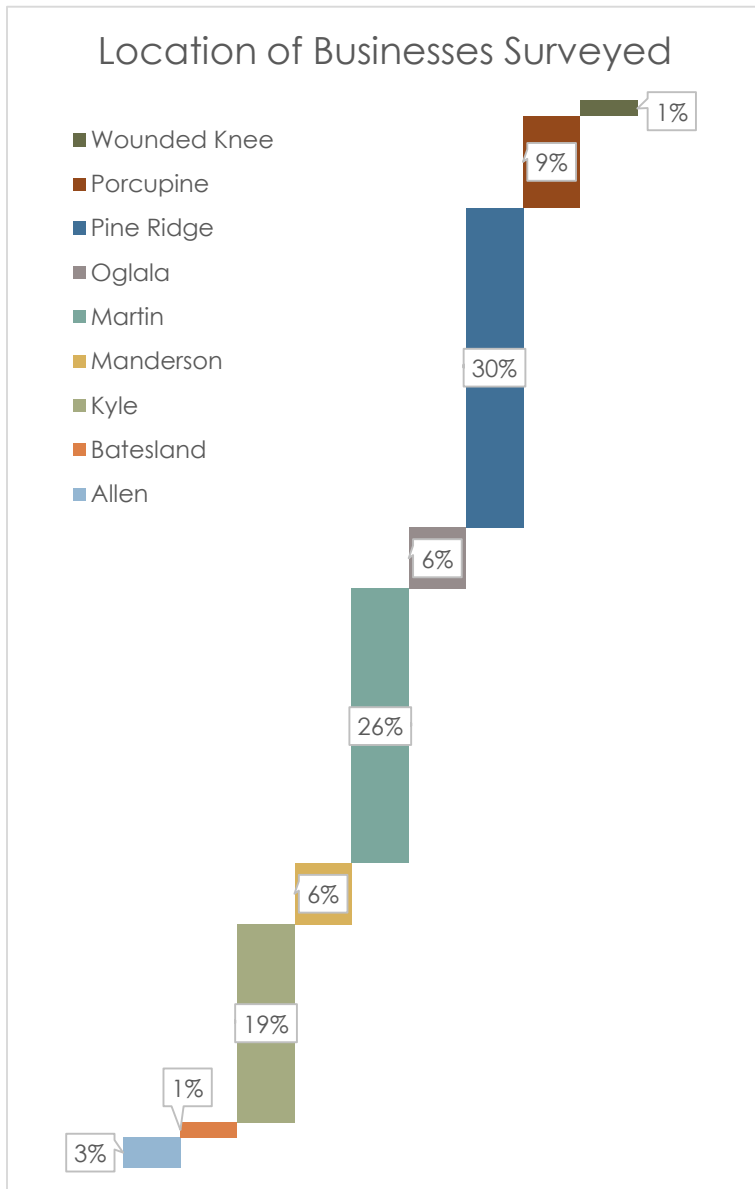




PINE RIDGE AREA CHAMBER OF COMMERCE REPORT OF WORKFORCE AND BUSINESS DEVELOPMENT PRE-ASSESSMENT SURVEY REPORT 11 AUGUST 2014



The following report is a summary of the Pine Ridge Area Chamber of Commerce Pilot Workforce and Business Development Survey administered to 70 businesses and tribal departments on the Reservation in June 2014. This survey will be conducted in an abbreviated version for the next 4 years and will be conducted again in entirety in 5 years to assess the impact of the Oglala Adventures initiative.



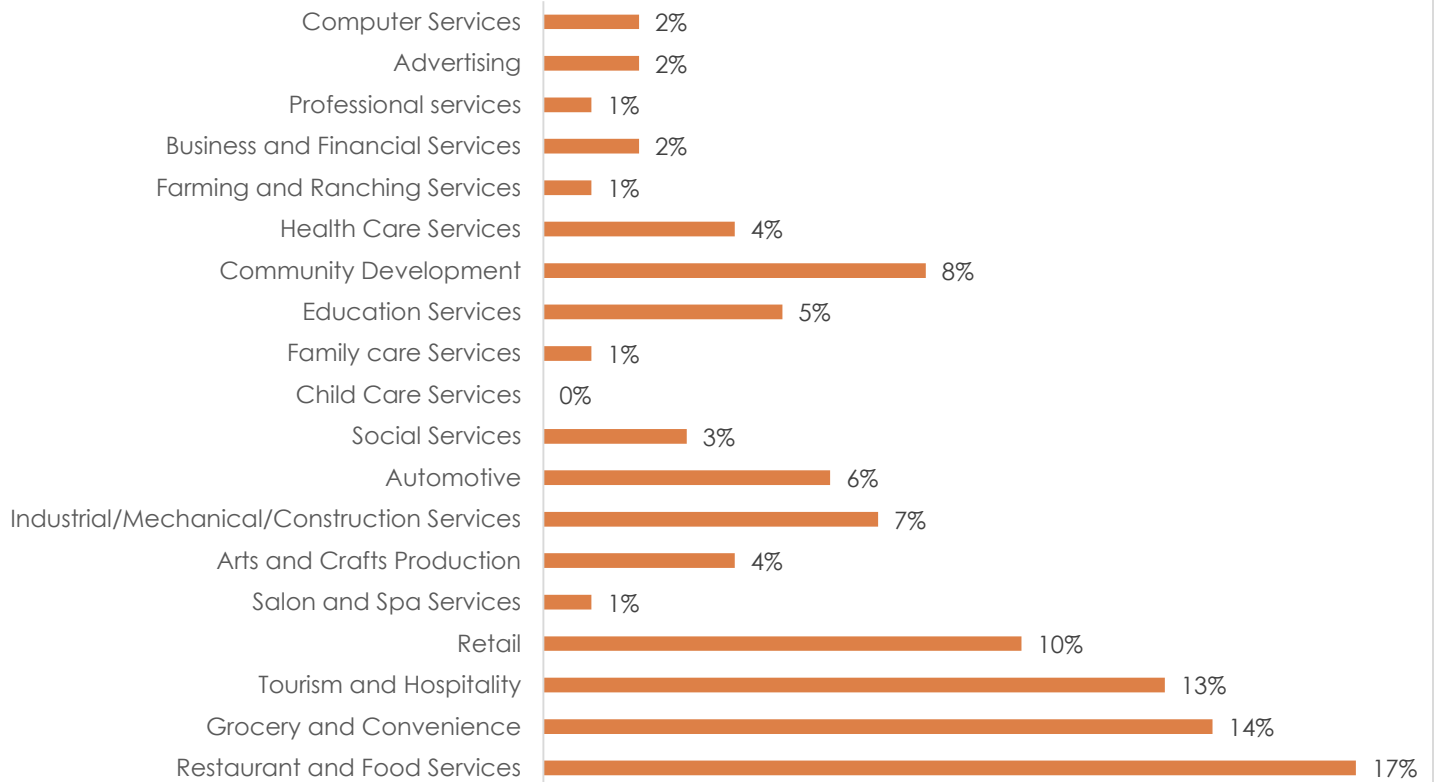
Questions 1 and 2 of the survey determined what the names of the businesses and the town which the businesses are located on the Reservation. Businesses from Allen, Batesland, Kyle, Manderson, Martin, Oglala, Pine Ridge, Porcupine and Wounded Knee, participated.

Question 3 was created to determine the participant's type of business. 73% of the businesses are For Profit while 27% are Non-Profit Organizations.

Question 4 asked what types of business services were given; as indicated in the table below, about half of the participants classified their business as having multiple services.

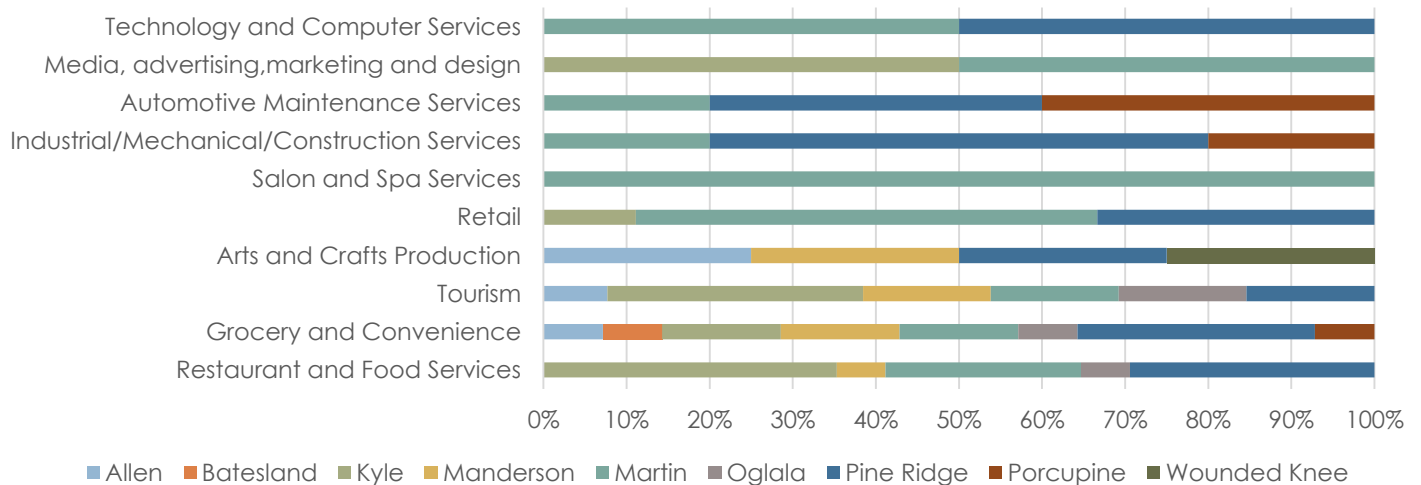


Types of businesses

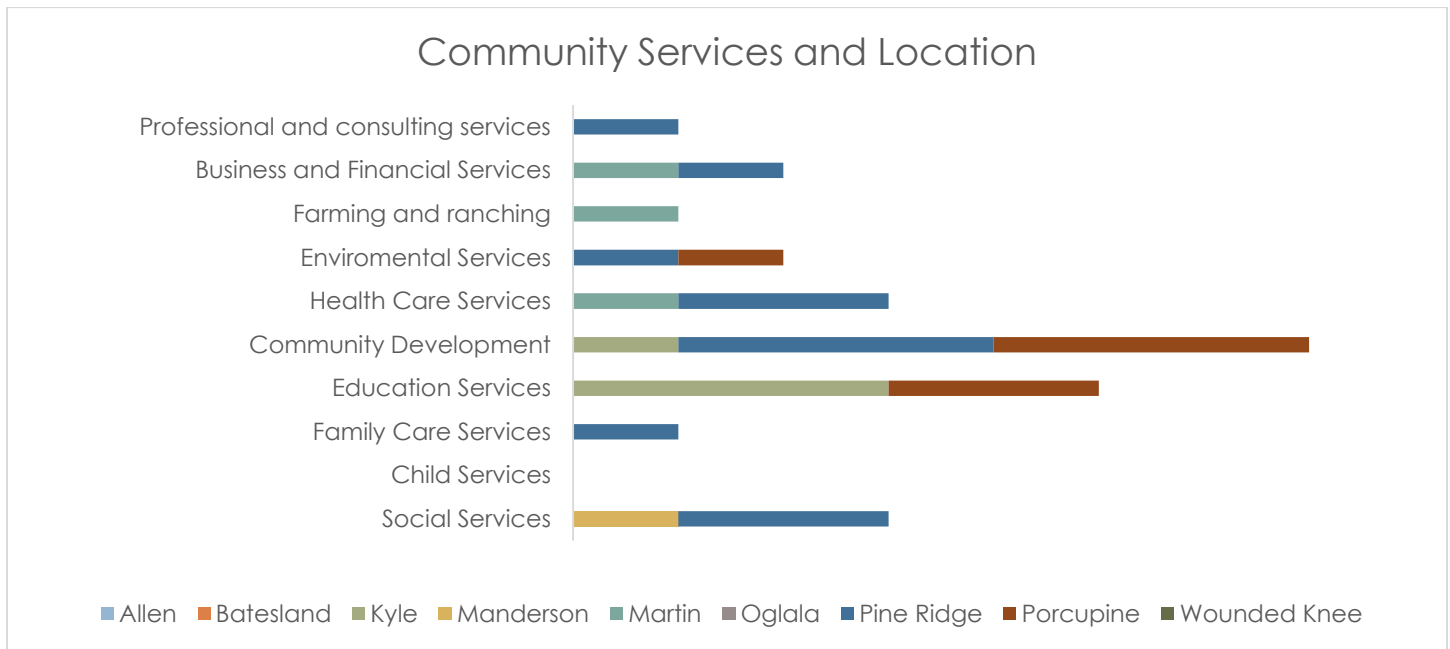


Below is a graph of business services and where they are located.

Business services and Location

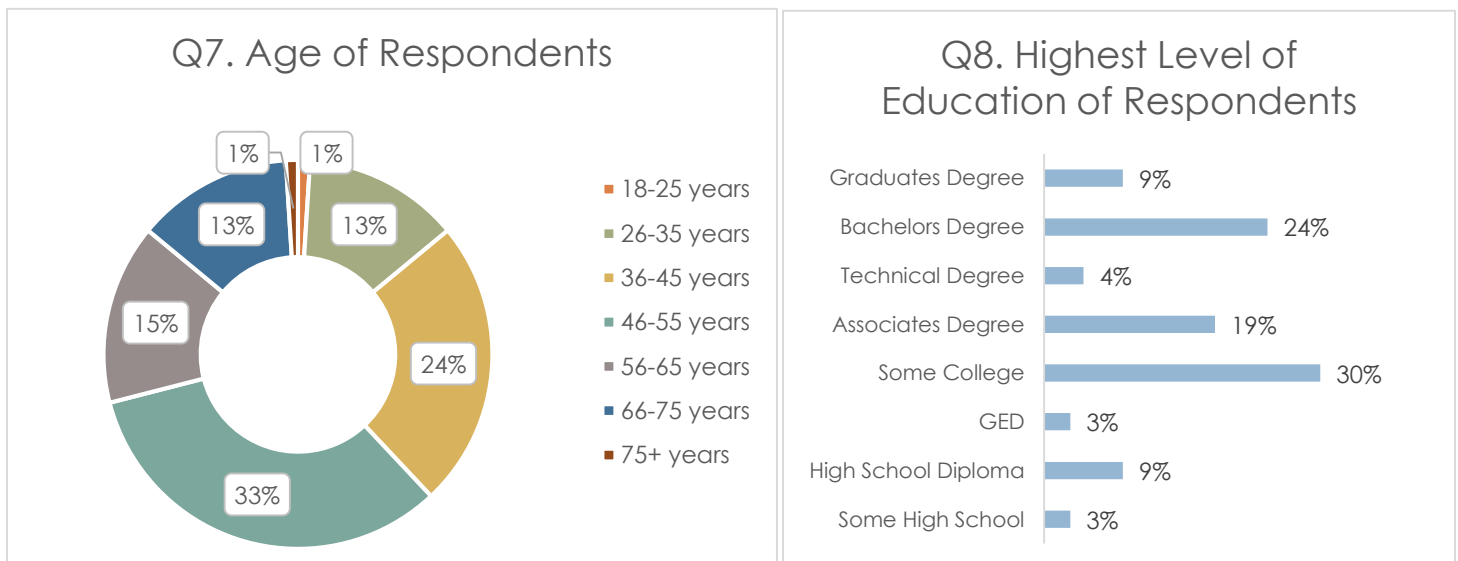


Below is a graph of the community services and where they are located.



Question 5 asked the survey participant what position they held in the business. Our target participants were the owners and managers. Of the survey participants, 44% were owners and 45% managers. While we did talk to people in other positions, 10% were assistant managers and 2% were associates.

Question 7 asked if the participant was male or female. The percentage of males was 36% while females made up 64% of the respondents.



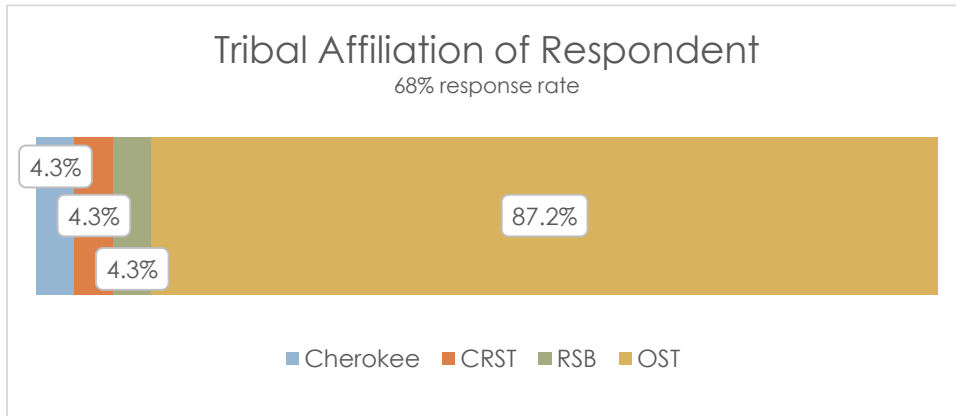
Question 8, as indicated above, asked participants about their education. Of the respondents, 86% furthered their education passed high school either through graduate, bachelors, and associates degrees, or through technical degrees.



Question 9 asked about the participant's ethnicity. Of the participants that were surveyed, 62% were American Indian or Alaskan Native, 26% were white, 1% is Native Hawaiian, while 1% is Hispanic or Latino. Roughly 10% of people said they had mixed ethnicity.

Question 10 asked the participants if they are an enrolled member of a tribe. 70% of people said yes while 30% of people said no.

Question 11 was a follow up to question 10, asking the participants what tribe they were associated with. Over 87% of respondents were Oglala.



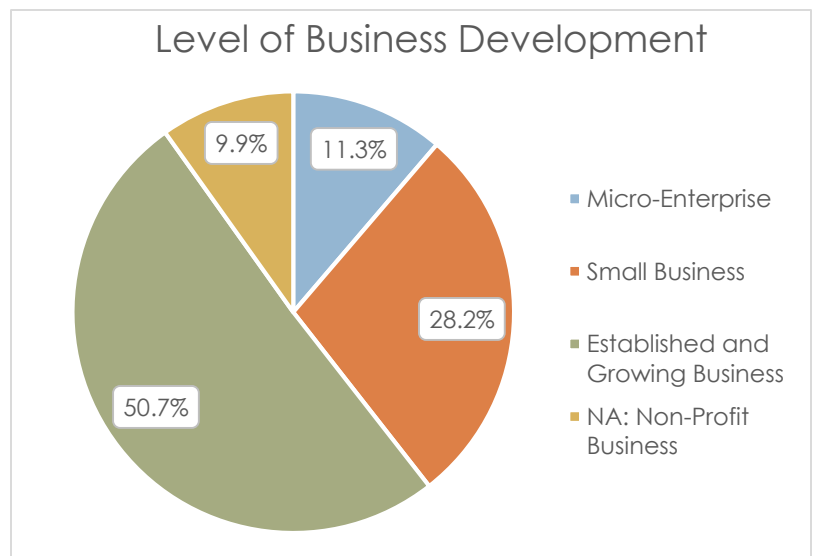
Question 12 asked if the business was Native American owned (51% or more). 61% of the participants said that their business is owned by Native Americans while 39% of people said that the business is not Native owned.

Question 13 asked if the participants are a member of the Pine Ridge Area Chamber

of Commerce (PRACC). Out of all the businesses surveyed, 37% of people said yes and 56% of people said no. Interestingly 7% of the participants were not sure if they were part of the Chamber.

Question 14 asked if they would be interested in becoming a member of the PRACC. From the people who were not currently part of the Chamber, 51% of people said that they were interested while 49% said they were not. The graph below depicts what communities have businesses that are interested in becoming members of PRACC. Some of the responses for those who said they did not want to become a member included that they were already working together but were not members while some said the problem is the distance. One person did not like the fact that it was a corporation.

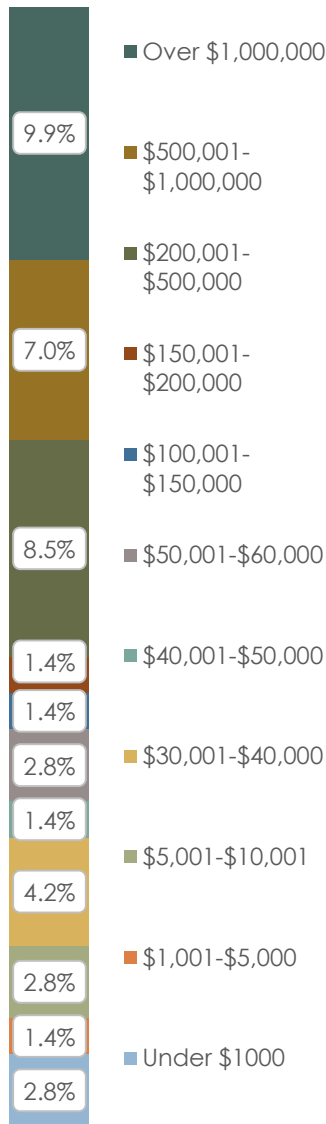
Question 15 asked each business what level of development they had attained. Roughly 10% of respondents reported that their business was a microenterprise, with another 10% reporting that it was a non-profit organization. 28% of businesses were reported as "Small Businesses" and about half of businesses were reported to be "Established and Growing Businesses."



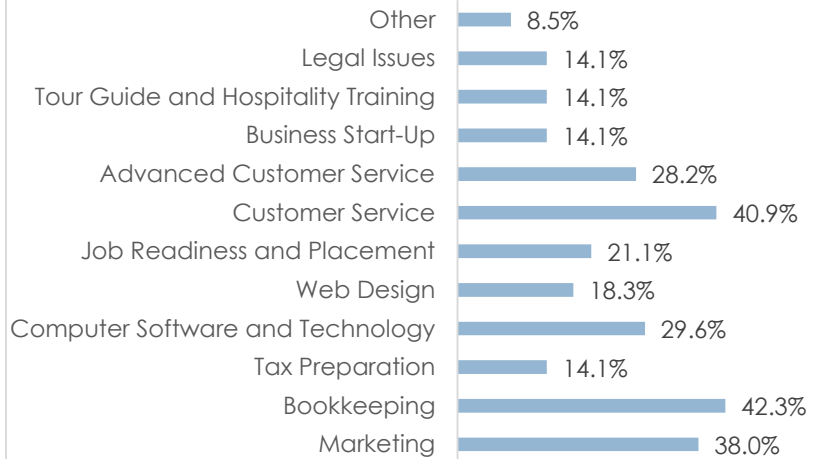
Question 16 asked which areas of training businesses would appreciate their employees receiving. The most common response was "Bookkeeping", with 42% of respondents requesting bookkeeping training. The next most common response was "Customer Service", at 41% of respondents. 30% of respondents wanted "Computer Software and Technology" training, and 28% of respondents

Total Business Sales Revenue

44% response rate



Training Interests



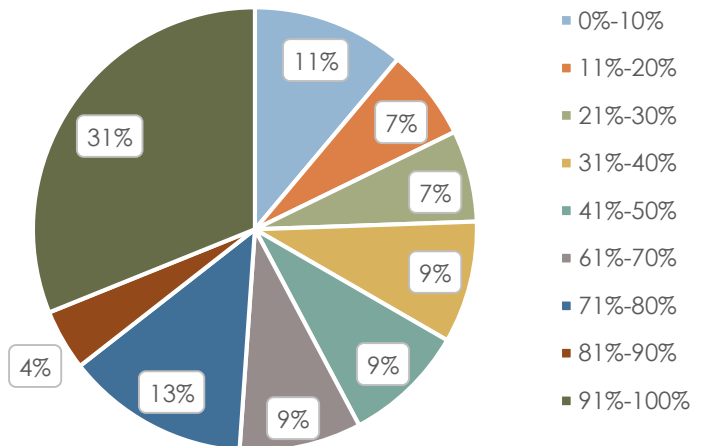
wanted "Advanced Customer Service" training. 21% of respondents wanted "Job Readiness and Placement" training, and 18% of respondents wanted "Web Design" training. 14% of respondents wanted training in "Legal Issues", "Tourism and Hospitality", "Business Start-Up", and "Tax Preparation". 8% of respondents wanted some other trainings that were not listed on the survey.

Question 17 asked each business their level of revenue in the last year. Nine respondents reported that their business had earned less than \$50,000. Another four respondents reported that their business earned between \$50,000 and \$200,000. 18 respondents reported that their businesses earned more than \$200,000 in the last year. About 18% of respondents reported that the question was not applicable to them because they were non-profit organizations. A vast number of respondents, 38% of the total, did not respond to the question, leaving a great deal of uncertainty to the aggregate results.

Question 18 asked what proportion of the business' revenue

Percent of business revenue that stays in the community

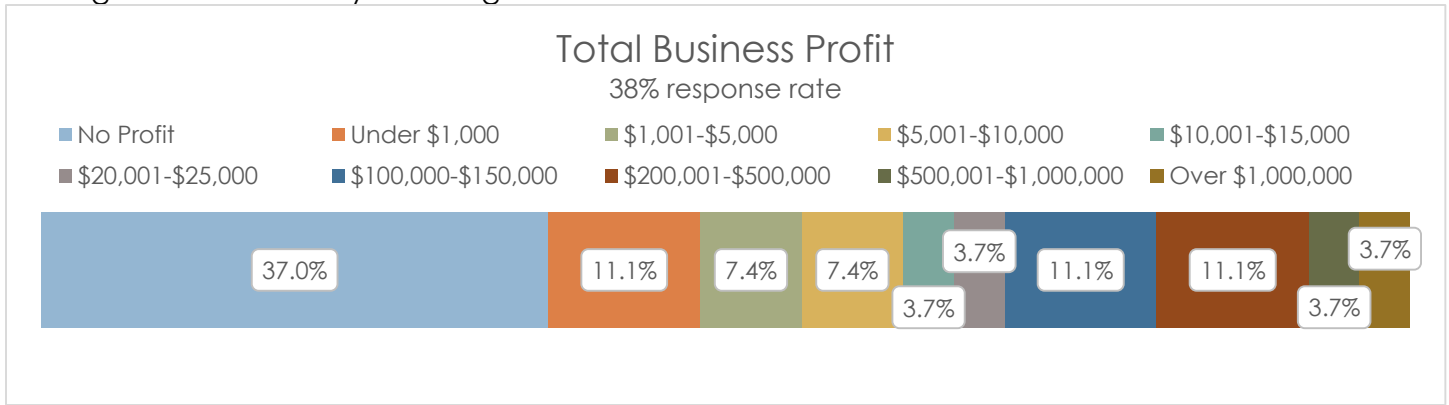
63% response rate



remains in the community. 11% of respondents stated that less than 30% of their revenue remained in the community. 9% of respondents reported that between 41% and 70% of their revenue stays in the community. 13% of respondents reported that more than 70% of their revenue stays in the community. About 20% of respondents stated that more than 90% of their revenue stayed in the community. 15% of respondents reported that the question was not applicable to them,

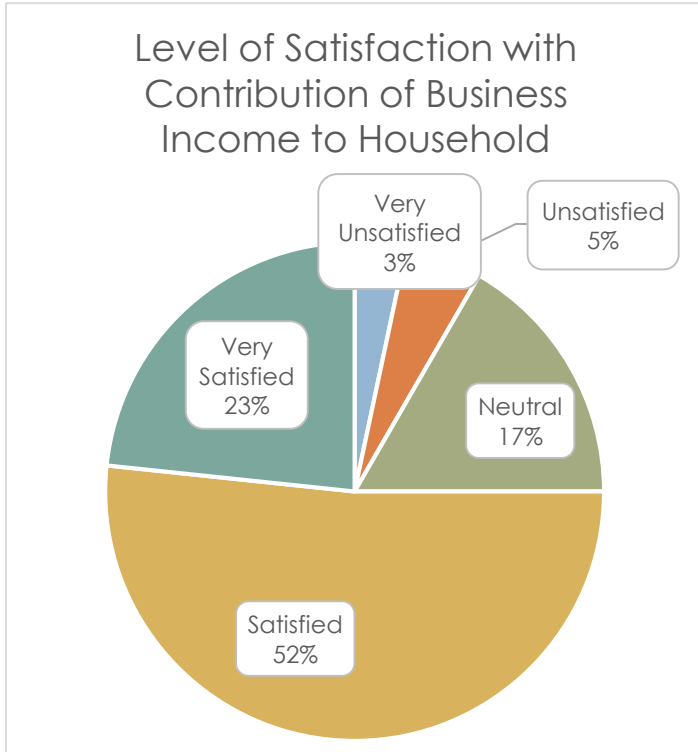
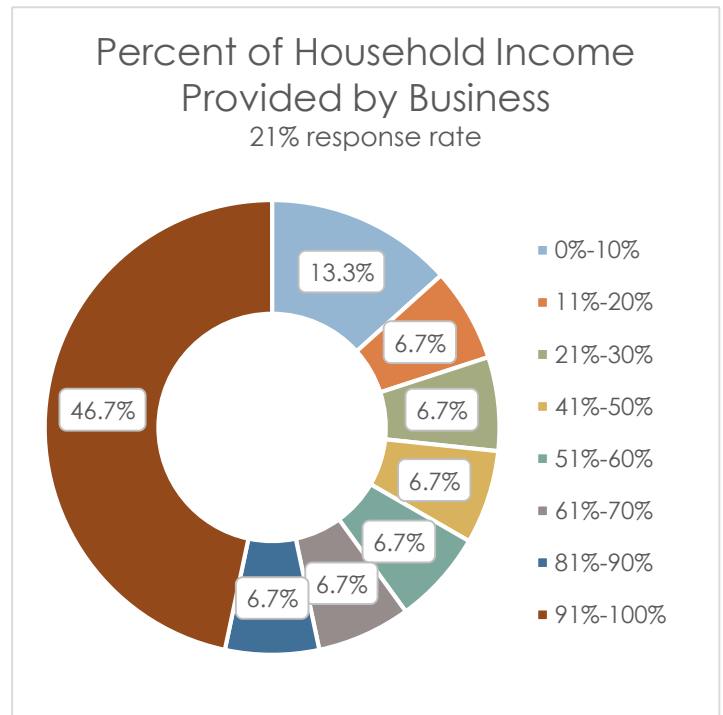


likely because they were operating a non-profit. 21% of respondents did not leave a response, leaving some uncertainty to the figures.



Question 19 asked each respondent how much their business has profited over the last year. About 14% of respondents reported that they made no profit. Almost half of the respondents did not leave a response, leaving a large level of uncertainty to the figures. There is very little consistency in the figures, with no more than three people providing any one response aside from those mentioned above.

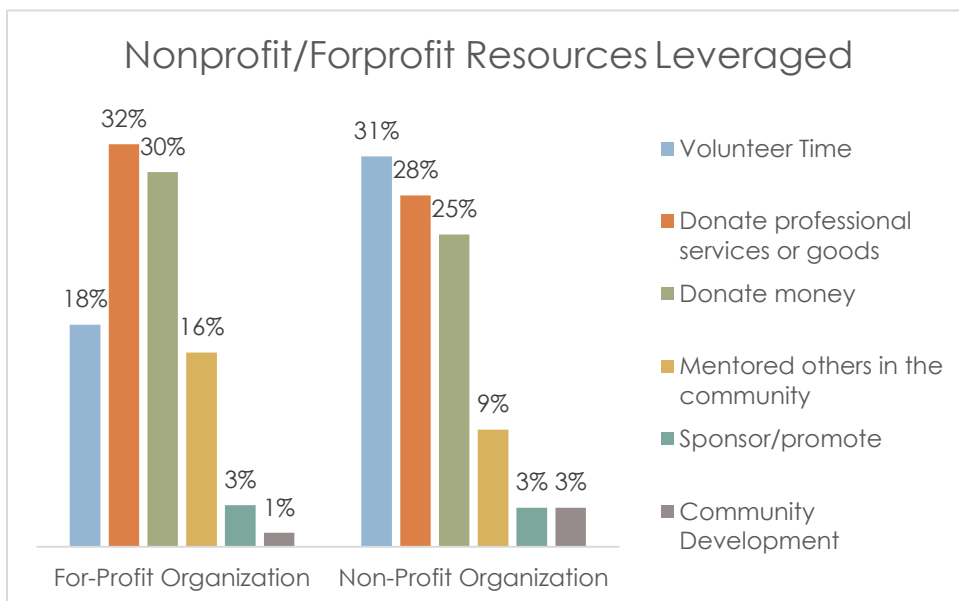
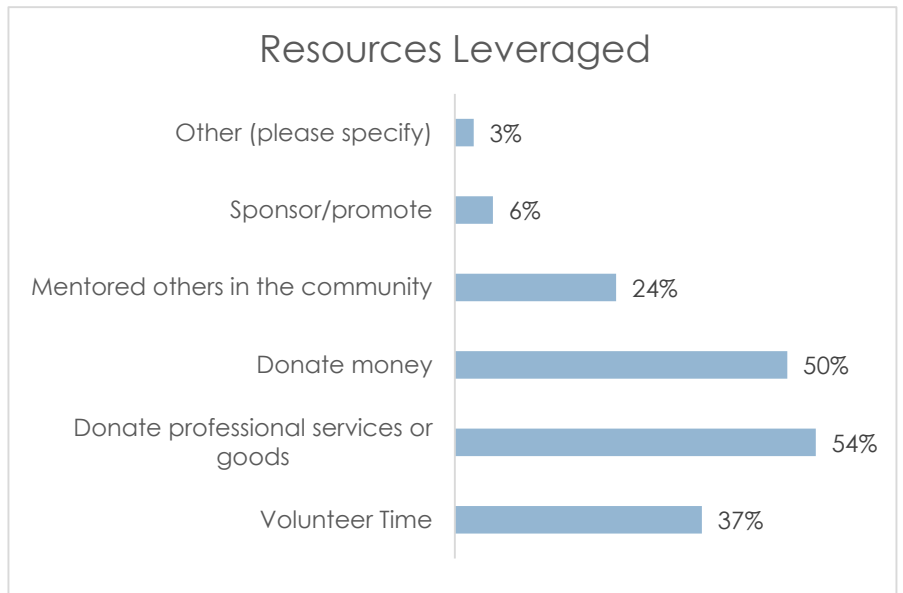
Question 20 asked each respondent what proportion of their personal income is provided by their position as business owner or manager. Two thirds of respondents did not provide an answer to this question, meaning that little can be drawn from the responses to this question.



Question 21 asked what level of satisfaction the respondent received from the income he or she received from his or her position. The majority of respondents reported that they were satisfied or very satisfied with their income. 8% of people listed that they were unsatisfied or very unsatisfied with their income.

Questions 22 and 23 indicated that Reservation businesses (n = 70) are versatile in leveraging resources. The majority of resources leveraged, 54%, came from donated professional services or goods while 50% of resources leveraged consisted of money donated. Most businesses, as indicated in the chart below, leveraged resources in more than one category.

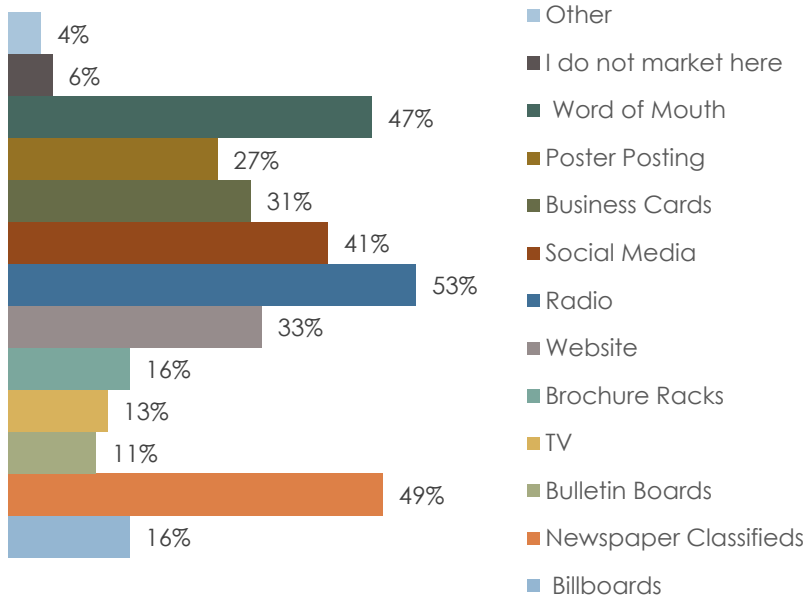
Differences emerged among resources leveraged when analyzing businesses according to profit and non-profit status. Non-profit businesses are more likely to volunteer time and engage in community development than for-profit businesses on the Reservation.



Question 24 signified that Reservation businesses utilize a diverse amount of strategies for local, regional, national, and international marketing. The four charts below signify the different approaches used for local, regional, national, and international marketing strategies.

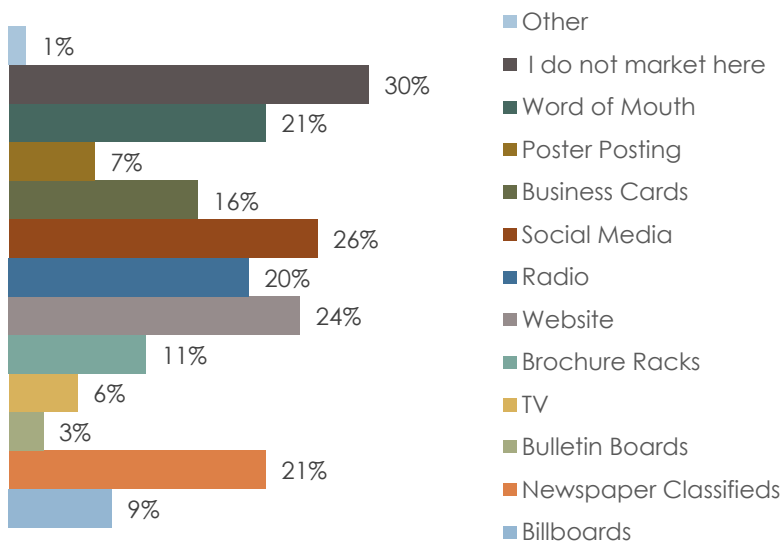


Local Marketing Strategies



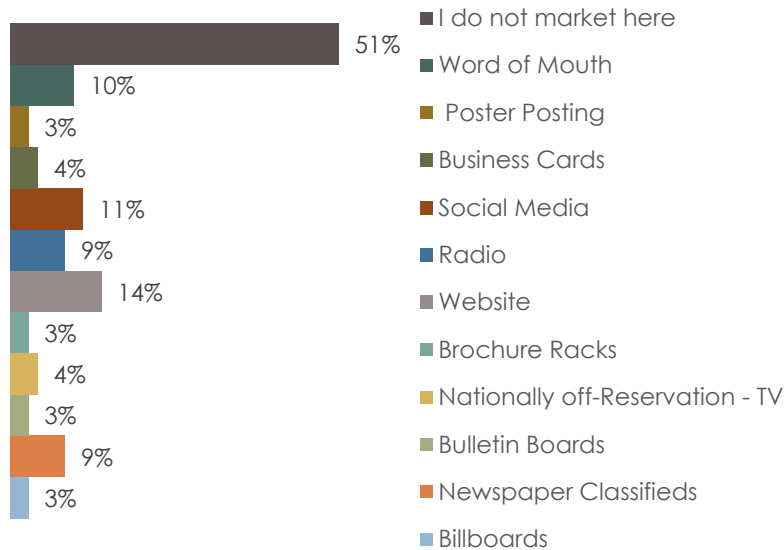
The most common local marketing strategy used by Reservation businesses is radio advertising, which is used by 53% of survey participants followed by newspaper classifieds which are used by 49% of survey participants. Accordingly, 47% of Reservation businesses use word-of-mouth and 41% of Reservation businesses utilize social media such as Facebook for local marketing.

Regional Marketing Strategies



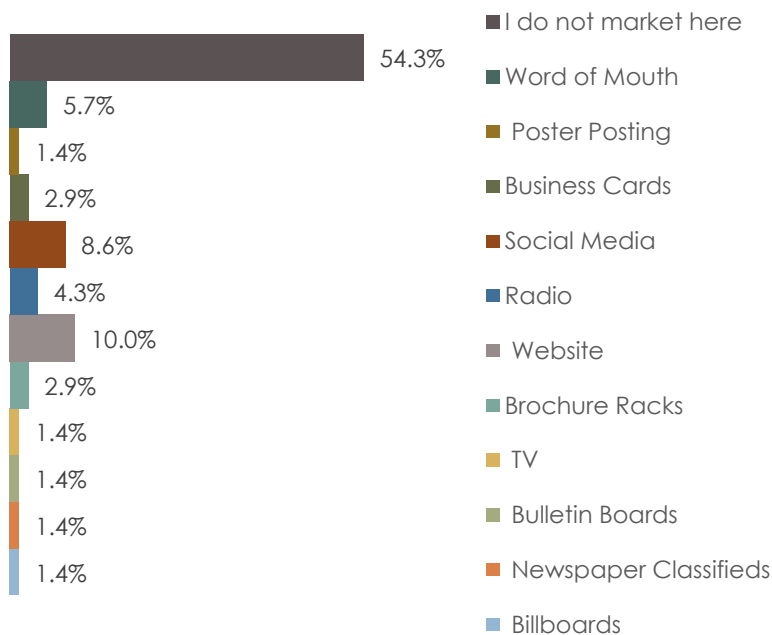
The chart to the left illustrates that there is a significant decrease in the number of marketing strategies used regionally compared to the number of marketing strategies that are used locally by businesses on the Reservation. This decrease is indicated by a decrease in percentages. Similar to local marketing strategies, though, newspaper classifieds, social media, and word-of-mouth are important for regional marketing as well.

National Marketing Strategies



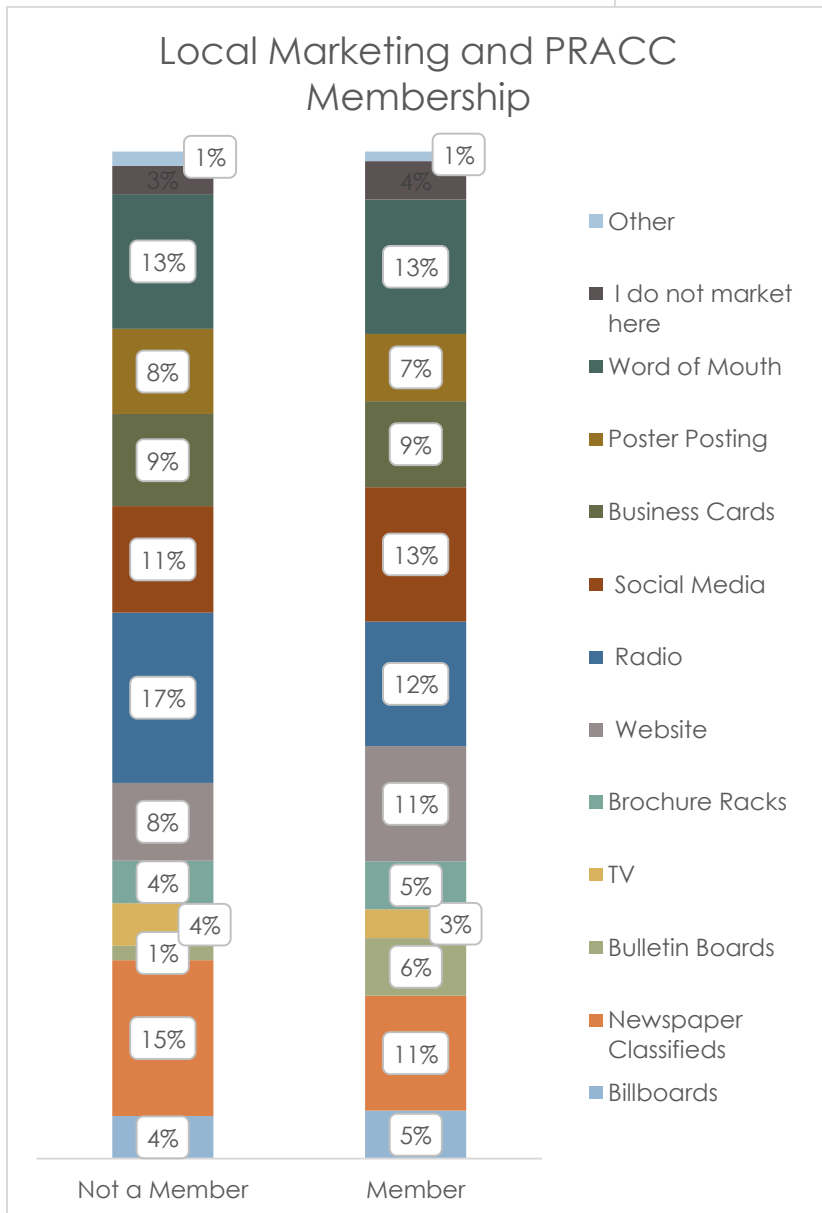
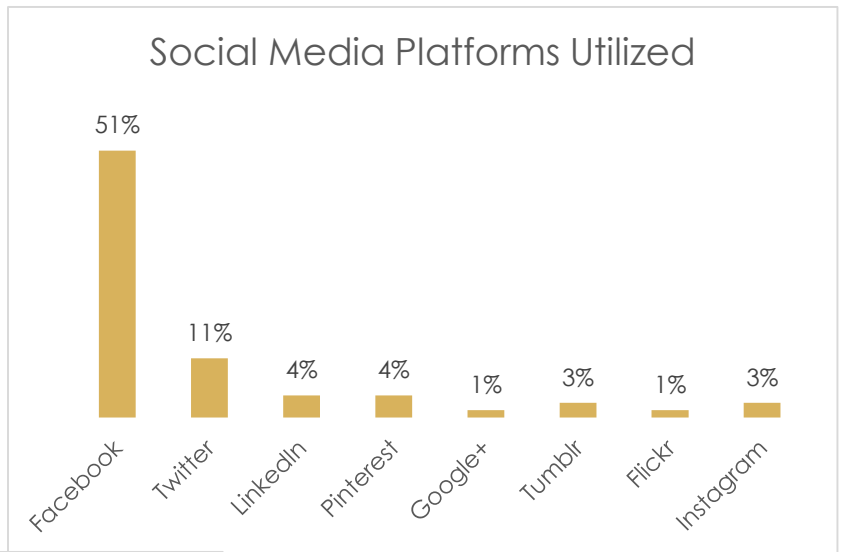
This chart shows the proportion of businesses who used a particular national marketing strategy. Websites and social media are the most used methods for national marketing. Of particular importance is the level of responses for "I do not market here". Of the 70 businesses surveyed, 51% do not market nationally. This statistic reiterates the importance of local business, local marketing, and attracting local customers.

International Marketing Strategies



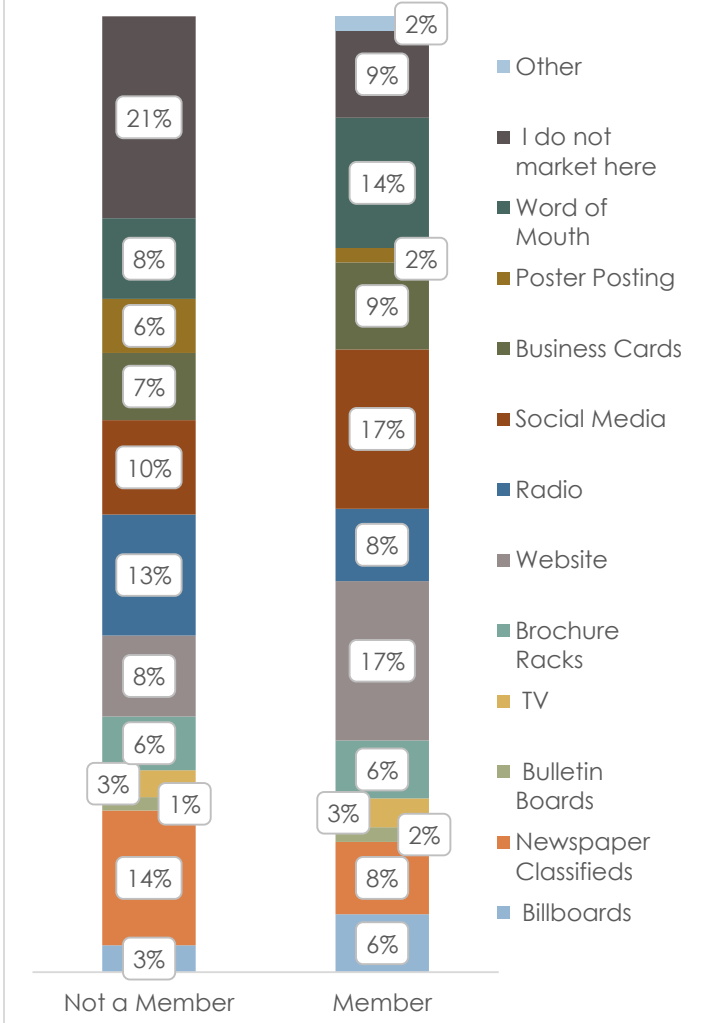
This chart shows the proportion of businesses who used a particular international marketing strategy. As noted, the majority of businesses that participated in the survey do not market internationally. Of Reservation businesses who do market internationally, 10% use websites, 9% use social media, and 6% uses word-of-mouth.

This graph shows the number of businesses that used various social media platforms. Facebook is by far the most widely used social media platform. 51% of businesses surveyed on the Reservation are utilizing Facebook as a marketing tool. In accordance with social media marketing, 43% of Reservation businesses indicated that they had websites.



This graph shows the percentage of businesses that utilize particular local marketing strategies in relation to whether or not the businesses are a member of the PRACC. Aside from the use of bulletin boards, there is no significant difference between the two groups.

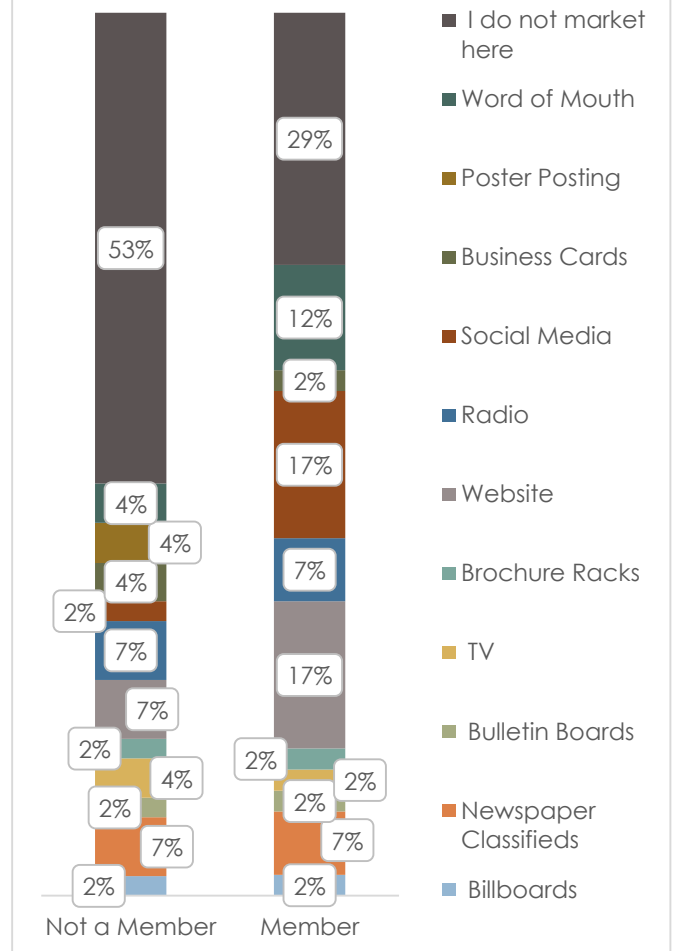
Regional Marketing and PRACC Membership



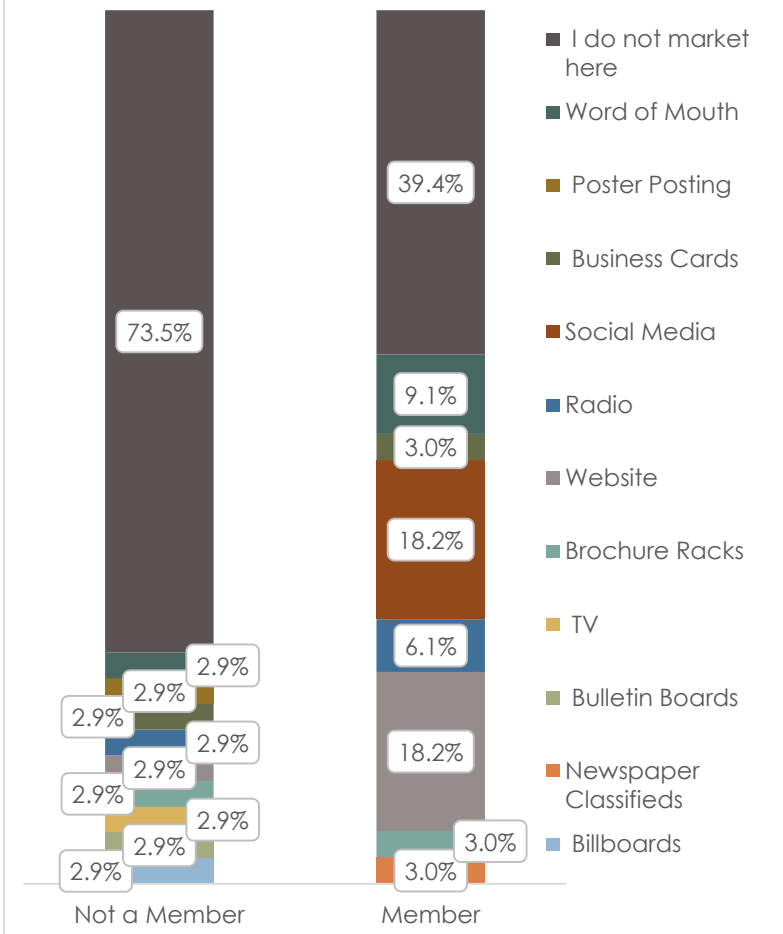
This graph shows the percentage of businesses that utilize particular regional marketing strategies in relation to whether or not the businesses are a member of the PRACC. As noticed in the next 3 charts, PRACC members are more dedicated to website and social media based marketing in the regional, national, and international arenas, when compared with non-members of the PRACC.

This graph shows the percentage of businesses that utilize particular national marketing strategies in relation to whether or not the businesses are a member of the PRACC.

National Marketing and PRACC Membership

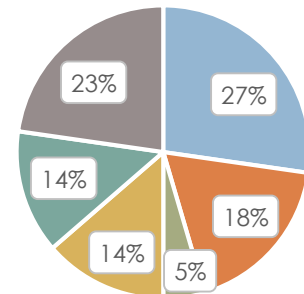


International Marketing and PRACC Membership



This graph shows the percentage of businesses that utilize particular international marketing strategies in relation to whether or not the businesses are a member of the PRACC.

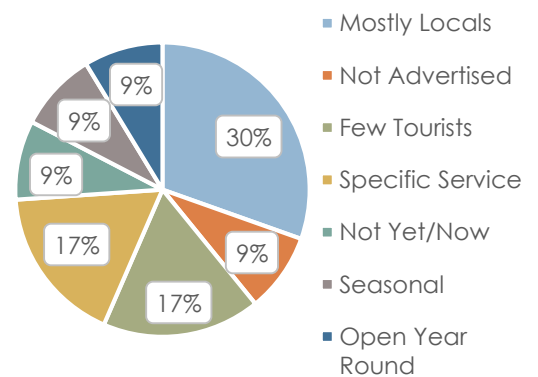
Why Tourist Business



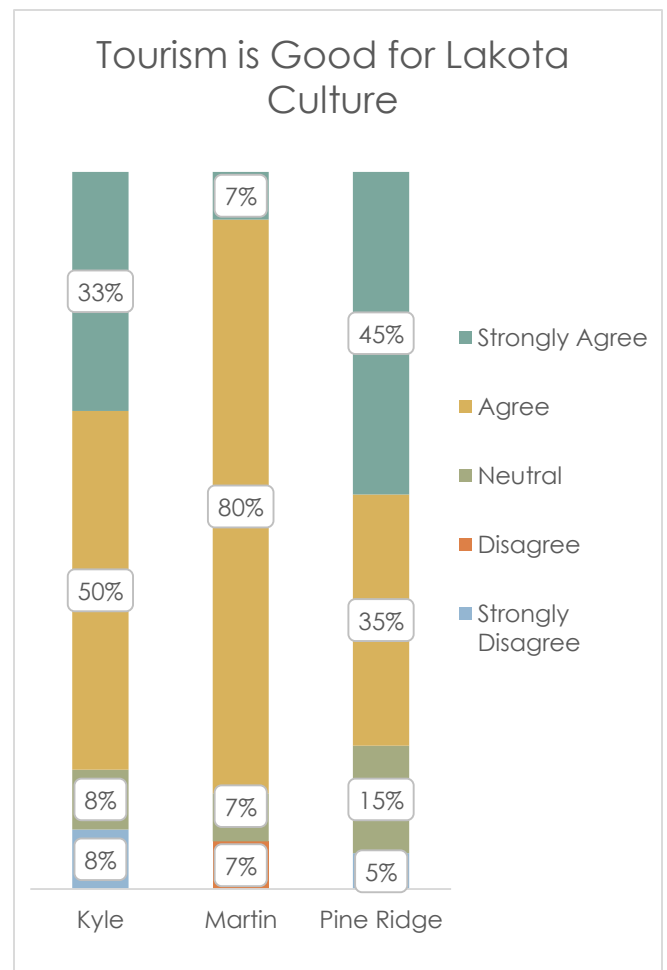
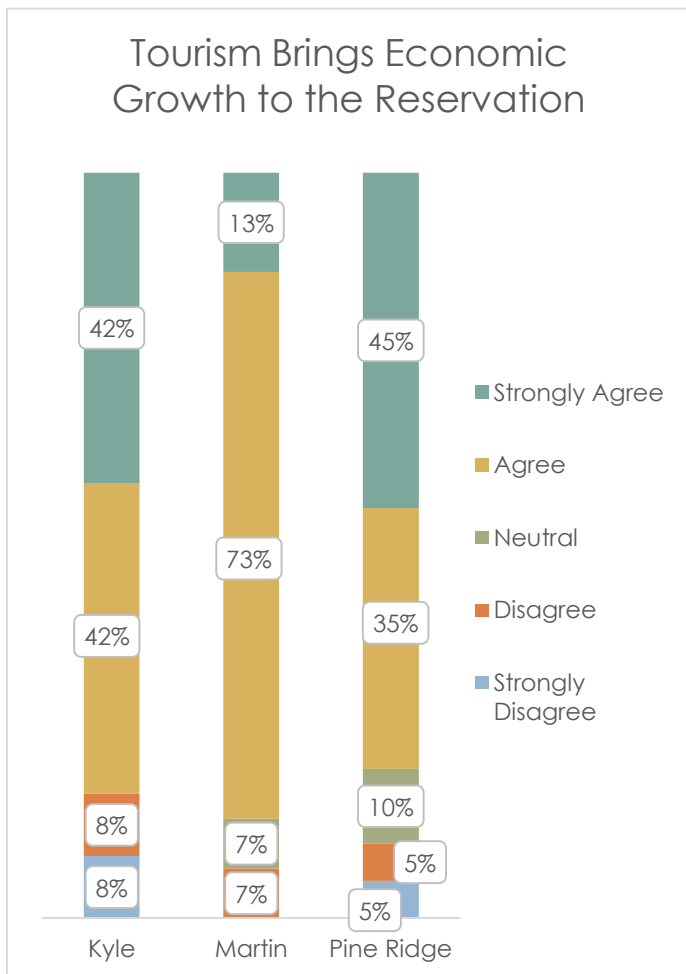
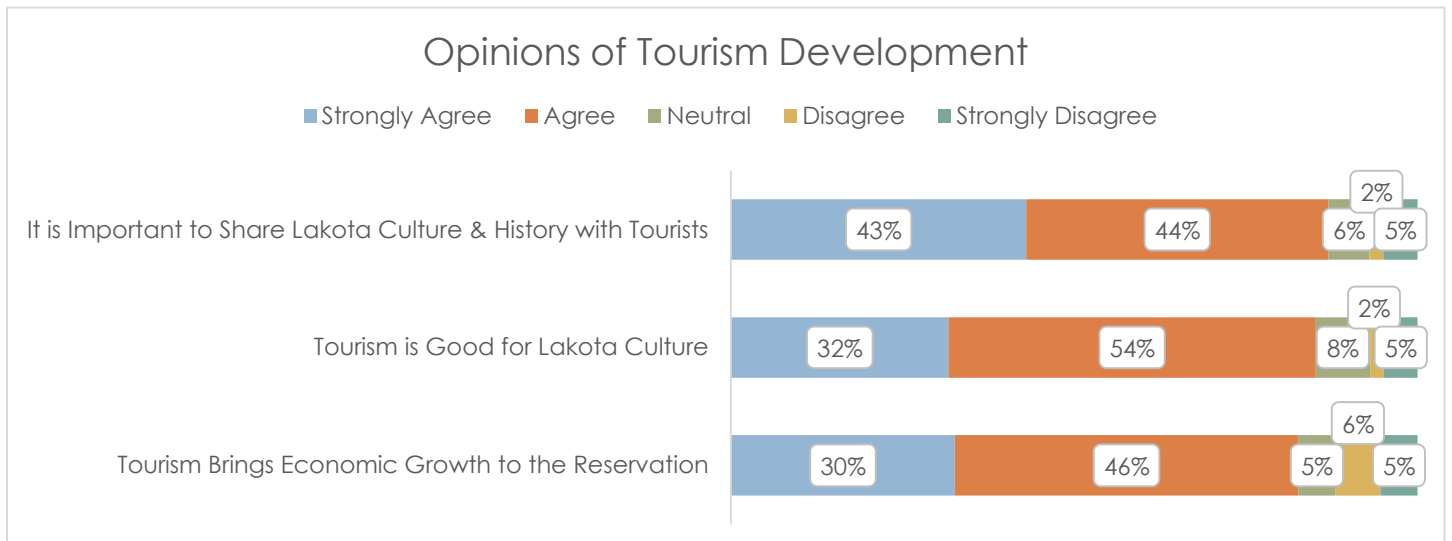
Questions 25 and 28 were asked to determine the percentage of clients who live on the Reservation versus the proportion that are tourists. The results demonstrate that most clients are from the Reservation with 22 out of 64 respondents saying 90-100% of their clients are from the reservation and only 2 out of 65 respondents saying 90-100% are tourists.

Questions 26 and 27 were asked to determine if participants considered their businesses to be related to tourism and why or why not they believed that. 63% of respondents did not consider their business a tourism business versus 37% that did. The figures to the right depict why or why not businesses considered themselves to be tourist businesses.

Why Not Tourist Business

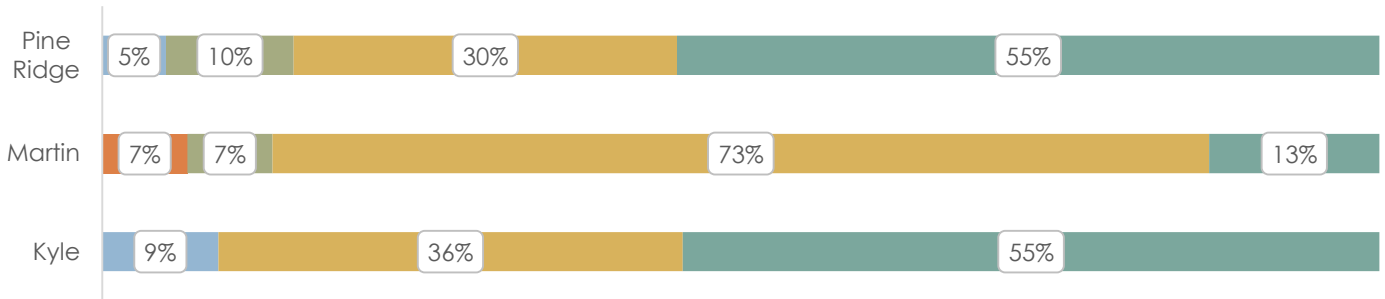


For Questions 29, 30, and 31, a Likert Scale was used to measure how strongly respondents agreed or disagreed with the provided statements. Regarding tourism bringing economic growth to the reservation, 46% agreed and 38% strongly agreed. A similar trend is seen with Q30 regarding Tourism being good for Lakota Culture. Q30 also had similar results with 43% strongly agreeing that it is important to share Lakota culture and history with tourists and 44% agreeing. For Q29, 30 and 31 only 5% strongly disagreed.



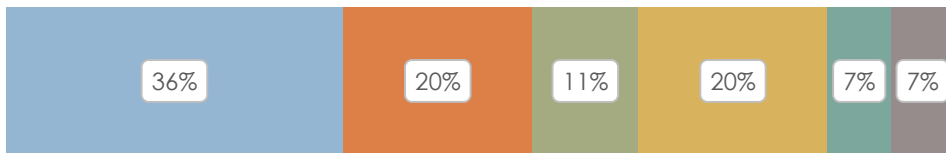
Lakota Culture & History Should be Shared with Tourists

■ Strongly Disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly Agree



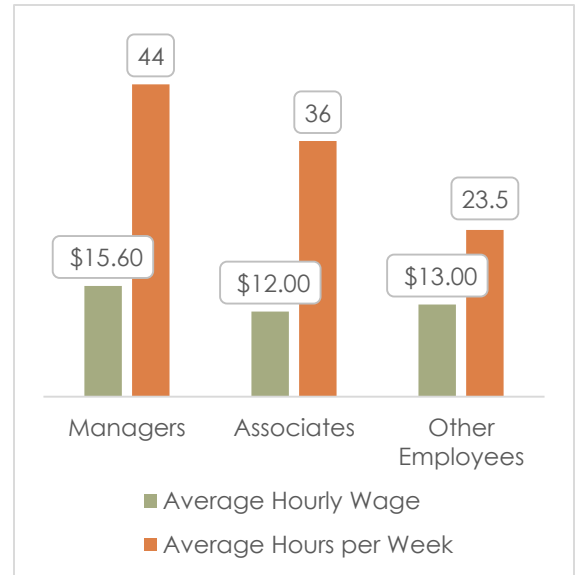
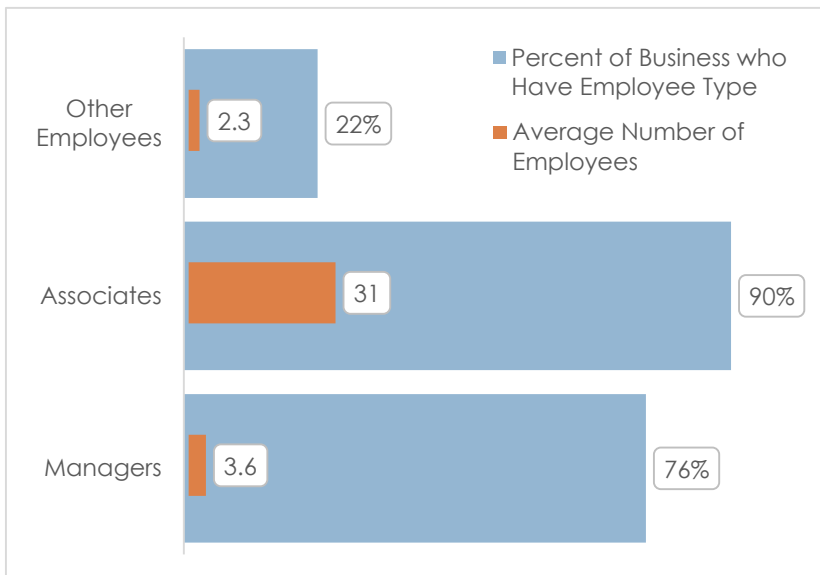
Number of Employees

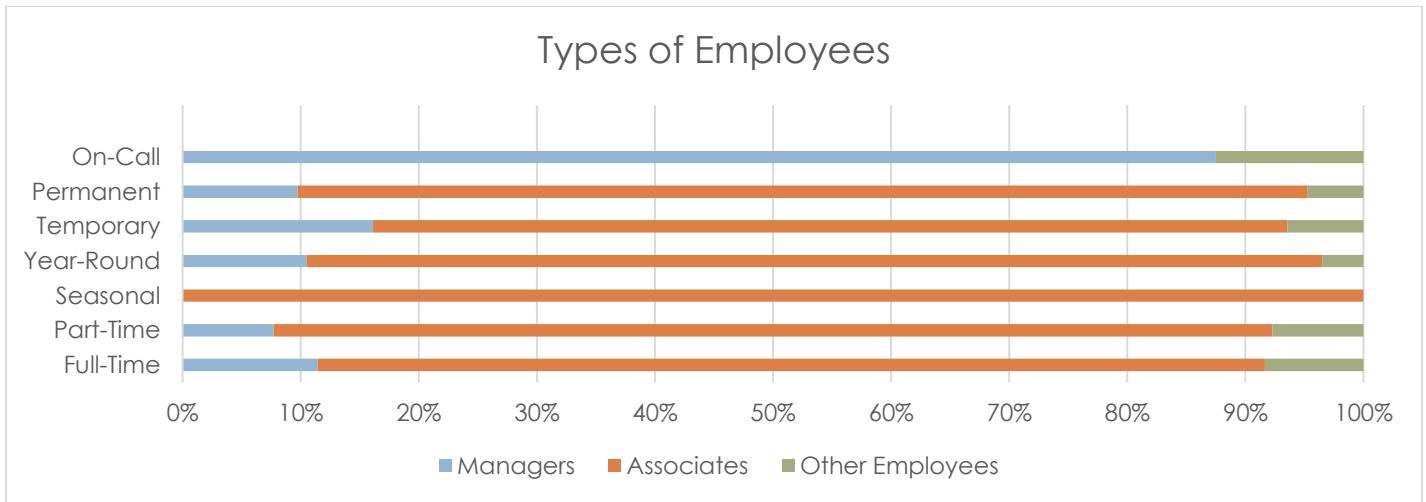
■ 1-5 employees ■ 6-10 employees ■ 10-20 employees
 ■ 20-50 employees ■ 50-100 employees ■ over 100 employees



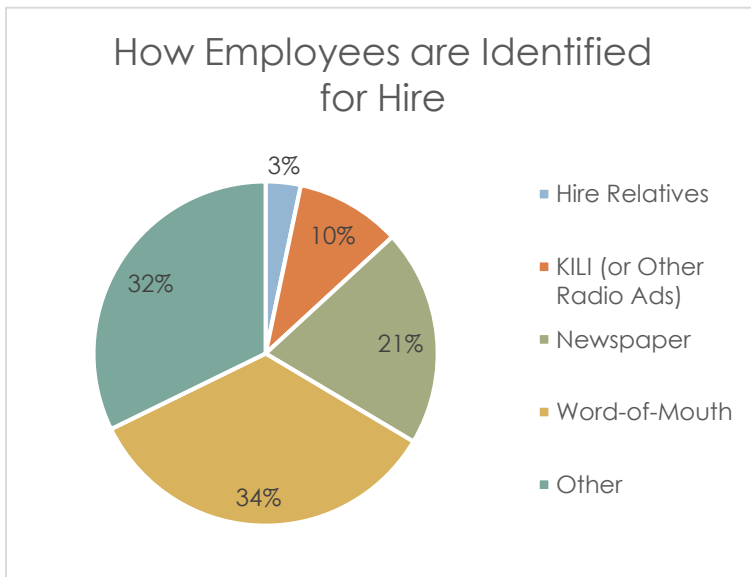
Responses for Questions 32 and 33 indicated that each business has an average of 1.4 owners (87% response rate). Of those businesses with owners, all but one work on a permanent basis. 63% work full-time and 93% work year-round. They make an average of \$12.50 per hour (20% response rate) and

work an average of 38 hours a week, or \$23,750 per year. 84% of the businesses surveyed have employees. Those businesses with employees, employ a total of 1,505 people with an average of 33 people working at each business. The graph below shows the distribution of the number of employees with the majority of businesses having under 10 employees. The graphs following provide average numbers of employees, average full-time vs. part-time, average seasonal, year-round, temporary and permanent, and average hourly wages and hours worked.





Question 34 was a multiple selection question asked to determine how businesses identify potential employees. While there was some variance across business types, word-of-mouth is the most commonly employed method with 34% of businesses utilizing it. The second most common response was “other”, at 32%. Of those who responded “other”, 42% indicated that submitted job applications were used (n=26).



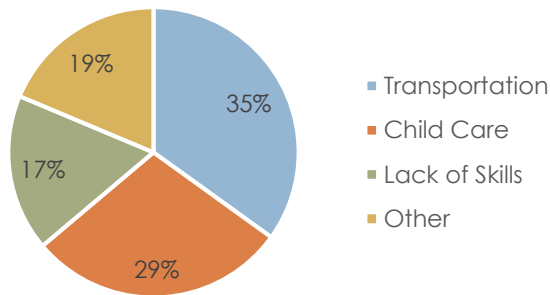
Other	# Responses	Proportions
Applications	11	42%
Social Media	3	12%
Website	3	12%
College	1	4%
Flyers	2	8%
Government	4	15%
N/R	2	8%
Total	26	100%

Questions 35 and 36 asked if employers ever needed additional help and, if so, what type. 54% of employers responded that they did need additional help and 53% of those respondents clarified by simply stating they needed extra help in general. Less common responses were “seasonal” and “day labor”.

Question 37 was a multiple selection question that asked what major issues employers had with new hires. With 86 responses, 31% indicated lack of job skills, 30% cited poor attendance, and 23% claimed repetitive tardiness. 8 responses were for “other” with the most common clarification being work ethic.

A follow-up to question 37 asked what job skills employees were lacking. 82% gave no response. The rest of the answers were largely indicated by question 37 (punctuality, work ethic, etc)

Barriers that Prevent Employee Success



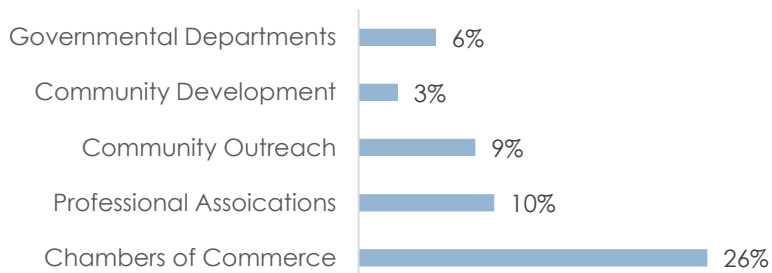
Question 38 asked what employers saw as major strengths in their employees. At 18% each, "hard working" and "willingness to learn" were the most common of the 147 responses given.

Question 39 sought to determine what barriers prevent employees from succeeding at their jobs. The least common answer was lack of job skills. Employers seemed to feel that the largest barriers were lack of transportation and lack of child care services. Responses clarifying "other" were either non-responses or only had 1-2 responses per theme.

Question 40 concerned the number of businesses that have partnered with local networks and organizations on the Reservation. Of the 31 businesses that have

partnered with a local network or organization, 26% have partnered with a local chamber of commerce, with other businesses partnering with professional associations, community outreach and development programs, as well as governmental departments.

Local Business Partnerships

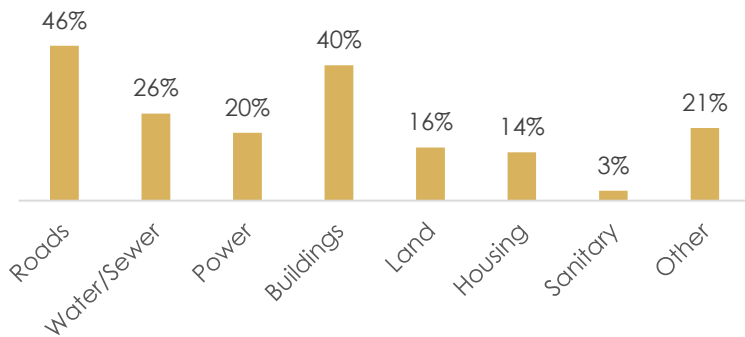


Question 4, as indicated by the chart to the left, asked whether the survey participant held a leadership role within their local business, and, if so, at what level.

Out of 70 survey participants, 11 participants held leadership roles within their workplace. As the graph below shows, the majority of these leadership positions were board members followed by equal numbers of owners and

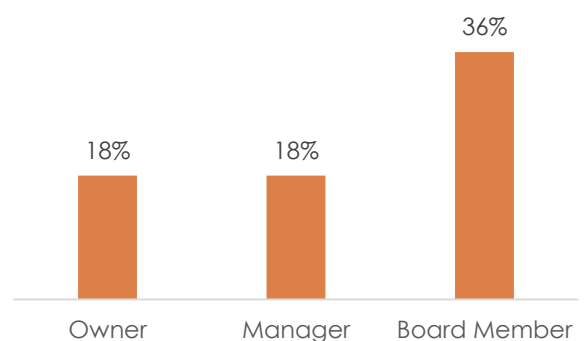
managers.

Pressing Infrastructure Needs for Reservation

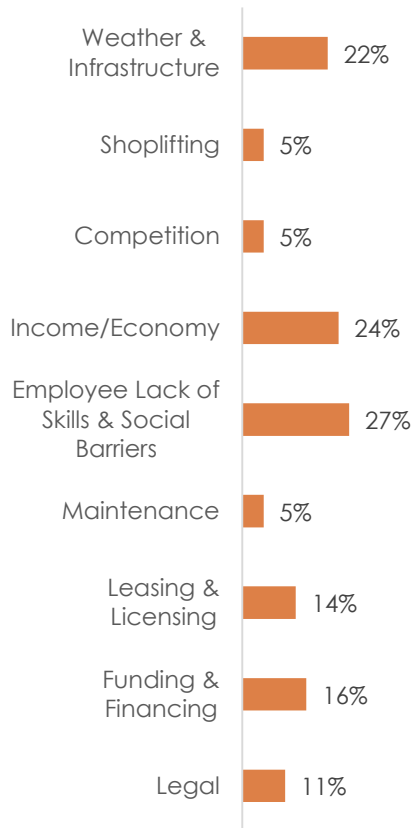


Question 42, as indicated in the chart above, was concerned with asking participants what they thought the most pressing infrastructure needs were for

Most Common Leadership Roles in Local Businesses



Barriers to Business



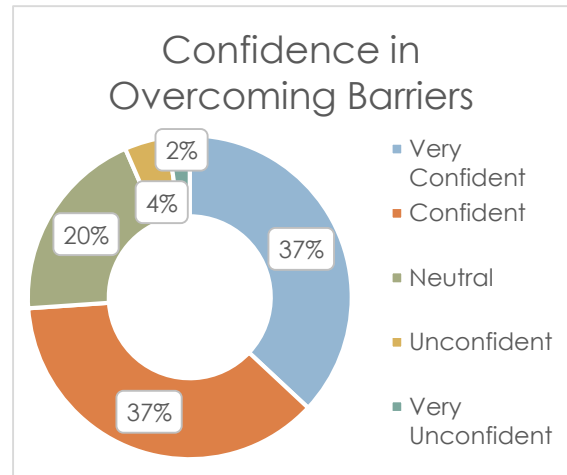
the Reservation. As the chart shows, participants felt that roads at 46% followed closely by buildings at 40% had the highest level of infrastructural attention, with sanitation needing the least amount of attention. Several participants felt that roads in poor condition led to a lack of business from tourism and/or local customers.

Question 45 asked about barriers to business. Many businesses identified lack of skills and the general economy as barriers to their business.

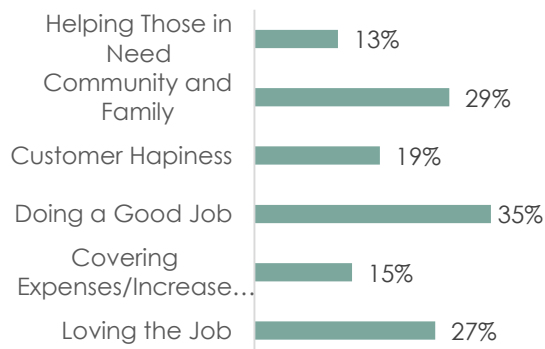
Question 46 asked how confident these businesses

felt in overcoming the barriers found in the previous question. Businesses were overwhelmingly confident or very confident that they could overcome these barriers.

Question 47 asked what professional fulfillment meant to the respondent. Many respondents cited "doing a good job" and providing a good life for their families and communities. Very few mentioned personal income or business growth and expansion.

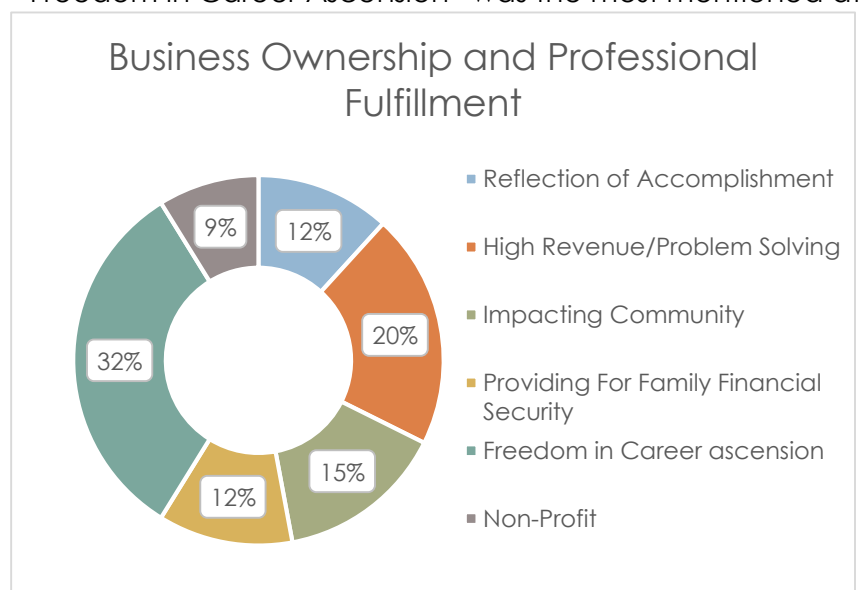


What Does Professional Fulfillment Mean to You

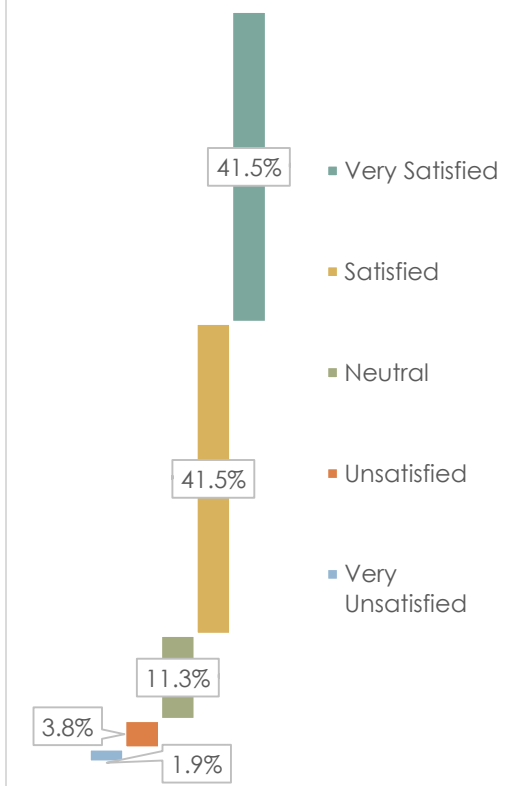


32%. "High Revenue/Problem Solving" was mentioned by 20% of respondents.

Question 48 was an open ended response question asked to determine how owning a business contributes to professional fulfillment. While the responses were varied, "Freedom in Career Ascension" was the most mentioned at

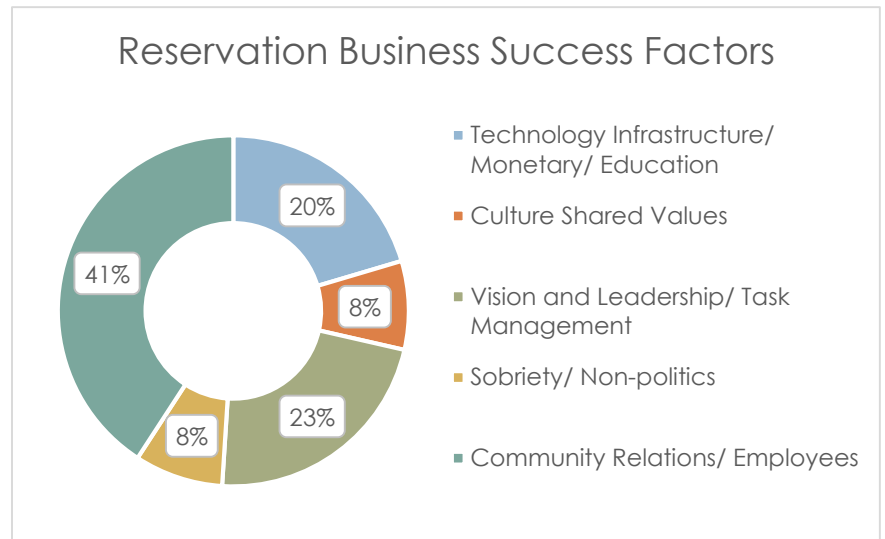


Business Owner Satisfaction



Question 49 was a scaled question asked to determine the satisfaction level of business owners on the Reservation. Of the business owners who responded, 41.5% are satisfied and 41.5% are very satisfied. Only 4% of respondents felt very unsatisfied or unsatisfied. Question 50 was an open ended question asked

Reservation Business Success Factors



to determine what factors lead to a successful business on the reservation. While there is some variation across the themes, Community and Employee Relations is the most frequent occurring response with a nearly 41% of respondents attributing that to success. Vision Leadership and

Management the second most frequent theme occurring, was mentioned by 22.4% of business owners.