

Miami County Pulse Survey

SURVEY ROUND 1 RESULTS & SUMMARY

July 16, 2020

Provided to:

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Background, Objective, and Methodology

BACKGROUND

Miami County recently completed an Economic Development Strategic Plan with Ady Advantage. The completion of the strategic plan document coincides with the COVID-19 pandemic, which has brought new urgency and may lead to a re-prioritization of economic development efforts within Miami County.

Meanwhile, Ady Advantage has been working with Evergy, the investor-owned utility serving Miami County, to develop community preparedness programs for the communities in its service territories. With the onset of the COVID-19 pandemic, we developed additional tools that became part of the Evergy Economic Development toolbox. The process we used to develop these tools was agile and nimble, and relied heavily on the feedback we received from Miami County on early iterations of potential data and reports. These tools are now formally available, and Miami County is taking advantage of the Business Recovery & Economic Impact program elements from the Evergy Community Preparedness toolbox.

OBJECTIVE

Therefore, the primary objective of this project is to help Miami County determine the baseline of where its existing industry base and economy are now, and how it will track its progress going forward. This includes the following:

- Provide economic risk information for Miami County, specifically comparative data on economic vulnerability, industry diversity, and occupational diversity.
- Conduct Pulse Surveys and analysis among existing businesses (four rounds through the end of 2020).
- Provide four consultations with Janet Ady through the end of 2020.

METHODOLOGY

Ady Advantage developed a Pulse Survey, with the first round of deployment consisting of 19 questions total (18 questions for those who had applied for financial assistance, and 16 questions for those who had no applied for financial assistance.) The survey was deployed to local business and industry of all sectors, for a two-week response window. Ady Advantage then conducted analysis on the survey results to identify key trends and takeaways to provide insight and guidance to Miami County in its efforts to help local businesses remain resilient and prosperous. This analysis can be found on the following slides.

In the first round of the survey, 91 employers were invited to participate and 64 responded, a response rate of 70%. Of those who responded 56 completed the survey entirely for a completion rate of 88%. These both exceeded the estimated response and completion rate projected by the survey service, Survey Monkey. It also exceeds the average survey response rate, which is about 33% (varying depending on the type of survey, the audience, if there are pre-established relations, etc.). A response rate above 50% is generally considered to be exceptional.

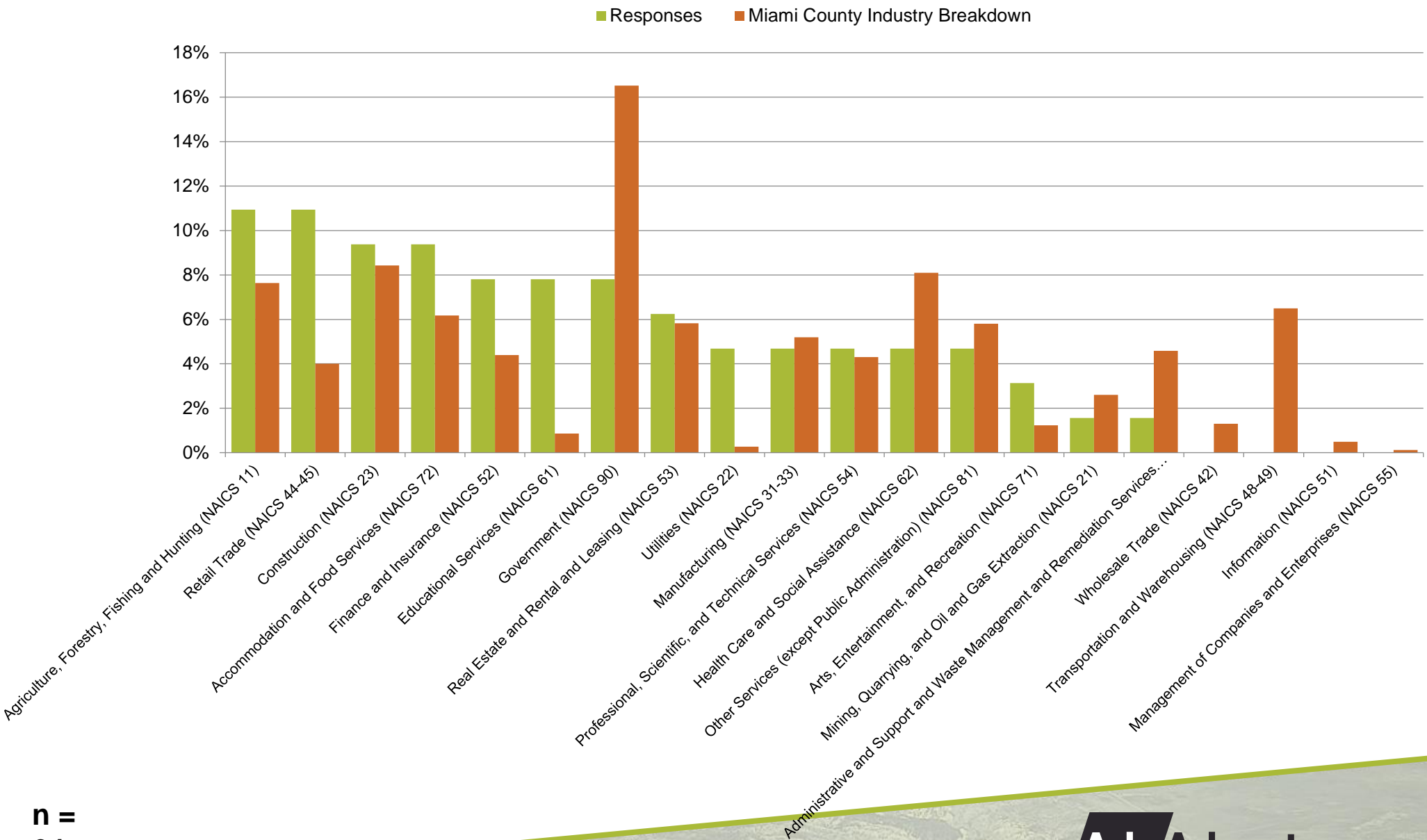
Pulse Survey Results

KEY TAKEAWAYS OF FIRST PULSE SURVEY DEPLOYMENT

- There is a fairly even spread of responses by employers across business industry type, with no industry representing more than 11% of the total.
- While Paola businesses constitute the majority of responses, all cities are represented in the survey at about 20% (combining Spring Hill City, Miami County and Spring Hill City, Johnson County).
- Every employer who responded is operating in some capacity; however, a quarter of employers reported they are not currently operating at full capacity.
- Since March, employers most frequently indicated experiencing (1) a reduction in customer traffic, (2) a revamping of businesses model to accommodate health concerns, and (3) an increase in supply chain disruptions. and/or concerns.
- For those employers who were not fully operational, it was most frequently indicated that to be fully operational once more they needed (1) new or improved safety and cleaning protocols, (2) consumer confidence restored, and/or (3) personal protection equipment made more widely available.
- Employers indicated a highest level of priority on (1) maintaining the health of their workforce, (2) retaining their existing workforce, (3) retraining their existing workforce, (4) managing their inventory and supply chain, and (5) investing in technology.
- Employers indicated the things that would be of the most assistance to them as being (1) tools for maintaining the health of their workforce, (2) liability protection for COVID-19 transmissions traced to their business, (3) assistance with employee recruitment, (4) improvement of access to broadband, and (5) assistance improving their supply chain.
- Almost half of employers do not anticipate any major changes to their business over the next year. About one-third of employers anticipate to expand products or services.
- Fifty-nine percent of employers HAVE sought financial assistance from a government program, lender, or other resource.; forty-one percent of employers HAVE NOT sought any assistance.
- Of those employers who HAVE sought financial assistance, 61% applied for and were approved for the Paycheck Protection Program (PPP) loan, and 36% applied for and were approved for the Economic Injury Disaster Loan (36%). Employers generally indicated they were aware of the existence of the other programs available but did not apply for them.
- Of those employers who HAVE sought financial assistance, the greatest concerns of employers in applying for financial assistance were (1) that the programs did not fit the needs of their company, (2) they did not want to take on additional debt, and (3) they were told they did not qualify.
- Of those employers who HAVE sought financial assistance, 21% anticipate needing additional financial relief, 36% anticipate not needing additional financial relief, and 42% are uncertain or don't know yet.
- Of those employers who HAVE NOT sought financial assistance, 43% were unaware of the existence of any of the available financial assistance relief programs. No financial assistance program reached a majority of awareness among these employers. 48% were aware of the Paycheck Protection Program, 35% were aware of the Miami County E-Community Mini Grant, and 26% were aware of the Economic Injury Disaster Loan (EIDL).
- Sixty-eight percent of employers expressed their willingness to be reached out to regarding free or reduced cost programs that could assist their business and granted permission to do so. Thirty-two percent of employers declined.

Pulse Survey Results

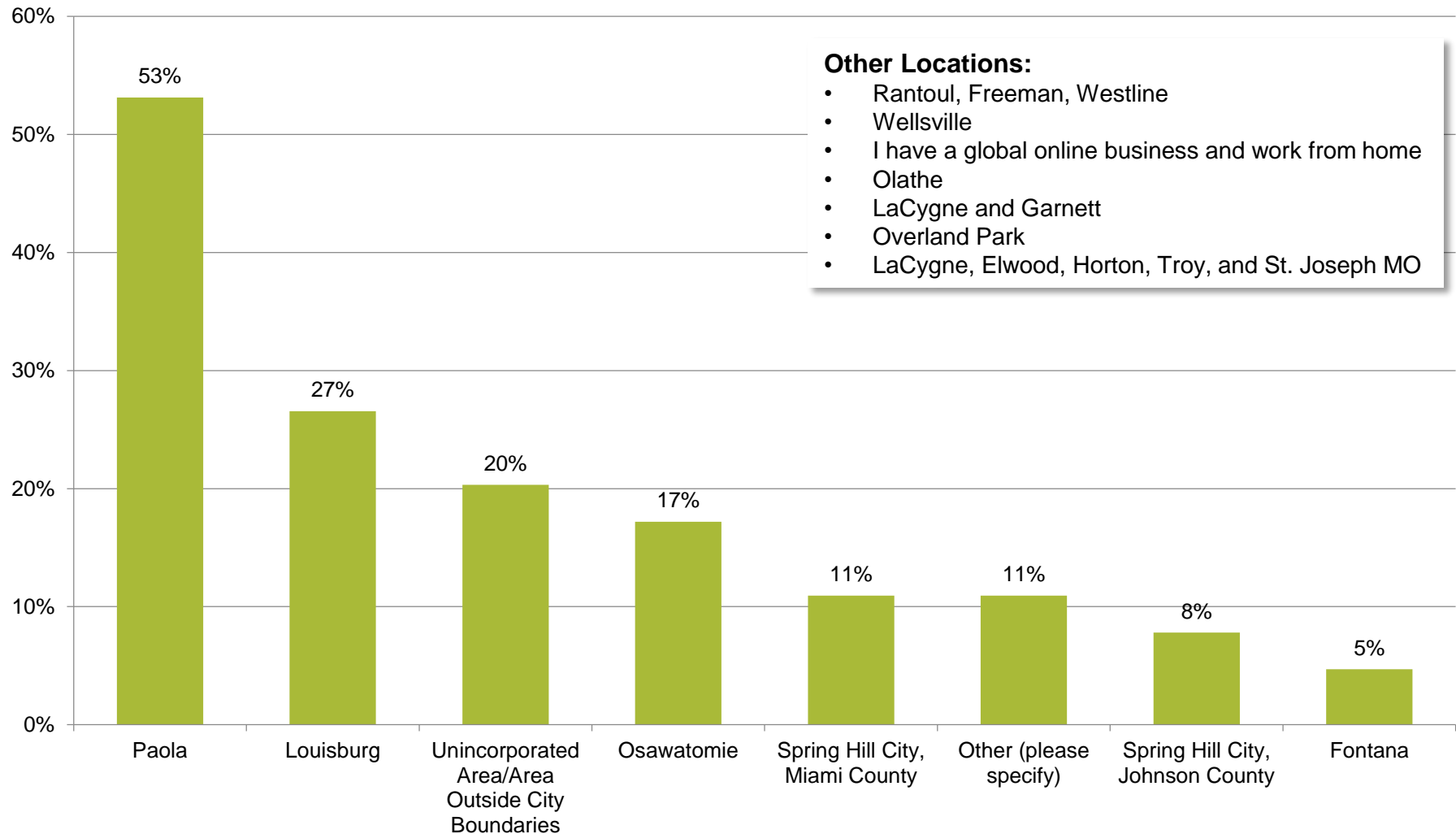
WHICH INDUSTRY BEST DESCRIBES YOUR BUSINESS??



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64

Pulse Survey Results

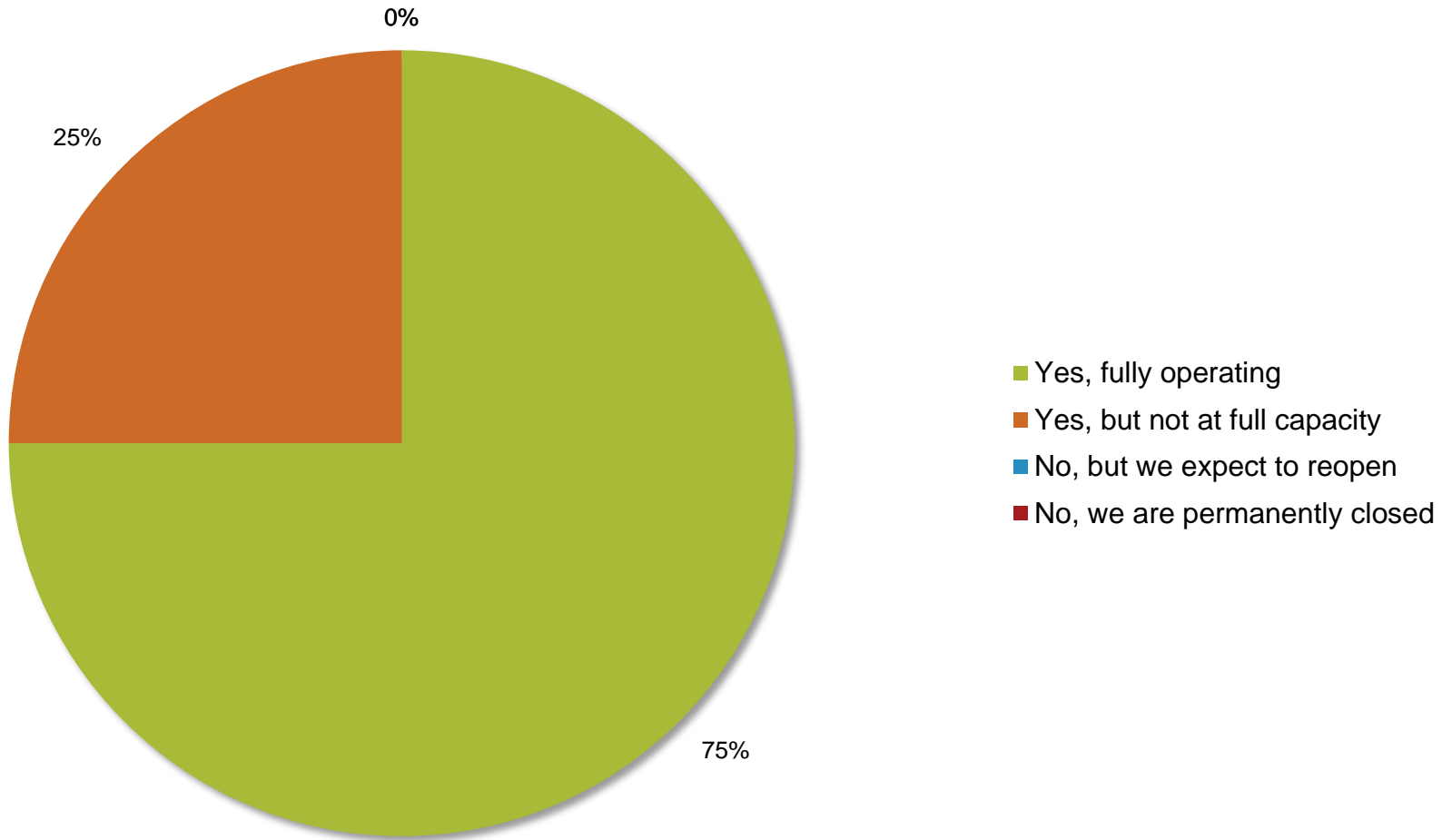
WHERE DOES YOUR BUSINESS HAVE LOCATIONS? SELECT ALL THAT APPLY.



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Pulse Survey Results

IS YOUR BUSINESS CURRENTLY OPERATING?



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Pulse Survey Results

HOW MANY FULL-TIME EQUIVALENT EMPLOYEES DID YOU, OR DO YOU EXPECT TO HAVE, ON THE FOLLOWING DATES?

Employee Range	March 1, 2020 Average	June 2020 (Today)	September 2020 (Projected)
1-9	3.0	3.6	4.0
10-49	19.7	18.7	26.3
50-99	64.6	65.4	67.4
100-199	143.6	119.8	153.0
200 or more	311.6	302.6	316.0
Total Responses	51.7	48.9	54.5
Outlier*	2000	2000	3000

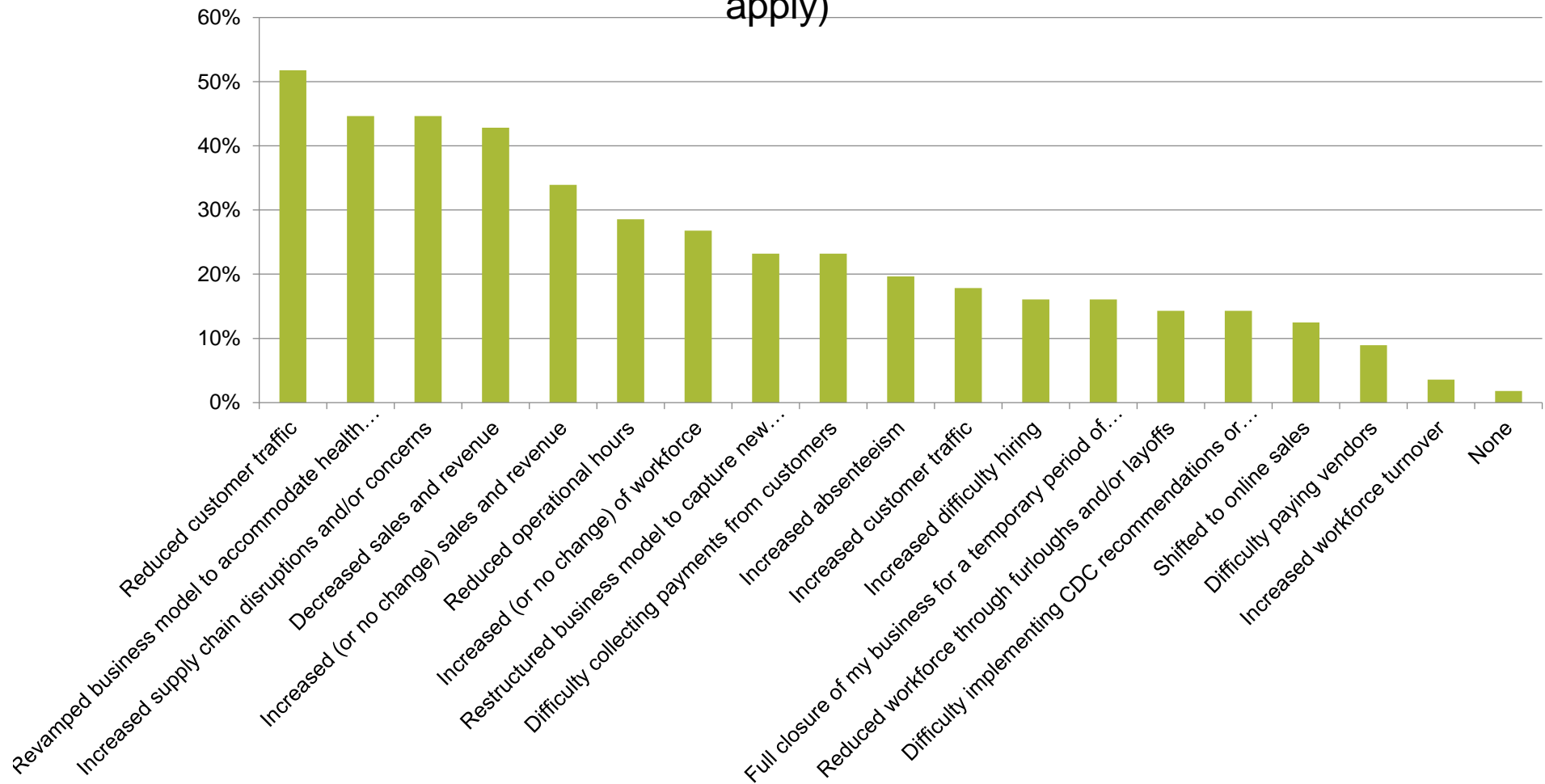
*Outlier answer replied with an employee number significantly higher than all other responses and displayed separately from other responses.

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Pulse Survey Results

WHAT HAS YOUR BUSINESS EXPERIENCED SINCE MARCH? (CHECK ALL THAT APPLY)

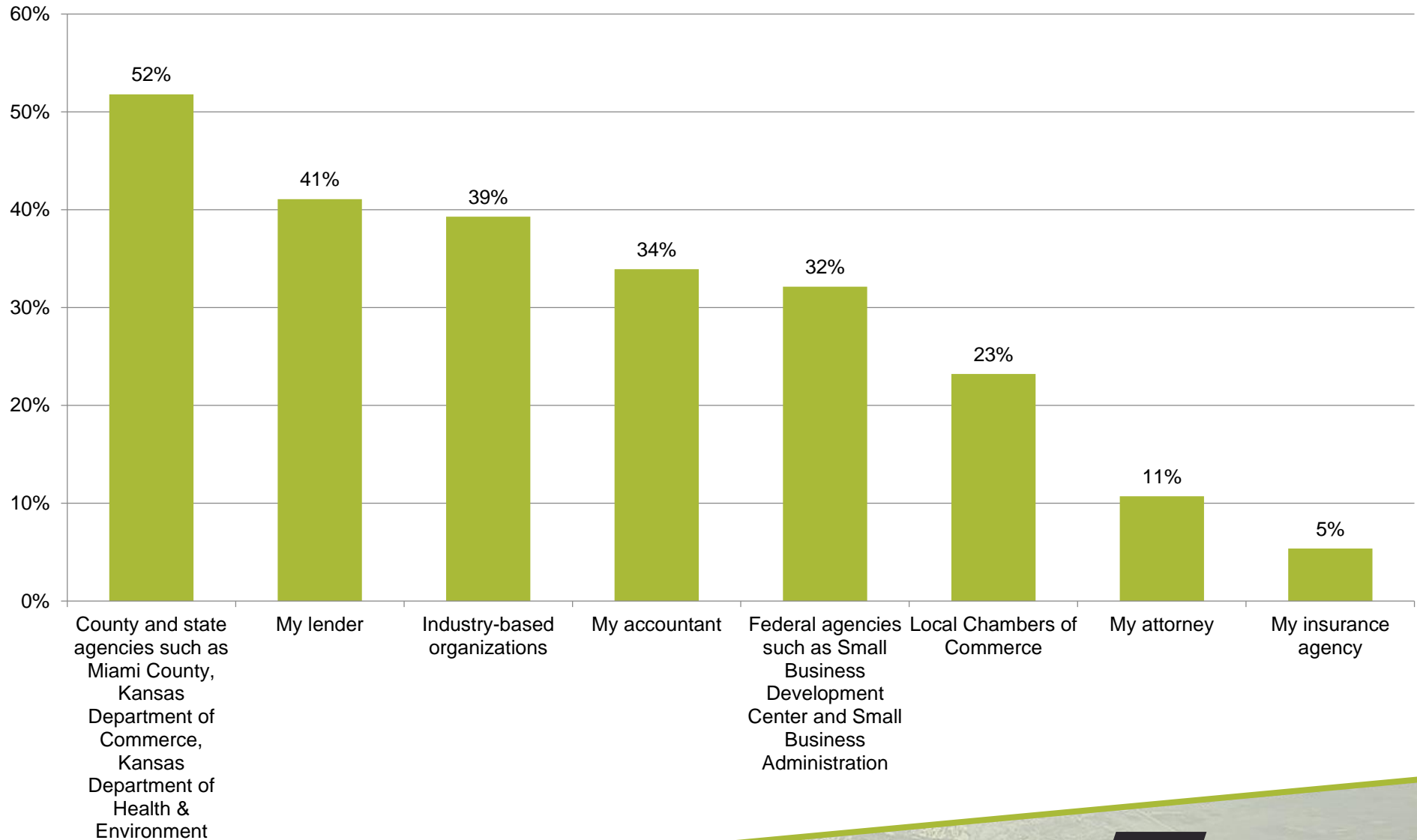
What has your business experienced since March? (check all that apply)



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Pulse Survey Results

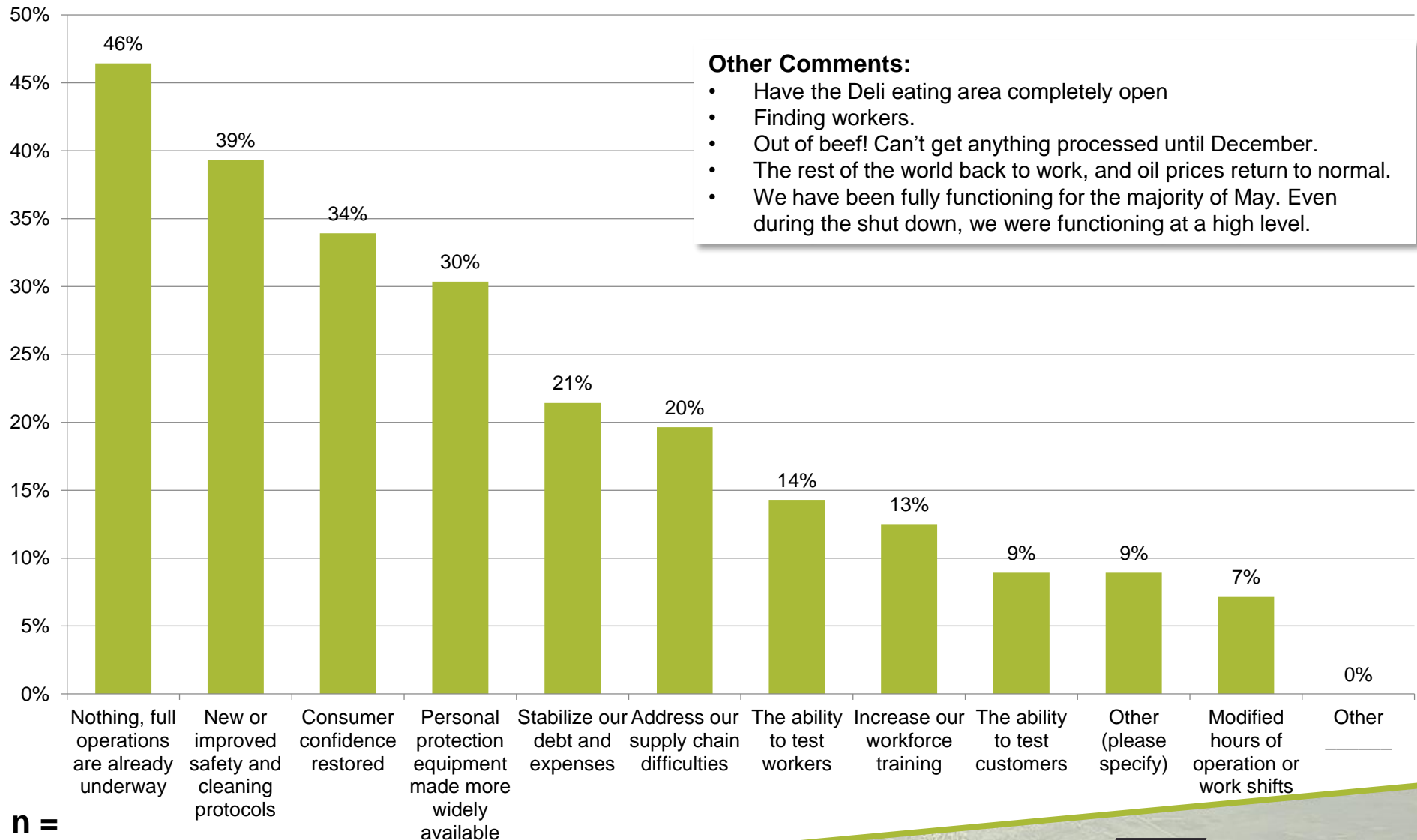
WHAT RESOURCES PROVIDED YOU WITH THE MOST HELPFUL GUIDANCE DURING THE PAST THREE MONTHS? (SELECT ALL THAT APPLY)



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Pulse Survey Results

WHAT WILL YOU NEED TO ADOPT OR HAVE OCCUR IN ORDER FOR YOUR BUSINESS TO FULLY RE-ESTABLISH OPERATIONS? (CHECK ALL THAT APPLY)



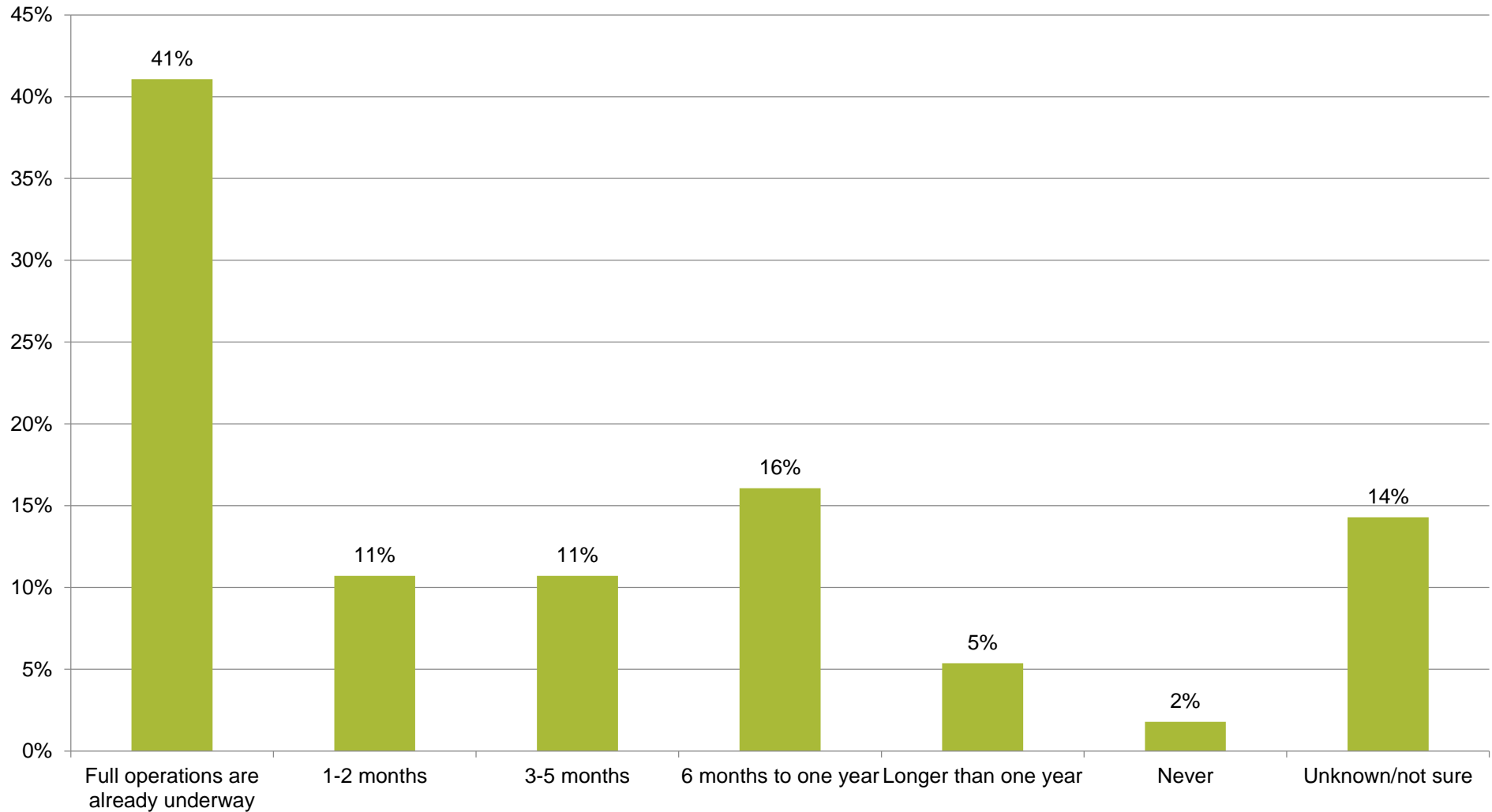
Other Comments:

- Have the Deli eating area completely open
- Finding workers.
- Out of beef! Can't get anything processed until December.
- The rest of the world back to work, and oil prices return to normal.
- We have been fully functioning for the majority of May. Even during the shut down, we were functioning at a high level.

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Pulse Survey Results

WHEN DO YOU EXPECT TO RETURN TO A PRE-COVID LEVEL OF ACTIVITY OR OPERATIONS?

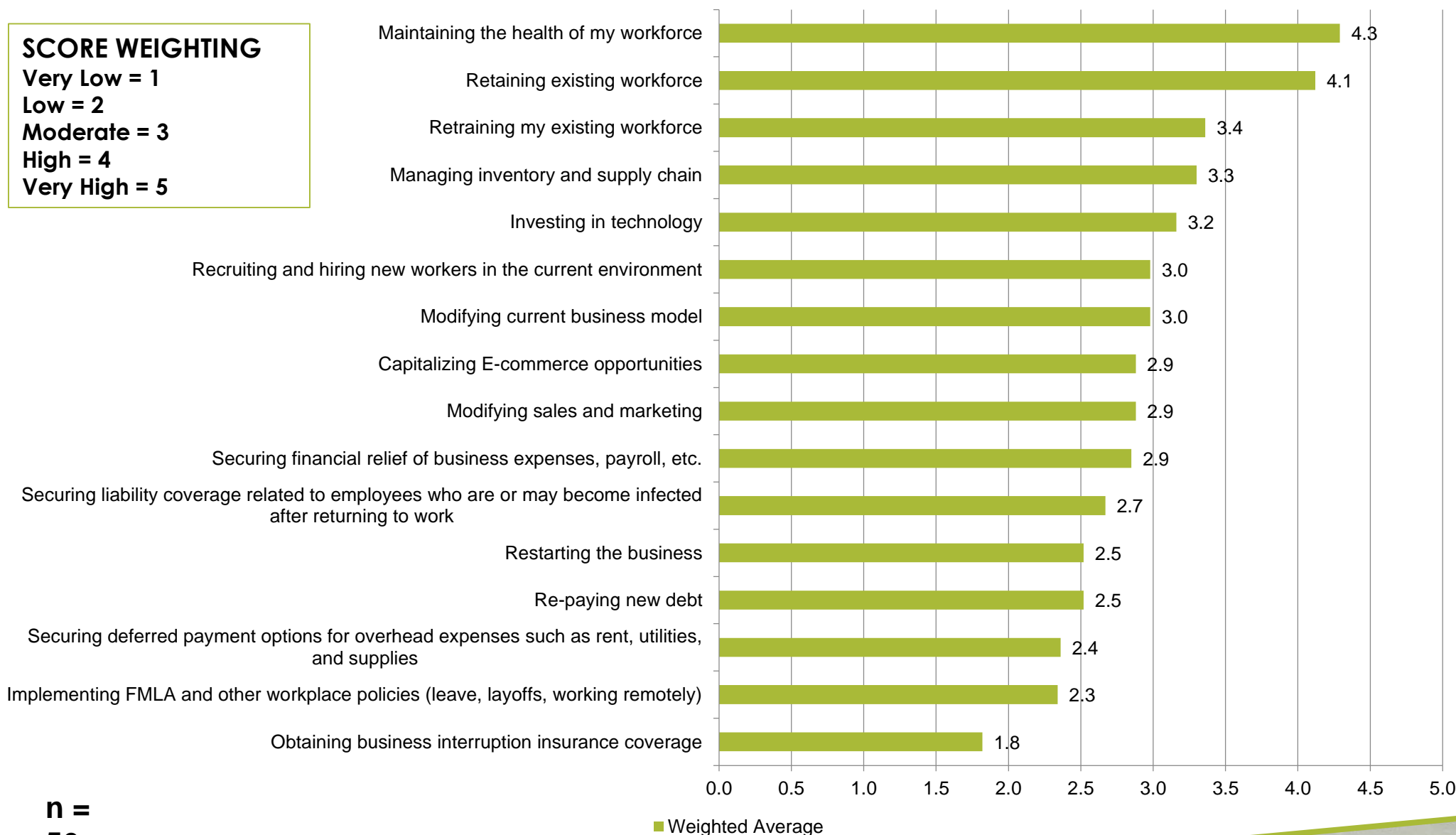


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Pulse Survey Results

PLEASE RATE THE FOLLOWING ITEMS BASED ON THEIR CURRENT LEVEL OF PRIORITY WITHIN YOUR COMPANY.

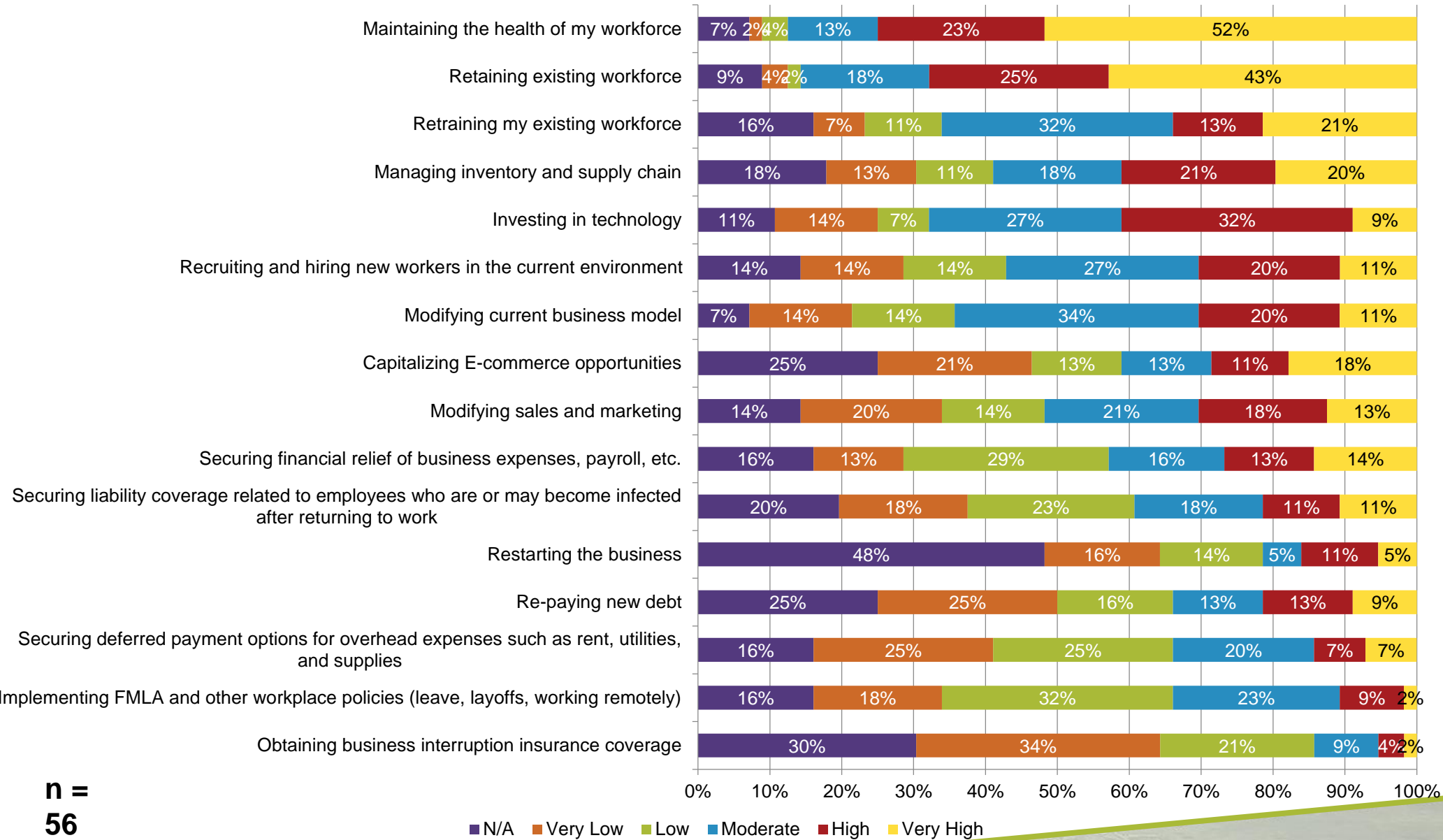
SCORE WEIGHTING
Very Low = 1
Low = 2
Moderate = 3
High = 4
Very High = 5



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56

Pulse Survey Results

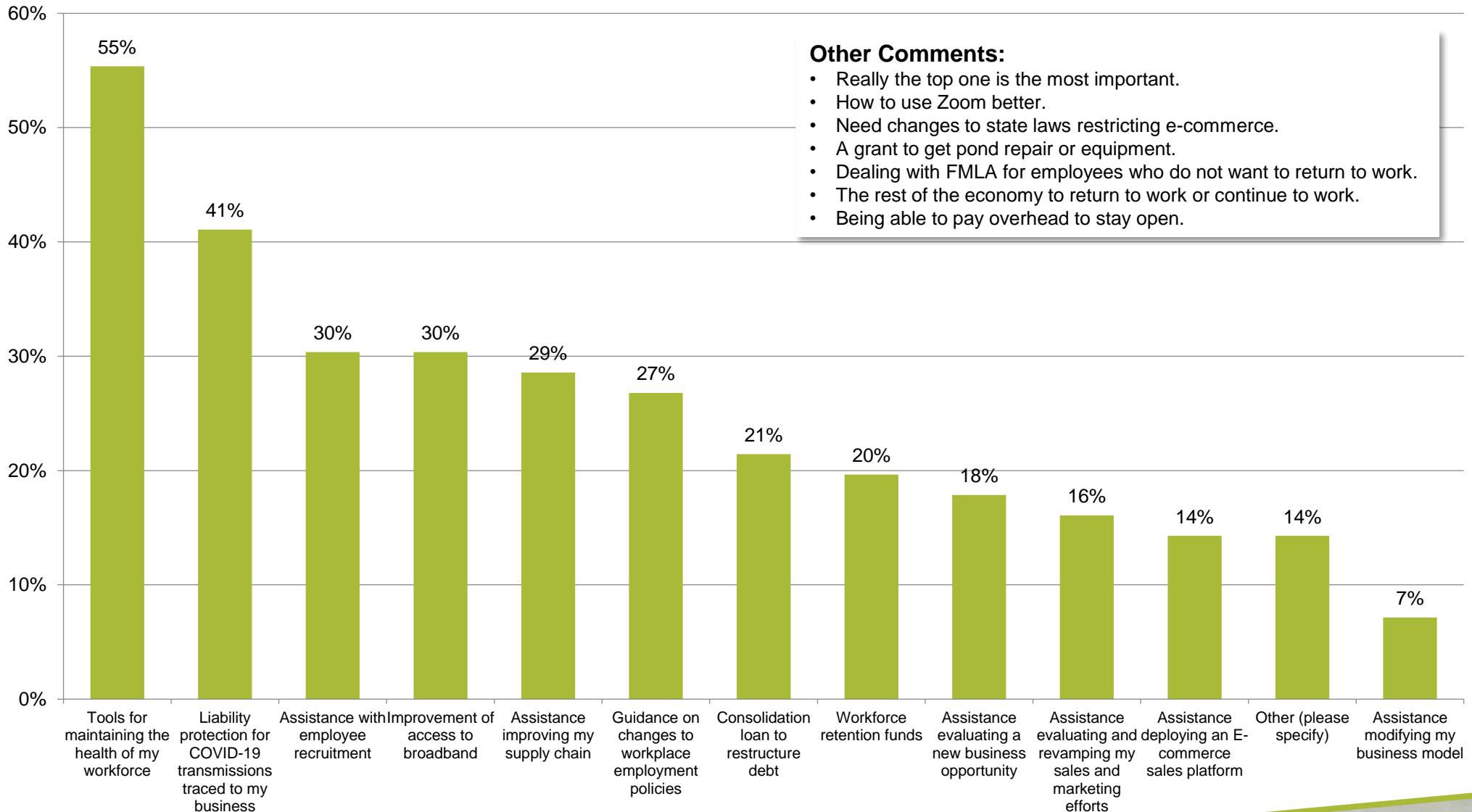
PLEASE RATE THE FOLLOWING ITEMS BASED ON THEIR CURRENT LEVEL OF PRIORITY WITHIN YOUR COMPANY.



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Pulse Survey Results

WHAT WOULD BE OF THE MOST ASSISTANCE TO YOU? (SELECT TOP FIVE)



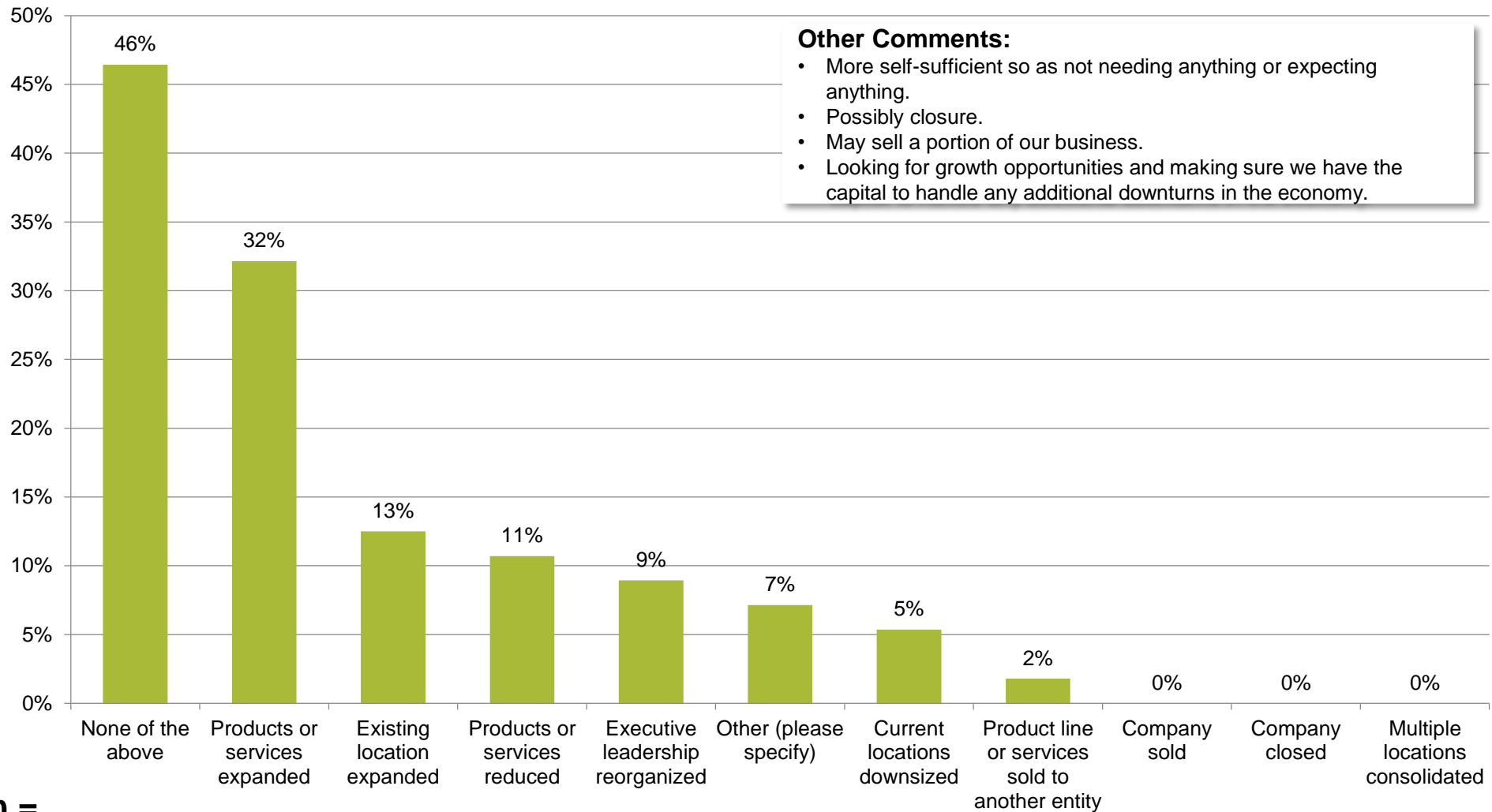
Other Comments:

- Really the top one is the most important.
- How to use Zoom better.
- Need changes to state laws restricting e-commerce.
- A grant to get pond repair or equipment.
- Dealing with FMLA for employees who do not want to return to work.
- The rest of the economy to return to work or continue to work.
- Being able to pay overhead to stay open.

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Pulse Survey Results

DURING THE NEXT YEAR, DO YOU ANTICIPATE YOUR BUSINESS TO UNDERGO ANY OF THE FOLLOWING CHANGES? (CHECK ALL THAT APPLY)



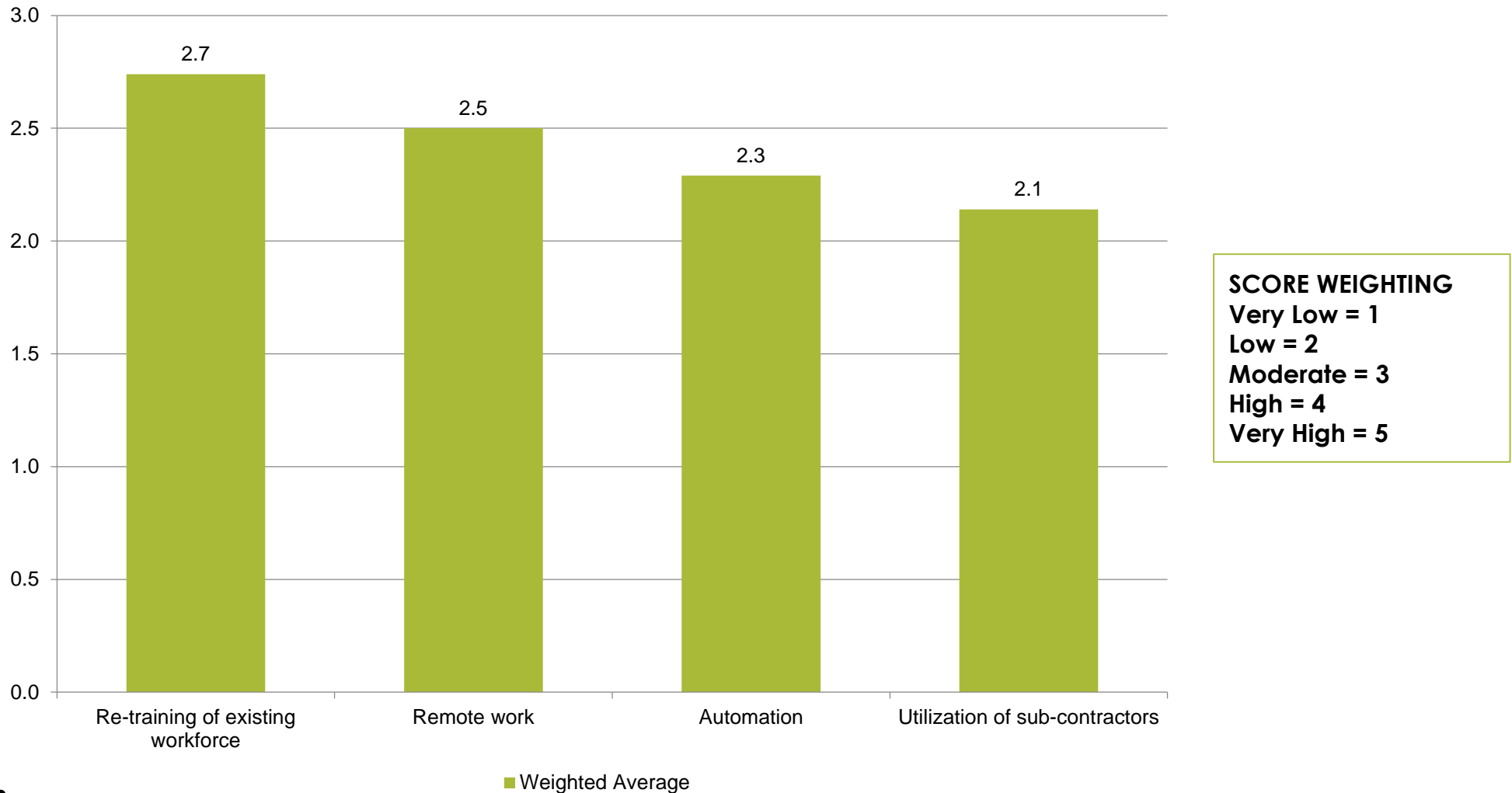
Other Comments:

- More self-sufficient so as not needing anything or expecting anything.
- Possibly closure.
- May sell a portion of our business.
- Looking for growth opportunities and making sure we have the capital to handle any additional downturns in the economy.

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Pulse Survey Results

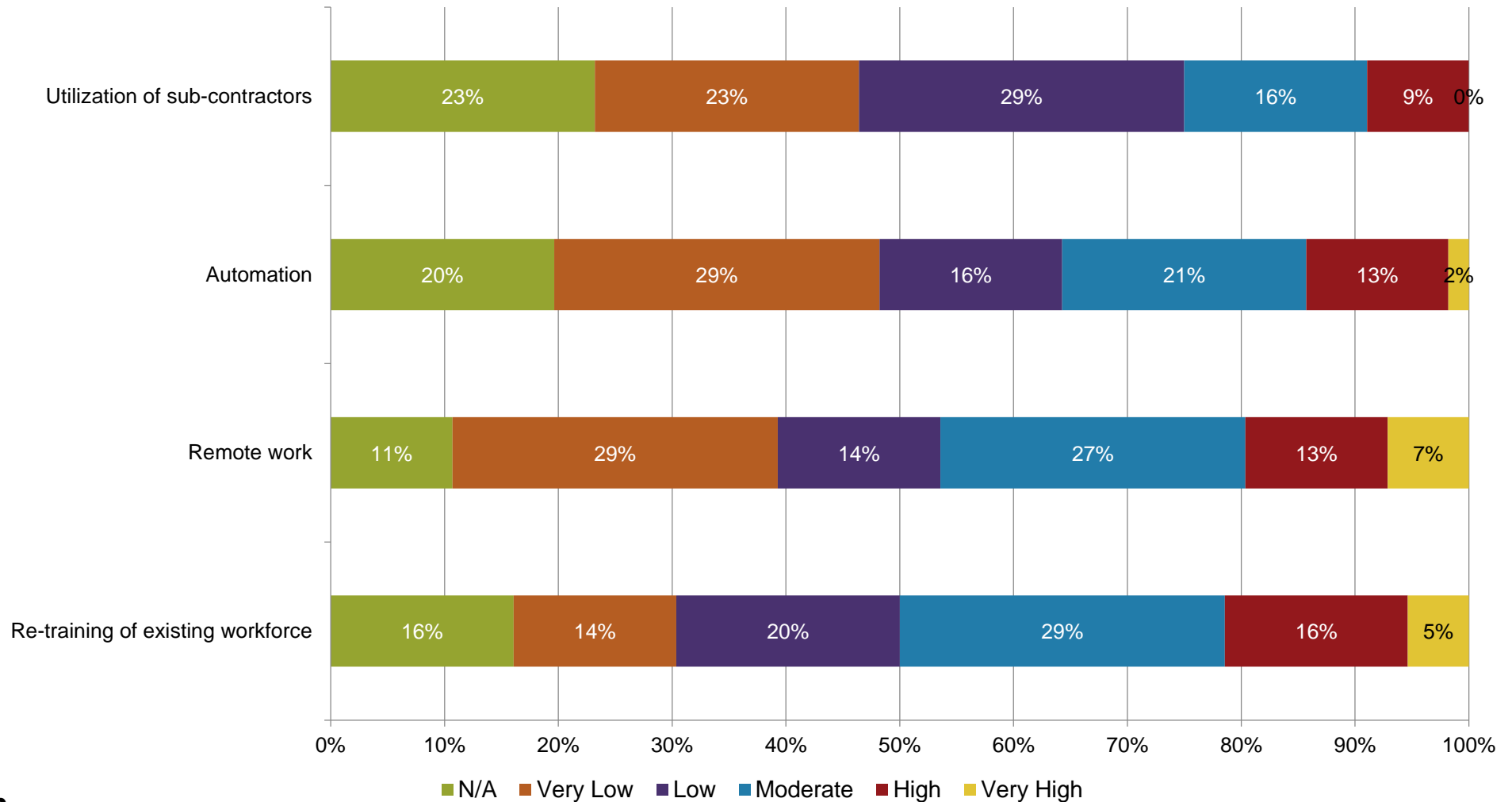
DURING NEXT YEAR, TO WHAT EXTENT DO YOU ANTICIPATE THE FOLLOWING WORKFORCE TRENDS TO IMPACT YOUR BUSINESS?



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Pulse Survey Results

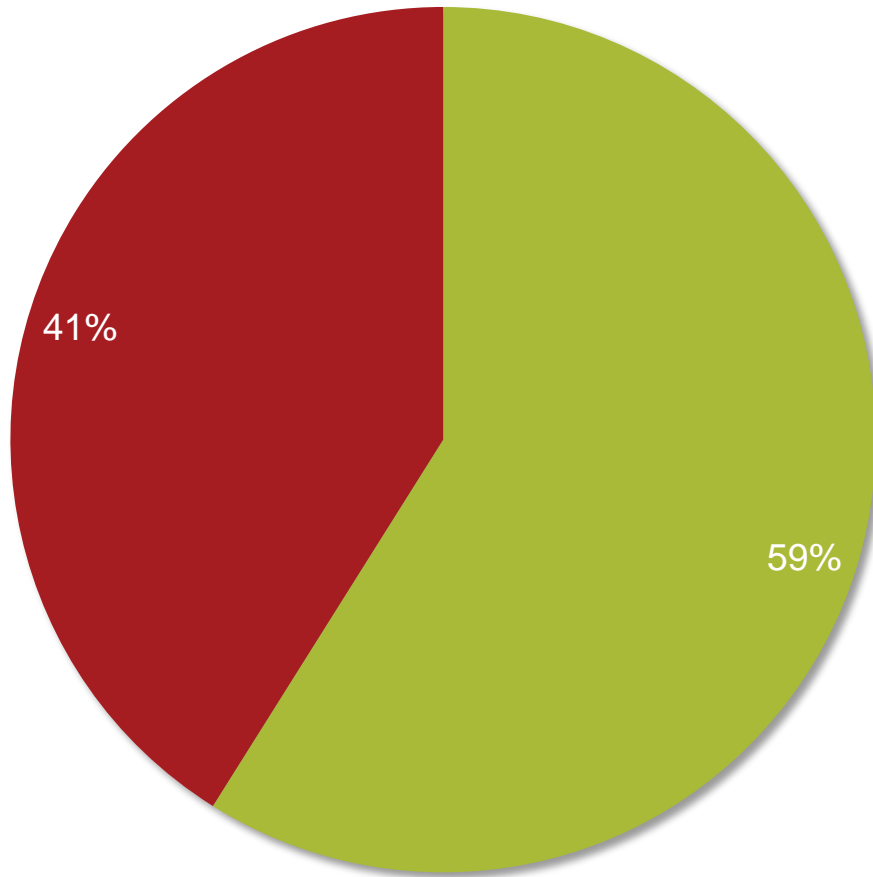
DURING NEXT YEAR, TO WHAT EXTENT DO YOU ANTICIPATE THE FOLLOWING WORKFORCE TRENDS TO IMPACT YOUR BUSINESS?



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Pulse Survey Results

HAS YOUR COMPANY RECEIVED OR SOUGHT ANY KIND OF FINANCIAL ASSISTANCE OR APPLIED FOR ASSISTANCE SINCE MARCH 16?

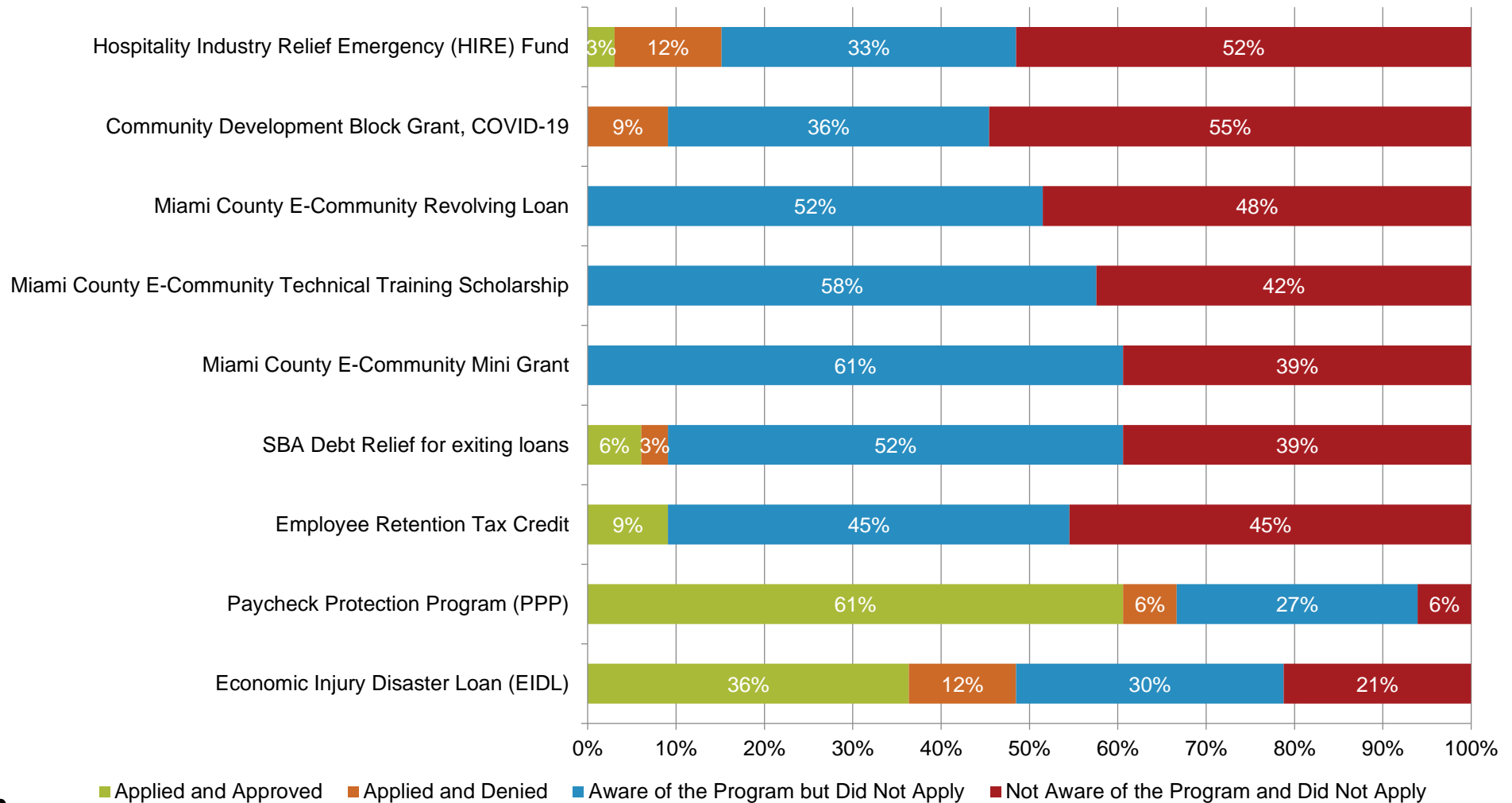


- HAVE sought financial support from a government program, lender, or other resource
- HAVE NOT sought any assistance

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Pulse Survey Results

WHAT WAS YOUR EXPERIENCE WITH THE FINANCIAL ASSISTANCE PROGRAMS THAT YOU APPLIED FOR?



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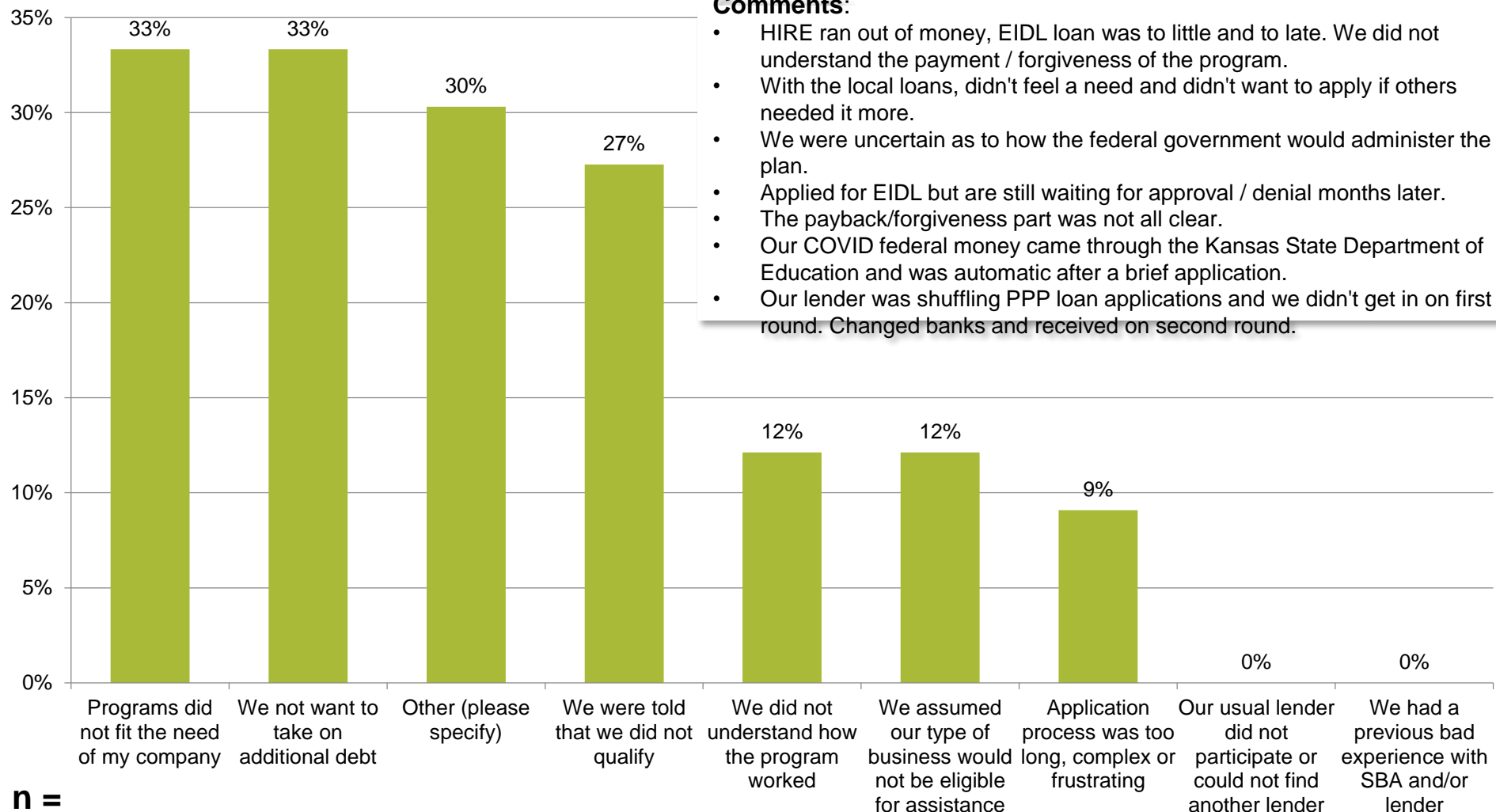
Responses were only from employees who answered "Yes" to seeking aid from page 18.

Pulse Survey Results

WHAT CONCERNS DID YOU HAVE IN APPLYING FOR FINANCIAL ASSISTANCE OR RELIEF PROGRAMS (OR CONCERNS THAT PREVENTED YOU FROM DOING SO)? (CHECK ALL THAT APPLY)

Comments:

- HIRE ran out of money, EIDL loan was too little and too late. We did not understand the payment / forgiveness of the program.
- With the local loans, didn't feel a need and didn't want to apply if others needed it more.
- We were uncertain as to how the federal government would administer the plan.
- Applied for EIDL but are still waiting for approval / denial months later.
- The payback/forgiveness part was not all clear.
- Our COVID federal money came through the Kansas State Department of Education and was automatic after a brief application.
- Our lender was shuffling PPP loan applications and we didn't get in on first round. Changed banks and received on second round.

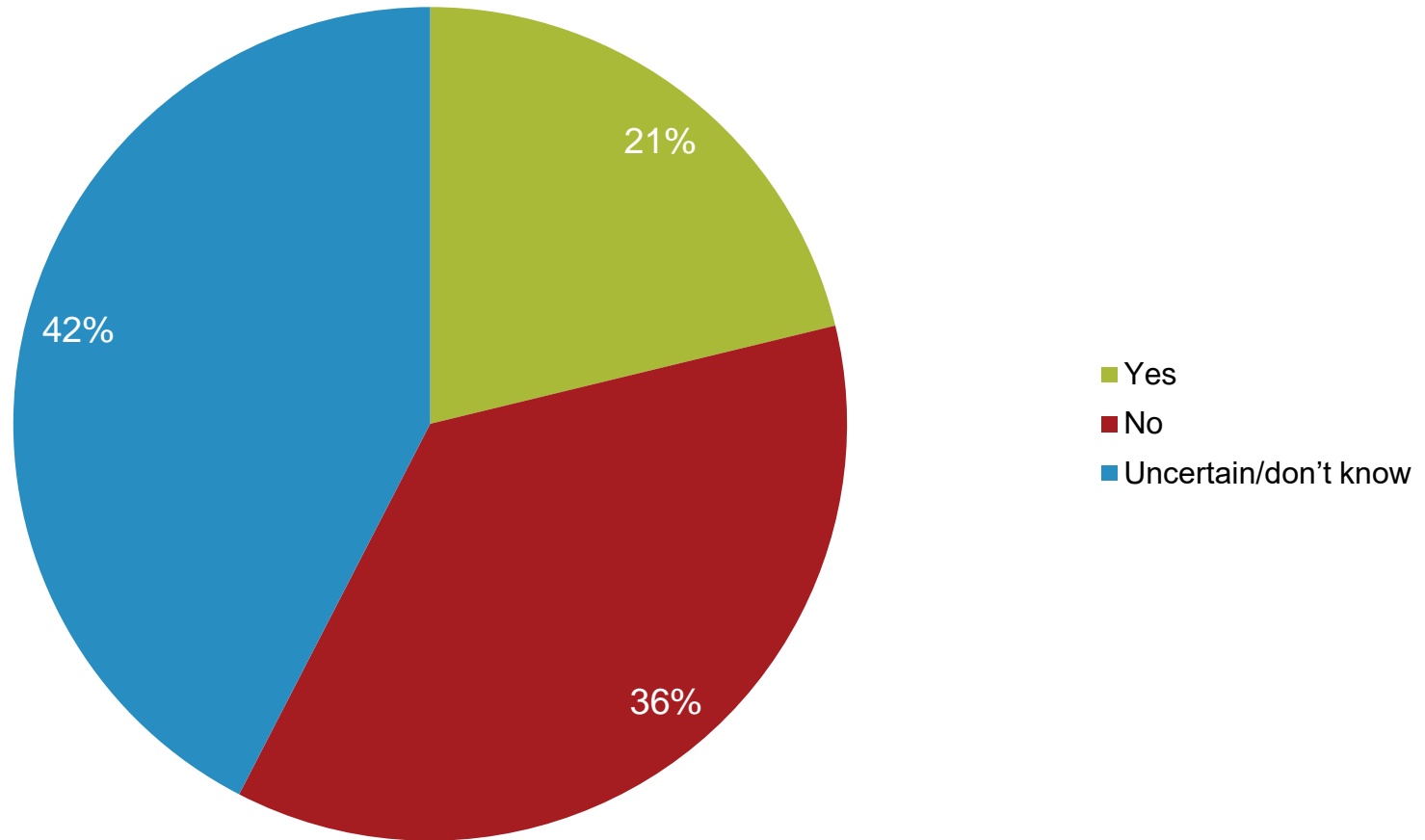


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Responses were only from employees who answered "Yes" to seeking aid from page 19.

Pulse Survey Results

BEYOND WHAT YOU HAVE ALREADY RECEIVED, DO YOU ANTICIPATE NEEDING ADDITIONAL FINANCIAL ASSISTANCE WITHIN THE NEXT YEAR?

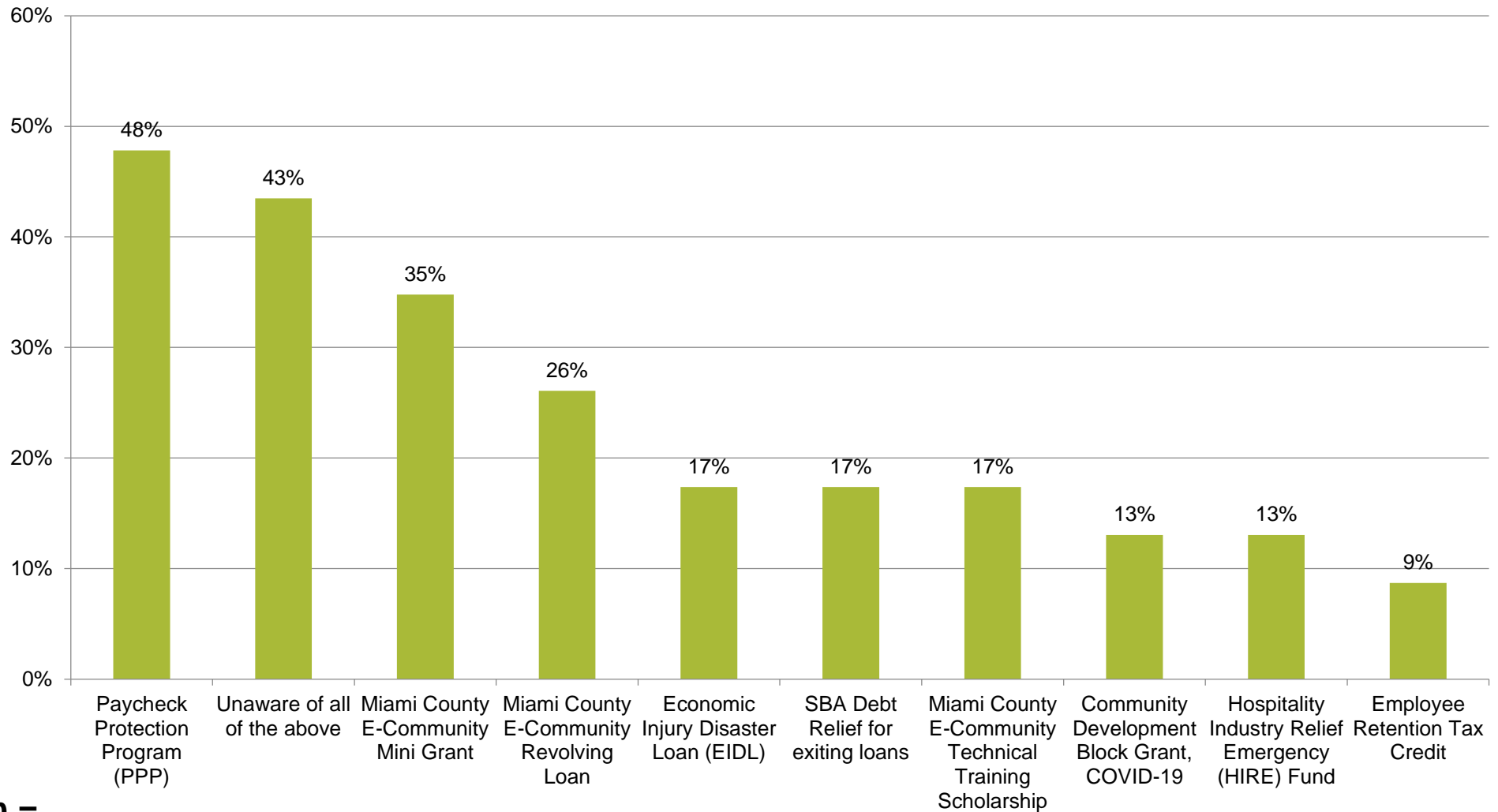


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Responses were only from employees who answered "Yes" to seeking aid from page 19.

Pulse Survey Results

ARE YOU AWARE OF THE FOLLOWING FINANCIAL ASSISTANCE RELIEF PROGRAMS AVAILABLE TO YOU AT THE FEDERAL, STATE AND LOCAL LEVEL?

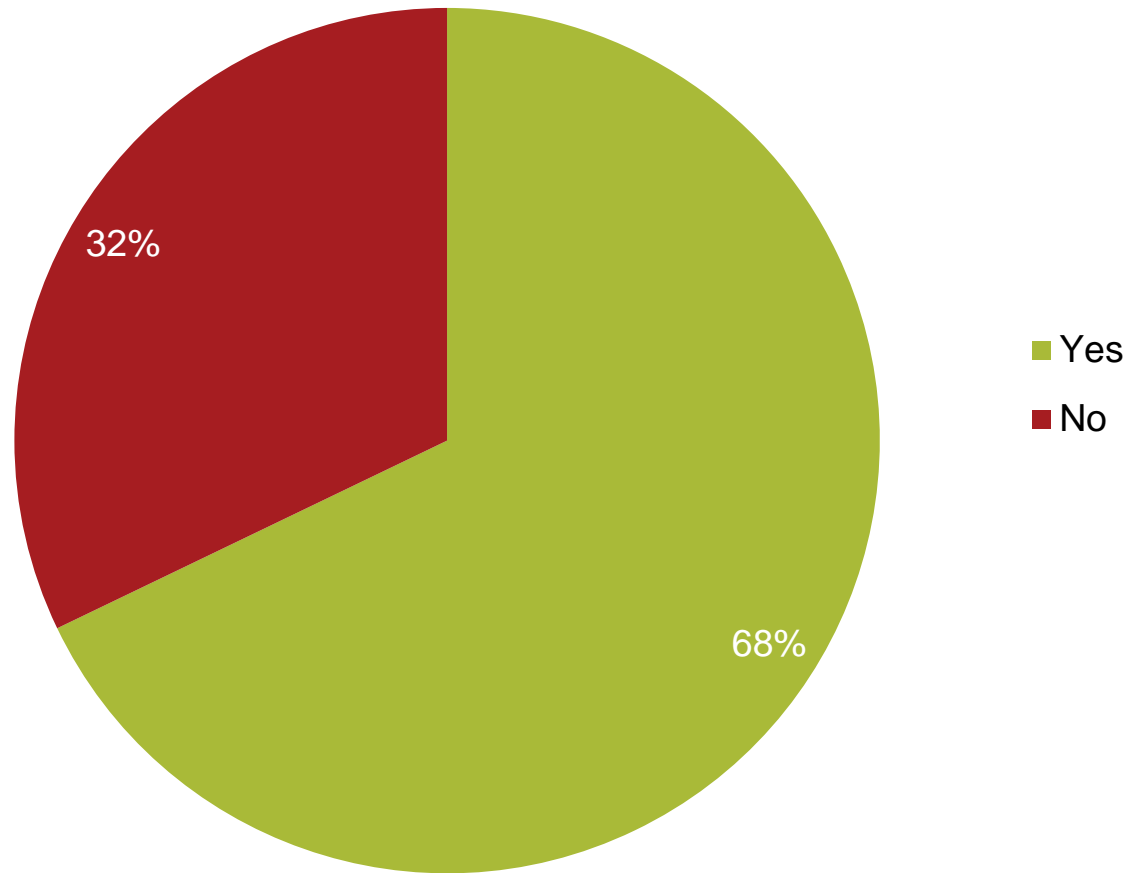


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Responses were only from employees who answered "No" to seeking aid from page 19.

Pulse Survey Results

THERE MAY BE FREE, OR REDUCED COST, PROGRAMS THAT COULD ASSIST YOUR BUSINESS. DO WE HAVE YOUR PERMISSION TO REACH OUT AND REVIEW THOSE OPTIONS WITH YOU?



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Pulse Survey Results

PLEASE SHARE ANY ADDITIONAL COMMENTS

Doing Well

- We are owned by a national company and have had great national support
- On balance, we have managed better than we expected when we were planning our summer season back in March. We adapted our business model and are making less than previous years but with an EIDL we are okay for this season. However, planning for being open as normal next year is difficult. We are already being asked about summer 2021.

Not Doing Well

- Help us if you can. We are sucking air trying to hang it there.
- Covid-19 stopped my business for some time. I will work hard to finish the year with little effect to my way of living.

Concerns

- Get people back to work , scared economy, people have no money. State Kansas Department of labor owes me 12 weeks of pay, can get in to call and leave call back number, no reply.
- I am concerned with a new shut down in November or at some later date. I don't know if we can survive this happening again in November and lasting 2-3 months through the winter. In hospitality this is the SLOW months and we don't have enough income to cover overhead in a normal year. Without a strong summer season we won't have any cash to begin to make it through.

Advice

- Support/include agritourism more as part of the economic picture. Invite more opportunities as there is such a growing trend- Kansas City people and others want it and it contributes to the vitality of the community and the county economy.
- Need to develop the community so as to be able to sustain anything like this from within in community. Where our food supply comes from local farmers. We need meat small local meat processing plants. Creates jobs and food. If we had small grocery stores selling the local farmers food at many points in the county. Need a strong food co-operative in the County.

Cannot Participate In Programs

- It has been my experience that none of these programs are meant for mom and pop operations, which is what we are.
- Banks were excluded from participating in a lot of these programs.

Thank You's

- Thank you for all that you do!
- Thank you for this survey. This is timely and much needed as we are planning for possible second round of COVID.

Pulse Survey Next Steps

NEXT STEPS

- Discuss any findings of particular interest from this report. What was surprising? Most helpful? Etc.
- Discuss development of second round of Pulse Survey (changes, alterations, edits, additional question responses to add, etc.)
- Confirm participants for next round.
- Discuss timing of deployment of second round of Pulse Survey (currently planned to be deployed the week of July 27)

Thank You!