



History, Charm, & Southern Hospitality.

Vision

The Village of Pinehurst is a charming, vibrant community which reflects our rich history and traditions, enhanced by a unique combination of cultural arts and recreational activities.

Mission

Preserve and enhance the community's character and ambience by guiding growth, managing change, and providing services in a financially responsible manner.

Values

Competent
Courteous
Professional
Responsive



**FY 2015 Strategic Planning Retreat – Village Hall
December 12 and 13, 2013**

Day One 8:30 a.m. – 8:45 a.m.	Introduction ▪ Welcome and ground rules ▪ Review VOP Strategic Planning Process	Deb, Natalie, All
8:45 a.m. – 9:00 a.m.	Re-Affirm MVV & Core Competencies ▪ Review & affirm Mission, Vision, and Values ▪ Review & affirm core competencies	Deb, All
9:00 a.m. – 10:00 a.m.	Environmental Scan ▪ Demographics ▪ Economic environment ▪ Revenue forecast ▪ Customer focused results ▪ Leadership & governance results ▪ Workforce focused results ▪ Financial environment	John, Angie, Natalie
10:00 a.m. – 11:00 a.m.	2014 Strategic Plan Review ▪ BSC review ▪ 2014 Strategic Plan status ▪ Past Blind Spots	Andy, Natalie, Jeff, Deb
11:00 a.m. – 12:00 p.m.	SWOT Analysis ▪ Discover & agree on strengths, weaknesses, opportunities, and threats	Deb, All
12:00 p.m. – 12:45 p.m.	Lunch	Deb, All
12:45 p.m. – 1:15 p.m.	Define Strategic Advantages & Challenges	Deb, All
1:15 p.m. – 4:00 p.m.	Strategic Objectives ▪ Review and affirm strategic objectives ▪ Create goals for strategic objectives based on environmental scan ▪ Review & update performance measures for strategic objectives ▪ Prioritize objectives	Deb, Natalie, All

Day Two 8:30 a.m. – 10:00 a.m.	Strategic Objectives (Continued) ▪ Review and affirm strategic objectives ▪ Create goals for strategic objectives based on environmental scan ▪ Review & update performance measures for strategic objectives ▪ Prioritize objectives	Deb, All
10:00 a.m. – 11:00 a.m.	Ensure Sustainability ▪ Identify opportunities for innovation and needed core competencies ▪ Create a “New Idea” process ▪ Analyze Baldrige core values	Deb, All
11:00 a.m. – 11:30 a.m.	Wrap-up and Next Steps	Deb, All

* Times are approximate and include breaks.

Key Terms Used Throughout the Retreat

Action Plans

The term “action plans” refers to specific actions that respond to short- and longer-term strategic objectives. Action plans include details of resource commitments and time horizons for accomplishment. Action plan development represents the critical stage in planning when strategic objectives and goals are made specific so that effective, organization-wide understanding and deployment are possible. Deployment of action plans includes creating aligned measures for all departments and work units. Deployment also might require specialized training for some employees or recruitment of personnel.

Core Competencies

The term “core competencies” refers to your organization’s areas of greatest expertise. Your organization’s core competencies are those strategically important capabilities that are central to fulfilling your mission or provide an advantage in your marketplace or service environment. Core competencies frequently are challenging for competitors or suppliers and partners to imitate, and they may provide a sustainable competitive advantage. Absence of a needed organizational core competency may result in a significant strategic challenge or disadvantage in the marketplace.

Core competencies may involve technology expertise, unique service offerings, a marketplace niche, or a particular business acumen (e.g., business acquisitions).

Customer

The term “customer” refers to actual and potential users of your organization’s products, programs, or services (referred to as “products” in the Criteria). Customers include the end users of your products, as well as others who might be their immediate purchasers or users. These others might include distributors, agents, or organizations that further process your product as a component of their product. The Criteria address customers broadly, referencing current and future customers, as well as the customers of your competitors.

Customer-driven excellence is a Baldrige core value embedded in the beliefs and behaviors of high-performing organizations. Customer focus impacts and should integrate an organization’s strategic directions, its work systems and work processes, and its business results.

Customer Engagement

The term “customer engagement” refers to your customers’ investment in or commitment to your brand and product offerings. It is based on your ongoing ability to serve their needs and build relationships so they will continue using your products. Characteristics of customer engagement include customer retention and loyalty, customers’ willingness to make an effort to do business with your organization, and customers’ willingness to actively advocate for and recommend your brand and product offerings.

Goals

The term “goals” refers to future conditions or performance levels that your organization intends or desires to attain. Goals can be both short and longer term. They are ends that guide actions. Quantitative goals, frequently referred to as “targets,” include a numerical point or range. Targets might be desired performance based on comparative or competitive data. Stretch goals are goals for desired major, discontinuous (non-incremental) or breakthrough improvements, usually in areas most critical to your organization’s future success.

Goals can serve many purposes, including: clarifying strategic objectives and action plans to indicate how you will measure success; fostering teamwork by focusing on a common end; encouraging out-of-

the-box thinking (innovation) to achieve a stretch goal; and providing a basis for measuring and accelerating progress.

Innovation

The term “innovation” refers to making meaningful change to improve products, processes, or organizational effectiveness and to create new value for stakeholders. Innovation involves the adoption of an idea, process, technology, product, or business model that is either new or new to its proposed application. The outcome of innovation is a discontinuous or breakthrough change in results, products, or processes.

Successful organizational innovation is a multistep process that involves development and knowledge sharing, a decision to implement, implementation, evaluation, and learning. Although innovation is often associated with technological innovation, it is applicable to all key organizational processes that would benefit from change, whether through breakthrough improvement or a change in approach or outputs. It could include fundamental changes in organizational structure or the business model to more effectively accomplish the organization’s work.

Intelligent Risks

The term “intelligent risks” refers to opportunities for which the potential gain outweighs the potential harm or loss to your organization’s sustainability if you do not explore them. Taking intelligent risks requires a tolerance for failure and an expectation that innovation is not achieved by initiating only successful endeavors. At the outset, organizations must invest in potential successes while realizing that some will lead to failure.

The degree of risk that is intelligent to take will vary by the pace and level of threat and opportunity in the industry. In a rapidly changing industry with constant introductions of new products, processes, or business models, there is an obvious need to invest more resources in intelligent risks than in a stable industry. In the latter, organizations must monitor and explore growth potential and change but, most likely, with a less significant commitment of resources.

Strategic Advantages

The term “strategic advantages” refers to those marketplace benefits that exert a decisive influence on an organization’s likelihood of future success. These advantages frequently are sources of an organization’s current and future competitive success relative to other providers of similar products. Strategic advantages generally arise from either or both of two sources: (1) core competencies, which focus on building and expanding on an organization’s internal capabilities, and (2) strategically important external resources, which are shaped and leveraged through key external relationships and partnerships.

When an organization realizes both sources of strategic advantage, it can amplify its unique internal capabilities by capitalizing on complementary capabilities in other organizations.

Strategic Challenges

The term “strategic challenges” refers to those pressures that exert a decisive influence on an organization’s likelihood of future success. These challenges frequently are driven by an organization’s future competitive position relative to other providers of similar products. While not exclusively so, strategic challenges generally are externally driven. However, in responding to externally driven strategic challenges, an organization may face internal strategic challenges.

External strategic challenges may relate to customer or market needs or expectations; product or technological changes; or financial, societal, and other risks or needs. Internal strategic challenges may relate to an organization’s capabilities or its human and other resources.

Strategic Objectives

The term “strategic objectives” refers to an organization’s articulated aims or responses to address major change or improvement, competitiveness or social issues, and business advantages. Strategic objectives generally are focused both externally and internally and relate to significant customer, market, product, or technological opportunities and challenges (strategic challenges). Broadly stated, they are what an organization must achieve to remain or become competitive and ensure long-term sustainability. Strategic objectives set an organization’s longer-term directions and guide resource allocations and redistributions.

Sustainability

The term “sustainability” refers to your organization’s ability to address current business needs and to have the agility and strategic management to prepare successfully for the future business, market, and operating environment. To be sustainable, your organization needs to consider both external and internal factors. The specific combination of factors might include industry wide and organization –specific components.

Factors in your organization’s sustainability might include workforce capability and capacity, resource availability, technology, knowledge, core competencies, work systems, facilities, and equipment. Sustainability might be affected by changes in the marketplace and customer preferences, in the financial markets, and in the legal and regulatory environment. In addition, sustainability has a component related to day-to-day preparedness for real-time or short-term emergencies.

Voice of the Customer

The term “voice of the customer” refers to your process for capturing customer-related information. Voice-of-the-customer processes are intended to be proactive and continuously innovative to capture stated, unstated, and anticipated customer requirements, expectations, and desires. The goal is to achieve customer engagement. Listening to the voice of the customer might include gathering and integrating various types of customer data, such as survey data, focus group findings, warranty data, and complaint data, that affect customers’ purchasing and engagement decisions.

Workforce

All people actively supervised by your organization and involved in accomplishing your organization’s work, including paid employees (e.g., permanent, part-time, temporary, and telecommuting employees, as well as contract employees supervised by your organization) and volunteers, as appropriate. Your workforce includes team leaders, supervisors, and managers at all levels.

Village of Pinehurst
FY 2014 Balanced Scorecard



Strategic Objective	Performance Measure	FY 2012	FY 2013	FY 2014 Est.	FY 2014 Goal	Focus Area
Safeguard the community	UCR index crime rate per 1,000 residents	11.26	11.12	11.5	14	
	Fires per 1,000 population	1.55	2.87	3.79	2.75	●
	% of residents whose overall feeling of safety in the Village is good or excellent	96%	96%	96%	96%	
Preserve the character & ambience of the Village	% satisfaction with landscaping in medians and other public areas	85%	83%	84%	85%	
	% of residents who rate the overall appearance of the Village as good or excellent	93%	92%	93%	93%	
	% of residents who rate the overall quality of life as good or excellent	88%	91%	90%	90%	
Promote economic opportunity	1st floor occupancy rate in the Village Center	n/a	77%	78%	85%	●
	% of businesses likely to recommend the Village as a business location	73%	84%	85%	77%	
Provide safe traffic & pedestrian mobility	Pavement condition rating	83	82.9	82.9	80	
	# of lf of sidewalks, greenways, and bike paths constructed	-	6,680	12,900	8,000	
	% of residents satisfied with the availability of pedestrian walkways & sidewalks	37%	35%	35%	37%	●
	% of residents satisfied with the maintenance of streets in neighborhoods	73%	72%	73%	73%	
Protect the environment	% of refuse diverted from the landfill	32.2%	33.2%	32%	32.7%	
	% of residents satisfied with curbside recycling services	92%	91%	92%	92%	
Provide a variety of recreational & cultural opportunities	% of residents satisfied with P&R programs	75%	72%	72%	75%	
	% of residents satisfied with the availability of cultural recreational opportunities	56%	52%	58%	58%	●
	% of residents satisfied with P&R facilities	78%	78%	78%	76%	
Enhance customer service	% of residents satisfied with customer service provided by Village employees	78%	80%	80%	78%	
Leverage technology to continuously improve processes	Full time equivalents per million \$ of revenue	8.41	8.34	7.80	8.41	
Develop collaborative solutions	# of new collaborative initiatives developed	n/a	n/a	8	6	
Meet legal & regulatory requirements	% compliance with the NC Local Government and Fiscal Control Act	100%	100%	100%	100%	
Increase volunteer engagement	% of volunteers satisfied with the volunteer experience	90%	91%	89%	88%	
Promote learning & leadership development	% of EEs who agree the VOP develops employees' leadership abilities	79%	79%	80%	80%	
Increase employee engagement & satisfaction	% of EEs who are satisfied with their job	90%	90%	90%	90%	
	% of EEs who would recommend working for the VOP to a friend	90%	85%	87%	90%	●
Recruit & retain a skilled & diverse workforce	Employee turnover rate	10.7%	11.4%	10%	8%	●
Provide value for tax dollars	% of residents satisfied with the value received for taxes paid	66%	71%	71%	66%	
Maintain a strong financial condition	Bond rating	Aa2/AA	Aa2/AA	Aa2/AA	Aa2/AA	
	Debt service expenditures as a % of total budgeted expenditures	5.8%	3.6%	3.3%	4%	
	Unassigned GF fund balance as a % of actual expenditures	29.5%	28.5%	26.9%	15%	
Invest in capital	Capital asset condition ratio	59%	59%	59%	60%	
Manage operating costs	Operating expenditures as a % of operating revenues	89%	85%	86%	89%	



BSC - Customer Perspective

Dept	Initiative	Status	Comments
Safeguard the community			
FD	Evaluate fire inspection processes and modify to ensure consistent inspections are delivered	●	iPads and a master inspection schedule were prepared and deployed in Q1
FD	Install Opticom traffic device to improve response time and ensure safety of emergency personnel	●	Agreement with NCDOT was brought to the Council in Q2. Installation is expected to occur in Q3.
Preserve the character and ambiance of the Village			
SG	Enhance landscaping of highly visible public areas	●	Underway. Expect all areas except traffic circle to be completed in Q2 and traffic circle enhancement to be completed in Q3.
SG	Partner with NCDOT to install sidewalks and decorative stoplights in conjunction with Hwy 211 widening	●	Sidewalks are partially installed and stoplights are onsite. Project is expected to be completed in Q4.
SW	Evaluate yard debris collection process for efficiency improvements	●	BIRDIE Team presented recommended changes to the Council in Q2. Council approved needed budget amendment and recommendations were presented to the NAC in Q2. Full implementation is expected in Q3 2015.
Promote economic opportunity			
CD	Provide online resources for existing and prospective businesses	●	Guide to Doing Business completed and distributed to property owners and commercial brokers in Oct. 2013; Merchant Meeting materials and other helpful links posted on website in Q2.
CD	Create a mechanism to obtain and maintain updated business contact information	●	Front desk staff contacts businesses weekly to update information and maintain central database on Knowledge Management Portal.
CD	Institute a monthly e-blast to Village businesses	●	e-blast configured and sent out in Q2.
CD	Provide public restrooms in the Village Center	●	Theatre Building was selected as public restroom location and currently working with the architect on design. Expect construction to be complete in Q3.
Provide safe traffic and pedestrian mobility			
CD	Install gateway and wayfinding signage	●	Wayfinding signage package was presented to the Council in Q2. Will go to bid in Q2 and installation is expected in Q3. Gateway signage is on hold, per Council.
CD	Develop an alternative transportation master plan to identify locations of greenways, sidewalks and bike paths	●	Committee selected and currently developing RFQ. Expect to select a firm in Q3 and then proceed with developing the plan.
CD	Conduct a Village-wide evaluation of street lighting needs	●	Evaluation is planned to commence in Q3.
PB	Continue to enhance Village roadways with Annual Street Resurfacing Program	●	Notice to proceed with fall resurfacing package has been issued and resurfacing will be completed in Q3.
Protect the environment			
HT	Complete Harness Track storm water improvement project	●	Bids have been received and will construct after horses leave the track in Q4.
Provide a variety of recreational and cultural activities			
BG	Enhance the quality of athletic fields	●	Irrigation to be completed in Q3
PR	Identify and secure dedicated and adequate indoor space for adult and youth recreation programs	●	Evaluated use of Post Office and Fire Station. Offered additional programs at the Fair Barn in Winter 2013.
PR	Support the Given Memorial Library expansion and expand other cultural events sponsored by the Village	●	Issued FY 2014 capital contribution to Given Library and placed in escrow. Working on master event calendar and partnering with CVB.



Completed



In progress



Not started

**Village of Pinehurst
FY 2014 Strategic Plan Update**

BSC - Internal Perspective

Dept	Initiative	Status	Comments
Enhance customer service			
HR	Develop and implement a customer service survey for internal service departments		Survey has been designed and planned to implement in Q3
Leverage technology to continuously improve processes			
AD	Automate Council agenda packet preparation and distribution process		Selected Novus Agenda – Automated Q2
Fire	Utilize technology to obtain customer feedback on incident response and fire inspections services		Survey has been prepared and paper copies are currently being printed. We anticipate beginning to survey in Q3.
HR	Implement an automated employee benefit enrollment system		New automated employee benefit enrollment system was implemented in Q2
IT	Centralize data access and promote business process analysis by maintaining, supporting, and utilizing SharePoint more effectively		Hired Business Analyst and scheduled training for Q2. In process of selecting a consultant to work with.
PL	Automate the Technical Review Committee (TRC) review process		Expect to begin BIRDIE process in Q3.
Meet legal and regulatory requirements			
FS	Design and implement a compliance program for outreach to Historically Underutilized Businesses (HUB)		Scheduled to begin and complete in Q3
PD	Implement dual authentication requirements as required for the FBI Criminal Justice Informational Service (CJIS) System.		Selected a consultant in Q1 and scheduled to meet with consultant in Q3.

 **Completed**
 **In progress**
 **Not started**

Village of Pinehurst
FY 2014 Strategic Plan Update

BSC - Employee Perspective

Dept	Initiative	Status	Comments
Increase volunteer engagement			
GB	Develop and implement effective methods to recruit volunteers, using technology and other means		Created a SharePoint list and expect to implement recruitment methods in Q3.
GB	Develop a systematic process for onboarding members of Council appointed boards and commissions		Evaluated alternative onboarding methods and planned to implement in Q3.
Increase employee engagement and satisfaction			
HR	Perform a formal compensation study to review current practices, pay scales, & position descriptions		Study has been completed and results will be presented to the Council in Q3.
Recruit and retain a skilled and diverse workforce			
HR	Develop a Village-wide employee recognition program		In progress and plan to rollout the program to employees in Q3.

BSC - Financial Perspective

Dept	Initiative	Status	Comments
Maintain a strong financial condition			
FS	Increase vendor participation in ACH and p-card payment systems		This is an ongoing initiative; added 8 ACH vendors in Q1.
Manage operating costs			
FB	Enhance marketing of the Fair Barn facility		Worked with CVB and Council approved corporate weekday rental rates. Marketing and meetings will begin in Q3.
Invest in capital			
IT	Continue the orderly replacement of technology assets, per the Village's IT Replacement Plan		Completed in Q2.
FM	Evaluate the size of the Village's fleet and update the Fleet Replacement Plan		Fleet size was evaluated and Council approved BA to reduce fleet capital purchases by \$175,000 in Q2; Will be modified with completion of yard debris evaluation
FM	Effectively maintain current capital assets		Ongoing.

 **Completed**
 **In progress**
 **Not started**

2013 Business Survey

FINAL Report



HISTORY, CHARM, AND SOUTHERN HOSPITALITY_____

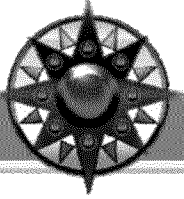
conducted for
The Village of
Pinehurst, North Carolina

by
ETC Institute
725 West Frontier
Olathe, Kansas 66061
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November, 2013

Contents

Executive Summary.....	i
Charts and Graphs	Section 1
Importance-Satisfaction Analysis.....	Section 2
Tabular Data and Survey Instrument.....	Section 3



Purpose and Methodology

A business survey was administered for The Village of Pinehurst to all businesses located within the Village limits during October and November of 2013. The survey was administered for the second time as part of an effort to assess business satisfaction with the quality of Village services and to measure Trends from the results of the first survey. The information gathered will help the Village address issues affecting the business community by measuring change over time.

Methodology. A four-page survey was mailed to 900 businesses in the Village of Pinehurst. Of the 900 businesses, 77 completed the survey (47 by mail and 30 by phone). The physical length of the survey was shorter this year because it was printed, compared to the electronic survey of 2012, but most of the same questions were asked as well as some additional questions. Business surveys are difficult to gather and this number represents a good sampling of businesses in the Village.

The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to be consistent with the presentation of the resident responses. Since the number of “don’t know” responses often reflects the utilization and awareness of services, the percentage of “don’t know” responses has been provided in the tabular data section of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “*who had an opinion.*”

This report contains:

- a summary of the methodology for administering the survey and major findings
- charts and graphs for each question on the survey
- importance-satisfaction analysis
- tables that show the results for each question on the survey
- a copy of the survey instrument.

Major Findings

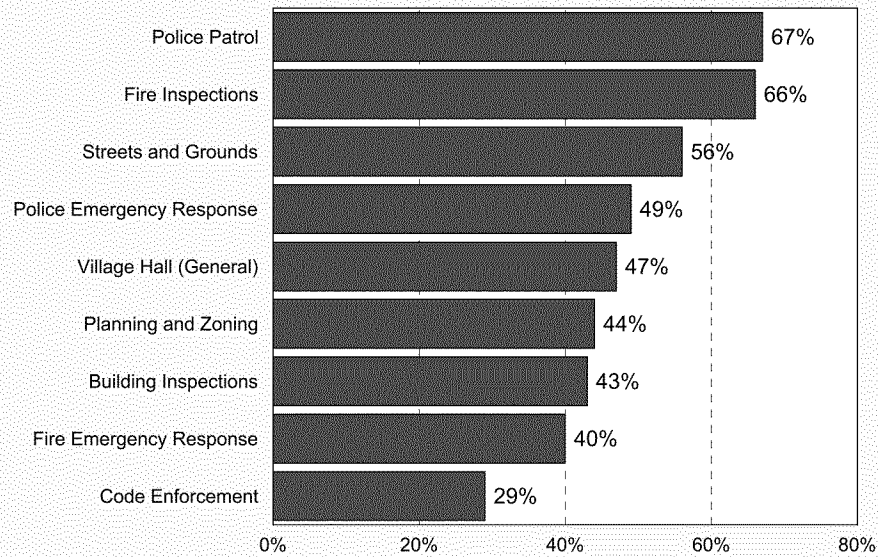
- **Business satisfaction with Village services.** The greatest number of businesses had experience with police patrol (67%) and Fire Inspections (66%) over the past year, and satisfaction was highest in building inspections (93%) and fire emergency responses (90%). It should be noted that because of the broader coverage of the survey this year, the use of these services was much greater.
- **Services that businesses thought should receive the most increase in emphasis over the next two years.** The areas that businesses thought should receive the most increase in emphasis from the Village of Pinehurst over the next two years were: (1) police patrol, (2) fire emergency response, and (3) police emergency response.
- **57% felt the Village met their expectations with the overall quality of services provided, compared to 52% in 2012.**
- **Satisfaction with Various Village Services.** Most (92%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the landscaping maintenance in right of ways and public areas; 91% were satisfied with the cleanliness of streets, and 75% were satisfied with the condition of sidewalks. Businesses were least satisfied with the availability of employee and customer parking around their business (49%).
- **Perceptions of the Village.** Most (98%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the overall feeling of safety during the day time; 91% were satisfied with the overall quality of life, and 89% were satisfied with the overall feeling of safety in the Village in the evening.
- **32% would be very likely, 34% would be likely, and 18% would be somewhat likely to recommend the Village as a business location to family and friends.**
- **39% rated the overall business atmosphere in the Village as better than two years ago (up from 31% in 2012).**
- **33% rated as very good and 51% rated as good, Village customer service.**
- **Level of Agreement with Statements About the Village.** Eighty-seven percent (87%) of the businesses surveyed who had an opinion were in agreement (rating of 4 or 5 on a 5-point scale) with courtesy of the Village staff, 82% were satisfied with the competence and professionalism of Village staff, and 78% were satisfied with the responsiveness to their needs.
- **Satisfaction with Village Communications with Businesses.** Sixty-three percent (63%) of the businesses surveyed who had an opinion were satisfied, 21% were neutral and 7% were dissatisfied with communications. Nine percent (9%) did not have an opinion.

- **Email and direct mail were indicated as the best way to communicate important information to businesses.**
- **75% were satisfied with the website, compared to 38% in 2012.**
- **Community Development (Codes and Ordinances)** Fifty percent (50%) of the businesses *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the zoning ordinances, 50% were satisfied with the historic district guidelines, and 45% were satisfied with business signage and regulations.
- **Amount of Various Cultural and Entertainment Opportunities** Seventy-nine percent (77%) of the businesses surveyed rated as “the right amount” major special events, 64% rated as “the right amount” restaurants in the Village, but 48% rated as “too few”, family friendly activities.
- **30% were very satisfied and 47% were satisfied with how the Village handles events that attract large crowds to the Village.**
- **Of the 77 businesses that responded, 20 had been in the Village 20 years or more.**
- **Importance of Various Reasons to Locate the Business in the Village** Ninety-two percent (92%) indicated that a low crime rate was the most important, 91% said the image of the Village was second, and 83% said the attitude of local government towards businesses to the location of their business in the Village.

Section 1:
Charts and Graphs

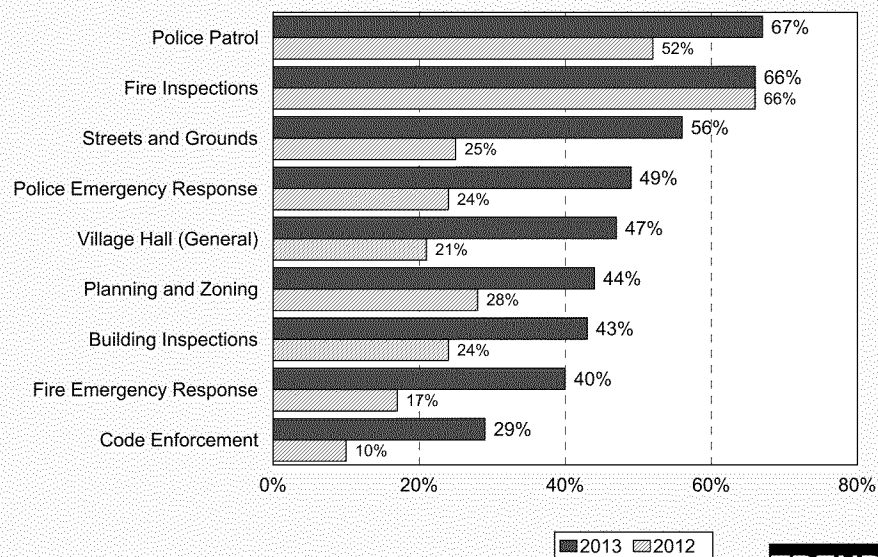
Q1. Have you used this service or department in the past two years?

by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Have you used this service or department in the past two years? - 2012 vs. 2013

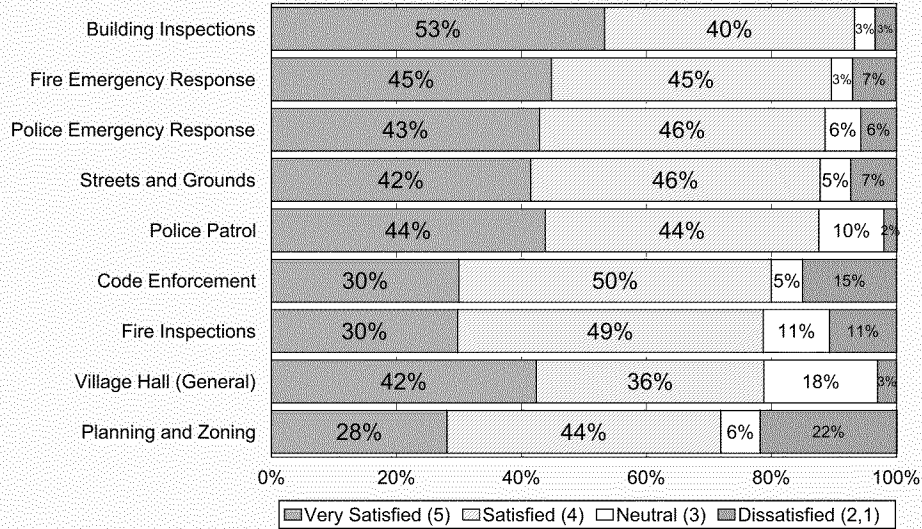


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

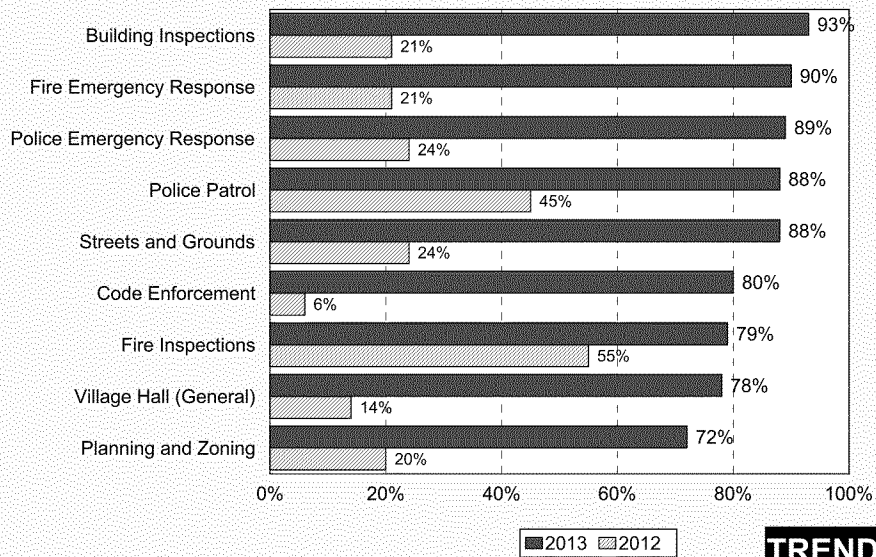
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Two Years

by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Overall Satisfaction with Pinehurst Services or Departments Used in the Past Two Years - 2012 vs. 2013

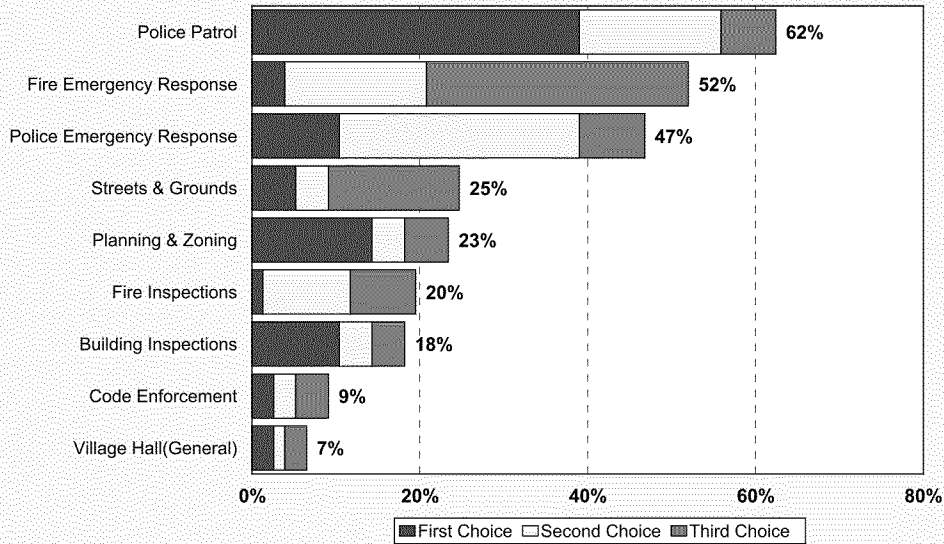


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q2. Village Services That Should Receive the Most Emphasis Over the Next Two Years by Major Category

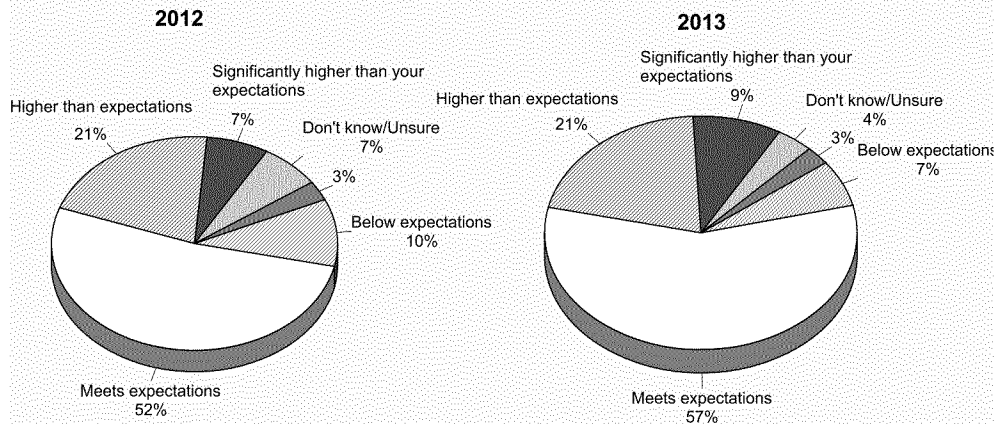
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q3. Do you agree with the following statements about the overall quality of services provided to your business by the Village of Pinehurst?

by percentage of respondents who answered "yes"

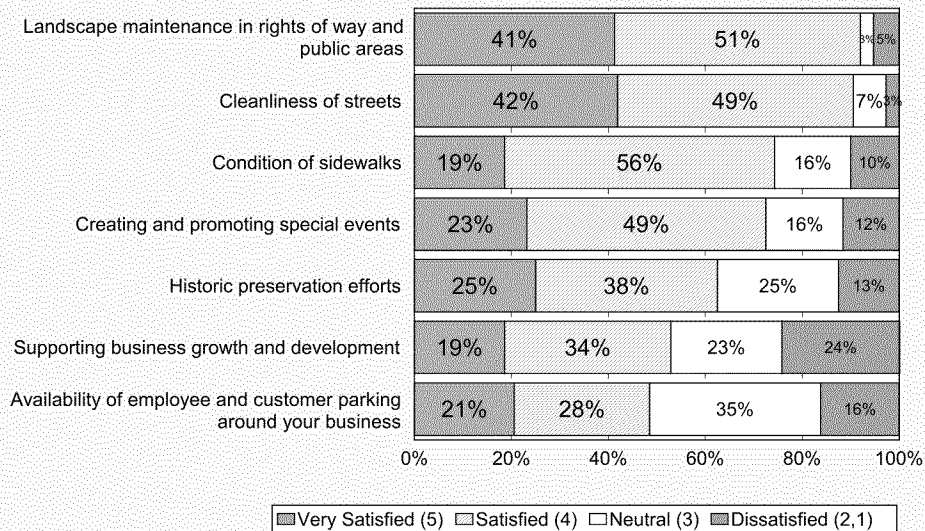


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

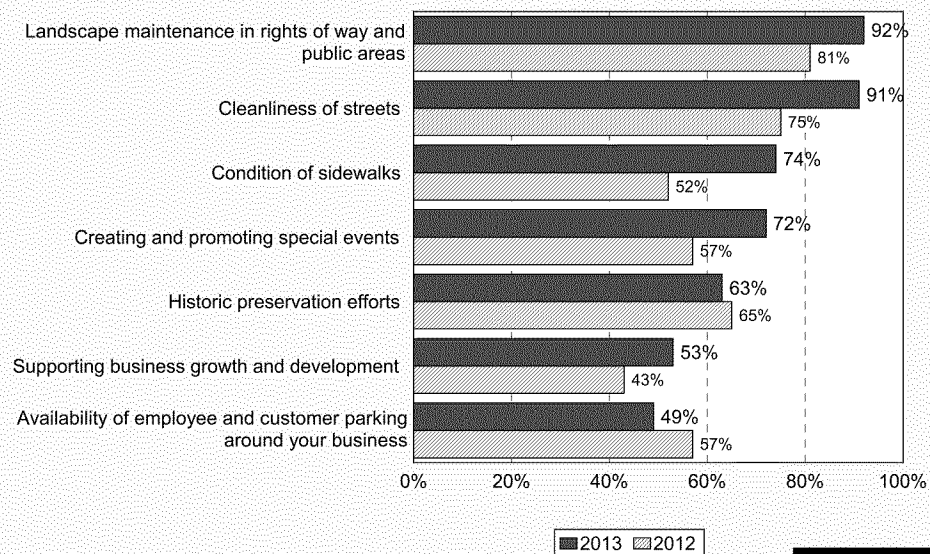
Q4. Level of Satisfaction with the Village in Various Areas

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Level of Satisfaction with the Village in Various Areas 2012 vs. 2013

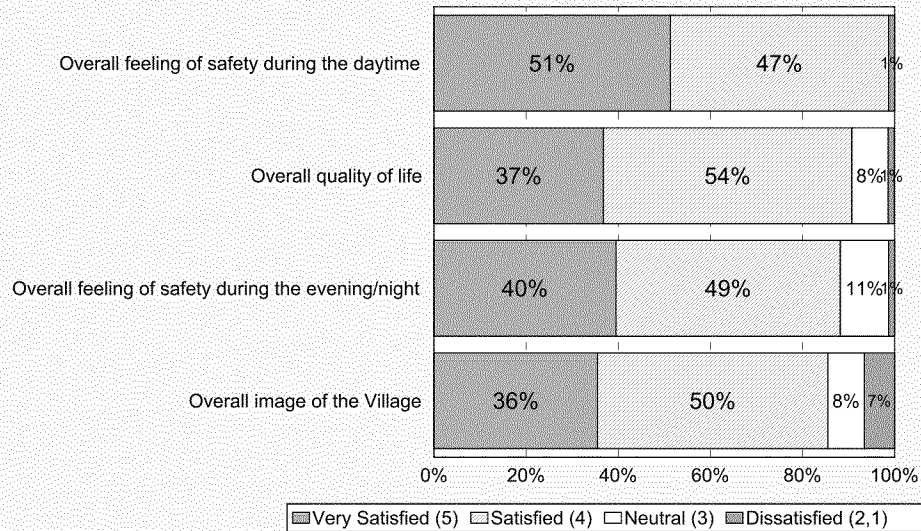


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

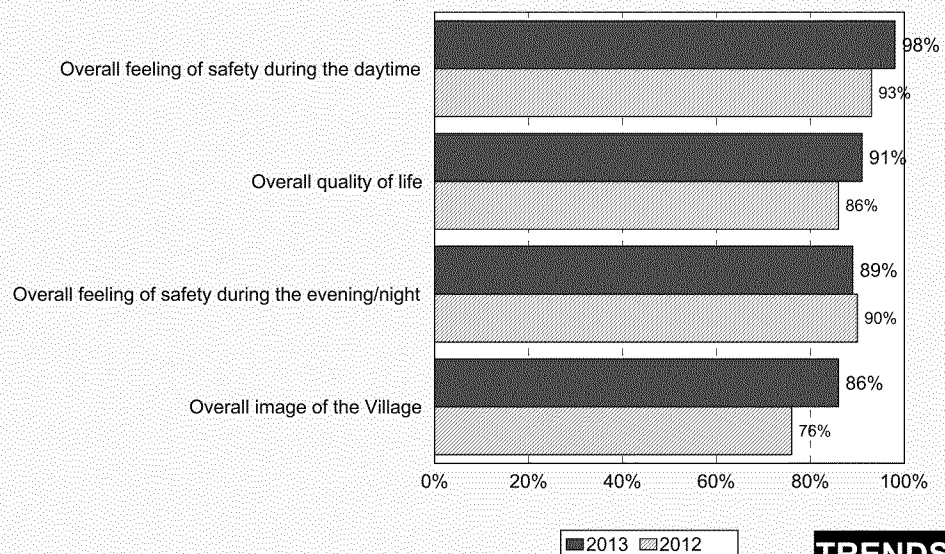
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2012 vs. 2013

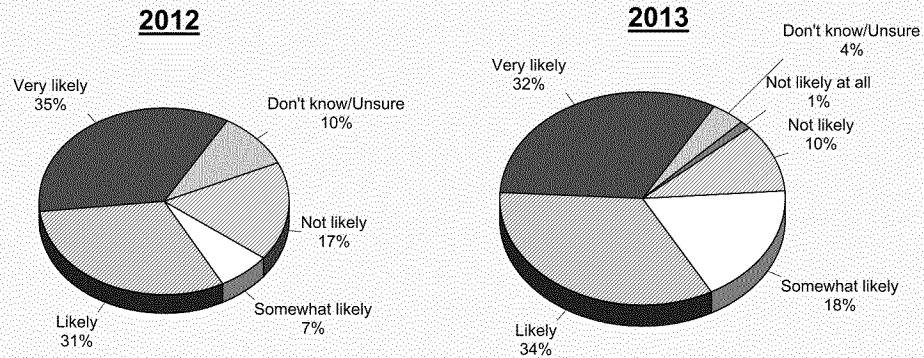


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

by percentage of respondents

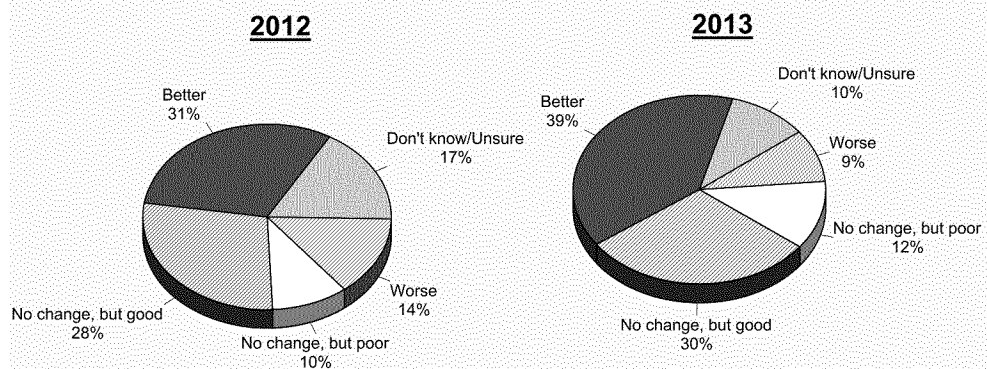


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q7. How would you rate the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

by percentage of respondents

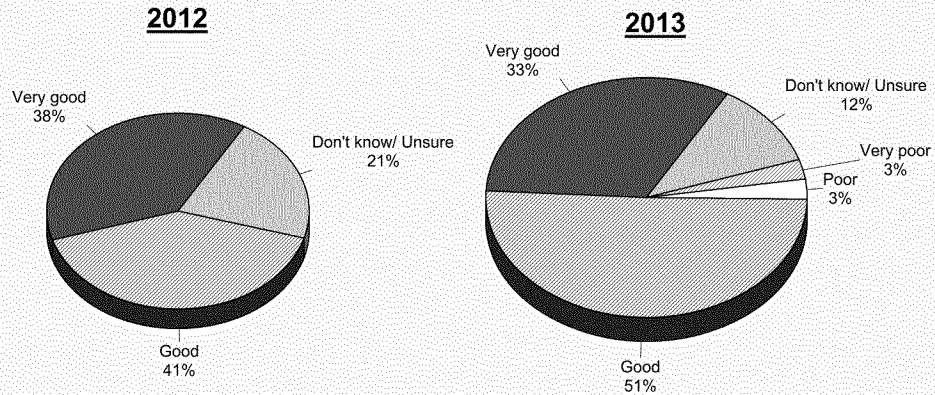


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q8. How would you rate the Village of Pinehurst customer service?

by percentage of respondents

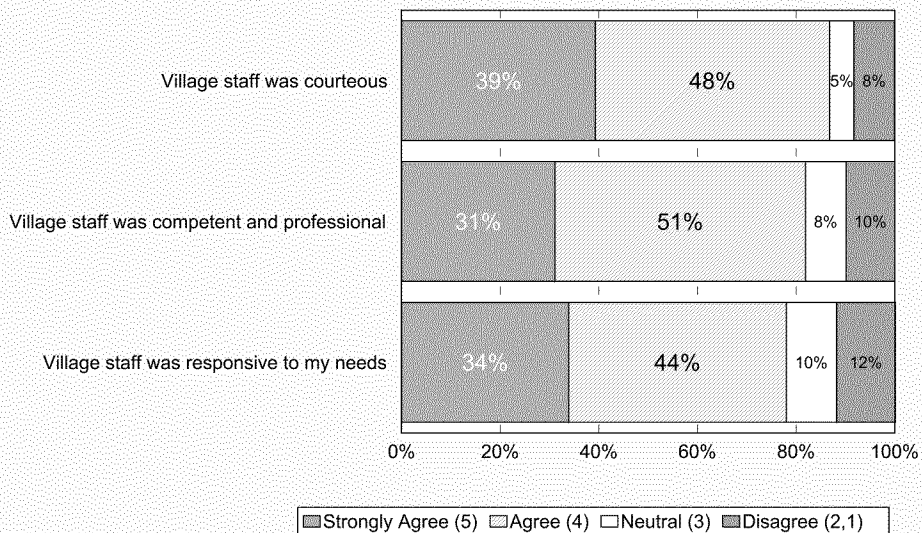


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

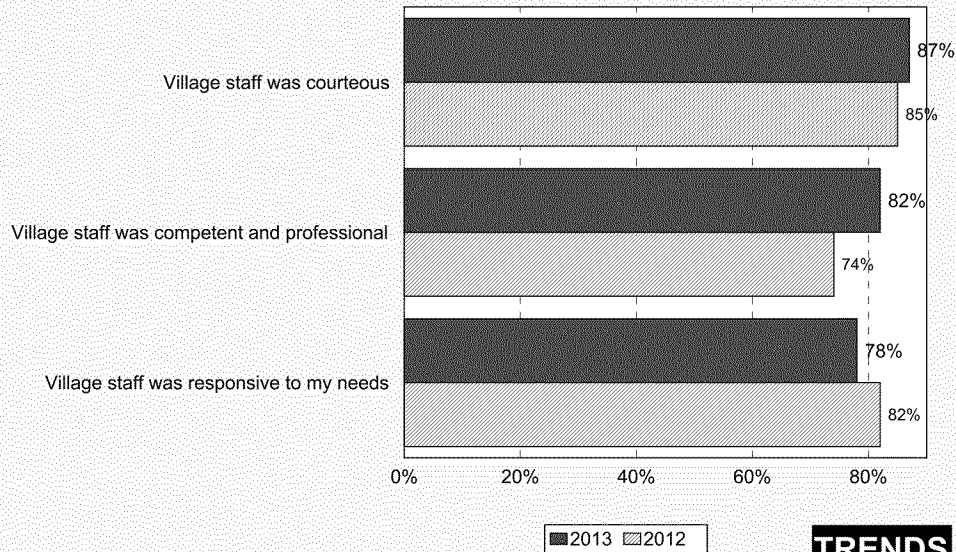
Q9. Level of Agreement with Statements about your Most Recent Contact with the Village

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Level of Agreement with Statements about your Most Recent Contact with the Village - 2012 vs. 2013

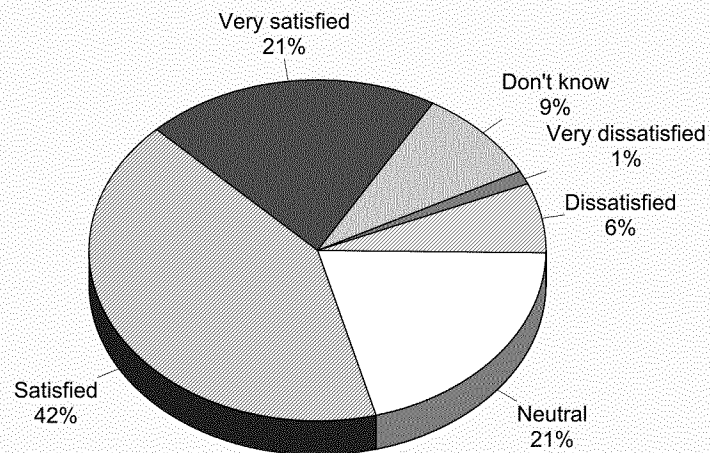


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q10. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

by percentage of respondents

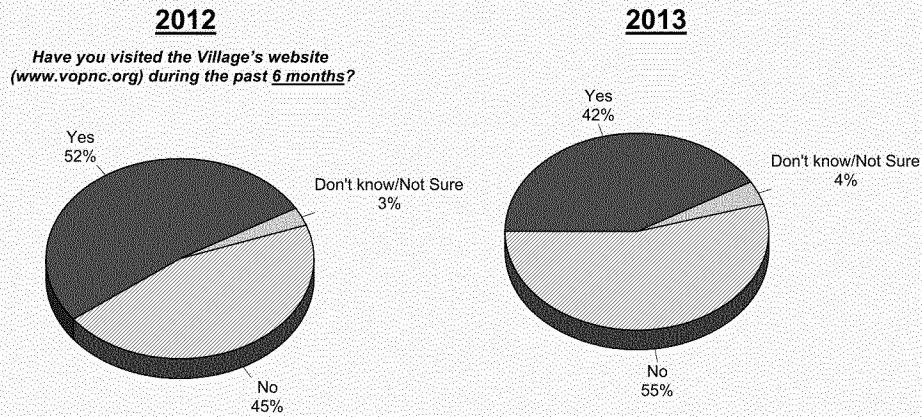


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

*Not asked in 2012

Q11. Have you visited the Village's website (www.vopnc.org) during the past 12 months?

by percentage of respondents

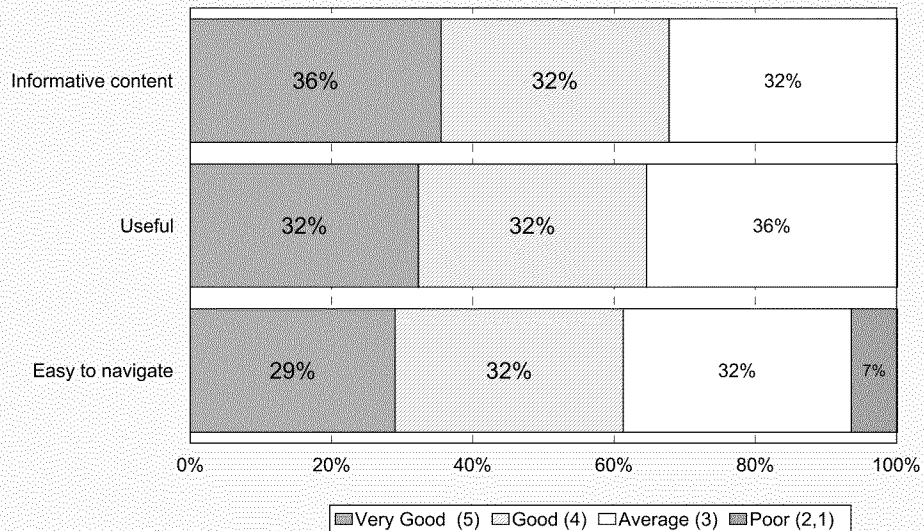


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

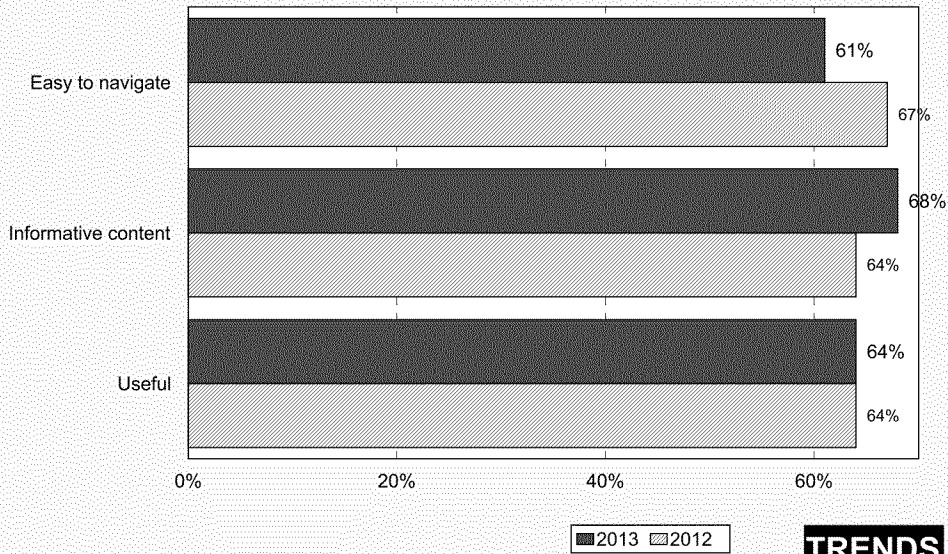
Q12. How would you rate the following characteristics of the Village website?

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (with "don't know")



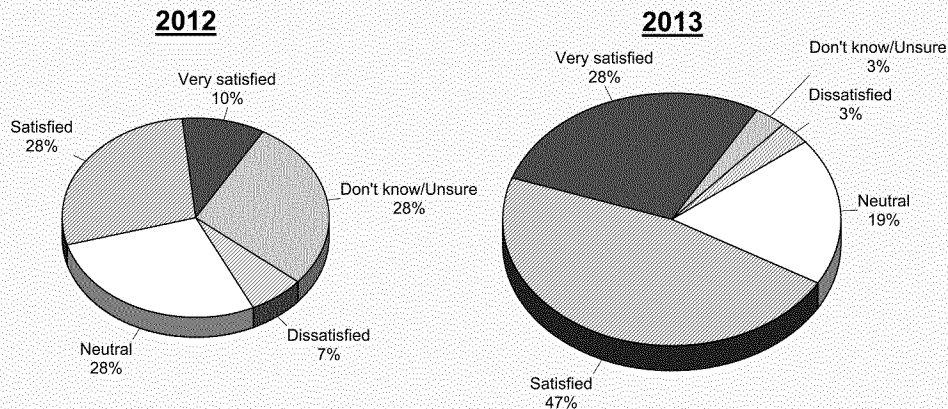
Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

How would you rate the following characteristics of the Village website? - 2012 vs. 2013



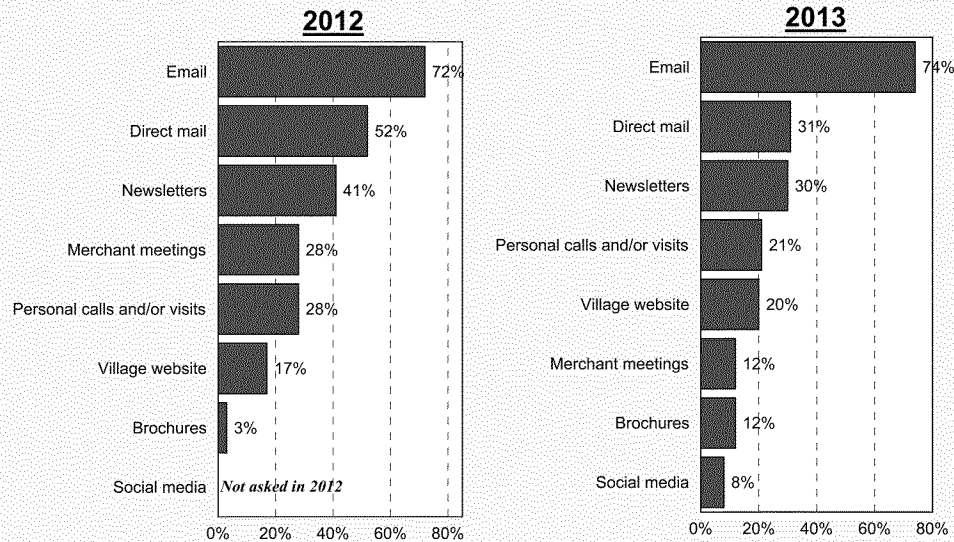
Q13. How satisfied are you with the Village's website?

by percentage of respondents



Q14. What are the best ways for the Village to communicate important information to your business?

by percentage of respondents (multiple choices could be made)

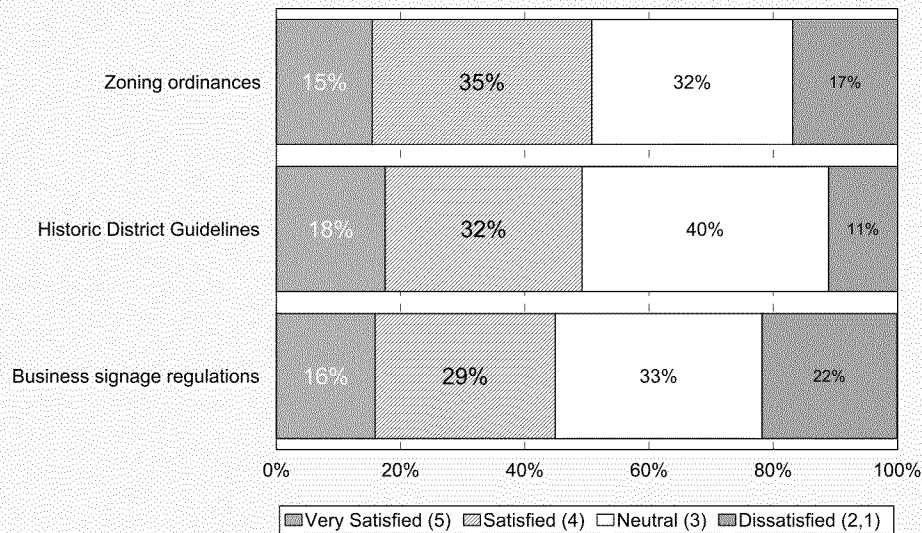


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

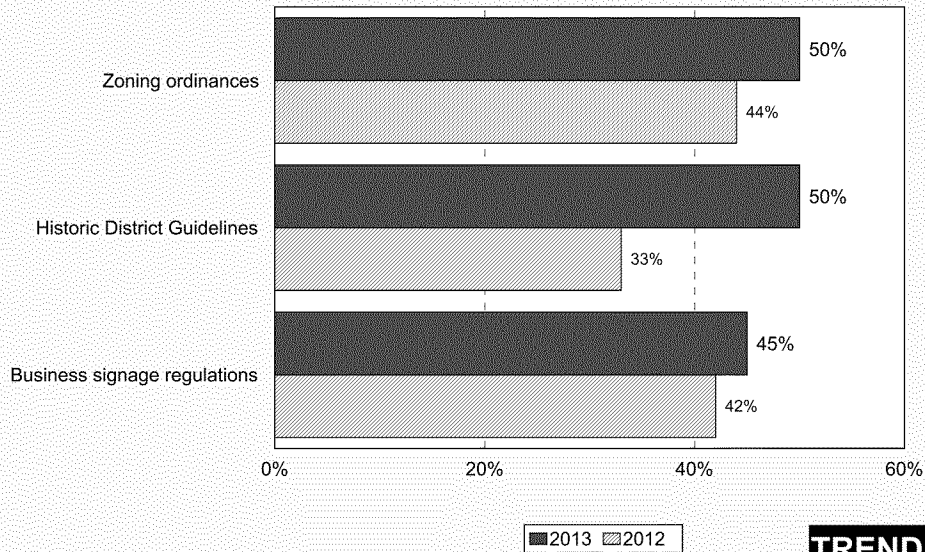
Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances)

by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (without "don't know")



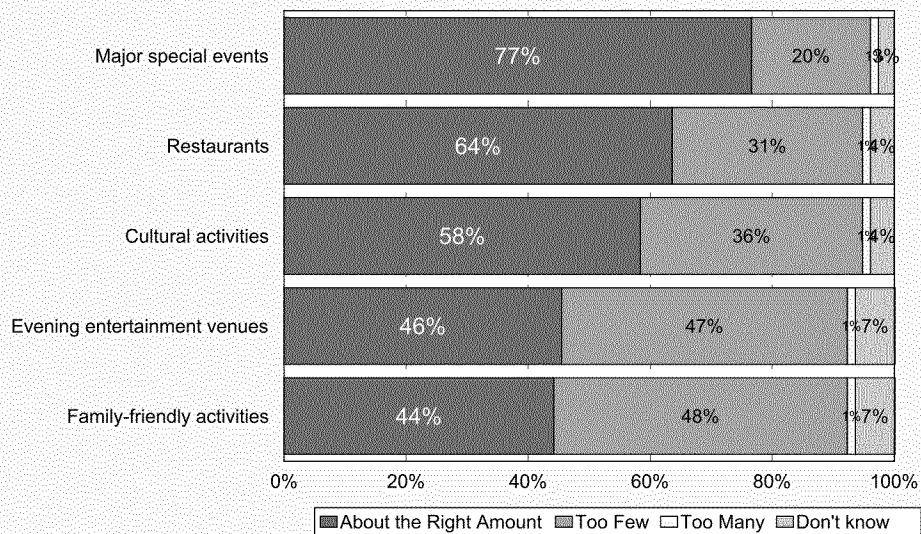
Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2012 vs. 2013



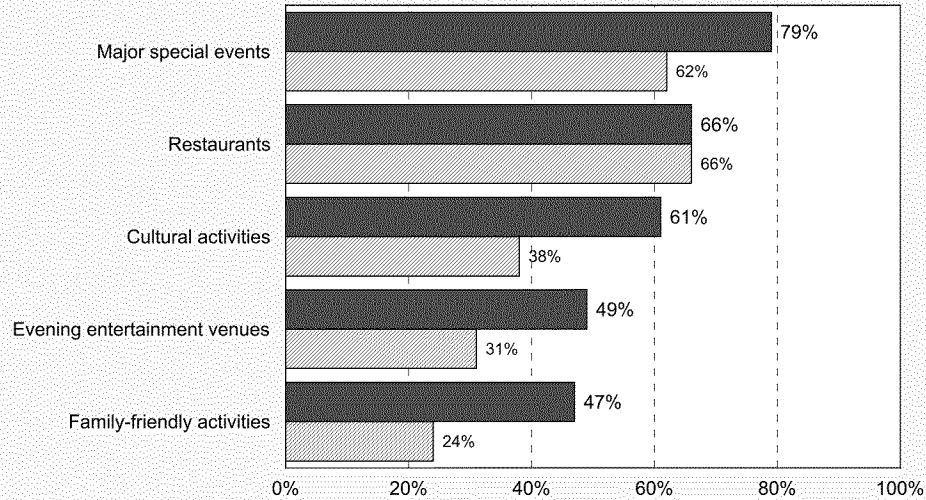
Q16. How Satisfied Your Business is With the Amount of the Following Cultural and Entertainment Opportunities in the Village

by percentage of respondents who had used the service or department and rated the item as a 1 to 3 on a 3-point scale



How Satisfied your Business is with the Amount of the Following Cultural and Entertainment Opportunities in the Village - 2012 vs. 2013

by percentage of respondents who rated the item as a 3 ("about the right amount") on a 3-point scale

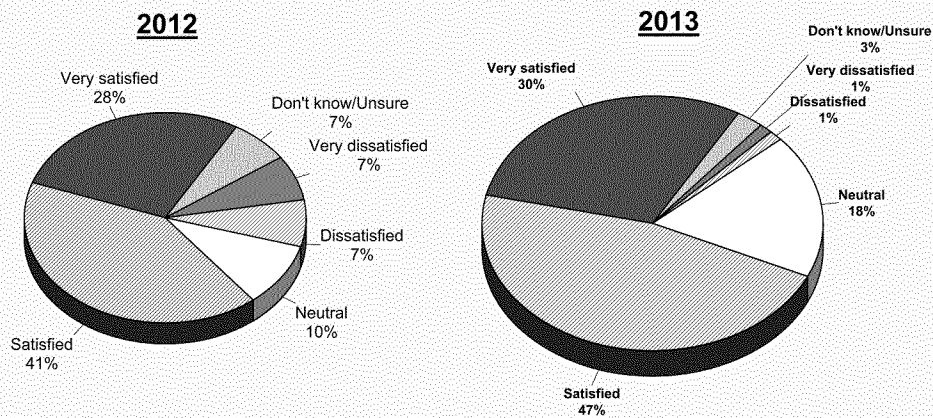


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q17. How satisfied are you with the way the Village handles events that attract large crowds to the Village?

by percentage of respondents

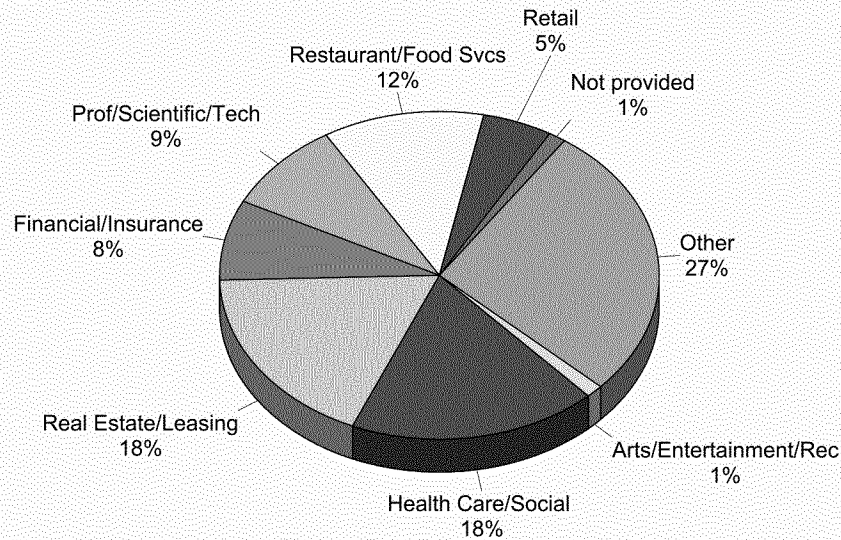


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q18. Primary Business Category for Your Business

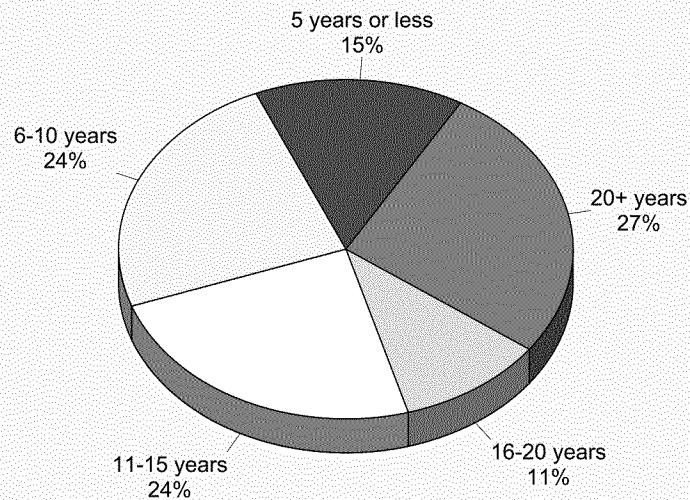
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q19. How many years have you been in operation in the Village?

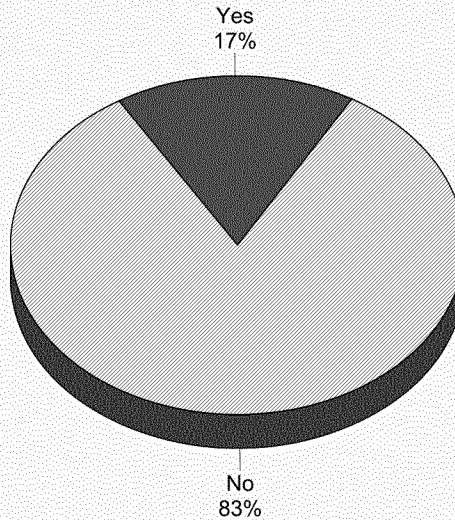
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q20a. Are you a member of the Pinehurst Business Guild?

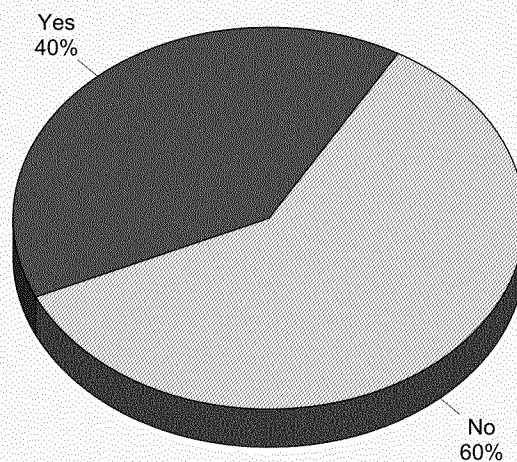
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q20b. Are you a member of the Moore County Chamber of Commerce?

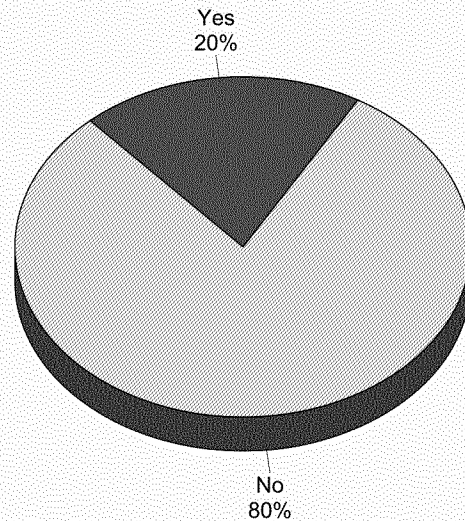
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q20c. Is your business located in the Village Center?

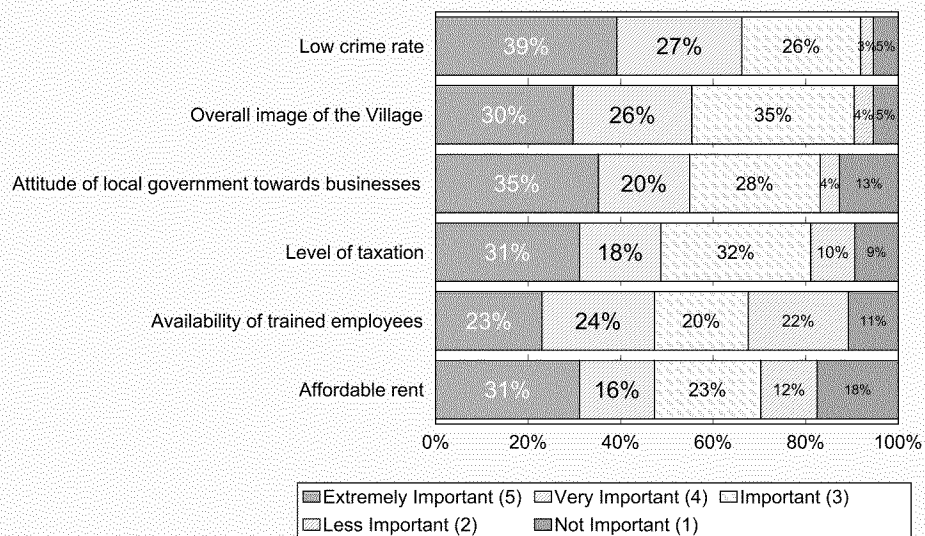
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

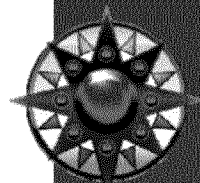
Q21. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale
(without "not provided")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Section 2:
Importance-Satisfaction
Analysis



Importance-Satisfaction Analysis

Businesses of The Village of Pinehurst, NC

Overview

Today, community officials have limited resources which need to be targeted to activities that are of the most benefit to their businesses. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to businesses; and (2) to target resources toward those services where businesses are the least satisfied.

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that cities will maximize overall business satisfaction by emphasizing improvements in those service categories where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the City to emphasize over the next two years. This sum is then multiplied by 1 minus the percentage of Businesses that indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 4 and 5 on a 5-point scale excluding "don't know" responses). "Don't know" responses are excluded from the calculation to ensure that the satisfaction ratings among service categories are comparable. $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$.

Example of the Calculation. Businesses were asked to identify the major categories of City services they thought should receive the most emphasis over the next two years, twenty-two percent (62%) ranked "Police Patrol" as one of the most important service to emphasize over the next two years.

With regard to satisfaction, “Police Patrol” was ranked second overall with 88% rating “Police Patrol” as a “4” or a “5” on a 5-point scale excluding “Don’t know” responses. The I-S rating for “Police Patrol” was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 62% was multiplied by 12% (1-0.88). This calculation yielded an I-S rating of **0.0774**, which was ranked first out of nine major service categories.

The maximum rating is 1.00 and would be achieved when 100% of the Businesses select an item as one of their top three choices to emphasize over the next two years and 0% indicate that they are positively satisfied with the delivery of the service.

The lowest rating is 0.00 and could be achieved under either one of the following two situations:

- if 100% of the Businesses were positively satisfied with the delivery of the service
- if none (0%) of the Businesses selected the service as one of the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .10 to .20 identify service areas that should receive increased emphasis. Ratings less than .10 should continue to receive the current level of emphasis.

- Definitely Increase Emphasis ($IS \geq 0.20$)
- Increase Current Emphasis ($0.10 \leq IS < 0.20$)
- Maintain Current Emphasis ($IS < 0.10$)

The results for the Village of Pinehurst are provided on the following page.

Importance-Satisfaction Rating

Village of Pinehurst Business

OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Medium Priority (IS <.10)</u>						
Police Patrol	62%	1	88%	5	0.0774	1
Planning and Zoning	23%	5	72%	9	0.0658	2
Fire Emergency Response	52%	2	90%	2	0.0541	3
Police Emergency Response	47%	3	89%	3	0.0534	4
Fire Inspections	20%	6	79%	7	0.0415	5
Streets and Grounds	25%	4	88%	4	0.0301	6
Code Enforcement	9%	8	80%	6	0.0182	7
Village Hall (General)	7%	9	78%	8	0.0143	8
Building Inspections	18%	7	93%	1	0.0122	9

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding 'don't know'. Respondents ranked their level of satisfaction with each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

Importance-Satisfaction Matrix Analysis

The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. ETC Institute developed an Importance-Satisfaction Matrix to display the perceived importance of major services that were assessed on the survey against the perceived quality of service delivery. The two axes on the matrix represent Satisfaction (vertical) and relative Importance (horizontal).

The I-S (Importance-Satisfaction) matrix should be interpreted as follows.

- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis on items in this area.
- **Exceeding Expectations (below average importance and above average satisfaction).** This area shows where the Village is performing significantly better than customers expect the Village to perform. Items in this area do not significantly affect the overall level of satisfaction that residents have with Village services. The Village should maintain (or slightly decrease) emphasis on items in this area.
- **Opportunities for Improvement (above average importance and below average satisfaction).** This area shows where the Village is not performing as well as residents expect the Village to perform. This area has a significant impact on customer satisfaction, and the Village should DEFINITELY increase emphasis on items in this area.
- **Less Important (below average importance and below average satisfaction).** This area shows where the Village is not performing well relative to the Village's performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly affect overall satisfaction with Village services because the items are less important to residents. The agency should maintain current levels of emphasis on items in this area.

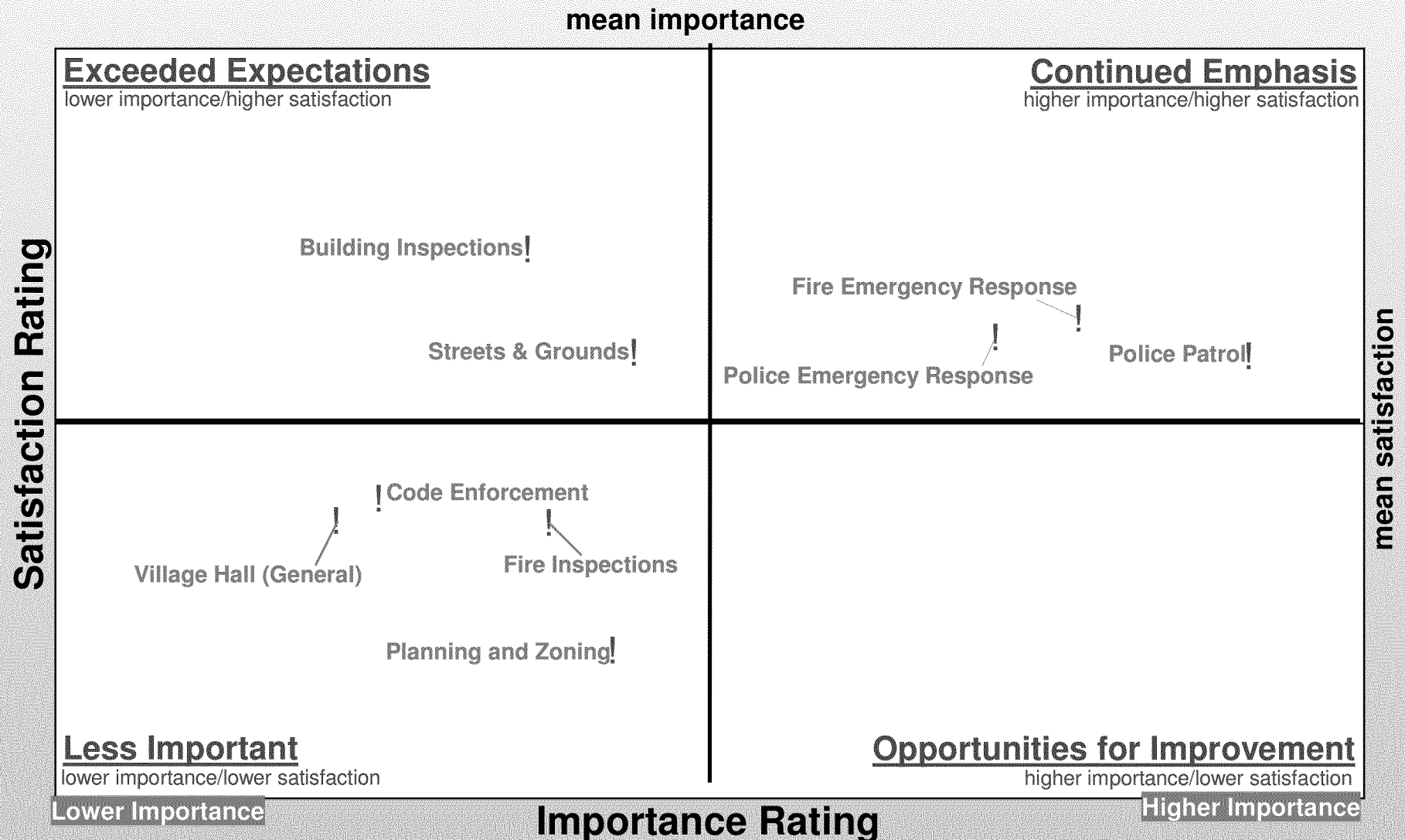
Matrices showing the results for Pinehurst are provided on the following pages.

2013 Village of Pinehurst Business Survey

Importance-Satisfaction Assessment Matrix

-Overall-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



Source: ETC Institute (2013)

Importance Satisfaction Analysis

Page 5

Section 3:
Tabular Data,
Survey Instrument

2013 Business Survey – Village of Pinehurst

Q1. SERVICE SATISFACTION. Please indicate if your business has used the service or department listed below in the past year.

(N=77)

	Yes	No
Q1a. Building Inspections	42.9%	57.1%
Q1b. Fire Inspections	66.2%	33.8%
Q1c. Planning & Zoning	44.2%	55.8%
Q1d. Code Enforcement	28.9%	71.1%
Q1e. Police Patrol	67.1%	32.9%
Q1f. Police Emergency Response	49.4%	50.6%
Q1g. Fire Emergency Response	40.3%	59.7%
Q1h. Village Hall (General)	46.8%	53.2%
Q1i. Streets & Grounds	55.8%	44.2%

2013 Business Survey – Village of Pinehurst

Q1. SERVICE SATISFACTION. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1a. Building Inspections	48.5%	36.4%	3.0%	0.0%	3.0%	9.1%
Q1b. Fire Inspections	28.0%	46.0%	10.0%	6.0%	4.0%	6.0%
Q1c. Planning & Zoning	26.5%	41.2%	5.9%	11.8%	8.8%	5.9%
Q1d. Code Enforcement	26.1%	43.5%	4.3%	13.0%	0.0%	13.0%
Q1e. Police Patrol	41.2%	41.2%	9.8%	2.0%	0.0%	5.9%
Q1f. Police Emergency Response	39.5%	42.1%	5.3%	5.3%	0.0%	7.9%
Q1g. Fire Emergency Response	41.9%	41.9%	3.2%	3.2%	3.2%	6.5%
Q1h. Village Hall (General)	38.9%	33.3%	16.7%	2.8%	0.0%	8.3%
Q1i. Streets & Grounds	39.5%	44.2%	4.7%	2.3%	4.7%	4.7%

2013 Business Survey – Village of Pinehurst

Q1. SERVICE SATISFACTION. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1a. Building					
Inspections	53.3%	40.0%	3.3%	0.0%	3.3%
Q1b. Fire Inspections	29.8%	48.9%	10.6%	6.4%	4.3%
Q1c. Planning & Zoning	28.1%	43.8%	6.3%	12.5%	9.4%
Q1d. Code					
Enforcement	30.0%	50.0%	5.0%	15.0%	0.0%
Q1e. Police Patrol	43.8%	43.8%	10.4%	2.1%	0.0%
Q1f. Police					
Emergency Response	42.9%	45.7%	5.7%	5.7%	0.0%
Q1g. Fire Emergency					
Response	44.8%	44.8%	3.4%	3.4%	3.4%
Q1h. Village Hall					
(General)	42.4%	36.4%	18.2%	3.0%	0.0%
Q1i. Streets & Grounds	41.5%	46.3%	4.9%	2.4%	4.9%

2013 Business Survey – Village of Pinehurst

Q2. Which THREE of the services or Village departments listed above are the most important to your business?

Q2. Top choice	Number	Percent
Building Inspections	8	10.4 %
Fire Inspections	1	1.3 %
Planning & Zoning	11	14.3 %
Code Enforcement	2	2.6 %
Police Patrol	30	39.0 %
Police Emergency Response	8	10.4 %
Fire Emergency Response	3	3.9 %
Village Hall (General)	2	2.6 %
Streets & Grounds	4	5.2 %
None chosen	8	10.4 %
Total	77	100.0 %

Q2. Which THREE of the services or Village departments listed above are the most important to your business?

Q2. 2nd choice	Number	Percent
Building Inspections	3	3.9 %
Fire Inspections	8	10.4 %
Planning & Zoning	3	3.9 %
Code Enforcement	2	2.6 %
Police Patrol	13	16.9 %
Police Emergency Response	22	28.6 %
Fire Emergency Response	13	16.9 %
Village Hall (General)	1	1.3 %
Streets & Grounds	3	3.9 %
None chosen	9	11.7 %
Total	77	100.0 %

2013 Business Survey – Village of Pinehurst

Q2. Which THREE of the services or Village departments listed above are the most important to your business?

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	3	3.9 %
Fire Inspections	6	7.8 %
Planning & Zoning	4	5.2 %
Code Enforcement	3	3.9 %
Police Patrol	5	6.5 %
Police Emergency Response	6	7.8 %
Fire Emergency Response	24	31.2 %
Village Hall (General)	2	2.6 %
Streets & Grounds	12	15.6 %
None chosen	12	15.6 %
Total	77	100.0 %

Q2. Which THREE of the services or Village departments listed above are the most important to your business? (top 3)

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	14	18.2 %
Fire Inspections	15	19.5 %
Planning & Zoning	18	23.4 %
Code Enforcement	7	9.1 %
Police Patrol	48	62.3 %
Police Emergency Response	36	46.8 %
Fire Emergency Response	40	51.9 %
Village Hall (General)	5	6.5 %
Streets & Grounds	19	24.7 %
None chosen	8	10.4 %
Total	210	

2013 Business Survey – Village of Pinehurst

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is:

Q3. How satisfied are you with overall quality of services provided to your business	Number	Percent
Significantly higher than your expectations	7	9.1 %
Higher than your expectations	16	20.8 %
Meets your expectations	44	57.1 %
Below your expectations	5	6.5 %
Significantly below your expectations	2	2.6 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is: (without "don't know/unsure")

Q3. How satisfied are you with overall quality of services provided to your business	Number	Percent
Significantly higher than your expectations	7	9.5 %
Higher than your expectations	16	21.6 %
Meets your expectations	44	59.5 %
Below your expectations	5	6.8 %
Significantly below your expectations	2	2.7 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

Q4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the Village in the following areas:

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4a. Supporting business growth & development	16.9%	31.2%	20.8%	16.9%	5.2%	9.1%
Q4b. Availability of employee & customer parking around your business	18.2%	24.7%	31.2%	7.8%	6.5%	11.7%
Q4c. Condition of sidewalks	16.9%	50.6%	14.3%	6.5%	2.6%	9.1%
Q4d. Creating & promoting special events	20.8%	44.2%	14.3%	9.1%	1.3%	10.4%
Q4e. Historic preservation efforts	23.4%	35.1%	23.4%	7.8%	3.9%	6.5%
Q4f. Cleanliness of streets	40.3%	46.8%	6.5%	2.6%	0.0%	3.9%
Q4g. Landscape maintenance in rights of way & public areas	40.3%	49.4%	2.6%	5.2%	0.0%	2.6%

2013 Business Survey – Village of Pinehurst

Q4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the Village in the following areas: (without "don't know")

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4a. Supporting business growth & development	18.6%	34.3%	22.9%	18.6%	5.7%
Q4b. Availability of employee & customer parking around your business	20.6%	27.9%	35.3%	8.8%	7.4%
Q4c. Condition of sidewalks	18.6%	55.7%	15.7%	7.1%	2.9%
Q4d. Creating & promoting special events	23.2%	49.3%	15.9%	10.1%	1.4%
Q4e. Historic preservation efforts	25.0%	37.5%	25.0%	8.3%	4.2%
Q4f. Cleanliness of streets	41.9%	48.6%	6.8%	2.7%	0.0%
Q4g. Landscape maintenance in rights of way & public areas	41.3%	50.7%	2.7%	5.3%	0.0%

2013 Business Survey – Village of Pinehurst

Q5. PERCEPTIONS OF THE VILLAGE. Several items that may influence your business's perceptions of the Village of Pinehurst are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Don't know
Q5a. Overall image of Village	35.1%	49.4%	7.8%	6.5%	1.3%
Q5b. Overall quality of life	36.4%	53.2%	7.8%	1.3%	1.3%
Q5c. Overall feeling of safety during daytime	50.6%	46.8%	0.0%	1.3%	1.3%
Q5d. Overall feeling of safety during evening/night	39.0%	48.1%	10.4%	1.3%	1.3%

Q5. PERCEPTIONS OF THE VILLAGE. Several items that may influence your business's perceptions of the Village of Pinehurst are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied
Q5a. Overall image of Village	35.5%	50.0%	7.9%	6.6%
Q5b. Overall quality of life	36.8%	53.9%	7.9%	1.3%
Q5c. Overall feeling of safety during daytime	51.3%	47.4%	0.0%	1.3%
Q5d. Overall feeling of safety during evening/night	39.5%	48.7%	10.5%	1.3%

2013 Business Survey – Village of Pinehurst

Q6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers?

Q6. How likely would you be to recommend
Village as a business location to friends, family, &
co-workers

	Number	Percent
Very likely	25	32.5 %
Likely	26	33.8 %
Somewhat likely	14	18.2 %
Not likely	8	10.4 %
Not likely at all	1	1.3 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

Q6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers? (without "don't know/unsure")

Q6. How likely would you be to recommend
Village as a business location to friends, family, &
co-workers

	Number	Percent
Very likely	25	33.8 %
Likely	26	35.1 %
Somewhat likely	14	18.9 %
Not likely	8	10.8 %
Not likely at all	1	1.4 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

Q7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

Q7. Overall business atmosphere in Pinehurst today compared to two years ago	Number	Percent
Better	30	39.0 %
No change, but good	23	29.9 %
No change, but poor	9	11.7 %
Worse	7	9.1 %
Don't know/Unsure	8	10.4 %
Total	77	100.0 %

Q7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago? (without "don't know/unsure")

Q7. Overall business atmosphere in Pinehurst today compared to two years ago	Number	Percent
Better	30	43.5 %
No change, but good	23	33.3 %
No change, but poor	9	13.0 %
Worse	7	10.1 %
Total	69	100.0 %

2013 Business Survey – Village of Pinehurst

Q8. CUSTOMER SERVICE. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is:

Q8. How would you rate Pinehurst customer service	Number	Percent
Very good	25	32.5 %
Good	39	50.6 %
Poor	2	2.6 %
Very poor	2	2.6 %
Don't know/Unsure	9	11.7 %
Total	77	100.0 %

Q8. CUSTOMER SERVICE. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is: (without "don't know/unsure")

Q8. How would you rate Pinehurst customer service	Number	Percent
Very good	25	36.8 %
Good	39	57.4 %
Poor	2	2.9 %
Very poor	2	2.9 %
Total	68	100.0 %

2013 Business Survey – Village of Pinehurst

Q9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."

(N=77)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Q9a. Village staff was responsive to my needs	26.0%	33.8%	7.8%	5.2%	3.9%	23.4%
Q9b. Village staff was competent & professional	24.7%	40.3%	6.5%	5.2%	2.6%	20.8%
Q9c. Village staff was courteous	31.2%	37.7%	3.9%	3.9%	2.6%	20.8%

Q9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree." (without "don't know")

(N=77)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q9a. Village staff was responsive to my needs	33.9%	44.1%	10.2%	6.8%	5.1%
Q9b. Village staff was competent & professional	31.1%	50.8%	8.2%	6.6%	3.3%
Q9c. Village staff was courteous	39.3%	47.5%	4.9%	4.9%	3.3%

2013 Business Survey – Village of Pinehurst

Q10. COMMUNICATION. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

Q10. How satisfied are you with Village of Pinehurst communicating with business owners

	Number	Percent
Very satisfied	16	20.8 %
Satisfied	32	41.6 %
Neutral	16	20.8 %
Dissatisfied	5	6.5 %
Very dissatisfied	1	1.3 %
Don't know	7	9.1 %
Total	77	100.0 %

Q10. COMMUNICATION. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are... (without "don't know")

Q10. How satisfied are you with Village of Pinehurst communicating with business owners

	Number	Percent
Very satisfied	16	22.9 %
Satisfied	32	45.7 %
Neutral	16	22.9 %
Dissatisfied	5	7.1 %
Very dissatisfied	1	1.4 %
Total	70	100.0 %

2013 Business Survey – Village of Pinehurst

Q11. Have you visited the Village's website (www.vopnc.org) during the last 12 months?

Q11. Have you visited Village's website (www.vopnc.org)	Number	Percent
Yes	32	41.6 %
No	42	54.5 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

Q11. Have you visited the Village's website (www.vopnc.org) during the last 12 months? (without "don't know/unsure")

Q11. Have you visited Village's website (www.vopnc.org)	Number	Percent
Yes	32	43.2 %
No	42	56.8 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

Q12. Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor", please rate the Village website on the following characteristics:

(N=32)

	Very good	Good	Average	Poor	Don't know
Q12a. Easy to navigate	28.1%	31.3%	31.3%	6.3%	3.1%
Q12b. Informative content	34.4%	31.3%	31.3%	0.0%	3.1%
Q12c. Useful	31.3%	31.3%	34.4%	0.0%	3.1%

Q12. Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor", please rate the Village website on the following characteristics: (without "don't know")

(N=32)

	Very good	Good	Average	Poor
Q12a. Easy to navigate	29.0%	32.3%	32.3%	6.5%
Q12b. Informative content	35.5%	32.3%	32.3%	0.0%
Q12c. Useful	32.3%	32.3%	35.5%	0.0%

2013 Business Survey – Village of Pinehurst

Q13. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...

Q13. How satisfied were you with Village of Pinehurst Website	Number	Percent
Very satisfied	9	28.1 %
Satisfied	15	46.9 %
Neutral	6	18.8 %
Dissatisfied	1	3.1 %
Don't know	1	3.1 %
Total	32	100.0 %

Q13. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were... (without "don't know")

Q13. How satisfied were you with Village of Pinehurst Website	Number	Percent
Very satisfied	9	29.0 %
Satisfied	15	48.4 %
Neutral	6	19.4 %
Dissatisfied	1	3.2 %
Total	31	100.0 %

2013 Business Survey – Village of Pinehurst

Q14. Please indicate the best ways for the Village to communicate with you to get important information to your business.

Q14. Best ways for Village to communicate with you to get important information to your business	Number	Percent
Direct mail	24	31.2 %
Village website	15	19.5 %
Email	57	74.0 %
Merchant meetings	9	11.7 %
Social media	6	7.8 %
Personal calls and/or visits	16	20.8 %
Newsletters	23	29.9 %
Brochures	9	11.7 %
Other	2	2.6 %
None chosen	3	3.9 %
Total	164	

Q14. Please indicate the best ways for the Village to communicate with you to get important information to your business. (without "none chosen")

Q14. Best ways for Village to communicate with you to get important information to your business	Number	Percent
Email	57	77.0 %
Direct mail	24	32.4 %
Newsletters	23	31.1 %
Personal calls and/or visits	16	21.6 %
Village website	15	20.3 %
Merchant meetings	9	12.2 %
Brochures	9	12.2 %
Social media	6	8.1 %
Other	2	2.7 %
Total	161	

Q14. Other

Q14 Other

EMAIL NEWSLETTERS

VISITS

2013 Business Survey – Village of Pinehurst

Q15. COMMUNITY DEVELOPMENT. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the following Village codes and ordinances:

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q15a. Zoning ordinances	13.0%	29.9%	27.3%	10.4%	3.9%	15.6%
Q15b. Business signage regulations	14.3%	26.0%	29.9%	16.9%	2.6%	10.4%
Q15c. Historic District Guidelines	14.3%	26.0%	32.5%	6.5%	2.6%	18.2%

Q15. COMMUNITY DEVELOPMENT. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the following Village codes and ordinances: (without "don't know")

(N=77)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q15a. Zoning ordinances	15.4%	35.4%	32.3%	12.3%	4.6%
Q15b. Business signage regulations	15.9%	29.0%	33.3%	18.8%	2.9%
Q15c. Historic District Guidelines	17.5%	31.7%	39.7%	7.9%	3.2%

2013 Business Survey – Village of Pinehurst

Q16. CULTURE/ENTERTAINMENT. Using a scale of 1 to 3, where 3 means "About the Right Amount" and 1 means "Too Many", please indicate if you feel there are an appropriate amount of the following in the Village Center:

(N=77)

	About right amount	Too few	Too many	Don't know
Q16a. Restaurants	63.6%	31.2%	1.3%	3.9%
Q16b. Evening entertainment venues	45.5%	46.8%	1.3%	6.5%
Q16c. Cultural activities (live music, art festivals, etc.)	58.4%	36.4%	1.3%	3.9%
Q16d. Family friendly activities (movies in the park, etc.)	44.2%	48.1%	1.3%	6.5%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	76.6%	19.5%	1.3%	2.6%

Q16. CULTURE/ENTERTAINMENT. Using a scale of 1 to 3, where 3 means "About the Right Amount" and 1 means "Too Many", please indicate if you feel there are an appropriate amount of the following in the Village Center: (without "don't know")

(N=77)

	About right amount	Too few	Too many
Q16a. Restaurants	66.2%	32.4%	1.4%
Q16b. Evening entertainment venues	48.6%	50.0%	1.4%
Q16c. Cultural activities (live music, art festivals, etc.)	60.8%	37.8%	1.4%
Q16d. Family friendly activities (movies in the park, etc.)	47.2%	51.4%	1.4%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	78.7%	20.0%	1.3%

2013 Business Survey – Village of Pinehurst

Q17. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues, etc.)?

Q17. How satisfied are you with Village handling events that attract large crowds	Number	Percent
Very satisfied	23	29.9 %
Satisfied	36	46.8 %
Neutral	14	18.2 %
Dissatisfied	1	1.3 %
Very dissatisfied	1	1.3 %
Don't know/Unsure	2	2.6 %
Total	77	100.0 %

Q17. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues, etc.)? (without "don't know/unsure")

Q17. How satisfied are you with Village handling events that attract large crowds	Number	Percent
Very satisfied	23	30.7 %
Satisfied	36	48.0 %
Neutral	14	18.7 %
Dissatisfied	1	1.3 %
Very dissatisfied	1	1.3 %
Total	75	100.0 %

2013 Business Survey – Village of Pinehurst

Q18. DEMOGRAPHIC/OTHER INFORMATION. Please indicate the primary business category for your business (1st choice):

<u>Q18. Primary business category for your business</u>	<u>Number</u>	<u>Percent</u>
Retail	4	5.2 %
Restaurants & Food Services	9	11.7 %
Professional, Scientific, & Technical Services	7	9.1 %
Financial & Insurance	6	7.8 %
Real Estate & Rental Leasing	14	18.2 %
Health Care & Social Assistance	14	18.2 %
Arts, Entertainment, & Recreation	1	1.3 %
Other	21	27.3 %
Not provided	1	1.3 %
Total	77	100.0 %

Q18. Other

Q18 Other

BUILDER CONTRATORS
CHURCH
CHURCH
CONSULTANT MARKET
CONSULTING TRAVEL
EXTERMINATING SERVICE
GOLF DEVELOPMENT
LANDSCAPING
OFFICE SERVICES
PET GROOMING RETAIL
TRAVEL SALES MARKETING

2013 Business Survey – Village of Pinehurst

Q19. How many years have you been in operation in the Village?

Q19. How many years have you been in operation in Village	Number	Percent
0-5 years	11	14.3 %
6-10 years	18	23.4 %
11-15 years	18	23.4 %
16-20 years	8	10.4 %
20+ years	20	26.0 %
<u>Not provided</u>	2	2.6 %
Total	77	100.0 %

Q19. How many years have you been in operation in the Village? (without "not provided")

Q19. How many years have you been in operation in Village	Number	Percent
0-5 years	11	14.7 %
6-10 years	18	24.0 %
11-15 years	18	24.0 %
16-20 years	8	10.7 %
20+ years	20	26.7 %
Total	75	100.0 %

2013 Business Survey – Village of Pinehurst

Q20. Please answer the following questions:

(N=77)

	Yes	No	Not provided
Q20a. Are you a member of Pinehurst Business Guild	16.9%	81.8%	1.3%
Q20b. Are you a member of Moore County Chamber of Commerce	40.3%	59.7%	0.0%
Q20c. Is your business located in Village Center	19.5%	77.9%	2.6%

Q20. Please answer the following questions: (without "not provided")

(N=77)

	Yes	No
Q20a. Are you a member of Pinehurst Business Guild	17.1%	82.9%
Q20b. Are you a member of Moore County Chamber of Commerce	40.3%	59.7%
Q20c. Is your business located in Village Center	20.0%	80.0%

2013 Business Survey – Village of Pinehurst

Q21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important", please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst:

(N=77)

	Extremely important	Very important	Important	Less important	Not important	Not provided
Q21a. Overall image of Village	28.6%	24.7%	33.8%	3.9%	5.2%	3.9%
Q21b. Low crime rate	37.7%	26.0%	24.7%	2.6%	5.2%	3.9%
Q21c. Availability of trained employees	22.1%	23.4%	19.5%	20.8%	10.4%	3.9%
Q21d. Level of taxation	29.9%	16.9%	31.2%	9.1%	9.1%	3.9%
Q21e. Affordable rent	29.9%	15.6%	22.1%	11.7%	16.9%	3.9%
Q21f. Attitude of local government towards businesses	32.5%	18.2%	26.0%	3.9%	11.7%	7.8%

Q21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important", please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst: (without "not provided")

(N=77)

	Extremely important	Very important	Important	Less important	Not important
Q21a. Overall image of Village	29.7%	25.7%	35.1%	4.1%	5.4%
Q21b. Low crime rate	39.2%	27.0%	25.7%	2.7%	5.4%
Q21c. Availability of trained employees	23.0%	24.3%	20.3%	21.6%	10.8%
Q21d. Level of taxation	31.1%	17.6%	32.4%	9.5%	9.5%
Q21e. Affordable rent	31.1%	16.2%	23.0%	12.2%	17.6%
Q21f. Attitude of local government towards businesses	35.2%	19.7%	28.2%	4.2%	12.7%



HISTORY, CHARM, AND SOUTHERN HOSPITALITY_____

October 2013

Dear Village of Pinehurst Business Owner,

The Village of Pinehurst is requesting your help to gather business owners' opinions and feedback regarding Village services. The attached survey will be used to help determine your level of satisfaction with our services and help us improve future services.

We greatly appreciate your participation. Please take a few minutes to complete and return the survey in the postage paid envelope. We estimate it should take approximately 5-10 minutes to answer all the questions, and your individual responses to the questions will remain confidential.

Please return your completed survey in the next few days using the postage paid envelope provided.

The survey data will be compiled and analyzed by ETC Institute, one of the nation's leading governmental research firms. Upon receipt of their final report, Village staff will present the survey results to the Pinehurst Village Council at their Strategic Planning Retreat in December.

If you have any questions about the survey, please contact me directly at 295-1900, ext. 1103. Thank you for helping guide the direction of our community by completing and returning the enclosed survey.

Sincerely,

A handwritten signature in cursive script, reading "Natalie E. Dean".

Natalie E. Dean
Assistant Village Manager

ADMINISTRATION

395 Magnolia Road • Pinehurst, NC 28374 • Telephone (910) 295-1900 • Fax (910) 295-4434 • www.vopnc.org



2013 Village of Pinehurst Business Satisfaction Survey

Please take a few minutes to complete this survey. Your input is an important part of the Village's ongoing effort to identify and respond to business concerns. If you have questions, please contact **Natalie Dean, Assistant Village Manager at (910) 295-1900** or at ndean@vopnc.org.

1. **SERVICE SATISFACTION.** Please indicate if your business has used the service or department listed below in the past year. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

	Has your business used this service or department in the past year?		Service/Program	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	YES	NO	Building Inspections	5	4	3	2	1	9
B.	YES	NO	Fire Inspections	5	4	3	2	1	9
C.	YES	NO	Planning and Zoning	5	4	3	2	1	9
D.	YES	NO	Code Enforcement	5	4	3	2	1	9
E.	YES	NO	Police Patrol	5	4	3	2	1	9
F.	YES	NO	Police Emergency Response	5	4	3	2	1	9
G.	YES	NO	Fire Emergency Response	5	4	3	2	1	9
H.	YES	NO	Village Hall (General)	5	4	3	2	1	9
I.	YES	NO	Streets & Grounds	5	4	3	2	1	9

2. Which THREE of the services or Village departments listed above are the most important to your business?

1st: _____ 2nd: _____ 3rd: _____

3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is:

_____ (01) Significantly higher than your expectations
 _____ (02) Higher than your expectations
 _____ (03) Meets your expectations

_____ (04) Below your expectations
 _____ (05) Significantly below your expectations
 _____ (09) Don't know/Unsure

4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the Village in the following areas:

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	Supporting business growth and development	5	4	3	2	1	9
B.	Availability of employee and customer parking around your business	5	4	3	2	1	9
C.	Condition of sidewalks	5	4	3	2	1	9
D.	Creating and promoting special events	5	4	3	2	1	9
E.	Historic preservation efforts	5	4	3	2	1	9
F.	Cleanliness of streets	5	4	3	2	1	9
G.	Landscape maintenance in rights of way and public areas	5	4	3	2	1	9

5. **PERCEPTIONS OF THE VILLAGE.** Several items that may influence your business's perceptions of the Village of Pinehurst are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	Overall image of the Village	5	4	3	2	1	9
B.	Overall quality of life	5	4	3	2	1	9
C.	Overall feeling of safety during the daytime	5	4	3	2	1	9
D.	Overall feeling of safety during the evening/night	5	4	3	2	1	9

6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers?

_____ (01) Very likely

_____ (02) Likely

_____ (03) Somewhat likely

_____ (04) Not likely

_____ (05) Not likely at all

_____ (09) Don't know/Unsure

7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

_____ (01) Better

_____ (02) No change, but good

_____ (03) No change, but poor

_____ (04) Worse

_____ (09) Don't know/Unsure

8. **CUSTOMER SERVICE.** Overall, how would you rate the Village of Pinehurst customer service? Would you say it is:

_____ (01) Very good

_____ (02) Good

_____ (03) Poor

_____ (04) Very poor

_____ (09) Don't know/Unsure

9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."

		Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
A.	Village staff was responsive to my needs.	5	4	3	2	1	9
B.	Village staff was competent and professional.	5	4	3	2	1	9
C.	Village staff was courteous.	5	4	3	2	1	9

10. **COMMUNICATION.** Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

_____ (01) Very satisfied

_____ (02) Satisfied

_____ (03) Neutral

_____ (04) Dissatisfied

_____ (05) Very dissatisfied

_____ (09) Don't know

11. Have you visited the Village's website (www.vopnc.org) during the last 12 months?

_____ (01) Yes (answer Q12A through C)

_____ (02) No (skip to Q14)

_____ (09) Don't know/Unsure

12. Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor", please rate the Village website on the following characteristics:

		Very Good	Good	Average	Poor	Very Poor	Don't Know
A.	Easy to navigate	5	4	3	2	1	9
B.	Informative content	5	4	3	2	1	9
C.	Useful	5	4	3	2	1	9

13. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...

☐ (01) Very satisfied
☐ (02) Satisfied
☐ (03) Neutral

☐ (04) Dissatisfied
☐ (05) Very dissatisfied
☐ (09) Don't know

14. Please indicate the best ways for the Village to communicate with you to get important information to your business. (check all that apply)

☐ (01) Direct mail
☐ (02) Village website
☐ (03) Email
☐ (04) Merchant meetings
☐ (05) Social media

☐ (06) Personal calls and/or visits
☐ (07) Newsletters
☐ (08) Brochures
☐ (09) Other _____

15. **COMMUNITY DEVELOPMENT.** Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied", please indicate how satisfied your business is with the following Village codes and ordinances:

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	Zoning ordinances	5	4	3	2	1	9
B.	Business signage regulations	5	4	3	2	1	9
C.	Historic District Guidelines	5	4	3	2	1	9

16. **CULTURE/ENTERTAINMENT.** Using a scale of 1 to 3, where 3 means "About the Right Amount" and 1 means "Too Many", please indicate if you feel there are an appropriate amount of the following in the Village Center:

		About the Right Amount	Too Few	Too Many	Don't Know
A.	Restaurants	3	2	1	9
B.	Evening entertainment venues	3	2	1	9
C.	Cultural activities (live music, art festivals, etc.)	3	2	1	9
D.	Family friendly activities (movies in the park, etc.)	3	2	1	9
E.	Major special events (Holly Arts and Crafts Festival, parades, etc.)	3	2	1	9

17. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues, etc.)?

____ (01) Very satisfied
 ____ (02) Satisfied
 ____ (03) Neutral

____ (04) Dissatisfied
 ____ (05) Very dissatisfied
 ____ (09) Don't know/Unsure

18. **DEMOGRAPHIC/OTHER INFORMATION.** Please indicate the primary business category for your business:

____ (01) Retail
 ____ (02) Restaurants and Food Services
 ____ (03) Inn
 ____ (04) Professional, Scientific, and Technical Services

____ (05) Financial and Insurance
 ____ (06) Real Estate and Rental Leasing
 ____ (07) Health Care and Social Assistance
 ____ (08) Arts, Entertainment, and Recreation
 ____ (09) Other

19. How many years have you been in operation in the Village?

____ (01) 0-5 years
 ____ (02) 6-10 years
 ____ (03) 11-15 years

____ (04) 16-20 years
 ____ (05) 20+ years

20. Please answer the following questions:

		Yes	No
A.	Are you a member of the Pinehurst Business Guild?	1	2
B.	Are you a member of the Moore County Chamber of Commerce?	1	2
C.	Is your business located in the Village Center?	1	2

21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important", please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst:

		Extremely Important	Very Important	Important	Less Important	Not Important
A.	Overall image of the Village	5	4	3	2	1
B.	Low crime rate	5	4	3	2	1
C.	Availability of trained employees	5	4	3	2	1
D.	Level of taxation	5	4	3	2	1
E.	Affordable rent	5	4	3	2	1
F.	Attitude of local government towards businesses	5	4	3	2	1

This concludes the survey. Thank you for your time!

Please return your completed survey in the enclosed postage paid envelope addressed to:
 ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061



Moore Opportunity

A New Integrated Approach for
Economic Development

Moore Opportunity Study

- Selected Carol Kline, PhD w/ ECU to conduct a study for Moore County (via a RFP process)
 - Place-Based Marketing Research
 - Spring – Summer 2013

Research Purpose

- Develop a strong understanding of the characteristics, motivations and benefits identified by the four (4) target markets as to: 1) why they chose to move to Moore County; 2) why they choose to remain in Moore County; 3) as an outside resident, what is their perception / image of Moore County, etc.
- Traditional Retirees
- “Returnees”: people who grew up here, left for college/work, and ultimately returned.
- “Relocatees”: Military (active personnel and recently- retired military who are still in the work force) and others who have relocated here (for work, to be near family, etc.).
- “Outsiders”: young professionals and families (not originally from area) who are residents of the Triangle and Fayetteville areas.

Research Methods

- Online survey
 - May 7 – July 10; 600 responses; 19% non-resident
- Focus groups
 - May 27 – July 28; 25 informants
- Speed survey
 - May 31-June 1; 132 responses
- Secondary data
 - US Census, USDA Economic Research Service, US Bureau of Labor Statistics
- Existing reports/plans
- Project Partners:
 - Partners in Progress
 - Moore Forward - Advocate
 - Convention & Visitors Bureau*
 - Realtors Association*
 - Home Builders Association*

* Provided Funding

Results

- Study confirmed our assumptions.
- Better defined four target markets.
- Provided detailed market strategies for:
 - Website
 - Social Media
 - Traditional Marketing
 - Differentiation



Work in the
TRIANGLE
Smarter from any angle

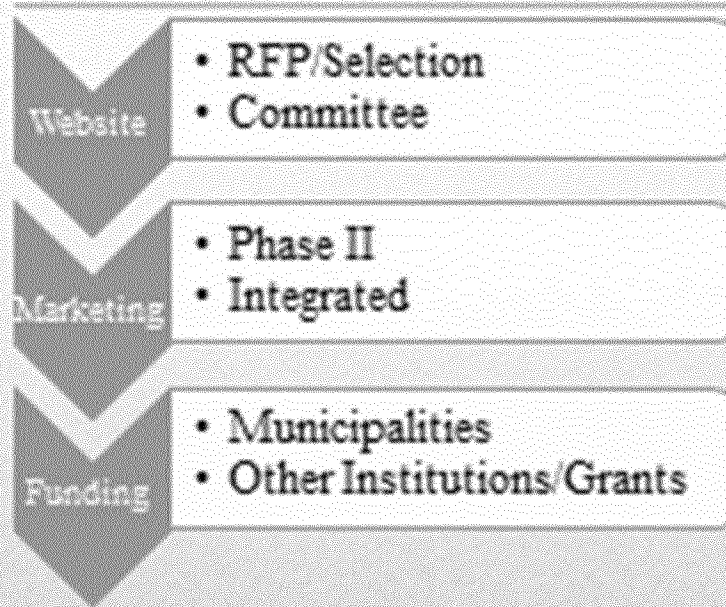


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[Salaries and](#)
[Wages](#)
[Networking/Industry](#)
[Associations](#)

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[Communities](#)
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workinthetriangle.com

Process



Budget

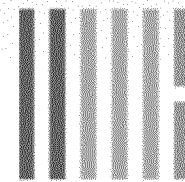
- Website Development
 - \$ 30K - \$ 50K
- Hosting/Main./SEO/Analytics
 - \$ 25K - \$ 40K
- Mktg: Social, PR, Traditional
 - \$ 30 - \$ 60K
- Total: \$ 85K - \$ 160K
- Target: \$ 120K
- Obtained Duke Energy Matching Grant
 - $\$ 50K + \$ 50K = \$ 100K$

Next Steps

Liaison

DESIGN GROUP

- Founded in 2000
- Focused on graphic design
- Based in Raleigh
- Deep understanding of economic development, including talent attraction



NEW
MEDIA
CAMPAIGNS

- Founded in 2006
- Focused on Internet technologies
- Based in Carrboro
- Launched more than 400 websites
- Deep knowledge of technology, social media and Search Engine Optimization

Joint clients include:

Research Triangle Regional Partnership
Wake County Economic Development (Work in the Triangle)
East Carolina University, NC State University
More than two dozen cities, counties and EDOs

Our Model

We are a combination of successful small businesses that focus on specific areas of marketing. By joining forces with each other, we provide our clients access to expertise only when they need it.

For example; when you need a videographer, you have access to an expert. When you don't need a videographer, you won't be helping my company pay for one.

Our Team

We know economic development. Nine years of full-time professional experience. CEcD. More than a dozen economic development clients, including the Work in the Triangle talent initiative.

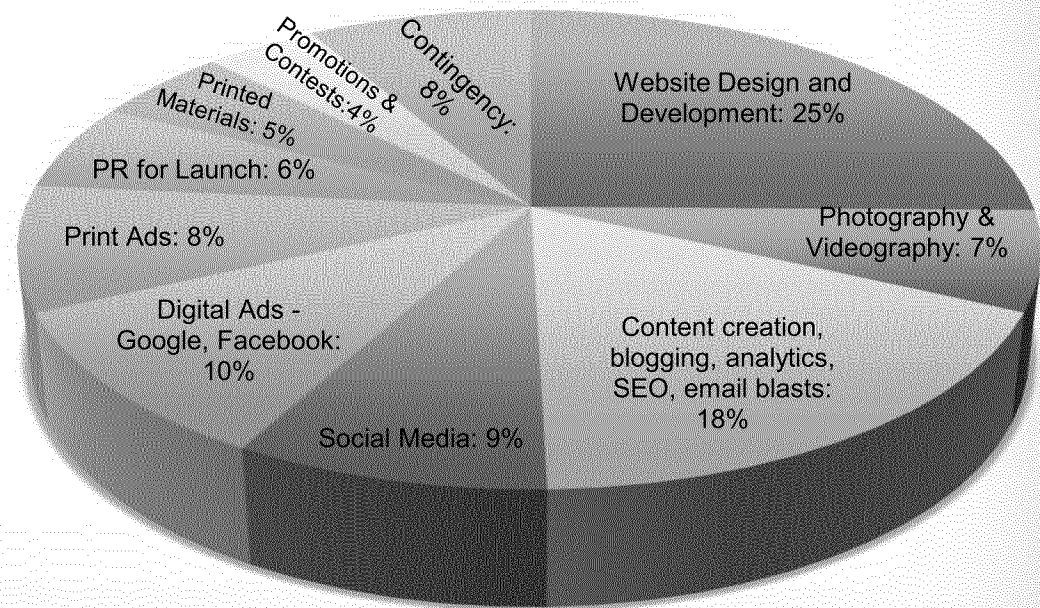
We are totally committed to customer service and satisfaction. Our reputations are on the line with every project.

We bring together a talented team of experts. You pay for that expertise when you need it. And you don't when you don't.

We propose placing the Moore Opportunity website on a scalable, customizable, easy-to-use and extremely powerful Content Management System. If you can use MS Word, you can control virtually every aspect of your site.

Project Scope and Budget

Web design & development:	\$30K
Photography & videography:	\$8K
Content creation, blogging, Analytics, SEO, email blasts:	\$21K
Social Media:	\$10K
Digital Ads (Google, Facebook):	\$12K
Print Ads:	\$10K
PR for site launch:	\$7K
Printed materials/collateral:	\$6K
Promotions/contests:	\$5K
Contingency:	\$10K



Project Highlights

The foundation of this initiative will be a custom designed website that will allow Moore County to tell its story through high impact images and testimonials.

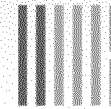
The Moore Opportunity initiative will focus on all of Moore County.

The budget covers an 18 month period, during which time our team will be dedicated to content creation, Search Engine Optimization and social media.

This will be much more than just a website. It will be a well-rounded marketing campaign to raise awareness of your efforts and drive traffic to the website.

Our Process

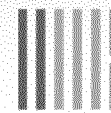
Initial planning meeting	ASAP
Research and design	3 weeks
Review and revisions	1 week
Development	3 weeks
Content creation	Ongoing
Testing	1 week
CMS training	½ day prior to, or immediately after, launch



Key Dates

Landing page/blog launch	Early January, 2014
Full site launch	March 31
PR push	April, May, early June
Social Media	Begin 1 st Quarter 2014
Content creation, SEO	Ongoing
Online Ads	Begin 1 st Quarter 2014
Photography/Videography	May, June 2014

Liaison
DESIGN GROUP



NEW
MEDIA
CAMPAIGNS

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