following corrective actions:

- ✓ Perform outreach initiatives both individually and collectively in the official capacity as Town Councilmembers of the Town of Florence. Set priorities to meet with business owners individually in their place of business to understand their business operations as well as gather information on their concerns.
- ✓ As spokesmen and leaders for the Town of Florence, energy should be utilized to dispel perceptions or realities in regards to unification of the community. Some business owners have identified the presence of a definitive split within the community between "generational" citizens of Florence and those who have moved into the community. This has also been titled "old blood vs. new blood" and splitting the geography of Florence by utilizing the Gila River. Town Council members should be cognizant of business accomplishments and struggles throughout the

community and champion all businesses equally. The Town Council should also be cautious not to place all of their discretionary energy and resources into the Downtown area of Florence, but should focus on other economic development “hot spots” located along State Route 79, Hunt Highway, and in the Anthem community.

- ✓ With many in the business community identifying what they consider to be a “Good Ol’ Boy” network as a barrier to growth in the community, there appears to be a disconnect between the strata of business and elected leadership. Such perceptions are common in rural municipal settings, but caution should be taken to ensure elected officials make themselves available and impartial to all business owners. Unified efforts to invite the business community to participate in economic development planning and discussions could help dispel this perception.
- ✓ There is a common perception that the Town of Florence is not open or amiable to new growth within their community. This perception also causes existing businesses to question or delay expansion within their existing business operations. The Town Council should ensure adequate funds and political resources are given to the fields of community marketing and business incentives. Currently, there is nothing being done to attract new business into the Town of Florence when there is a great need for additional services and amenities. In order to capture new businesses and attract entrepreneurs, the Town Council should explore incentives they would be willing to enact to capture specific business sectors or amenities to their community.

Town of Florence Business Community

Central to this survey was the Florence business community to address their concerns and perceptions regarding the local economy. To change the current state of the local economy, efforts need to be initiated between Town of Florence elected officials, economic development professionals, and leaders within the business community.

- ✓ The business community needs to be more involved with the local Chamber of Commerce. A Chamber membership, much like a gym membership, will do very little sitting stagnant in one’s pocket. Operations of a Chamber of Commerce are only as successful as the business community is willing to support and permit business-related activities. Those businesses interested in moving the local economy forward should actively work alongside and, if necessary, seek Board membership with the Chamber of Commerce.
- ✓ Businesses should actively seek an audience with their local elected officials or representatives in economic development services if/when

grievances are present. If there is currently not a viable system to levy concerns or complaints, bring your ideas and suggestions to the Town of Florence, Town Council, or Chamber of Commerce for implementation. Problems are never solved when they are allowed to fester for long periods of time.

- ✓ There are multiple opportunities for businesses to work together in order to keep consumers spending their dollars locally. Efforts to retain customer bases needs to initiate at the business-owner level for maximum efficiency and results. Business owners should explore partnerships and collaborative efforts with similar or complementary businesses to maximize profit margins and attract additional consumers during the slower summer months.

Appendix A

Copy of 2012 Business Retention and Expansion Program Business Survey

GENERAL COMPANY INFORMATION

Primary Business Name:

Secondary Businesses, if applicable:

Address:

City: State: ZIP:

Phone Number: Fax Number: E-Mail:

Name of person completing survey

Title:

- Using a scale from 1 to 5, please rate what you feel to be the quality of the following services provided by the Town of Florence and within the community. The rating scale is as follows: 1, Very Unsatisfactory; 2, Unsatisfactory; 3, Neutral; 4, Satisfactory; 5, Very Satisfactory. If you do not know or if the service does not apply, please mark the box designated with "D".

City Services	Low	1	2	3	4	5	High	D
Building Code Compliance Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Fees and Licensing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Permit Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economic Development Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing and Redevelopment Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Library Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and Recreation Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Police Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sewer Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Street Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Street and Road Drainage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Street and Sidewalk Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic Flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Land Use and Zoning Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Services	Low	1	2	3	4	5	High	D
Availability of Business Capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childcare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost and Availability of Housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment and Training Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Highway System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Quality of Life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recreational Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Please provide us with additional information on any items that you have rated 2 or less.
- What do you think the future holds for the economy of Florence?
- What is the best thing about having a business in the Town of Florence?

5. Over the past two years, have you had any specific experiences with Town of Florence staff or regulations that have negatively affected your business? ☐ Yes ☐ No
 - a. If yes, what was the problem, and what was done to resolve it?
6. Are you a member of the Main Street Program? ☐ Yes ☐ No
 - a. If no, would you like to be contacted about membership in the Main Street Program?
☐ Yes ☐ No
7. Are you a member of a Chamber of Commerce? ☐ Yes ☐ No
 - a. If no, would you like to be contacted about membership in the Florence Chamber of Commerce? ☐ Yes ☐ No
8. What is the best thing the Florence Chamber of Commerce currently does to support your business?
9. What else could the Chamber do to help Florence businesses prosper?
10. Do you have any suggestions on how to increase the health of Florence's Economy?
11. Do you find that business and economic assistance is readily available to you? ☐ Yes ☐ No
 - a. If no, do you have any suggestions on how to make improvements?
12. What are Florence's **strengths** as a place to do business?
13. What are Florence's **weaknesses** as a place to do business?
14. Are there any barriers to growth in Florence? ☐ Yes ☐ No
 - a. If so, what are they (*be specific*)?

PRODUCTS AND SERVICES

15. Why do your customers buy from you instead of from your competitors?
16. At what stage in its life cycle is your business' primary product/service? - Please Select -
Definition Explanations
 - a. Emerging: Your business is new to the market and you are attempting to establish a customer base.
 - b. Growing: You have an established customer base and you are introducing new products and services that are attracting additional customers to your place of business.
 - c. Maturing: You are not growing or declining, but are focusing on your current customers and are streamlining current products and services within your business.
 - d. Declining: You are experiencing a drop in sales and customer base, and are cutting back services and capabilities.
17. During the last 5 years, has your business introduced new products/services/capabilities?
☐ Yes ☐ No
18. During the next 2 years, will you introduce any new products/services/capabilities? ☐ Yes ☐ No
19. Will your company's primary product, or how it is produced, be substantially changed by the introduction of new technology during the next 5 years? ☐ Yes ☐ No
 - a. If yes, please explain:

BUSINESS MARKET

20. Is your business' primary market: - Please Select -
Definition Explanations
 - a. Local: Your primary customers are from the Town of Florence
 - b. Regional: Your primary customers are from Pinal, Pima and Maricopa Counties

- c. National: Your primary customers are from outside the State of Arizona
 - d. International: Your primary customers are from outside the United State of America
21. Are total business sales: - Please Select -
22. Does the company plan to expand in the next three years? ☐ Yes ☐ No
- a. If yes, estimated dollar investment:
 - b. Estimated number of jobs to be created:
 - c. Estimated facility size increase (sq. ft.):
 - d. Estimated year of completion:
23. Do you believe collaboration between the Town of Florence and neighboring cities, such as Coolidge, is important for economic growth? ☐ Yes ☐ No
- a. If no, please explain why:

BUSINESS CHANGES

24. In the last year, has the company's top management changed, or is it expected to change in the next 18 months? ☐ Yes ☐ No
- a. If yes, please explain:
25. Please indicate whether the following projected utility needs for your facility will be increasing, stable or decreasing by marking the box that corresponds to your needs. If you do not utilize any of the utilities listed, please list their usage as "stable".

	Increasing	Stable	Decreasing
Data/Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Natural Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telecommunications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If increasing or decreasing, please describe:

BUSINESS WORKFORCE

26. Using the same scale found in Question 1 [1, Very Unsatisfied to 5, Very Satisfied), please rate the business workforce in Florence. If you do not know or if the service does not apply, please mark the box designated with "D".
- | | Low | 1 | 2 | 3 | 4 | 5 High | D |
|----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Availability of workers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Quality of workforce | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stability of workforce | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Workforce training opportunities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
27. How many full-time employees (40 hours/week) do you typically employ? - Please Select -
28. How many part-time employees (less than 40 hours/week) do you typically employ? - Please Select -
29. Do you find that the number of positions you have open but cannot fill is: - Please Select -
30. Are there any employee skills that your business needs which are difficult to find in Florence?
☐ Yes ☐ No
- a. If yes, what problems, positions, skills:
31. What type of local employee training, if any, would you like to see offered?
32. Do you expect employment at your business to expand, contract, or stay the same in the next year? - Please Select -
33. Do you expect employment at your business to expand, contract or stay the same in the next five years? - Please Select -

SURVEY IMPROVEMENTS

34. Is there a question(s) you think we should have asked that was not included in this survey?
35. Is there anything else you would like to comment on in response to this survey?

Appendix B

BR&E Project Timeline

Date	Activity
February 2, 2012	Town/Chamber/Main Street Triangulation Meeting with Committee Members. Review, edit and approve the business survey.
February 10, 2012	Complete data tracking worksheet, based on approved survey form.
February 24, 2012	Five businesses complete survey and data entered into worksheet.
March 9, 2012	Ten businesses complete survey and data entered into worksheet.
March 23, 2012	Twenty businesses complete survey and data entered into worksheet.
May 4, 2012	Fifty businesses complete survey and data entered into worksheet.
May 25, 2012	Seventy-Five businesses complete survey and data entered into worksheet.
June 15, 2012	One Hundred, if that many, businesses complete survey and data entered into worksheet.
July 10, 2012	Compile data and create a draft report for submission to the BR&E committee
August 2, 2012	Take suggestions from BR&E committee and draft final report. Create PowerPoint presentation of the report.
September 2012	Present report to the Town Council.
September 2012	Make presentation to the business community.

Appendix C

Survey Improvements – Additional Questions for Future Surveys

(Business Owner Suggested)

- 1) "What could the Town do to clean up its reputation of not being business friendly?"
- 2) "Are police officers doing a good job at controlling transient populations and enforcing parking regulations?"
- 3) "Do we rely too heavily on certain funding sources, such as prisons and the public sector?"
- 4) "Do you believe a monthly newsletter from the Town of Florence would be helpful to promote business activities and services?"
- 5) "Do you believe long-term care or assisted living services are needed in our community?"
- 6) "Do you believe the Town is doing enough to market the Main Street area?"
- 7) "Do you believe there is sufficient availability of grants for the business community?"
- 8) "Do you feel there are basic resources here in Florence (i.e. Groceries, baby supplies, clothing, etc.)?"
- 9) "Do you think businesses should be charged more for the same services as residential properties?"
- 10) "Do you understand what the Chamber of Commerce, IDA, Main Street Program, Historical Society do for Florence?"
- 11) "How are we going to increase our customer and service base in this community?"
- 12) "How available is Town Staff, especially those involved with economic development?"
- 13) "How could the Main Street Program and Chamber of Commerce communicate and work better with each other?"
- 14) "How has your business operated over the last 3 years? Decline? Growth? Stable?"
- 15) "How much authority/power should the economic development coordinator be given in order to advance the economy of Florence?"
- 16) "How would you rate our community in providing mental health services?"
- 17) "If you were in control, what would you do to progress the economic development landscape of this community?"
- 18) "Is it important for the Town of Florence to start investing in information infrastructure (e.g. broadband internet)?"
- 19) "Is your business home-based or do you own a store front?"
- 20) "What can be done to encourage individuals to shop locally?"
- 21) "What can the Town do to increase Florence's reputation in the State of Arizona?"
- 22) "What could the Town do in order to attract more businesses and services to the Main Street area?"

- 23) "What could the Town do to bring more people into the Town and make it more attractive for people to visit?"
- 24) "What do you think of the overall appearance of the Town?"
- 25) "What does the Main Street Program do for economic development in the Town of Florence?"
- 26) "What types of incentives should we be offering to attract more business?"

Appendix D

Survey Improvements – Business Owner Comments

- 1) Concerns about vagrants on Main Street; detracts from business environment and the positive image of the community and Main Street.
- 2) Excited that someone from the Town is finally asking the business community what they want.
- 3) Great survey.
- 4) Hopefully the results can shine some light on the current business climate.
- 5) I find it odd that I'm being asked to participate in a survey when the economic development functions of the Town are not communicated.
- 6) I think Florence has great potential, but we need to look outside of the box.
- 7) I think it is a good step in the right direction. I hope there is follow-up to this survey and a solid economic development plan comes from it.
- 8) I think it is forward-looking that you are doing something like this.
- 9) I think it is important that the Town is doing this survey and it will be great for the business community.
- 10) I think it is very good that you are taking the time to take the opinions of the businesses.
- 11) I think the American way is going away and we are losing a vision of small business.
- 12) I think this community has an apathy problem and it cannot be fixed at the governmental level.
- 13) I would like to see a survey that is completed by local businesses that have had to close their doors due to the local economy.
- 14) I would like to see Florence be a better business environment and see the active recruitment of more businesses into the area.
- 15) If we really do not want the Copper Project in Florence, let's not just say "no" but let's set the table for quality, non-polluting industries.
- 16) I'm dumbfounded that the Town of Florence is going to this level of service to gauge business opinions. I am extremely impressed.
- 17) I'm glad you are doing this survey.
- 18) I'm glad you are doing this survey; it shows that the Town is caring about how business owners are faring during this economic downturn.
- 19) I'm happy that this survey is being done so the Town can understand the business community. The Town needs to be actively seeking new investment into their community.
- 20) It is good to see people from the Town gauging the opinions of business owners.
- 21) It is imperative that we bring more people into the Town of Florence.
- 22) It would be helpful to have more questions about the specifics of economic development on this survey. It would be helpful for the Town to have a marketing/tourism director to help guide activities for the Town of Florence.

- 23) It's a great survey and it's an eye-opener to what's going on in businesses here in Town. It's great to see someone is taking the time to see what businesses need in our community.
- 24) Let's get started while we still have a town standing!
- 25) More needs to be done to increase collaboration between parties that are concerned with economic development.
- 26) Shopping locally is a key to fixing the local economy.
- 27) Thank you!
- 28) The leaders of this community need to plan where they want to be five years from now.
- 29) The Mayor and Council need to be open-minded to the future and relax on the preservation of "the way it was" or the Town will perish.
- 30) The Town Council and administrators need to get out and look at the Town's problems up close and personal. We need to clean up Main Street and crack down on the drunks and crazy people who roam the streets. We need to clean up the vacant lots and occupied lots where people are keeping tons of junk and are out of Code.
- 31) The Town needs to do more to get the slumlords on Main Street to bring their buildings into compliance so they can be rented to businesses. And the Town Code needs to be enforced to the letter so the Town is visually appealing to our visitors.
- 32) The Town should be advertising its attractions, history and destinations more! We need to be doing more to get people down here and visit our community.
- 33) This is long overdue and is a brilliant idea.
- 34) Time is of the essence. If we don't take advantage of our opportunities now, then we will lose them.
- 35) We are very glad you came to perform this survey and take our opinions.
- 36) We need to be focused on what we are producing, rather than what we are consuming. We need to be focused on training our future generations to be gainfully employed.
- 37) We need to do more to beautify our gateways to make our community more appealing to visitors and enjoyable for residents.
- 38) We should be interviewing our younger, teenage population to see what they want to see available here in our community. Give them a voice, and then make them partners in the process of making something happen. I am very happy that the Town is taking the time to gather this information.
- 39) Will there be any follow-up?
- 40) You are the first representative of the Town to grace the floor of this business in a very, very long time.

Appendix E

Survey Improvements – Business Retention and Expansion Committee Suggestions

Other improvements, specific to the creation and execution of the survey, are outlined below:

- 1) Need for additional personnel to assist with the gathering of business data. A single point-of-contact meant integrity of the data was kept in-check, but the process was long as a result. Citizens interested in assisting with the collection of data could be trained to do so properly.
- 2) If performed again in the future, a business survey with an online or e-mail option may be helpful. Some business owners were difficult to contact and an option besides a sit-down meeting may have lead to faster results.
- 3) Nearly all businesses did not know their primary Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS) codes. Future surveys would need to have this section left out, as it created confusion and unnecessary questions with some businesses.
- 4) Expand the number and responsibilities of the citizen members of the Business Retention and Expansion Committee.
- 5) For business owners sitting on the Business Retention and Expansion Committee, ensure specific geographic areas within Florence are represented. Example composition could be the following: two (2) Anthem-area business owners, two (2) Florence core-area business owners, (2) Main Street business owners, and two (2) Florence Gardens or other outlying areas business owners.

Appendix F

Survey Disclosures

- 1) All business surveys were conducted by Scott Bowles, Economic Development Coordinator for the Town of Florence.
- 2) Surveys were conducted between February and May 2012. Results gathered during the winter cycle of the local economy may skew results to show retail operations performing better than if gathered during the summer months.
- 3) Some businesses were excluded from this survey process. Large governmental facilities, such as the ICE facility, National Guard, and correctional facilities are not included in the findings of this survey. Since many of these types of facilities/entities/organizations have resources far beyond the scope of small businesses, it was decided to exclude these businesses. Other surveys could be completed to target these entities since they are major employers within the Town of Florence. A new survey would need to be drafted in order to better meet the needs of these types of businesses when compared to the needs of small business.
- 4) Some small businesses voluntarily excluded themselves from the survey process for a variety of reasons. The businesses who decided to not participate in the survey will not be listed.
- 5) Results of this survey were shared with a survey committee composed of local business owners, the Executive Director of the Florence Chamber of Commerce, Manager of the Florence Main Street Program, and a citizen of Florence. The primary function of this committee was to offer direction and perception into the survey process. This committee also assisted with the drafting and final editing of the survey report.

Appendix G

Government and Community Service Rankings

Overall Score Rankings	
Library Services	4.18
Fire Services	4.13
Police Services	4.06
Parks and Recreation Services	3.98
Sewer	3.88
Cost and Availability of Housing	3.80
Overall Quality of Life	3.78
Healthcare	3.76
Street Lighting	3.75
Traffic Flow	3.68
Street and Sidewalk Maintenance	3.61
Business Fees and Licensing	3.60
Street and Road Drainage	3.51
Water Services	3.45
Building Permit Process	3.43
Educational Opportunities	3.39
Building Code Compliance Process	3.33
Recreational Opportunities	3.25
Highway System	3.14
Land Use and Zoning Process	3.13
Childcare	3.08
Housing and Redevelopment Programs	2.97
Employment and Training Programs	2.86
Economic Development Programs	2.82
Availability of Business Capital	2.72
Public Transportation	2.59

Average Score Rankings	
TOWN SERVICES	AVERAGE
Library Services	4.18
Fire Services	4.13
Police Services	4.06
Parks and Recreation Services	3.98
Sewer	3.88
Street Lighting	3.75
Traffic Flow	3.68
Street and Sidewalk Maintenance	3.61
Business Fees and Licensing	3.60
Street and Road Drainage	3.51
Water Services	3.45
Building Permit Process	3.43
Building Code Compliance Process	3.33
Land Use and Zoning Process	3.13
Housing and Redevelopment Programs	2.97
Economic Development Programs	2.82
COMMUNITY SERVICES	AVERAGE
Cost and Availability of Housing	3.80
Overall Quality of Life	3.78
Healthcare	3.76
Educational Opportunities	3.39
Recreational Opportunities	3.25
Highway System	3.14
Childcare	3.08
Employment and Training Programs	2.86
Availability of Business Capital	2.72
Public Transportation	2.59

Score Rankings Summary		
TOWN SERVICES	AVERAGE	MEDIAN
Building Code Compliance Process	3.33	3
Business Fees and Licensing	3.60	4
Building Permit Process	3.43	4
Economic Development Programs	2.82	3
Fire Services	4.13	4
Housing and Redevelopment Programs	2.97	3
Library Services	4.18	4
Parks and Recreation Services	3.98	4
Police Services	4.06	4
Sewer	3.88	4
Street Lighting	3.75	4
Street and Road Drainage	3.51	4
Street and Sidewalk Maintenance	3.61	4
Traffic Flow	3.68	4
Land Use and Zoning Process	3.13	3
Water Services	3.45	4
COMMUNITY SERVICES	AVERAGE	MEDIAN
Availability of Business Capital	2.72	3
Childcare	3.08	3
Cost and Availability of Housing	3.80	4
Educational Opportunities	3.39	3
Employment and Training Programs	2.86	3
Healthcare	3.76	4
Highway System	3.14	3
Overall Quality of Life	3.78	4
Public Transportation	2.59	3
Recreational Opportunities	3.25	3

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