

Oregon Economic & Community
Development Department
Customer Satisfaction Survey
March 2001

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Introduction

Background

This report presents findings from a study conducted by Bardsley & Neidhart Inc. for the Oregon Economic and Community Development Department (Department). The objective was to learn how the Department is perceived by outside interests, private and public, who interact with it.

The study is similar to those conducted in 1997 and 1999 so that comparisons can be made and trends inferred. The primary analytical focus is on these comparisons.

Methodology

The study was conducted using Computer Assisted Telephone Interviewing from the Bardsley & Neidhart Inc. interviewing center in Portland. Interviewing was done between November 30 and December 19, 2000.

Sample

In this report, the 351 respondents are referred to as “customers.” They represent those who have dealt with any of twenty-two customer groups within the Department. Some of these groups were combined, resulting in the 14 analytical groups listed below.

- Business Development; Industry Development; Key Industries – Association; Strategic Reserve Fund relocation and equipment); Strategic Reserve Fund A, E (A-infrastructure addition to attract business, E-miscellaneous planning, exhibition technical assistance)
- Business Finance: Direct – Oregon Business Development Fund; Entrepreneurial Development Loan Fund; Industrial Development Revenue Bond
- Business Finance: Banks – Capital Assistance Program; Credit Enhancement Program
- County Development
- County Commissioners
- Local Economic Development Organizations
- Ports
- Regional Strategies; Regional/Rural Development
- Disaster Recovery
- Oregon Arts Commission
- Tourism
- Telecommunications
- International Division
- Oregon Progress Board

Oregon Arts Commission and Disaster Recovery were added in the 1999 study and do not appear in the 1997 data. Due to the small universe of Disaster Recovery customers in the 2000 study (N=4) and resulting small sample size (n=2), results for Disaster Recovery customers are not shown separately.

The 1997 survey included Enterprise Zones, Key Industries-Flexible Networks, and Key Industries-Targeted Training, customer groups that were not part of the 1999 study. International Division was part of the 1997 and 2000 studies, but was not included in 1999.

Detailed Findings

The detailed findings are broken out into the following sections:

- All Customers
 - Attribute Ratings
 - Outcomes
 - Partners
 - Funding
- Ports
- Industry Development
- Oregon Arts Commission
- International
- Oregon Tourism Commission
- Telecommunications
- Oregon Progress Board
- Service Delivery Teams

All Customers

This section reviews data for which all or most groups of customers were asked the questions. Topics asked only of selected customer types are discussed later.

Type of Assistance Received

Department customers received a wide variety of assistance, and most received more than one type of help. Four types of assistance were used by half or more customers, and another four were used by roughly 40%.

Most customers (89%) say they have an on-going relationship with the Department. Although applications for funding lead the types of assistance sought, there were also many applications for assistance on a one-time special project, requests for information, various kinds of technical assistance and training.

Types of Assistance Received from the Department

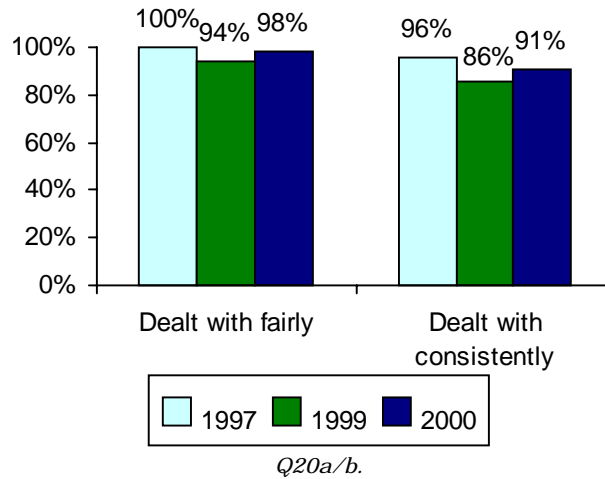
Types of Assistance	1997	1999	2000
Have an on-going relationship	81%	87%	89%
Applied for funding	57	83	76
One-time special projects	56	66	67
Contacted only for information	45	52	51
Decision to locate/retain facility, complete a project	38	47	42
Contacted but did not apply for funding	44	37	42
Non-monetary technical assistance	44	47	41
Improve infrastructure to aid in attracting businesses	40	41	39
Workforce development and training	24	27	28
Grant assistance	6	3	5
Applied to receive authorization to supply funding	5	6	3
International trade relations	7	--	3
Regional strategies	--	3	1
Leads/contacts/networking	2	--	1
Tourism	1	1	--
Miscellaneous	13	17	13

*Q1. Totals add to over 100% due to multiple responses.
-- less than 0.5%*

Consistency and Fairness

Almost all Department customers felt they were treated fairly and consistently, and there is an increase in these feelings since 1999, though the differences are not significant.

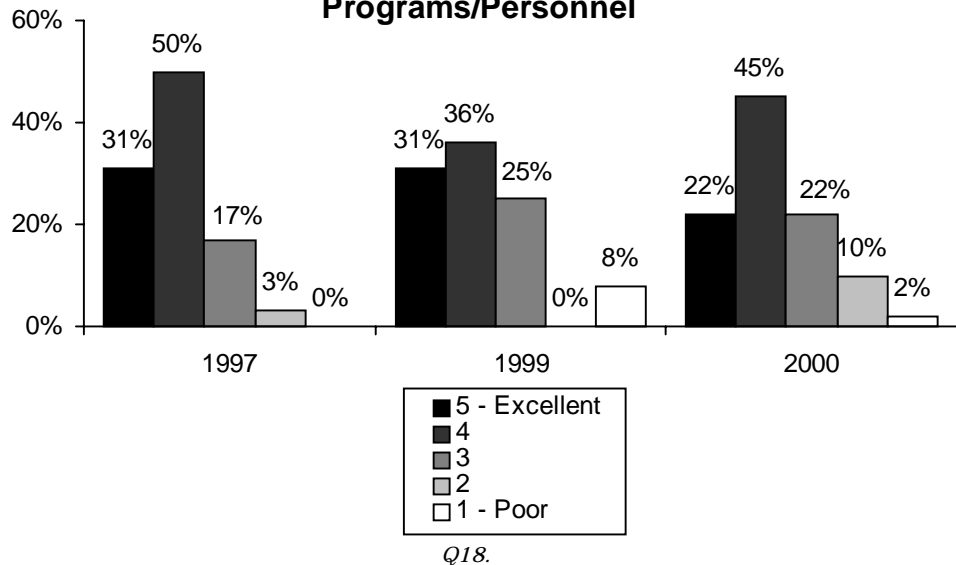
Fairness and Consistency



Perceived Coordination within the Department

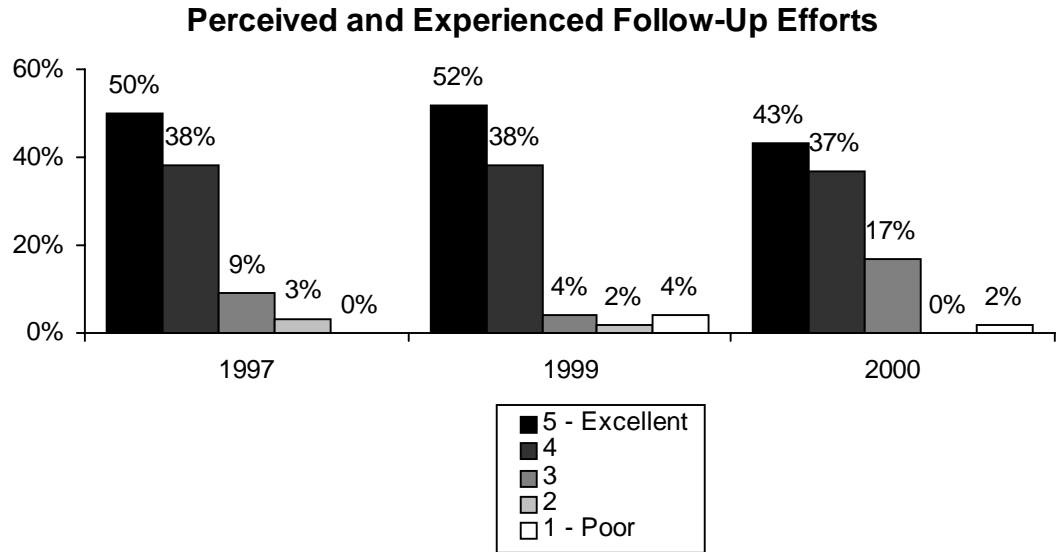
It is generally agreed that Department programs and personnel coordinate reasonably well, although the feeling was stronger in 1997 and 1999 than it is presently. The proportion stating that coordination among programs is excellent declined by nearly one-third between 1999 and 2000, while those rating it more in the middle increased.

Perceived Coordination Among Department Programs/Personnel



Perception of Department Follow-up Efforts

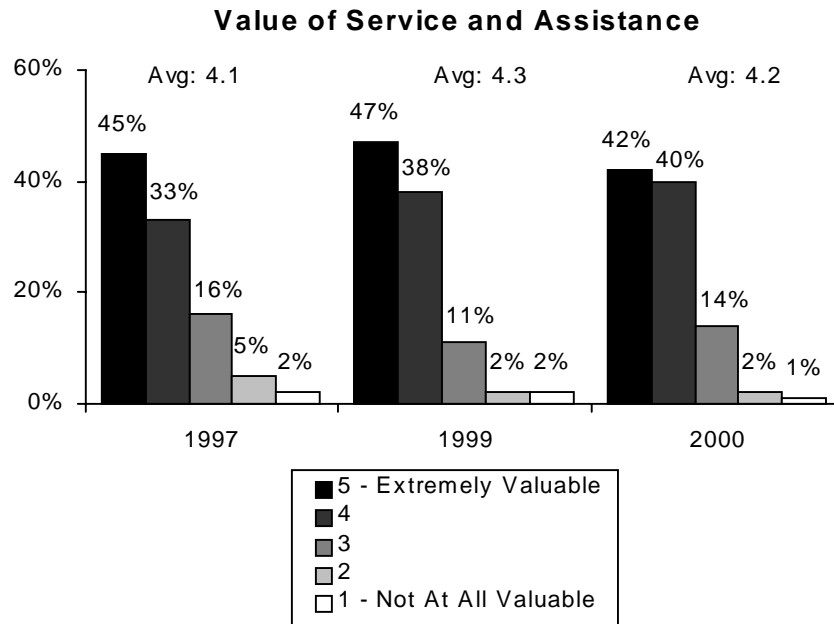
The Department continues to get high marks for good follow-up. Though ratings are down slightly from 1997 and 1999, eight in ten still rate it a 4 or 5 on a 5-point scale.



Q19.

Value of Service and Assistance Received

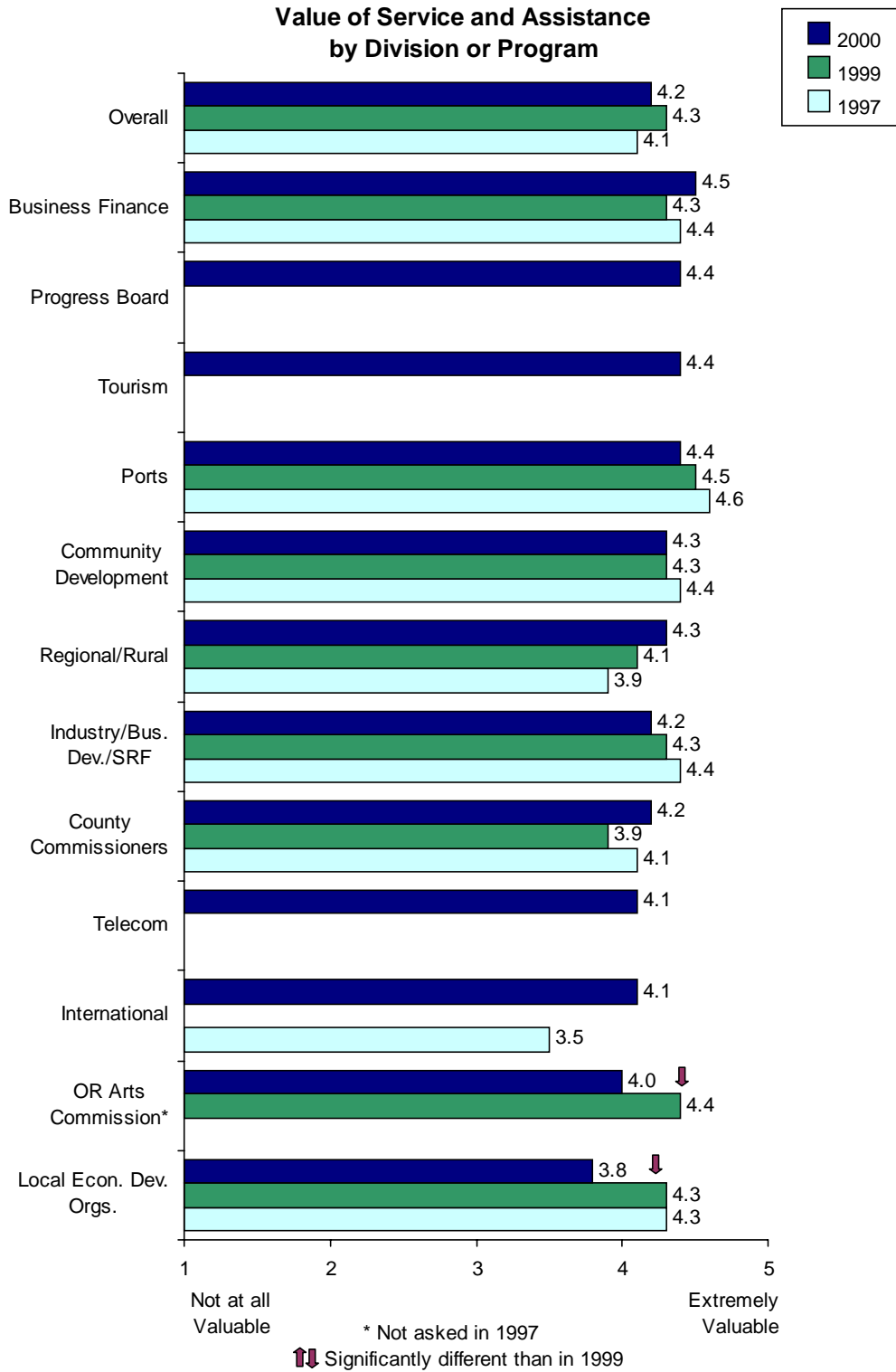
Department services are held in high value. Four in ten consider it extremely valuable, and, on a 5-point scale, 82% rate it either 5 or 4. The ratings are relatively consistent with those from previous years, and the year-to-year differences are not statistically significant.



Q51.

Perceived Value by Customer Segments

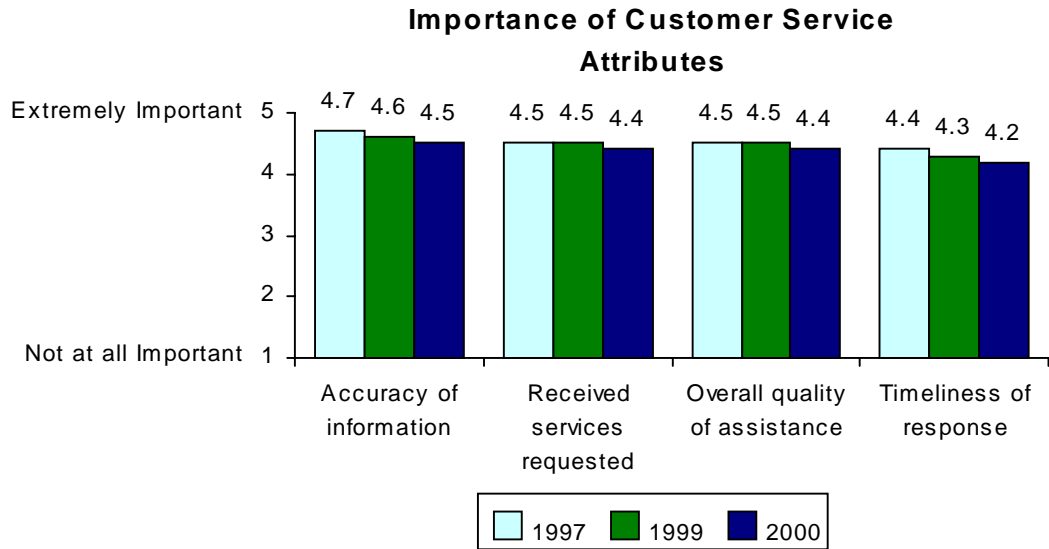
To provide easier comparison, mean ratings are used to show differences by customer segments. The value of Department services is rated quite high by most groups, although there are a few exceptions. Ratings for LEDO and Arts are lower than for the other groups, 3.8 and 4.0, respectively, and have fallen significantly since 1999, but are still not low enough to be viewed as a problem.



Q51.; Note: Disaster Recovery not shown because there were only two respondents.

Importance of Customer Service Attributes

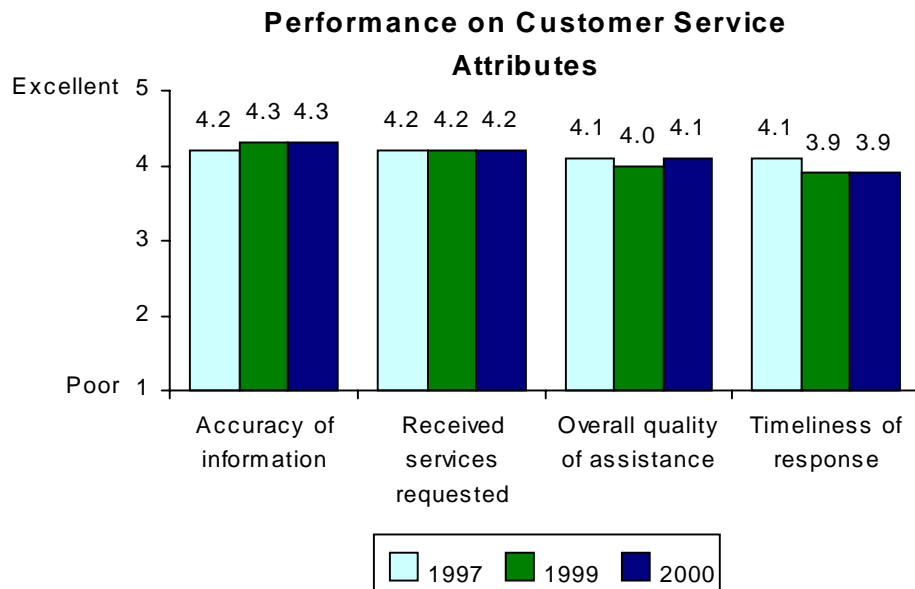
All four service attributes are considered important, with average ratings between 4.2 and 4.5 on a 5-point scale.



Q2.

Performance on Customer Service Attributes

The Department's performance on the aforementioned attributes is also very similar to 1997 and 1999. The only attribute for which performance scores below 4.0 is *Timeliness of response*, which remained unchanged from 1999 at 3.9.



Q3, 5.

Reasons for Ratings on Quality of Assistance

The major reasons why customers give high ratings to the quality of Department assistance are prompt service and a positive staff attitude. Even more striking are the dramatic declines in the proportion of respondents saying the Department understands their needs or helps prepare applications for funding.

**Reasons for High Quality of Assistance Ratings
(Rated Quality 4 or 5)**

Reason for High Ratings	1997	1999	2000
Positive Comments			
Customer Service			
Prompt response	35%	32%	24%
Positive staff attitude	13	18	14
Good relationship/partnership	8	9	8
Responsive/do what is asked	--	--	7
Good quality work/service	--	--	7
Personable/courteous staff	8	6	6
Professional staff	3	4	5
Helpful in obtaining grants	--	--	5
Understands needs/concerned	20	7	3
Willing to meet with us	8	4	1
Helps prepare applications	17	12	--
Good Information/Source of Information			
Helpful information	25%	26%	15%
Knowledgeable	15	7	7
Accurate information	10	6	7
Direct me to other resources	8	3	1
Miscellaneous Positive Comments	22%	13%	26%
Neutral comments	4%	4%	2%
Haven't had much/any contact with them	--	--	1%
Negative Comments			
Poor follow-through/not timely	6%	10%	9%
Poor information/confusing	6	3	1
Negative staff attitude	2	1	1
Miscellaneous negative comments	6	7	11

Q4. Totals add to over 100% due to multiple responses.

Low ratings are driven by impressions of poor follow-through/poor timeliness. Also contributing is a perception of a negative attitude from Department staff and poor or confusing information. However, mentions of poor follow-through and poor timeliness are lower in 2000 than they were in 1999, as are complaints that the information was not very good or confusing and perceptions of negative staff attitudes. (These areas of change are shaded in the table.)

**Reasons for Low Quality of Assistance Ratings
(Rated Quality 1, 2, or 3)**

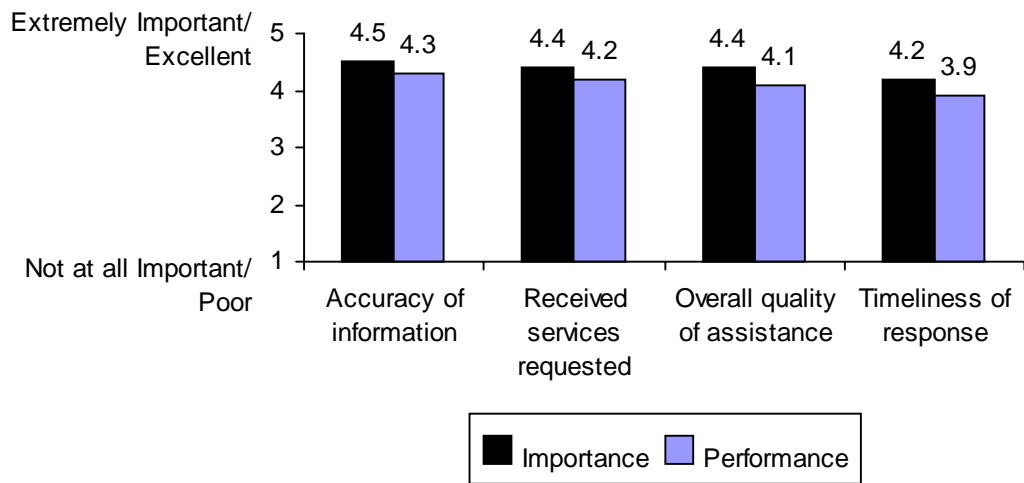
Reasons for Low Ratings	1997	1999	2000
Negative Comments			
Poor follow-through/poor timeliness	28%	47%	34%
Negative staff attitude	15	17	11
Poor information/confusing	28	18	9
Miscellaneous negative comments	34	35	46
Neutral Comments			
	21%	6%	5%
Haven't had much/any contact with them	--	--	4%
Positive Comments			
Positive staff attitude	9%	11%	4%
Good quality work/service	--	--	3
Prompt response	4	3	2
Responsive/do what is asked	--	--	1
Provide helpful information	2	5	1
Personable staff/courteous	2	2	1
Provide accurate information	2	--	1
Helpful in preparing applications	4	2	--
Good relationship/partnership	--	2	--
Miscellaneous positive comments	11	--	7

Q4. Totals add to over 100% due to multiple responses.

Customer Service Gap Analysis

Performance is rated slightly lower than importance, but this is the usual pattern that is found in customer satisfaction studies. In this study, the extent of this difference lies within acceptable norms (difference between importance and performance not greater than ± 0.5 on a 5-point scale).

Comparison of Importance and Performance -- 2000



Q2 vs. Q3, 5

Customer Service Gaps Over Time

The gaps are very similar in 1997, 1999 and 2000. However, to the very small extent that there are differences, all have decreased since 1999. This was primarily due to reduced importance and expectations in these factors by Department customers.

Customer Service Gaps in 1997, 1999 and 2000

Attributes	1997	1999	2000
Overall quality of assistance	- 0.4	- 0.5	-0.3
Timeliness of response	- 0.3	- 0.4	-0.3
Accuracy of information	- 0.5	- 0.3	-0.2
Received services requested	- 0.3	- 0.3	-0.2

Q2 vs. Q3, 5

Customer Service Gaps by Group/Program

When looking at the Department's customer groups, there are three attributes where the service gap meets or exceeds the -0.5 threshold of acceptability. These may reflect the interests or needs of these groups, as well as perceived shortcomings of the Department. Regional Strategies, Ports and Community Development had gaps at or exceeding - 0.5 for *Timeliness of response*. *Overall quality of assistance* appears to be an issue for Ports, Community Development, and the Arts Commission, each registering a -0.5 gap. LEDO took issue with *Accuracy of information* (-0.5).

Customer Service Gaps Meeting or Exceeding -0.5

Attribute	Group	Gap
Timeliness of response	■ <i>Regional Strategies</i>	-0.7
	■ <i>Ports</i>	-0.7
	■ <i>Community Development</i>	-0.6
Overall quality of assistance	■ <i>Ports</i>	-0.5
	■ <i>Community Development</i>	-0.5
	■ <i>Arts Commission</i>	-0.5
Accuracy of Information	■ <i>LEDO</i>	-0.5

Q2 vs. Q3, 5.

The chart below shows gaps for each attribute by group.

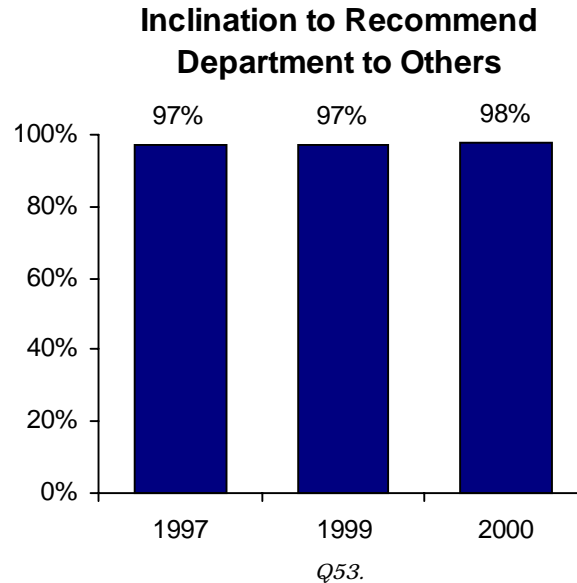
Customer Service Gaps by Group or Program

Group/Program	Overall Quality of Assistance	Accuracy of Information	Received Services Requested	Timeliness of Response
Total Sample	-0.3	-0.2	-0.2	-0.3
Industry/Business Development	-0.4	-0.3	0.0	-0.4
Business Finance	+0.2	0.0	-0.1	+0.1
Community Development	-0.5	-0.3	-0.3	-0.6
County Commissioner	-0.3	+0.2	-0.2	+0.2
LEDO	-0.3	-0.5	-0.1	-0.3
Ports	-0.5	0.0	-0.3	-0.7
Regional Strategies	-0.3	-0.3	0.0	-0.7
International Division	0.0	-0.2	-0.3	-0.1
Arts Commission	-0.5	-0.2	-0.3	-0.4
Tourism	-0.3	-0.4	-0.2	+0.2
Telecommunications	-0.4	+0.3	0.0	-0.1
Oregon Progress Board	-0.2	-0.3	-0.1	-0.2

Q2 vs. Q3, 5.

Recommending the Department to Others

Customers continue to be very satisfied with Department assistance, as evidenced by their continued very high willingness to recommend it to others.



The reasons for their willingness to recommend Department assistance show a very positive attitude. Although the availability of funding is high on the list, it is noteworthy that non-monetary reasons are also important. The Department is viewed by many as being valuable for its expertise and helpful personnel.

Reasons Would Recommend the Department

Reasons for Recommending	1997	1999	2000
It is a source of funding	41%	34%	21%
Have expertise/help you find it	34	21	20
Helpful personnel	16	12	14
Only resource in Oregon	--	5	12
Help in economic/project development	24	14	11
They are successful	--	2	4
Community oriented	8	1	3
Responsive/timely	8	15	3
Easy to use service	--	4	3
They provide small business assistance	--	--	3
Help with networking/contacts	7	4	2
They provide assistance (general)	--	--	2
Miscellaneous positive comments	14	19	25

Q54. Totals add to over 100% due to multiple responses.
-- less than 0.5%

Suggestions for Improvement

Despite their high satisfaction, almost 90% continue to offer suggestions for improving Department assistance. The primary suggestions given are to reduce hassles and make things easier (26%) and to increase funding availability (25%). There were reductions in the proportion of respondents indicating a need for improvement in staffing and customer service. This suggests that the Department has responded well to previous findings and, as a result, customers are more satisfied in these areas.

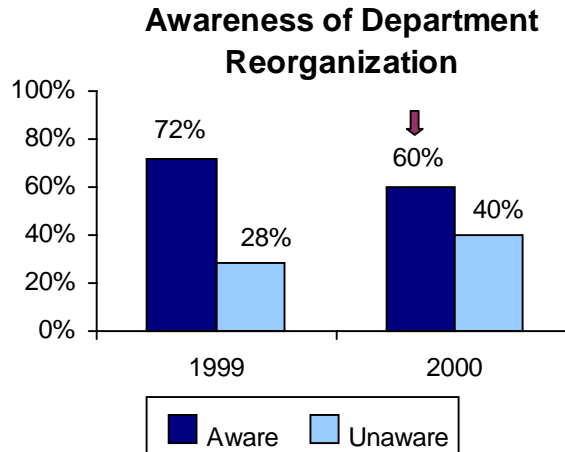
Suggestions for Improving Value of Service and Assistance

Suggestions for Improvement	1997	1999	2000
Made Suggestions	85%	88%	87%
Reduce Hassle/Make Things Easier	17%	26%	26%
Expedite process	2	10	16
Work with other agencies	2	4	5
Be more flexible	--	1	3
Be more consistent	--	2	2
Be easier to use	6	6	2
Help with filing requirements	5	3	1
Change rules	2	4	--
Funding	39%	30%	25%
Increase funding	1	8	7
Be better funded	14	4	7
Specific funding applications	3	8	2
More funding for communities	7	1	2
More help to specific industries	--	--	2
More grants/fewer loans	1	3	1
More proactive funding	9	2	--
Advise us of funding resources	3	1	--
Assist home ownership projects	--	1	--
Help fund start-up businesses	1	--	--
Other funding suggestions	--	3	4
Staffing	16%	26%	16%
Provide more staff	7	7	5
Hire better staff	--	2	2
Train staff better	--	3	1
Have regional offices and reps	8	6	1
Other staffing suggestions	--	4	4
Customer Service	24%	23%	15%
Be more responsive/keep customers informed	5	9	5
Have information about available resources	11	4	3
Improve communications	--	--	3
More assistance to small and rural businesses	2	4	2
Set up contacts/help networking	3	2	1
Provide better follow-up	--	--	1
Be more informed	3	5	--
All other reasons	14%	20%	6%
Pay more attention to rural areas	--	5	5
Regional/geographic issues	--	--	2
Closer contact	--	--	2
Develop regional strategies	--	1	1
Improve panel	--	--	1
Stop reorganizing	--	3	1
Do away with bureaucratic image	6	3	--
Keep legislature away from the Department	--	2	--
Think longer term rather than short term	--	1	--
Miscellaneous	8	12	20
Nothing/No suggestions	15%	12%	13%

Q52. Totals add to over 100% due to multiple responses. -- less than 0.5%

Awareness of Department Reorganization

Most customers (60%) say they are aware of the Department's reorganization, a significant decline from the 72% who said they were aware of the reorganization in 1999. This is likely due to the increased elapsed time since the reorganization.

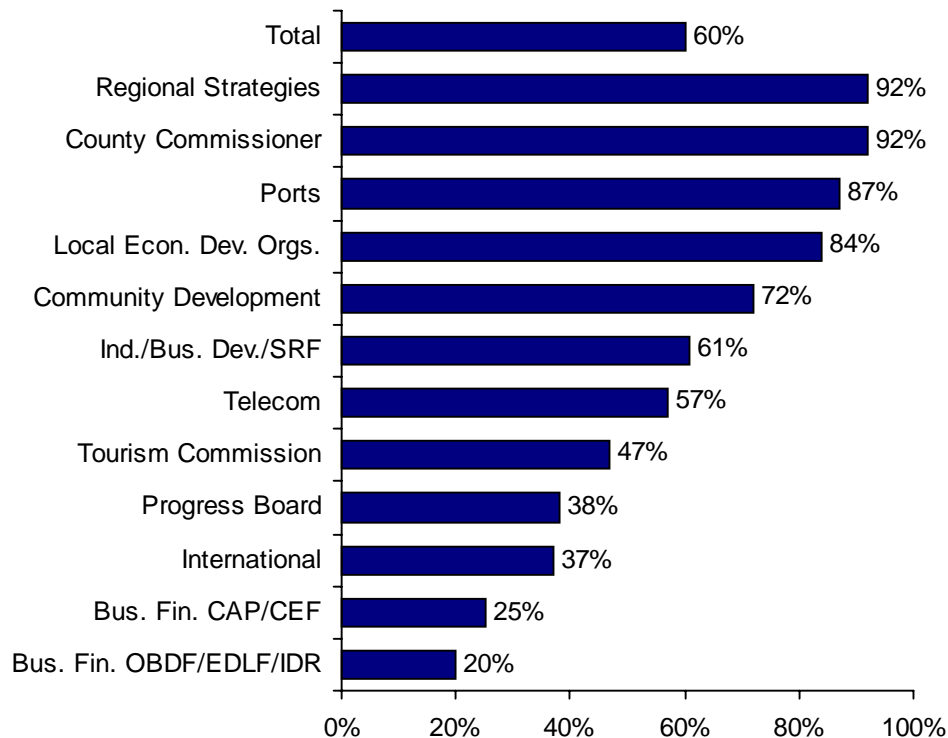


↑↓ Significantly different than in 1999

QN53a.

Awareness of the reorganization varied by customer type. Those who are more apt to deal with the Department on an on-going basis are more likely to know about the reorganization than are those more likely to have specific projects, often one-time interactions, with it.

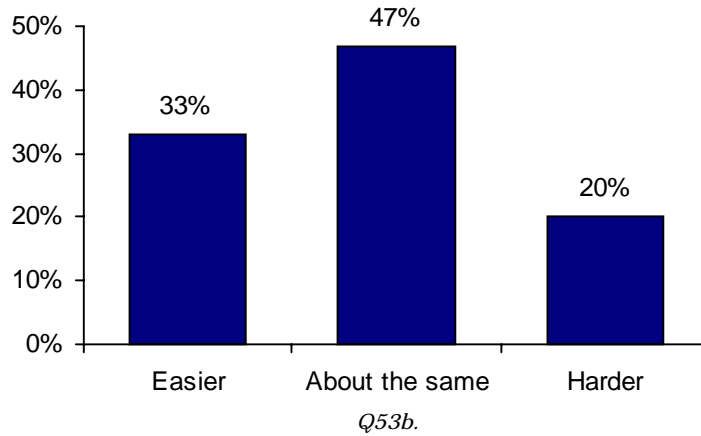
Awareness of Department Reorganization by Customer Types



QN53a.; Disaster Recovery excluded because there were only two respondents.

The most common perception about the effect of the reorganization is that it would not affect the ease of getting information from the Department. Thirty-three percent of respondents believe the reorganization will make it easier to get information, while 20% think it will be harder.

Perception of Reorganization Effect



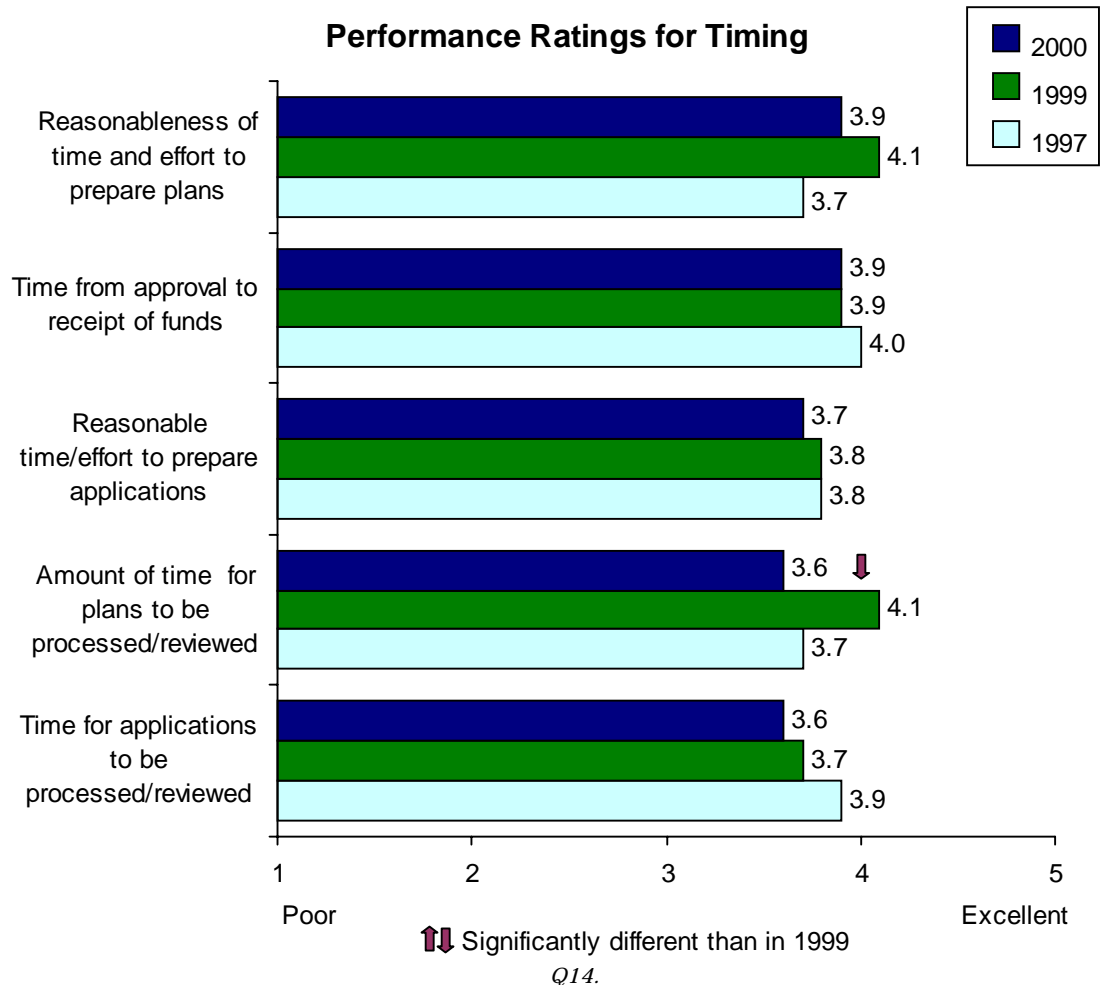
Attribute Ratings

Customers of Industry Development, Business Development, Business Finance, Community Development, Regional Strategies, Tourism and the Oregon Arts Commission were asked to rate the Department on two types of attributes: timeliness and clarity/helpfulness of the process and the service. A 5-point scale was used, with 5 meaning “excellent” and 1 denoting “poor.”

Of the twelve attributes measured in both 1999 and this year, only five are now rated higher, and four are rated lower (three are unchanged). These changes are discussed in the following two sections.

Timeliness Attributes

Five attributes regarding timeliness were measured, and the Department scored fair to reasonably well, but not outstandingly, on each. Ratings for three of the five attributes declined between 1999 and 2000, one increased slightly, and one remained unchanged. Only one change, the decline from 4.1 to 3.6 for *Amount of time for plans to be processed and reviewed* was significant.



Reasons For Low Ratings for Time/Effort Preparing Applications

Those who gave low ratings to the time and effort required to prepare an application are most concerned about it being too time consuming. This complaint (shaded in the table) is currently mentioned by slightly more customers than it was in 1997 or 1999. Other complaints are that the process is too complicated and repetitious and that the Department takes too long. The proportion of respondents saying the Department requires too much paperwork has declined steadily since 1997.

**Reasons for Low Ratings of Time and Effort
of Preparing Application**

Reasons for Rating 1, 2 or 3	1997	1999	2000
Rated Time or Effort Low (1, 2 or 3)	31%	39%	36%
Made Negative Comments			
Too time-consuming/not enough time	29%	25%	31%
Complicated/detailed	13	28	22
The Department takes too long	8	3	19
Repetitious/tedious	21	19	19
Too much paperwork	21	14	8
Too lengthy	13	14	3
Difficult for small cities to get information	14	3	3
Require irrelevant, unnecessary information	--	8	--
Miscellaneous negatives	4	17	22
Neutral Comments	4%	8%	8%
Positive Comments	17%	3%	6%

Q15. Totals add to over 100% due to multiple responses.

Reasons For Low Ratings for Time/Effort of Preparing Plans

The reasons for giving low ratings to the time and effort required for preparing strategic or business plan preparation are similar to those for preparing applications. Those rating this activity low felt it is too repetitious and tedious and too time consuming.

**Reasons for Low Ratings of Time and Effort
of Preparing Business or Strategic Plans**

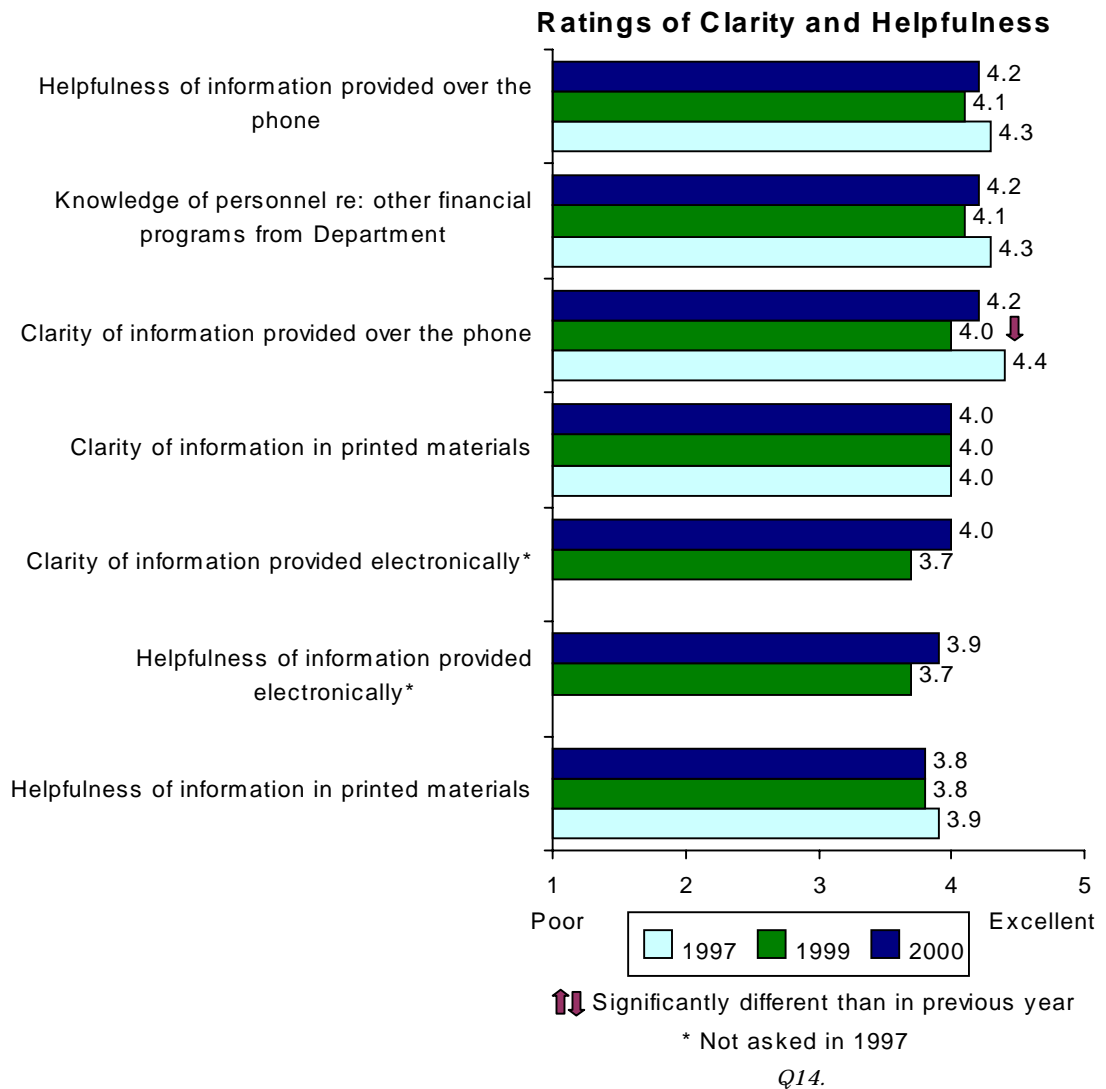
Reasons for Rating 1, 2 or 3	1997	1999	2000 (n=8)
Rated Time or Effort Low (1, 2 or 3)	38%	27%	28%
Made Negative Comments			
Repetitious/tedious	--	21%	50%
Too time-consuming/not enough time	56	36	25
The Department takes too long	11	--	13
Too much paperwork	11	7	--
Too lengthy	--	7	--
Difficult for small cities to get information	11	--	--
Complicated/detailed	22	7	--
Miscellaneous negatives	--	14	38
Neutral Comments	22%	7%	13
Positive Comments	--	7%	--

Q16. Totals add to over 100% due to multiple responses

Clarity and Helpfulness Attributes

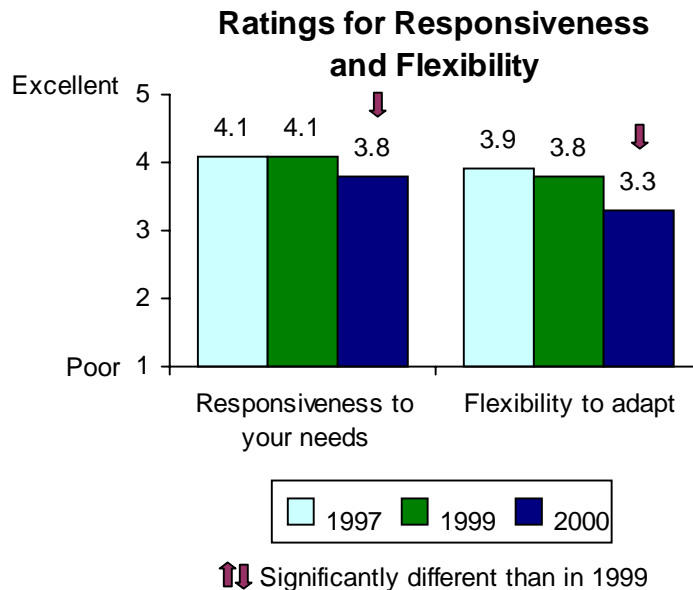
There were seven attributes related to the clarity and helpfulness of the information provided by the Department (five were included in the 1997 survey; the two measures added in 1999 were for help provided electronically). Ratings for all attributes remain stable. As with the attributes for timeliness, none is rated very low, although those pertaining to electronically provided information are among the lowest.

The higher rated attributes relate to phone information and the knowledge level Department personnel. The helpfulness of information provided over the phone is rated higher than that in printed materials. The clarity of phone information rated higher than printed materials. The lower ratings for electronic information may relate to the information itself or to the lower familiarity some customers might have with using it, though the increased ratings suggest that customers may be becoming more comfortable with this source of information.



Responsiveness and Flexibility

In 2000, the Department received lower ratings for its responsiveness to customer needs and its flexibility to adapt to changes in the Oregon economy than in either of the previous studies. The change in the Department's rating for flexibility is especially notable given the magnitude of the drop.



Q6.

Outcomes

Industry/Business Development Outcomes

To a list question of outcomes, just over half of business development customers responded that they had improved their regular business operations or methods as a result of Department assistance. More than four in ten said they expanded their current operation, and almost three in ten made a significant change in the nature of their business.

Very few mentioned a negative outcome, and even these were essentially neutral, such as decisions not to move ahead, rather than taking additional action. However, fewer cited positive outcomes than in previous years, especially regarding business start-ups.

**Industry Development Outcomes
Resulting from Department Assistance**

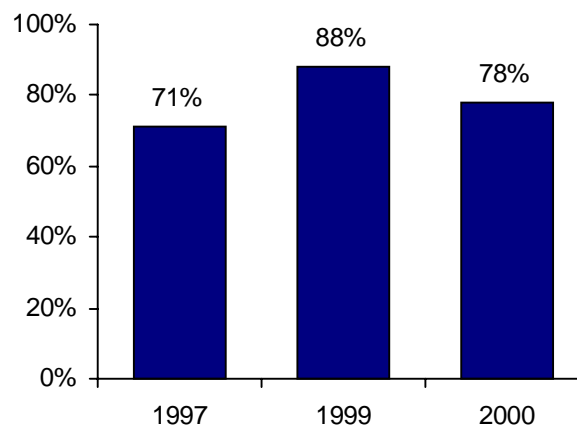
Outcomes	1997	1999	2000
Positive Outcomes			
Improved regular operations/methods	50%	55%	54%
Expanded current operations	50	55	42
Made sig. change in business or markets	40	27	29
Increased sales	50	55	21
Increased number of Oregon employees	50	68	17
Solved a specific operational problem	20	36	17
Decided to go into business	20	32	8
Actually started a business	50	32	4
Negative Outcomes			
Decided not to expand	20%	9%	8%
Decided not to go into business	10	5	4
Went out of business	10	--	--
Miscellaneous	40%	18%	13%

Q8. Totals add to over 100% due to multiple responses.

Employment Outcomes

When asked directly, 78% said they added new jobs as a result of the assistance provided. (This is much higher than the 17% shown from an open-ended question, suggesting that to many customers, adding to their employment rolls was not their top-of-mind outcome. It appears they may have seen the issue in terms of increased markets or higher sales, needing the direct, prompted question to think in terms of employment.¹)

**Added New Jobs Due to
Department Assistance**



Q9.

¹ Data from the open-end question is shown on the previous page.

Business Finance Outcomes

The major business outcomes resulting from Industrial Development, Business Development and Strategic Reserve Fund assistance continue to be improved competitiveness, strengthened fiscal health and/or profitability, lowered interest cost, and aid in starting a business.

Outcomes Helped by Department

Outcomes Helped	1997	1999	2000
Mentioned an Outcome Helped	97%	78%	96%
Increased company's competitiveness	52	35	49
Increased company's financial stability	55	41	45
Increased profitability	39	31	38
Lowered interest cost	42	22	36
Helped start up a business	43	29	35
Helped in obtaining financing from private sources	25	26	24
Funded improvements in infrastructure	--	7	6
Miscellaneous outcomes	30	7	15
None	3%	22%	4%

Q21. Totals add to over 100% due to multiple responses.

The major areas helped from Community Development, County Commissioners, Local Economic Development Organizations and Regional Strategies programs were contributions to local economic health by reducing costs. Help in building a facility was especially appreciated from Regional Strategies (100%) and County Commissioners. Regional Strategies (78%) and County Commissioners (75%) also noted increased municipal financial health as an area that was helped.

Areas Helped by Assistance from the Department

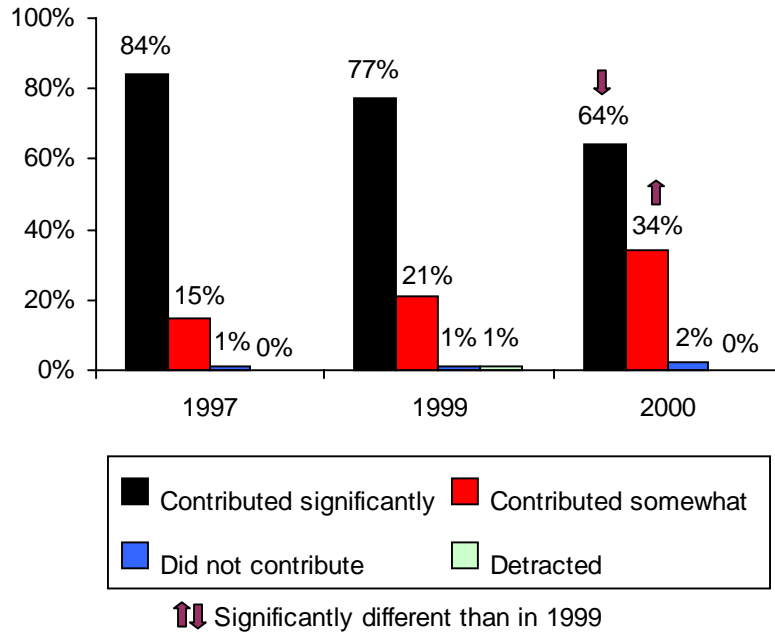
Areas of Activity	1997	1999	2000
Helped community build a facility	79%	78%	85%
Reduced cost of capital improvements	64	66	60
Increased municipal financial health	56	53	57
Helped lower costs to rate payers	33	26	29
Provided technical assistance	--	3	3
Improved facilities/infrastructure	5	8	1
Helped in planning	4	--	--
Helped diversify economy	4	--	--
Created jobs/attracted new jobs	3	--	--
Miscellaneous	3	9	8

Q29. Totals add to over 100% due to multiple responses. -- less than 0.5%

Department Contribution to Outcome

The majority of Department customers feel that the Department contributed significantly to the outcomes, almost always favorable, that they achieved. There is a decrease in the intensity of feeling that the Department contributed significantly, along with a simultaneous increase in the proportion of respondents saying that the Department contributed somewhat to the outcomes.

Department Contribution to Outcomes

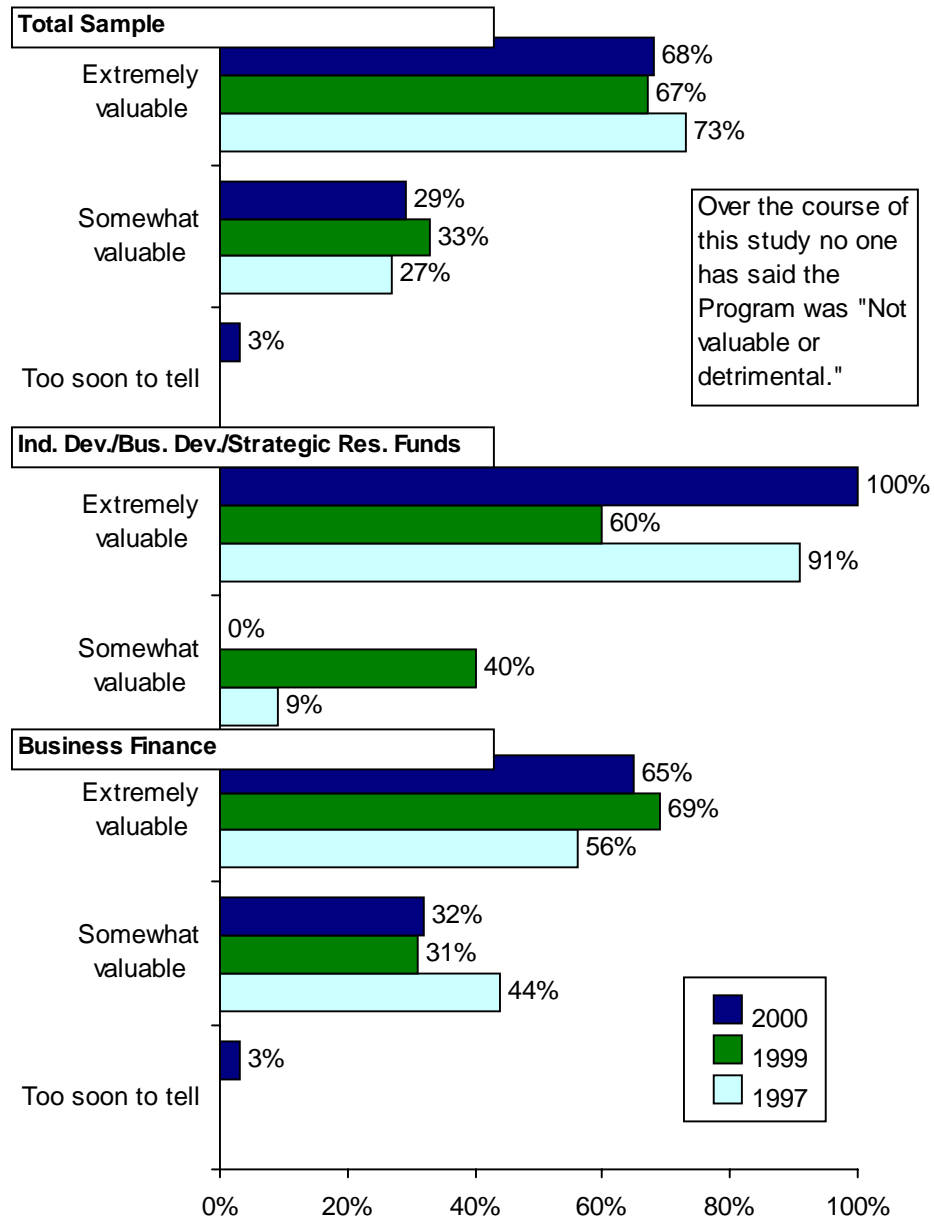


Q22.

Value of Department Assistance

Department customers feel the assistance was valuable to them. Far more rated it “extremely” than “somewhat” valuable, and none rated it “not valuable” or “detrimental.”

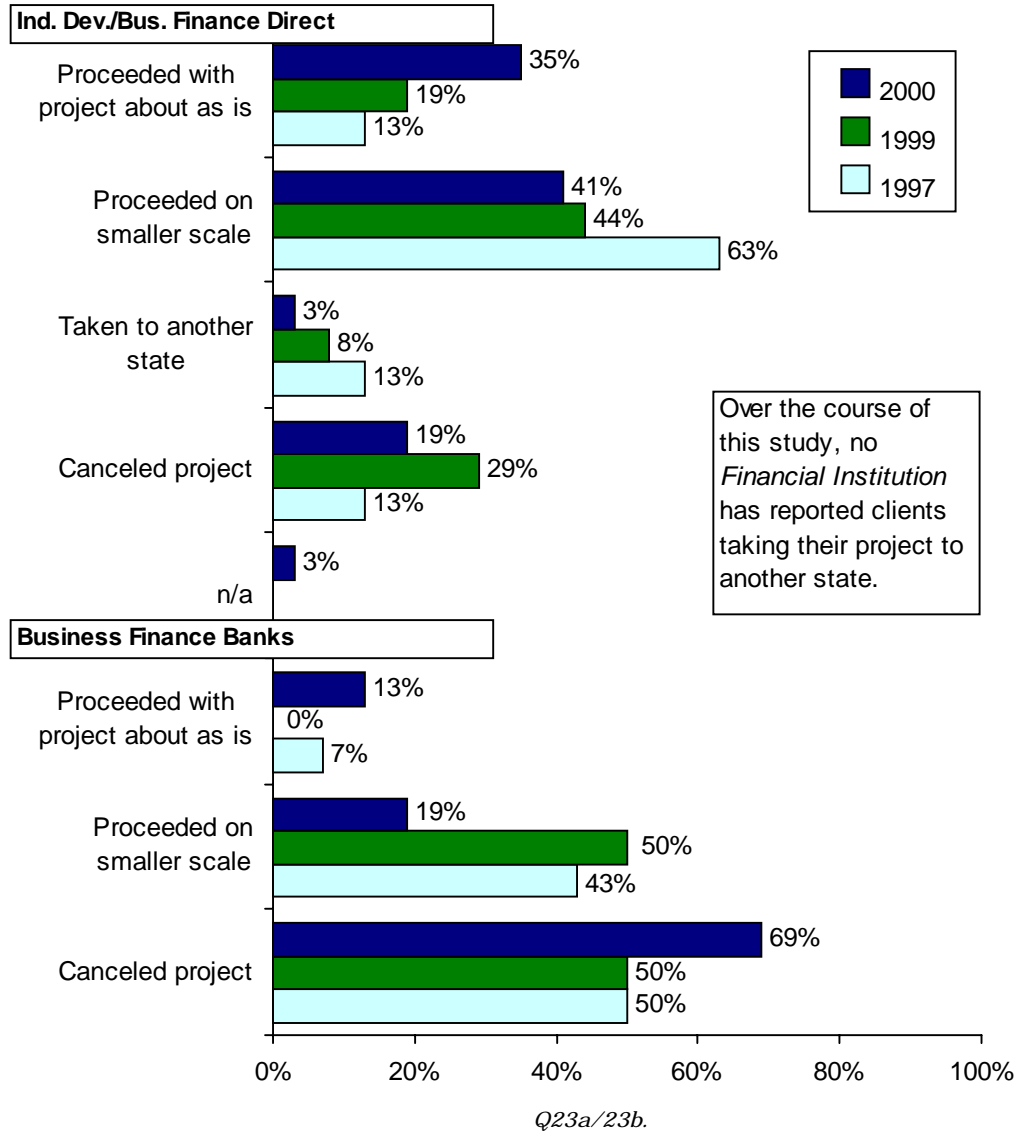
Value of Program to One's Business



Q24.

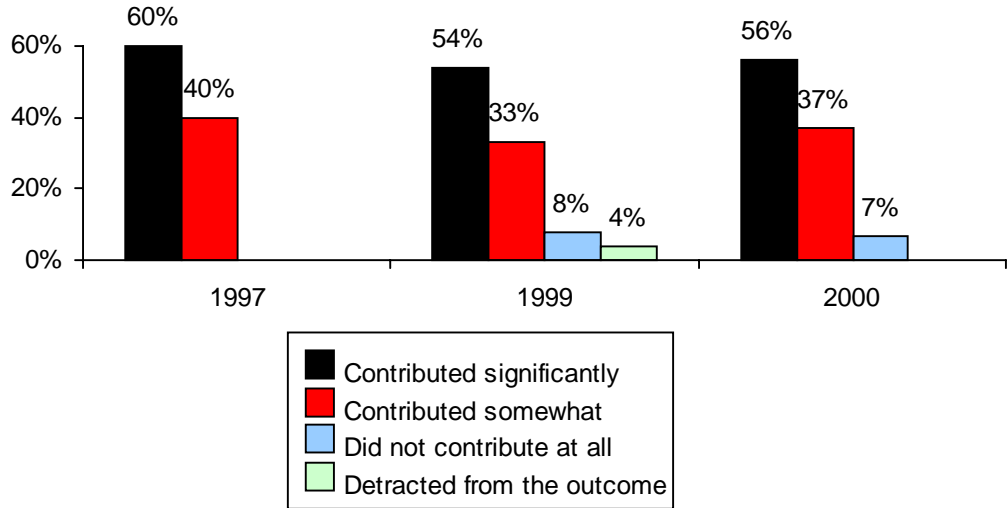
If Department assistance had not been forthcoming, about one-third of businesses would have continued with the project as is, six in ten would have down-sized their effort or even canceled the project. Among Business Finance Capital Assistance/Credit Enhancement customers labeled “Bank” in the chart), most felt the companies to which they provided funds would either have downscaled or canceled the project. In 2000, only 13% believe their clients would have continued as they did.

Perception of Outcome If Assistance Had Not Been Received



Customers overwhelmingly agree that the Department made a contribution to the outcome. Over half feel that the contribution is “significant.” These ratings were similar to 1999.

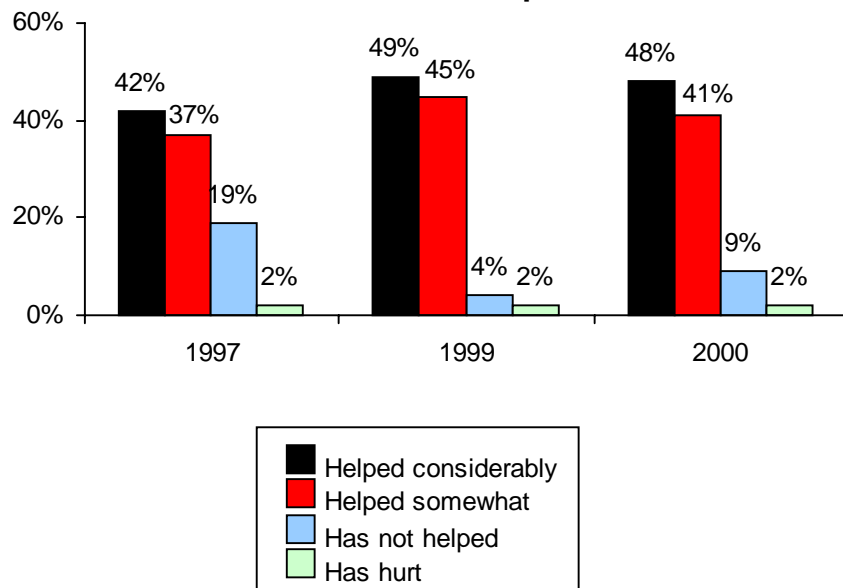
Rating of Department Contribution to Outcome



Q10.

Almost nine in ten customers feel that Department assistance helped either considerably or somewhat, although the proportion saying it was either not helpful or was harmful nearly doubled between 1999 and 2000.

Department Contribution to Community Economic Development

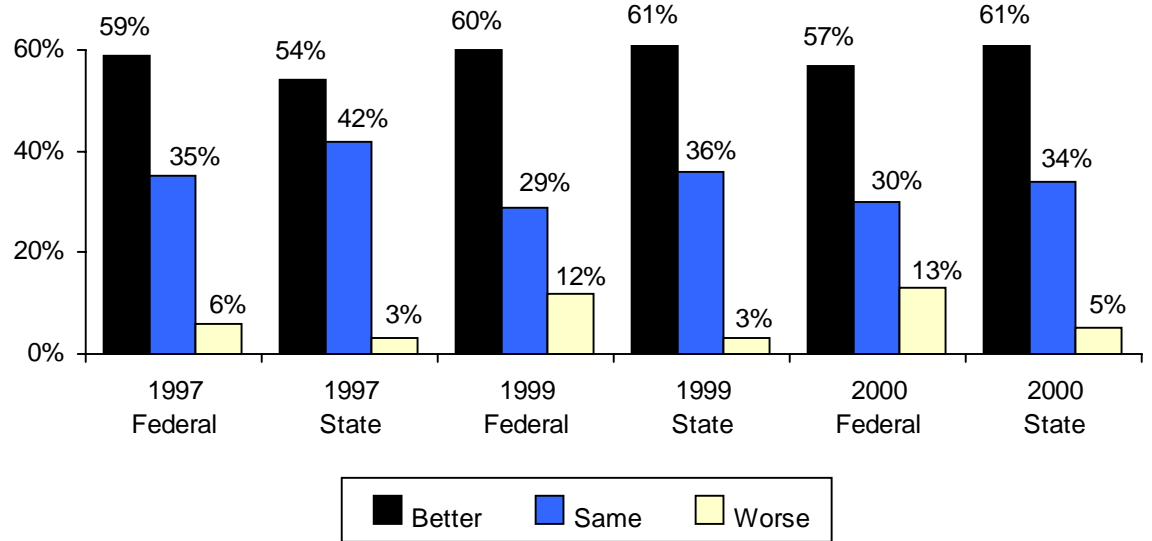


Q28.

Comparison with Other Funding Programs

In addition to being judged helpful, Department funding is generally viewed as being much better than other state or federal funding programs. For state funding this feeling is slightly weaker in 2000 than it had been previously, but the difference is not significant.

Department Compared to Other Funding Programs

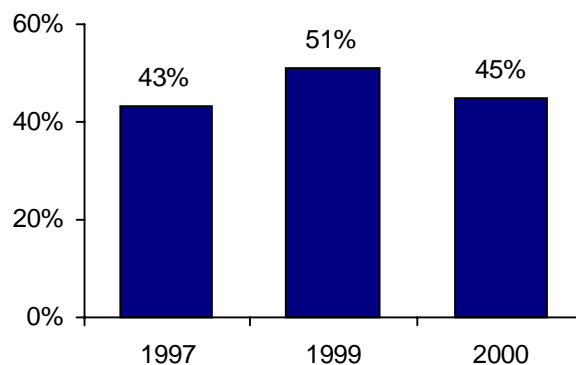


Q30/31.

Requirement to Submit Business or Strategic Plan

Just under half said that the Department required them to submit a strategic or business plan, a modest decrease since 1999, but not statistically significant.

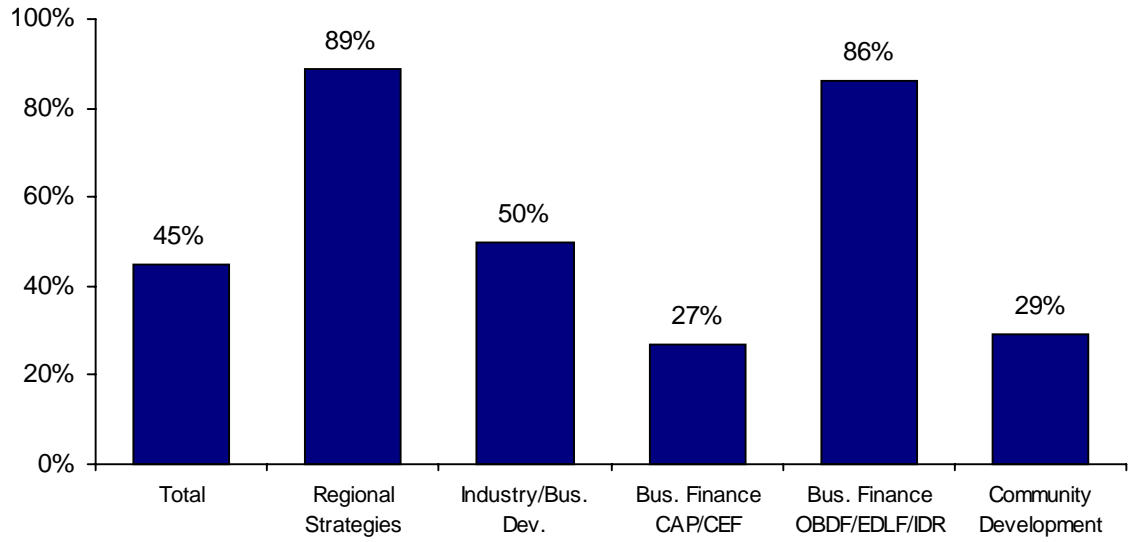
Required to Submit a Strategic or Business Plan



Q13.

As would be anticipated, there are differences cited in the requirement for a business or strategic plan. Most customers of Business Finance Direct (Oregon Business Development Fund/Entrepreneurial Development Loan Fund/Industrial Development Revenue Bond) said they needed to submit such a plan, but only three in ten Community Development clientele said so. Business Finance/CAP/CEF customers were least frequently required to provide a plan (27%).

Required to Submit a Strategic or Business Plan



Q13.

Important Industry Development Programs

When asked in an open-end question which Industry Development programs are judged most important, the two most frequent responses are small and emerging business (29%) and workforce training and development (25%). The only other two mentioned by more than 10% are rural issues and financial programs in general.

Industry Development Programs Deemed Most Important

Important Programs	1997	1999	2000
Small and emerging business	7%	6%	29%
Workforce training/development	30	27	25
Rural oriented answers	--	6	13
Regional strategies	17	18	8
Tourism	7	6	8
Targeted/customized training	13	12	4
Grant program	10	9	4
Recruiting assistance	10	3	4
International development	--	6	4
Infrastructure development	--	12	--
Business retention services	--	9	--
Brand Oregon	--	6	--
Key industries	27	21	--
Semi-conductor workforce consortium	23	--	--
Metals program	7	--	--
Other financial programs	--	6	17
Other technical programs	23	9	--
Other school programs	--	6	--
Miscellaneous programs	23	21	58

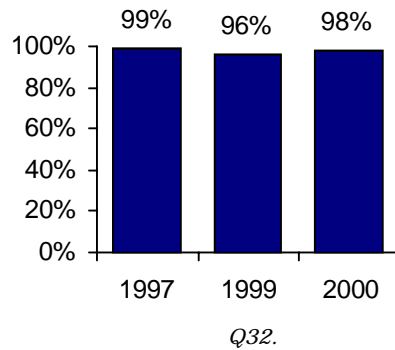
Q7. Totals add to over 100% due to multiple responses.

Partners

Relationship with the Department

The most basic measure of a satisfactory relationship with a service is one's propensity for using the service again. Since 1997, over 95% of Department customers said they would consider applying to the Department if they had another project.

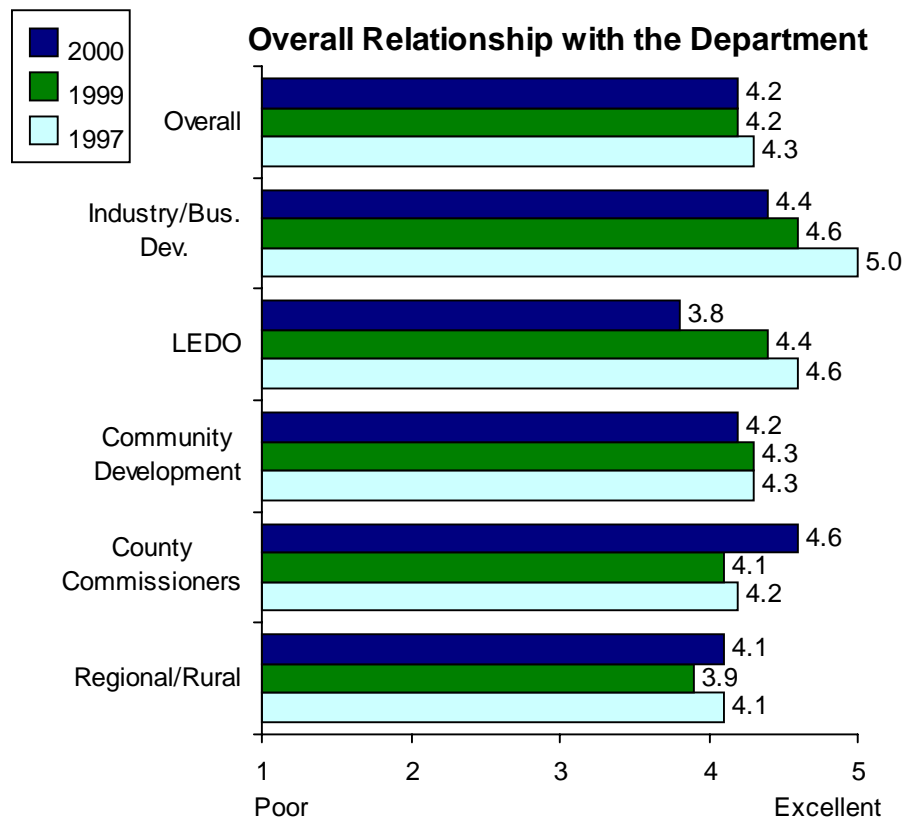
Would Apply For Department Funding Again



Rating of Relationship with the Department

Most customers feel they have a good alliance with the Department, rating the relationship 4.2 on a scale where 5 represents "excellent" and 1 means "poor." Less than one in five give ratings of 1, 2 or 3.

Even LEDO, although lowest at 3.9, garnered reasonably good marks. Eighty percent rated it "4" or "5" and 12% rated it below "3."



Reasons for Relationship Ratings

The major reason given for feeling they have a positive relationship with the Department is a “good relationship with Department staff.” This means that the people at the Department are good to work with and a definite asset. Other, more specific reasons are the responsiveness and helpfulness of staff and the help, often proactive, in obtaining funding.

Reasons for High Relationship Ratings

Reasons for High Ratings (4 or 5)	1997	1999	2000
Positive Reasons			
Good relationship with staff	43%	33%	30%
Responsive/helpful	--	9	27
Help in obtaining funding	14	11	17
Proactive/make things happen	3	10	8
Good people	--	--	8
Prompt response	16	14	6
Good results	--	4	6
Assist rural communities	2	3	4
Willing to listen/cooperative	--	1	4
Knowledgeable staff	26	5	2
Provide a needed service	5	7	1
Staff keeps us informed	5	4	--
Technical assistance	17	--	--
Have had no problems	5	--	--
Miscellaneous comments	7%	6%	12%
Neutral Reasons			
There is room for improvement	8%	12%	6%
Limited contact/don't know it well	3	--	1
Negative Reasons			
Poor communications	--	4%	4%
Need to emphasize rural areas	--	2	2
Inconsistent	--	2	1
Disagree on mission/Department issues	1	1	1
Too bureaucratic	--	3	--
Miscellaneous negative reasons	8	9	5

Q27. Totals add to over 100% due to multiple responses. -- less than 0.5%

Very few gave low ratings to their relationship with the Department, but poor communication stands out as the primary reason for doing so.

Reasons for Low Relationship Ratings

Reasons for Low Ratings (1, 2 or 3)	1997	1999	2000
Negative Responses			
Poor communications	--	11%	47%
Need to emphasize rural areas	--	11	6
Inconsistent	--	11	--
Too bureaucratic	--	11	--
Disagree on mission/issues	--	11	--
Miscellaneous negatives	50	11	41
Neutral Responses			
Limited contact/Don't know well enough	19%	32%	12%
There is room for improvement	19	5	12
Positive Responses			
Good people	--	--	12%
Good relationship with staff	--	--	6
Had good results	--	5%	--
Prompt response	6	--	--

Q27. Totals add to over 100% due to multiple responses. -- less than 0.5%

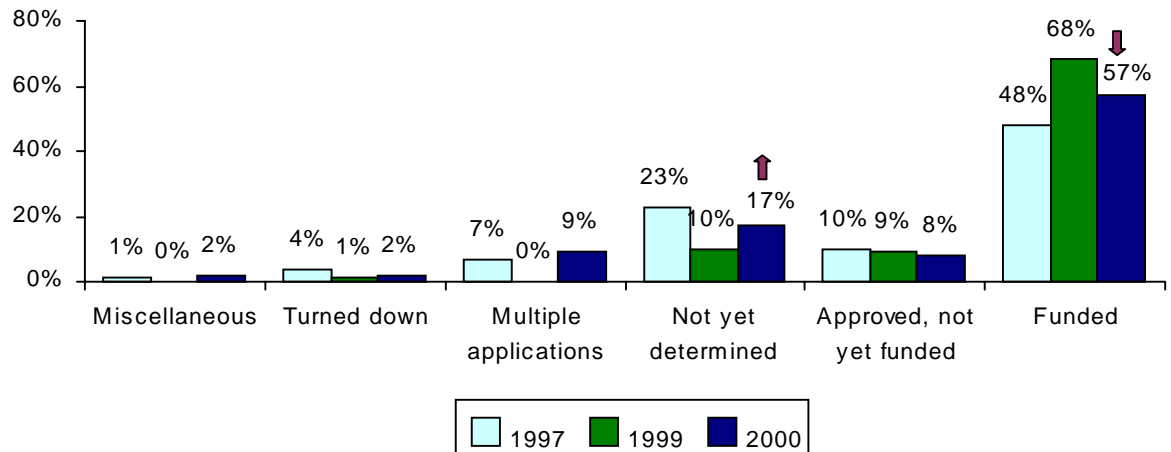
Funding

This section discusses the status of customers' funding requests and their views of the funding process.

Current Status of Application

Nearly two-thirds of surveyed customers say their project has been funded or is approved, waiting funding. This is down from more than three-quarters in 1999. Seventeen percent say that no decision has been made regarding their application.

Current Status of Application



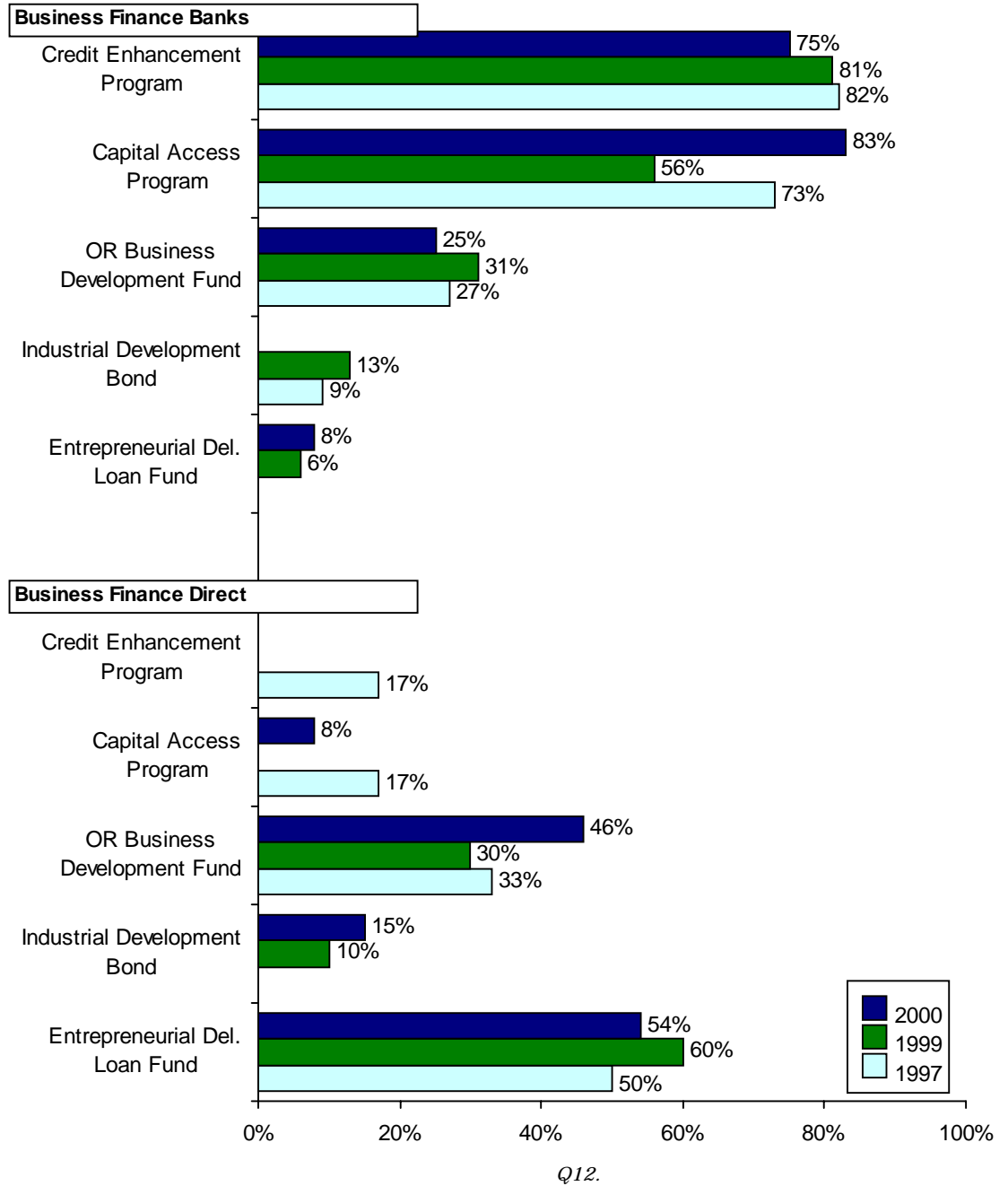
↑↓ Significantly different than in 1999

Q11.

Business Finance Programs Applied/Provide Funding For

The three most common Business Finance programs in the study are the Credit Enhancement Program, Capital Assistance Program and Entrepreneurial Development Loan Fund. There are differences in their incidence by those funded through banks and those funded directly.

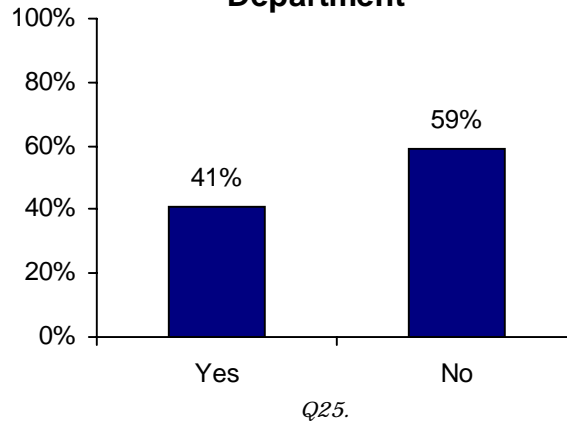
Funding Programs Applied/Supply Funding For



Private Sector Financing

Four in ten also received private sector funding.

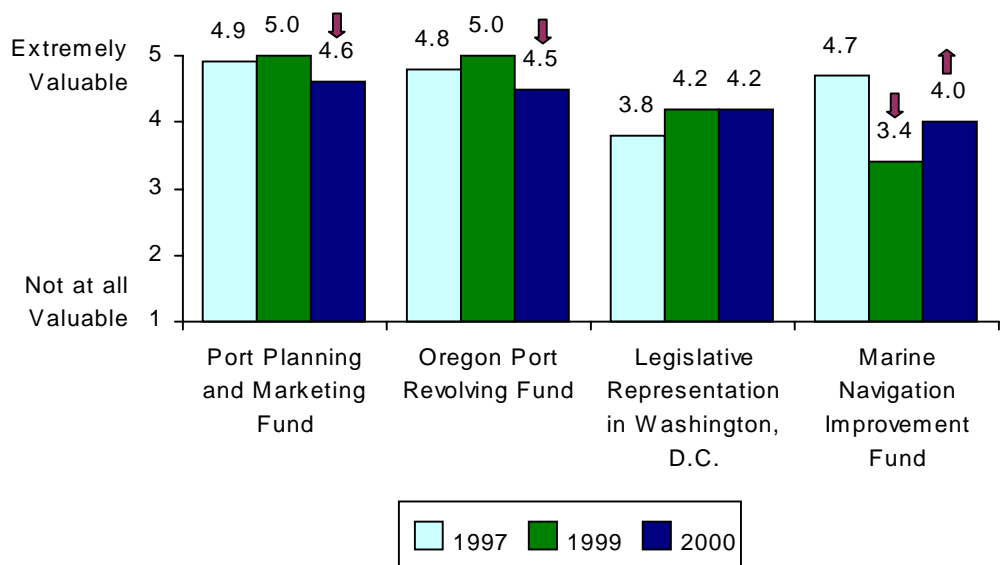
Receipt of Private Sector Financing Since Receiving Assistance from the Department



Ports

Four Ports programs were evaluated, and their perceived value remains high even though ratings for two of the four attributes declined significantly. For three of the four, *Port Planning and Marketing Fund*, *Oregon Port Revolving Fund* and *Legislative Representation in Washington DC*, nobody gave a rating of less than three on a 5-point scale. The increase for the *Marine Navigation Improvement Fund* is statistically significant, as are the declines for *Port Planning and Marketing Fund* and *Oregon Port Revolving Fund*.

Perceived Value of Selected Ports Activities

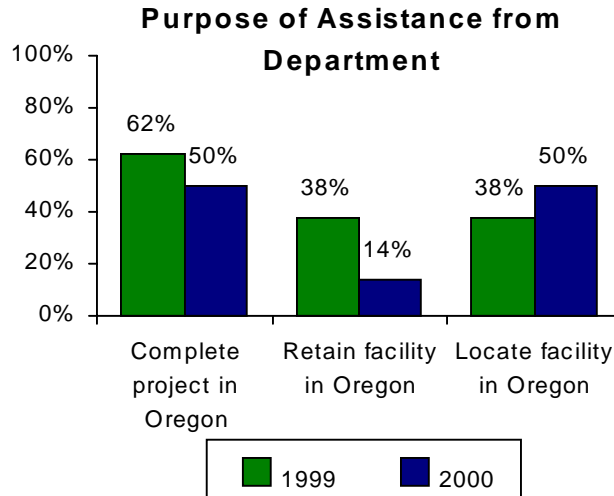


↑↓ Significantly different than in previous year
Q33.

Industry Development

Objective of Assistance

Half of all requests from Business Development and the Strategic Reserve Fund were to complete a project in Oregon and 50% were to locate a facility in the state. Others were to retain an Oregon operation.



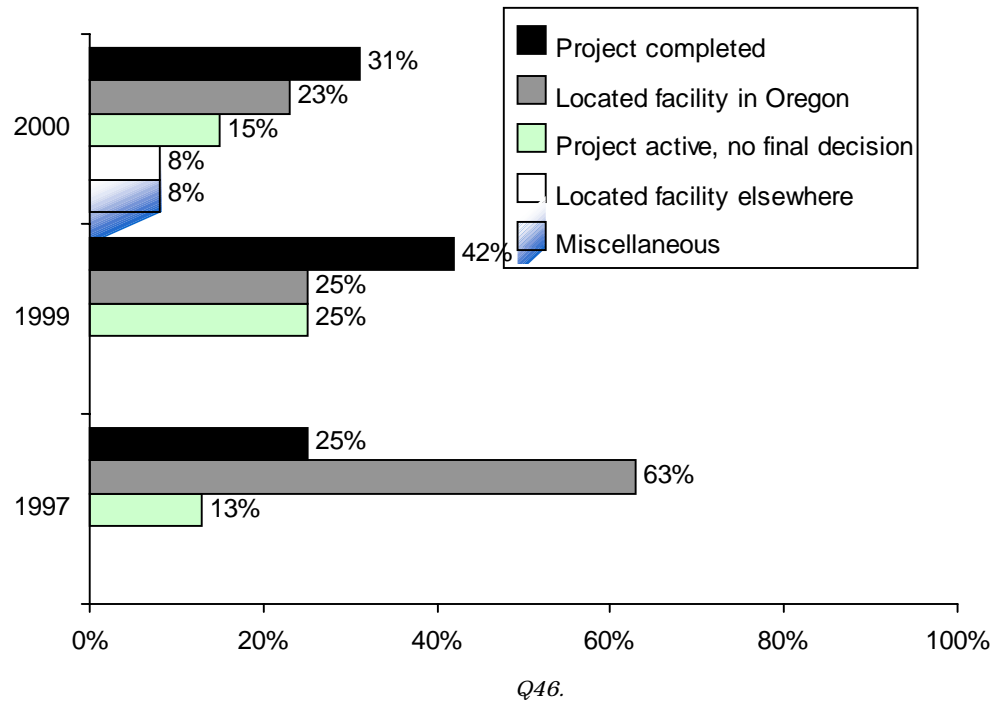
Note: Percents add to over 100% due to multiple response.

Q43.

Status

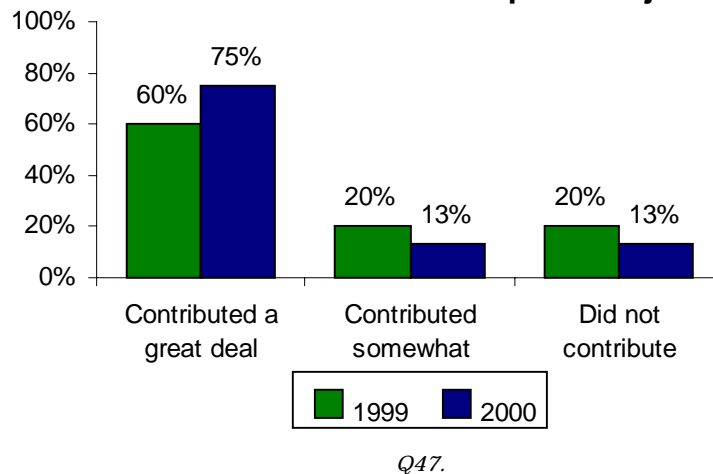
About half of Industry Development projects have either completed their project or located facilities within the state.

Current Status of Industry Development Projects



The vast majority, 88%, said that Department assistance contributed to their decision to locate a facility in Oregon or to complete a project in the state. Three-quarters said the assistance made a substantial contribution.

Contribution of Department Assistance to Decision to Locate or Complete Project



International

Results for the International Division are compared with the 1997 survey.

Initial Awareness

Being contacted by an International staff member and referrals were the most common sources of initial awareness among International customers. This represents a shift from 1997, when referrals were the most frequently cited initial source of awareness.

Source of Initial Awareness of the International Division

	1997	2000
Contacted by International staff member	7%	39%
Word of mouth/recommendation	56	35
Seminar/conference/workshop	11	9
Newsletter	--	9
Foreign Trade Council	9	--
Own knowledge	7	--
Miscellaneous	9	9

Q34; Note: Totals may not sum to 100% due to rounding. -- less than 0.5%

Outcomes

Export Activity Prior to Assistance

The majority of International business customers had some exporting activity prior to receiving assistance from the International Division.

Export Activity Prior to Assistance from International

	1997	2000
Did not export/not interested in doing so	12%	8%
Exported only for unsolicited orders	6	17
Not exporting, but interested in doing so	24	13
No more than (1997=5; 2000=9) export transactions per year	14	13
(1995 6+; 2000 10+) export transactions per year	45	50

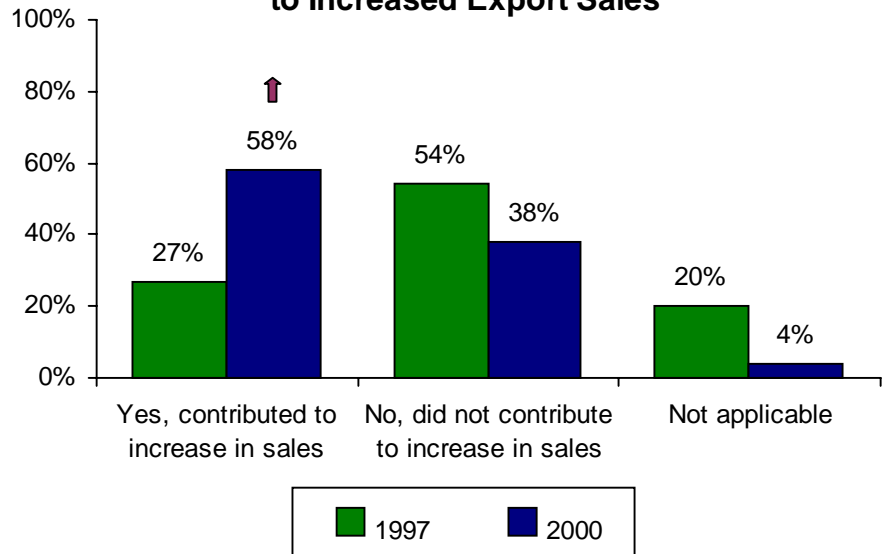
Q35; Note: Totals may not sum to 100% due to rounding.

Contribution of Assistance to Increased Sales

It appears that the International program's effectiveness in translating its assistance into increased export activity is rising. More than half (58%) of International business customers say that the International Division's assistance contributed to an increase in export sales for their company, double the numbers who said the same in 1997.

The proportion who say the International Division's assistance helped to increase export sales doubled since 1997.

Contribution of International's Assistance to Increased Export Sales



Percents may not add to 100% due to rounding

↑↓ Significantly different than in 1997

Q36

Among those who say that the International Division's assistance led to increased export sales, providing leads or contacts (29%) and that their sales increased/helped in sales (28%) are the most common reasons cited.

Even among those who say the assistance received did not result in increased sales, a few say it is too soon to tell (22% or two individuals). The same number (22%) said simply that the assistance received did not help.

Job Creation

Three-quarters (75%) of those reporting that the assistance provided by International contributed to increased export sales said at least one full-time equivalent job in Oregon had been added as a result of the increase in export sales. This compares with 67% in 1997 who said the same, which is a slight, but not significant, difference.

Telecommunications

Type of Assistance Received

Telecom customers are more apt than Department customers overall to have received assistance from the Department for infrastructure improvements to aid in attracting businesses (55% vs. 39% overall).

Type of Assistance Received – Telecom vs. Customers Overall

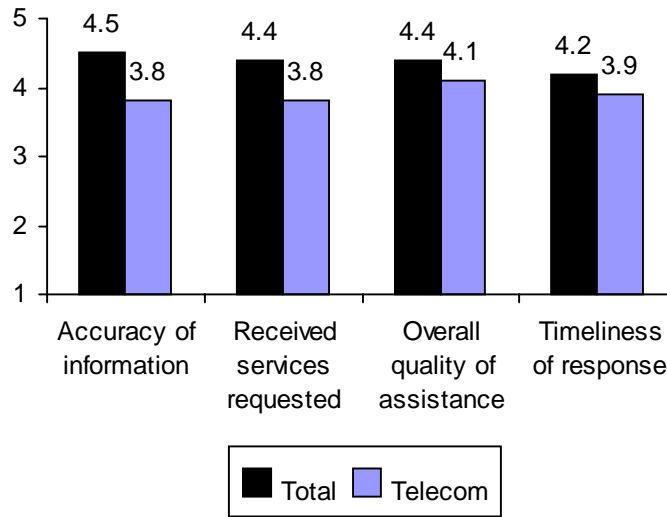
	Total	Telecom
Have an on-going relationship	89%	83%
Contacted only for information	51	69
Contacted but did not apply for funding	42	55
Improve infrastructure to aid in attracting businesses	39	55
Applied for funding	76	38
One-time special project	67	38
Decision to locate/retain facility, complete a project in Oregon	42	34
Non-monetary technical assistance	41	28
Grant assistance	5	7
Workforce development and training	28	3
International trade relations	3	3
Regional strategies	1	3
Applied to receive authorization to supply funding	3	--
Leads/contacts/networking	1	--
Tourism	--	--
Miscellaneous	13	10

Q1; Note: Totals may not sum to 100% due to multiple responses. -- less than 0.5%

Importance and Performance Ratings

Compared to other customers, Telecom customers tend to have lower expectations, which is indicated by lower than average importance ratings on various customer service attributes.

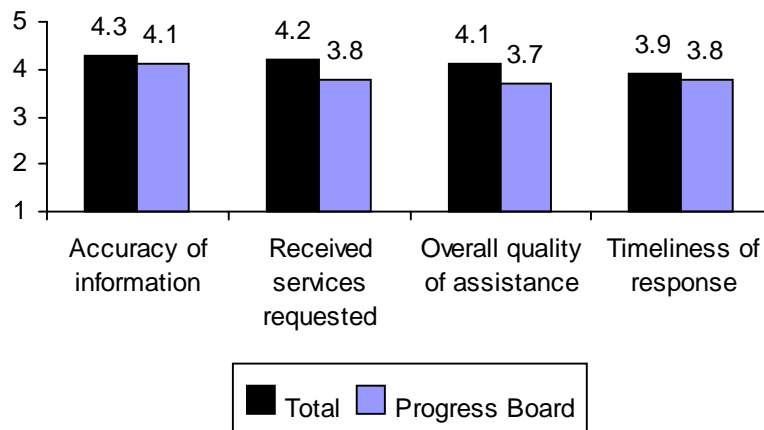
**Comparison of Importance
Telecom vs. Customers Overall**



Q2

Telecom customers also have lower than average assessments of the Department's performance on customer service attributes.

**Comparison of Performance
Telecom vs. Customers Overall**



Q3; 5

Despite their lower performance ratings, the lower importance ratings among Telecom customers on these same dimensions results in performance/importance gaps that are similar to Department customers overall.

**Customer Service Gaps
Telecom vs. Customers Overall**

Attribute	Total	Telecom
Overall quality of assistance	-0.3	-0.4
Timeliness of response	-0.3	-0.1
Accuracy of information	-0.2	-0.3
Received services requested	-0.2	0.0

Q2, 3, 5

Recommending the Department to Others

Results for Telecom customers parallel that of Department customers overall. Nearly all (97% vs. 98% overall) would recommend the Department to other businesses or communities. Main reasons for doing so relate to the Department personnel's expertise/their ability to help locate expertise (28%), their help in economic or project development (24%) and that the Department is a source of funds (20%).

Value of Service and Assistance

Forty-five percent (45%) of Telecom customers say the service and assistance provided by the Department is "extremely valuable," for a 4.1 average rating on a 5-point scale (4.2 average for Department customers overall).

When it comes to suggestions for improving the value of the service and assistance provided, Telecom customers generally reflect customers overall in the issues cited, although funding is less of an issue.

Suggestions for Improving Value of Service and Assistance -- Telecom vs. Customers Overall

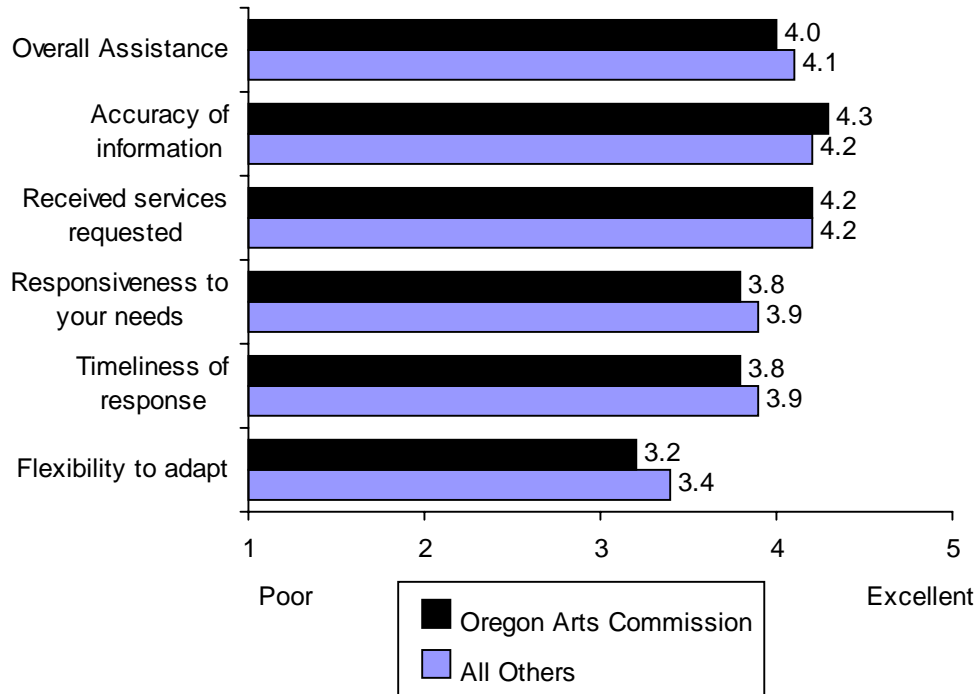
Suggestions for Improvement	Total	Telecom
Made Suggestions	87%	91%
Customer Service	15%	27%
Be more responsive/keep customers informed	5	9
More assistance to small and rural businesses	2	9
Have information about available resources	3	5
Be more informed	--	5
Improve communications	3	--
Set up contacts/help networking	1	--
Provide better follow-up	1	--
Reduce Hassle/Make Things Easier	26%	23%
Expedite process	16	18
Work with other agencies	5	5
Be more flexible	3	--
Be more consistent	2	--
Be easier to use	2	--
Help with filing requirements	1	--
Funding	25%	9%
Specific funding applications	2	5
Increase funding	7	--
Be better funded	7	--
More funding for communities	2	--
More help to specific industries	2	--
More grants/fewer loans	1	--
Other funding suggestions	4	5
Staffing	16%	9%
Other staffing suggestions	4	5
Train staff better	1	5
Have regional offices and reps	1	5
Provide more staff	5	--
Hire better staff	2	--
All other reasons	6%	14%
Closer contact	2	5
Keep legislature away from the Department	--	5
Improve panel	1	--
Stop reorganizing	1	--
Develop regional strategies	1	--
Miscellaneous	20	18
Regional/geographic issues	2%	9%
Pay more attention to rural areas	5%	--
Nothing/No suggestions	13%	9%

Q52. Totals add to over 100% due to multiple responses. -- less than 0.5%

Oregon Arts Commission

One attribute, *Accuracy of information*, of the quality of service received from the Oregon Arts Commission is rated higher than for the other Department services, but not significantly. However, the Commission receives significantly lower ratings for flexibility.

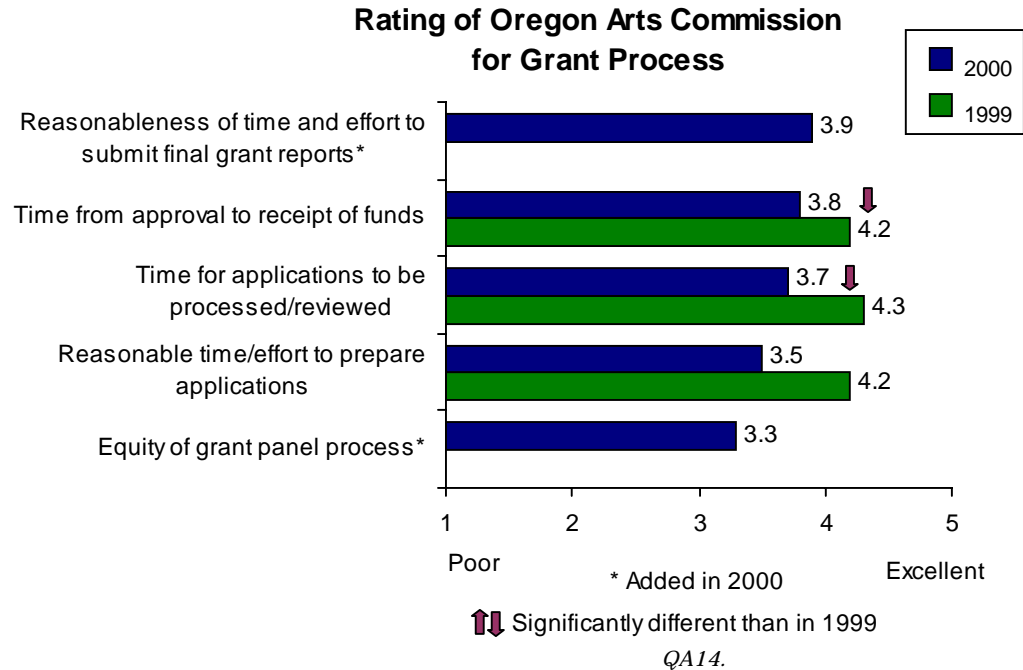
Ratings of Oregon Arts Commission Performance



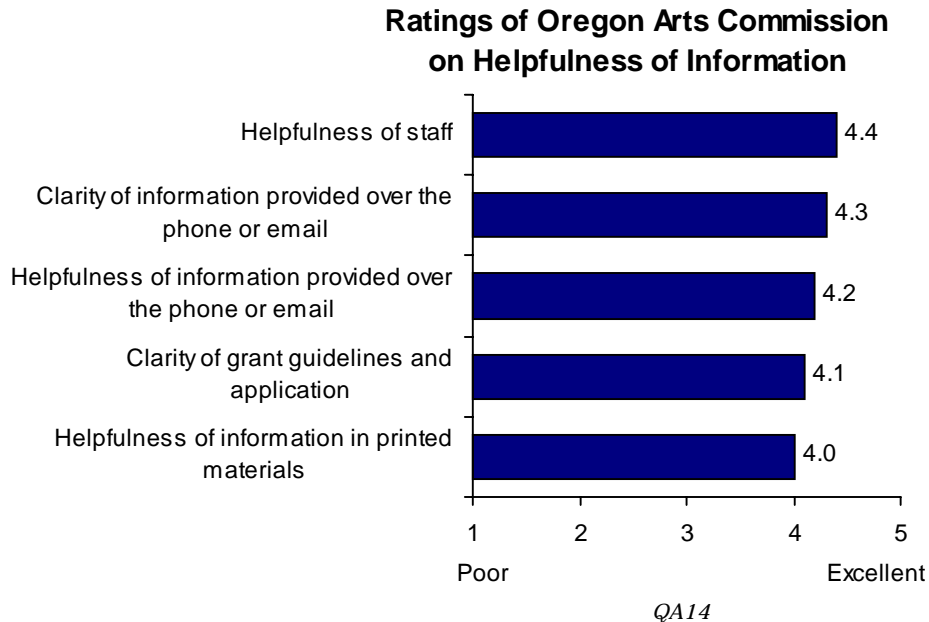
Q3, 5, 6.

Time and Effort Required to Obtain Funding

Customers' assessments of turnaround time for different tasks are more negative. Ratings for the *Time for applications to be processed* and *Time from approval to receipt of funds* declined significantly since the previous survey.



The Oregon Arts Commission receives high marks for the helpfulness and clarity of the information provided, both over the phone and via email. However, there is room for improvement regarding the perceived equity of the grant panel process. Half of Oregon Arts Commission customers have neutral or negative perceptions of the equity of the grant panel process, giving ratings of 1, 2 or 3 on a 5-point scale (3.3 average).



The arts funding applied for was largely the Arts Industry Development Grants and Arts Builds Communities Grants. Arts Education Model Project Grants and Regional Arts Education Partnership grants were each mentioned by nearly 20% of respondents.

Arts Funding Applied For

Applied For:	1999	2000
Arts Industry Development Grants	12%	61%
Arts Builds Communities Grants	61	48
Arts Education Model Project Grants	24	19
Regional Arts Education Partnership Grants	20	19
Arts Reaching Youth Initiative Grants	17	15
Individual Art Fellowship	15	15
Regional Arts Partnership Grants	24	13
Arts Build Communities Technical Assistance	10	9
Percent for Art Program	7	7
Media Fellowships	2	--
Miscellaneous	17	4

Q12c. Totals add to over 100% due to multiple responses. -- less than 0.5%

Oregon Tourism Commission

When asked in an open-ended fashion what types of information or assistance provided by the Oregon Tourism Commission is most useful to their organization, responses fell into four primary categories. Not surprisingly, assistance with funding/financing tops the list (53%), followed closely by marketing/advertising (42%), visitor information/statistics (37%) and technical assistance (21%). The following is an example of how the Oregon Tourism Commission helps its customers:

Other types of information cited include educational assistance, workshops or training for the hospitality industry, strategic advice or consulting on developments in the tourism industry, as well as referrals and leads.

Most Useful Information/Assistance Provided by the Oregon Tourism Commission

	2000
Financial assistance/funding	53%
Marketing/advertising assistance	42
Visitor information/statistics	37
Technical assistance	21
Miscellaneous	21

Qn1A; Note: Totals may not sum to 100% due to multiple responses.

Funding

Matching grants for marketing and development are the most common types of projects for which Oregon Tourism Commission customers receive funding (73%). Funds for the remaining four types of projects, cooperative marketing (33%), tourism workshops (27%) and Quality Service Initiatives (20%) are in the second tier.

Thus, it's no surprise that customers feel that matching grants for marketing and development is the most important type of project that should be funded by the Oregon Tourism Commission (89%). Strategic planning (47%), Scenic Byways (32%) and Research (26%) are in the second tier. No one selected the Quality Service Initiative as a funding priority.

Top Two Types of Projects Funded and Funding Priorities

	Types of Projects Funded	Funding Priorities
Matching grants for marketing and development	73%	89%
Cooperative Marketing	33	n/a
Tourism Workshops	27	n/a
Quality Service Initiative	20	--
Scenic Byways	13	32
Strategic Planning	n/a	47
Research	n/a	26
None/nothing	--	5

*Qn50c-d; Note: Totals may not sum to 100% due to multiple responses. -- less than 0.5%
n/a = not asked*

What do the Oregon Tourism Commission's customers think are the top issues facing tourism in the state? Funding for local or regional marketing (53%) is the top topic cited on an aided basis. Funding for the state tourism budget (37%), increasing awareness of the role of the tourism industry in Oregon (32%), sustaining tourism growth (32%), and statewide transportation systems are in the second tier in terms of importance. Relatively few (11%) cited partnership development.

Top Two Issues Facing Oregon's Tourism Industry

	2000
Funding for local or regional tourism marketing	53%
Funding for state tourism budget	37
Awareness of tourism as an important industry in Oregon	32
Sustaining tourism growth	32
Statewide transportation systems	26
Partnership development	11
None/nothing	5

Qn50e ; Note: Totals may not sum to 100% due to multiple responses.

Oregon Progress Board

This section highlights the differences for customers of the Oregon Progress Board.

Types of Assistance Received

Compared to other Department customers, the Progress Board appears to serve more of a consultant role to businesses. Those served by the Progress Board are less likely to have relied on them for funding (13% vs. 76% overall), for a decision to locate a facility or complete a project in Oregon (6% vs. 39% overall), or for training and development (less than 0.5% vs. 28% overall).

More than half of Progress Board customers said they participated in a Progress Board sponsored event (56%) or used Progress Board staff as a speaker at an event (69%).

Type of Assistance Received from the Progress Board

	Total	Progress Board
Have an on-going relationship	89%	75%
Used Progress Board staff as event speaker*	3	69
Contacted only for information	51	56
Contacted but did not apply for funding	42	56
Participated in Progress Board sponsored event*	3	56
Non-monetary technical assistance	41	44
One-time special project	67	38
Applied for funding	76	13
Decision to locate/retain facility, complete a project	42	13
Improve infrastructure to aid in attracting businesses	39	6
Regional strategies	1	6
Workforce development and training	28	--
Grant assistance	5	--
Applied to receive authorization to supply funding	3	--
International trade relations	3	--
Leads/contacts/networking	1	--
Tourism	--	--
Miscellaneous	13	25

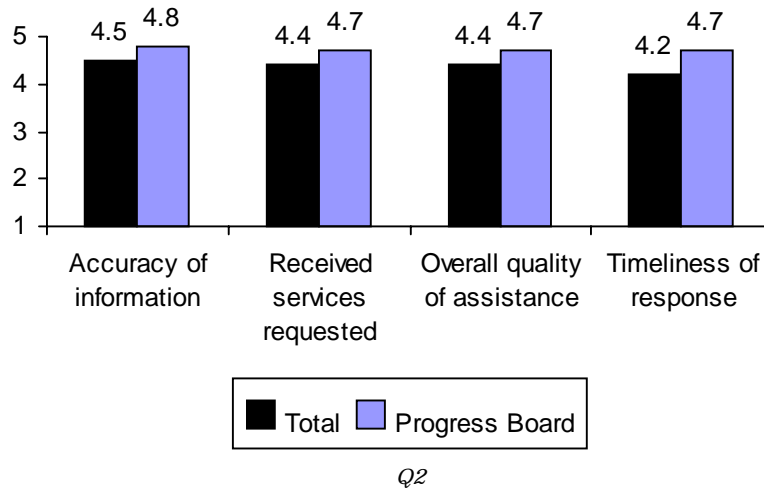
Q1; Note: Totals may not sum to 100% due to multiple responses. -- less than 0.5%

**Asked only of Progress Board customers.*

Importance and Performance Ratings

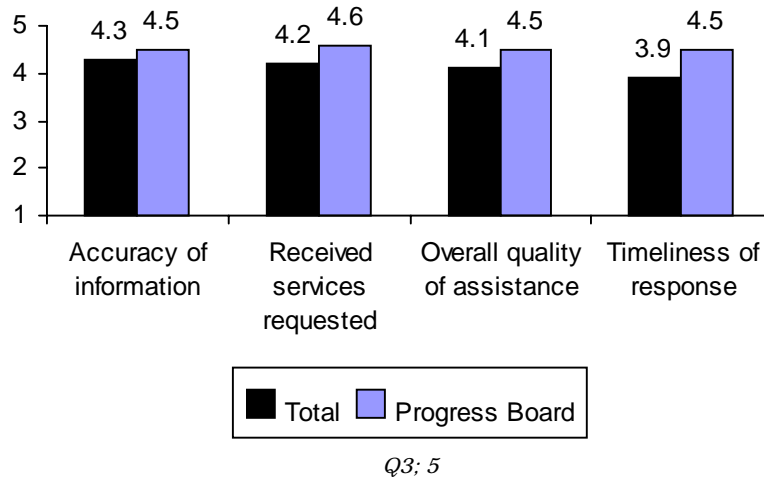
Progress Board customers generally have higher expectations than other Department customers, giving higher than average importance ratings.

**Comparison of Importance
Progress Board vs. Customers Overall**



However, Progress Board customers also give higher than average performance ratings for these same attributes.

**Comparison of Performance
Progress Board vs. Customers Overall**



Thus, despite their higher expectations, the gaps between performance and importance ratings among Progress Board customers are similar to that of Department customers overall.

**Customer Service Gaps
Progress Board vs. Customers Overall**

Attribute	Total	Progress Board
Overall quality of assistance	-0.3	-0.2
Timeliness of response	-0.3	-0.2
Accuracy of information	-0.2	-0.3
Received services requested	-0.2	-0.1

Q2, 3, 5

Recommending the Progress Board to Others

All Progress Board respondents would recommend the Progress Board to other businesses or communities. Primary rationale for doing so relate to the expertise and knowledge of the Progress Board's personnel. Those served by the Progress Board are more inclined than other Department customers to cite the Progress Board's expertise/ability to help clients find it (57% vs. 21% overall) as a reason for recommending the Progress Board.

Value of Service and Assistance

Similar to Department customers overall, four in ten Progress Board customers say the service and assistance provided by the Progress Board is "extremely valuable," for a 4.4 average rating on a 5-point scale (4.2 average for Department customers overall).

What can the Progress Board do to further enhance the value of its service? Working together with other agencies, as well as being more responsive/keeping clients better informed (both 17% vs. 5% overall) are the main issues cited. One-quarter were unable to provide suggestions for improvement, double the 13% of customers overall.

**Suggestions for Improving Value of Service and Assistance –
Progress Board vs. Customers Overall**

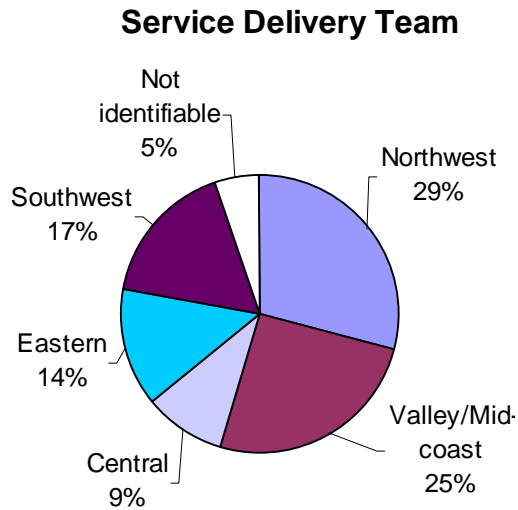
Suggestions for Improvement	Total	Progress Board
Made Suggestions	87%	75%
Reduce Hassle/Make Things Easier	26%	25%
Work with other agencies	5	17
Expedite process	16	8
Be more flexible	3	--
Be more consistent	2	--
Be easier to use	2	--
Help with filing requirements	1	--
Customer Service	15%	25%
Be more responsive/keep customers informed	5	17
More assistance to small and rural businesses	2	8
Have information about available resources	3	--
Improve communications	3	--
Set up contacts/help networking	1	--
Provide better follow-up	1	--
Funding	25%	17%
Increase funding	7	8
Be better funded	7	8
Specific funding applications	2	8
More funding for communities	2	--
More help to specific industries	2	--
More grants/fewer loans	1	--
Other funding suggestions	4	--
Staffing	16%	--
Provide more staff	5	--
Other staffing suggestions	4	--
Hire better staff	2	--
Train staff better	1	--
Have regional offices and reps	1	--
All other reasons	6%	--
Closer contact	2	--
Improve panel	1	--
Stop reorganizing	1	--
Develop regional strategies	1	--
Miscellaneous	20	--
Pay more attention to rural areas	5%	--
Regional/geographic issues	2	--
Nothing/No suggestions	13%	25%

Q52. Totals add to over 100% due to multiple responses. -- less than 0.5%

Service Delivery Teams

This section examines results by the five (5) Service Delivery Teams. For the most part, few differences are evident between the five regions.

The Northwest (29%) and Valley/Mid-coast (25%) are the largest Service Delivery Teams, followed by Southwest (17%), Eastern (14%) and Central (9%). The 5% considered “not identifiable” are customers who are located outside of Oregon or who are statewide or regional in nature.



Customer Service Gaps

The only critical gap between performance and importance ratings is noted among customers in the Eastern region for timeliness of response (-0.5). Assessments for overall quality of assistance are close to being a critical issue for customers in the Valley/Mid-coast, Eastern and Southwest regions, posting a service gap of -0.4 (performance rating minus importance rating).

Although customers in the Central region tend to give lower performance ratings, this is mitigated by their lower importance ratings. This results in service gaps that are in line with customers overall.

Customer Service Gaps by Service Delivery Team

Service Delivery Team	Overall Quality of Assistance	Accuracy of Information	Received Services Requested	Timeliness of Response
Total Sample	-0.3	-0.2	-0.2	-0.3
Northwest	-0.2	-0.3	-0.1	-0.2
Valley/Mid-coast	-0.4	-0.2	-0.3	-0.2
Central	-0.3	-0.2	-0.2	-0.3
Eastern	-0.4	-0.2	-0.2	-0.5
Southwest	-0.4	-0.1	-0.3	-0.2

Appendix

Methodology

The study was conducted using Computer Assisted Telephone Interviewing from the Bardsley & Neidhart interviewing center in Portland. Interviewing was done between November 30 and December 19, 2000.

The sample was randomly selected from a list of 1,580 customers provided by the Oregon Economic & Community Development Department. Attempts were made to call all of them, and 351 were reached for the final sample.

Statistics

Data Tables

Data was processed using “SPSS” for Windows.²

A complete set of data tables is under separate cover. There is a separate table for each question in the study. Data is shown for both the total sample and subsets of the data (i.e. type of customer, size of business, etc.). Each row of data shows the number of responses and its percent of the total in that row or subset.

Statistical Testing

To find statistically significant differences among sample sub-sets, additional analysis was conducted using t-tests.

² SPSS is a trademark of SPSS Corporation.

Sampling Variability

All survey samples are subject to ranges of variability known as “standard error.” It is the chance variation that can occur when a sample is used instead of surveying the entire population. It estimates the difference between the sample findings and those which would occur from a total canvass of the population using the same questionnaire and procedures.

Ranges of sampling variability are presented below for samples of 351 and 40 computed at the 95% confidence for an infinite sample. A sample of 351 ensures a maximum standard error within $\pm 5.2\%$. The standard errors shown are maximal ranges, and most survey findings tend to be closer than that to the actual figures in the universe.

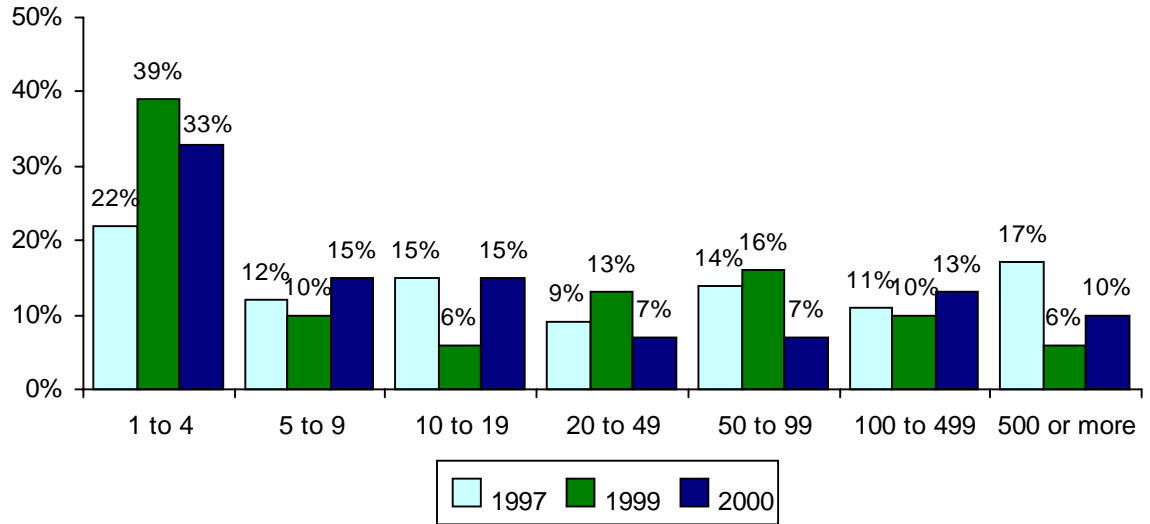
Sampling Variability		
Percentage Results Close to:	Sample Size of:	
	Total Sample 351	Typical Size of Group Samples 40
5% or 95%	$\pm 2.3\%$	$\pm 6.8\%$
15% or 85%	$\pm 3.7\%$	$\pm 11.1\%$
25% or 75%	$\pm 4.5\%$	$\pm 13.4\%$
35% or 65%	$\pm 5.0\%$	$\pm 14.8\%$
45% or 55%	$\pm 5.2\%$	$\pm 15.4\%$
50%	$\pm 5.2\%$	$\pm 15.5\%$

Example: Seventy-six percent of respondents say they have applied for funding from the Department. Based on a sample size of 351, chances are 19 out of 20 (95%) that this finding (76%) is within plus or minus 4.5% of the result which would occur from a complete enumeration of the population.

Sample Characteristics

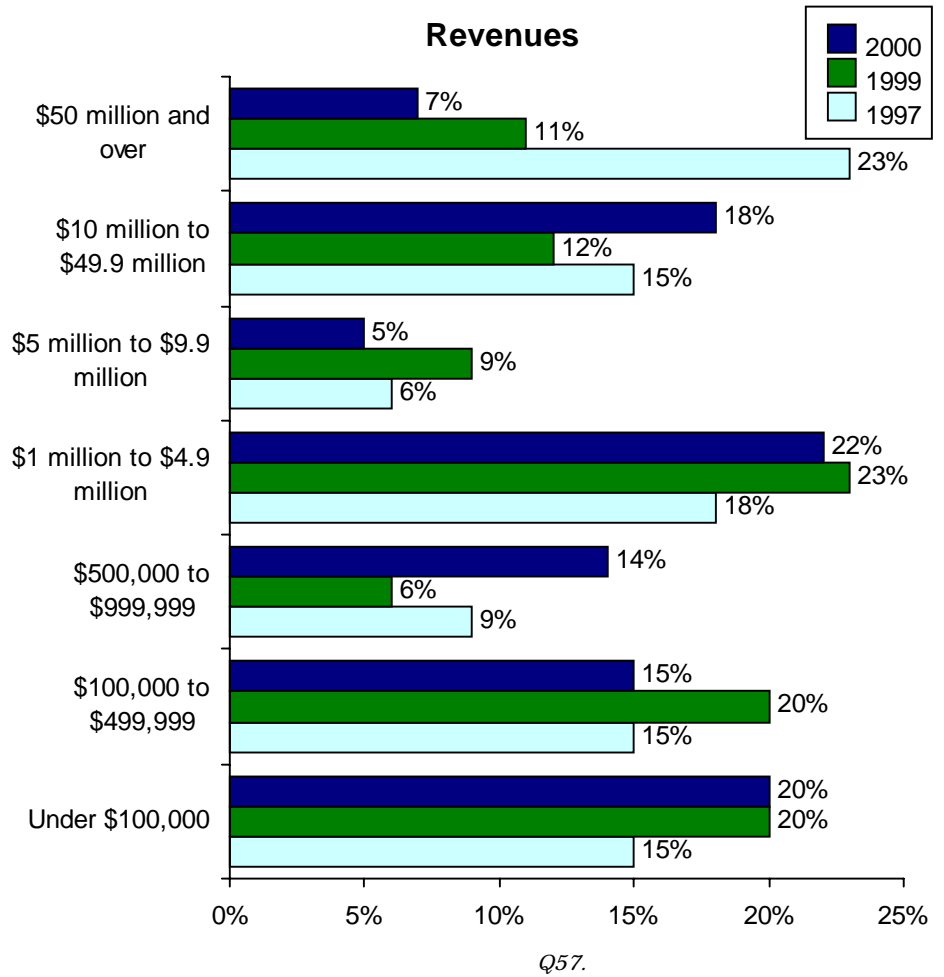
Firms in the 2000 sample have fewer Oregon employees than those in 1999. The average (median) number of local employees is 10.5 (versus 11.5 in 1999 and 22.8 in 1997). The pattern of business size is relatively unchanged. The proportions of businesses with fewer than ten employees or more than 50 employees are nearly identical from 1999 to 2000.

Number of Oregon Employees

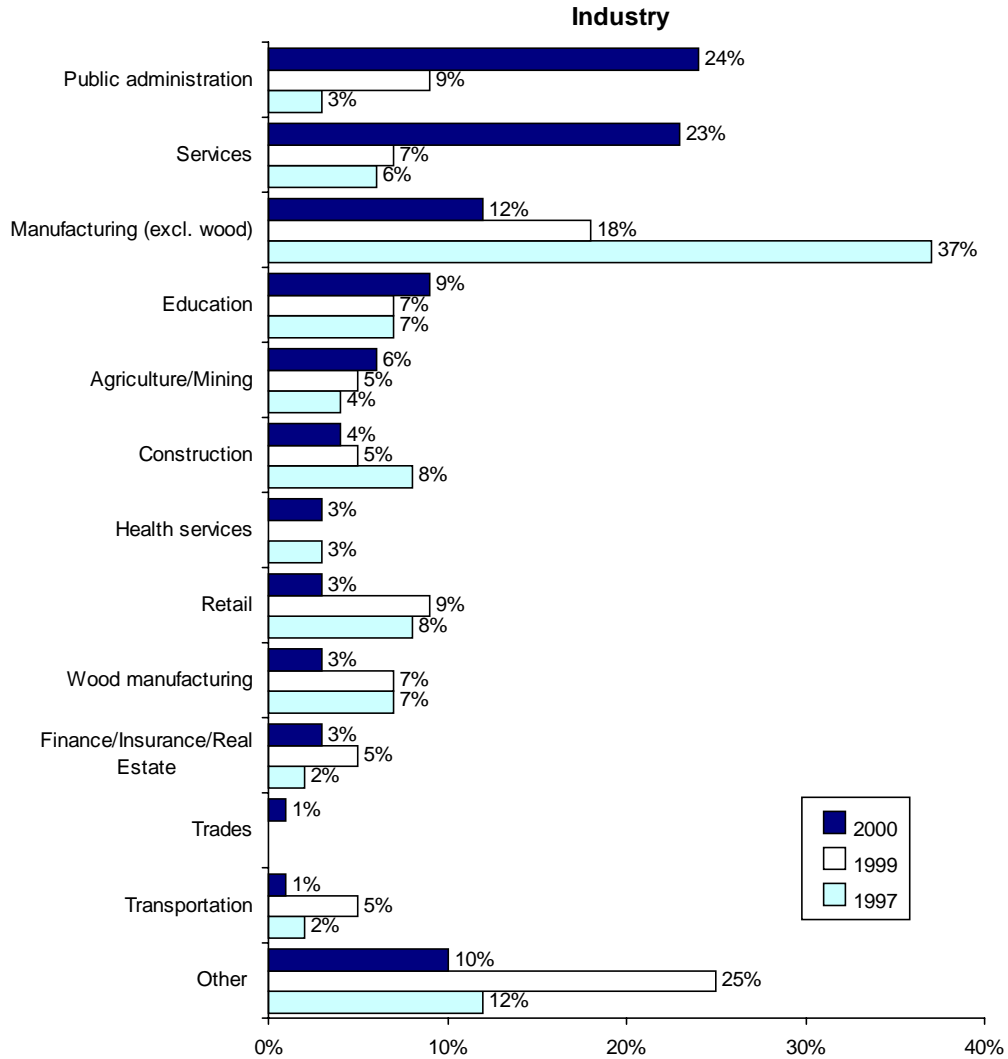


Q55.

These smaller businesses also had lower sales. Revenues continued to slide in 2000, as the median sales were \$1.3 million compared to more than \$1.7 million in 1999 and \$3.7 million, in 1997.



There is a striking difference in industry distribution between 1999 and 2000. The 2000 sample had far fewer manufacturing and 'other' firms and more public administration and services. This may be a result of the types of customers drawn by the division added for this year's survey.



Q56.