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## **Analyzing Regional Demand for Green Power – Survey Project How-To Manual**

By David Trechter and Shelley Hadley

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# ANALYZING REGIONAL DEMAND FOR GREEN POWER: SURVEY PROJECT - HOW TO MANUAL



Survey Research Center  
University of Wisconsin – River Falls  
2008

# Credits

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# Preface

In January 2008, the Survey Research Center (SRC) at the University of Wisconsin – River Falls, in collaboration with UW-Extension personnel, mailed surveys that were designed to determine current demand for energy coming from renewable sources and anticipated future demand for energy from such sources among key public organizations in western Wisconsin. Using the Western Wisconsin Renewable Energy Survey project as a guide, the “Renewable Energy Survey Cookbook” has been prepared by the SRC. It is intended to help organize, develop, and complete successful bio-energy survey projects.

*Additional information on the SRC is available at <http://www.uwrf.edu/src/>*

# Introduction

The “Renewable Energy Survey Cookbook” can be used as a tool for survey research to better understand the regional market for renewable or “green” power. The cookbook is divided into two columns. The first column provides detailed step-by-step instruction for those that are considering a mail survey project (defining objectives and goals, selecting population and sample size, questionnaire development, implementation, and analysis and reporting). The second column describes a ‘case study’ of a recent survey project completed by the SRC in western Wisconsin.

# Renewable Energy Survey Cookbook

## Survey Research

Steps Needed to Perform a Successful Mail Survey	Western Wisconsin Renewable Energy Survey Case Study
<p>1. <b>Initial meeting.</b> Clarify the purpose of the survey – what are the fundamental questions to be answered and key questions to include in the survey. Discuss the logistics of the survey: timing, budget, population to be sampled. If you know the size of the population to be surveyed and the level of accuracy you want to achieve, you can use an on-line sample size calculator such as: <a href="http://www.surveysystem.com/sscalc.htm">http://www.surveysystem.com/sscalc.htm</a> to determine the number of surveys you need to receive back.</p>	<p>1. <b>Initial meeting.</b> Members of the Survey Research Center (SRC) at the University of Wisconsin-River Falls met via phone with Extension agents involved in a grant in early October 2007 to identify the fundamental questions to be addressed and the population to be sampled.</p> <p>The group decided to survey public entities in the counties served by the West Central Wisconsin Regional Planning Commission (WCWRPC) about their current energy and green energy use, as well as, future expected demand from those public organizations for renewable energy.</p>
<p>2. <b>Draft the survey.</b> One person should take responsibility to draft the survey and the cover letter to accompany it. As you draft the survey, keep in mind these questions:</p> <ul style="list-style-type: none"><li>• what do I fundamentally want to know as a result of this survey,</li><li>• does this question help me understand my fundamental question(s),</li><li>• is the answer to this question something I “need to know” or is it something that would just be “nice to know”? Once drafted, it should be circulated to a committee or group of informed/interested people for review. It usually takes at least three iterations before people are satisfied with the survey and cover letter. At least 3 weeks should be allotted to this process.</li></ul>	<p>2. <b>Draft the survey.</b> Based on the initial phone conversation, the SRC developed a cost proposal, which was accepted in late October. The first draft of the questionnaire was circulated to the Extension agents in mid-November, a second draft in late November and the final version in December. A cover letter for the first mailing was drafted and accepted in January. The SRC contacted Bill Campbell, Director of Grant and Research at UW-RF, to confirm that a human subjects approval was not necessary for this project. No monetary or other material incentive to survey respondents was used with this project.</p>

## Steps Needed to Perform a Successful Mail Survey

## Western Wisconsin Renewable Energy Survey Case Study

**Human Subjects Approval.** When the questionnaire is in close-to-final form, if human subjects approval is needed as part of your institutional approval process, this is the time to request approval.

**Incentives.** Response rates are highest when the subject matter of the study has some personal relevance for the respondents, however, sometimes researchers provide monetary or other material incentives to increase response rates. Whether or not to use material incentives is up to the researcher. Consideration must be given to the appropriateness of the specific incentive to be offered.

3. **The first mailing.** Several things happen in this stage of the process. You need to realistically estimate the return rate you will get in order to determine the total number to be sent out. For example, if step 1 tells you that you will need 350 surveys returned in order to have estimates with the statistical properties you want (e.g. a margin of error of 5% with 95% confidence) and you estimate that you'll probably get back about one-third of those sent, you will need to mail out 1,050 surveys ( $=350/.333$ ). The return rate you can expect depends upon a number of factors: the length of the survey, the inherent interest (or lack thereof) of the topic addressed in the survey, the target audience (younger populations are more difficult than older ones, for example), how difficult the questions are for respondents to answer, etc. For social science surveys, typical return rates fall in the 30-40% range.
- With the number of surveys to be mailed in hand, you need to develop your mailing list and reproduce the questionnaire. Sometimes you will have access to a mailing list, sometimes you can buy a mailing list for a nominal amount of money, and sometimes you have to construct a mailing list from web or other sources of contact information. It is difficult to generalize how expensive and time consuming the mailing list acquisition will be. Sometimes this is a non-event, sometimes it is a major hurdle to get over.

3. **The first mailing.** To avoid the holiday season, the first mailing was sent to the target population (145 public institutions: schools, universities, hospitals, county and city governments) in January 2008. The mailing list was compiled via web searches for addresses of public institutions in western Wisconsin. The University's Public Affairs office issued a press release to local papers in western Wisconsin the week before the survey was sent. A total of 46 surveys were returned from the first mailing (32%).

A copy of the first mailing's cover letter and questionnaire can be found in the Appendix.

## Steps Needed to Perform a Successful Mail Survey

## Western Wisconsin Renewable Energy Survey Case Study

- Once you have the mailing list in hand, or expect to get it soon, copy the questionnaire and cover letter and make the mailing labels for the envelopes.
- You will find it useful to assign a unique identification number to each subject in the sample population prior to mailing to keep track of who has responded. This number should be printed somewhere on the questionnaire (or bar-code label).
- If you are explicit about the measures you are taking to ensure confidentiality in the cover letter you send with the questionnaire, most respondents will not react negatively to seeing identification numbers on their materials.
- It is also helpful if some advanced publicity about the survey can be arranged (e.g. an article/press release in local newspapers).

4. **Post card reminder.** We recommend that ten days to two weeks after the first mailing, a post card reminder be sent to those who have not returned their questionnaire.
- The post card needs to be printed on card stock and should say something like, “We haven’t yet received the questionnaire we sent to you. Your input is very important to us so we hope you will take a few minutes to complete and return the survey to us.”
  - You will need to adjust your mailing list to account for those from whom you have received a questionnaire. It is not unusual for the process of copying and putting the mailing labels on the post cards to take several days.

4. **Post card reminder.** The SRC sent post card reminders to non-respondents in late January.

A template of a postcard reminder can be found in the Appendix.

## Steps Needed to Perform a Successful Mail Survey

5. **The second mailing.** Ten days to two weeks after the postcard, a second survey is mailed to non-respondents. You will need to draft a second cover letter and continue to edit your mailing list to account for those from whom you received a questionnaire in response to the first mailing or the post card. You will, again, copy the estimated number of questionnaires and cover letters; fold, stuff, and affix the mailing label; and mail the survey.

**Follow-up phone calls.** Although not a usual step in a mail-out survey process, follow-up phone calls to non-respondents following the second mailing can be conducted provided telephone numbers are available. Unless the population included in the survey is small and, therefore, each returned questionnaire has great value, follow-up phone calls are not recommended. This is often a time-consuming and expensive activity.

## Western Wisconsin Renewable Energy Survey Case Study

5. **The second mailing.** The SRC sent a second questionnaire and cover letter to non-respondents in mid-February.

A copy of the cover letter for Mail 2 can be found in the Appendix.

In late February and early March, the SRC made follow-up phone calls to non-responding organizations. We asked if we could assist them in the completion of the survey. In some cases, both survey mailings had been misplaced, so another survey was mailed to them with a request to return the survey as soon as possible. By the determined cut-off date, the SRC had received a total of 88 completed questionnaires (61%).

Very few of the responding organizations were able to provide their electricity usage or the percentage coming from renewable sources directly. They did, however, generally give us permission to access electricity usage information from their energy provider. Ten utility providers were contacted by mail and phone requesting assistance with the study. Of the ten providers contacted, all ten cooperated and sent the requested information. This step in the process, however, was a lengthy one. Collecting this information from energy providers took the SRC an additional 13 weeks.

## Steps Needed to Perform a Successful Mail Survey

6. **Data entry and verification.** Prior to the first mailing, you need to set up a data entry key that indicates how the data will be entered into a spreadsheet.
- **Scales.** Many questionnaires use “Likert” scale questions that ask the respondent to indicate if they “strongly agree”, “agree”, are “neutral”, “disagree”, “strongly disagree” or have “no opinion” about some statement. Will these responses be entered as 1, 2, 3, 4, 5, and 6?
  - **Entry/Scanning.** Once the entry key is established, data can be entered/scanned as soon as questionnaires start to be returned. Data entry can be a tedious and time-consuming process. It is critical that the data be entered accurately; if not the entire project is undermined.
  - **Checking Data Entry.** You can set up checks in your spreadsheet to identify columns in which data have been entered that are smaller or larger than the minimum or maximum values. For example, in the example above, acceptable values range from 1 to 6. By using an “if” function in the spreadsheet, you can enter a formula that says, “if there is a value in this column that is less than 1, enter a 1 into this cell, otherwise enter a “0” and another formula that flags values greater than 6. Any column in which you see a 1 in either of these cells will need to be “cleaned” – you will have to find unacceptable data and correct them.
  - **Qualitative Data.** Most responses to open-ended questions are usually input “as written.”

## Western Wisconsin Renewable Energy Survey Case Study

6. **Data entry and verification.** A template was designed at the SRC allowing us to scan the data as it arrived. Software also allowed us to identify and correct any problems with the data. Once information was received from the utility providers, the SRC was able to go back to the spreadsheet and fill-in the electricity usage data for the organizations that had given the SRC permission to request electricity usage information.

## Steps Needed to Perform a Successful Mail Survey

7. **Data analysis.** There are a number of levels of data analysis that can be considered.
- At the most basic, you will want to calculate average values for the variables in your questionnaire and the frequency with which respondents answered each question in a particular way. For example, suppose you have a question asking respondents how important local generation of renewable energy is to them with response options varying from “very important” to “very unimportant”. Each response option will need to have a numeric value (e.g. very important = 1, important = 2, neutral = 3, unimportant = 4, and very unimportant = 5). You will probably want to calculate the average value of responses to this question and the frequency of which respondents said this was very important, important, etc.
  - Responses to open-ended questions in the survey are often difficult to compare and interpret. Any qualitative information you receive from your survey (open-ended questions) is generally descriptive in nature and not readily analyzed using statistical methods. The data must be organized, sorted, and cleaned. Data should be checked to see that the coding of observations, narratives, and themes are consistent across coders. There is qualitative data analysis software programs available (example: NVivo) that can assist with analyzing open-ended questions.

## Western Wisconsin Renewable Energy Survey Case Study

7. **Data analysis.** The SRC calculated averages and frequencies and completed additional analysis to look at associations between variables (based on the type of organization). Once the electricity usage data was received, this portion of the process took two days to complete.

## Steps Needed to Perform a Successful Mail Survey

## Western Wisconsin Renewable Energy Survey Case Study

- A second level of analysis starts to look at associations between variables. For example, your questionnaire might include some demographic information about the respondent (gender, age, education level, etc.) and you might be interested in seeing if men and women place equal importance on how important local generation of renewable energy is to them. You can examine this type of question with “cross tabulations” or, more formally, via t-tests (using chi square tables).
- A third level of analysis attempts to “explain” observed variation in a key outcome variable. Suppose you have an overarching question that asks respondents how important they think it is for their electric utility to increase the proportion of kilowatts they generate/purchase from renewable sources. Their opinion about this might be related to their level of understanding of/interest in environmental issues, their income level, their occupation, the relative cost of renewable energy units, etc. Regression analysis can be used to test for such associations.
- Many will find the statistical analysis of data to be difficult and faulty analysis can doom the credibility of results. Groups are urged to undertake this portion of the process only if they have members with a good understanding of statistics. Otherwise, they should seek the assistance of the Extension Service, universities, or some other consultant.

## Steps Needed to Perform a Successful Mail Survey

8. **Reporting.** This is the phase of the process that is most interesting/exciting. The goal is to take the numerical data collected in the survey process and the data analysis from the preceding step and figure out “what the story is.”

If you have done a good job of identifying the fundamental questions to which you want answers and crafted questions that shed light on that fundamental question (see step 2), the structure of the report should be fairly straightforward.

- You will want to describe the fundamental question(s) you are attempting to answer.
- You will also want to describe the process you have followed; including information about how reliable the results are likely to be (e.g. the confidence interval for the data).
- You will want to describe your results and what you think they say about your fundamental question(s).
- It is generally a good idea to have an executive summary that, in a page or two summarizes the key results of the survey.
- As you write up the results, you need to consider the likely audience for the report in terms of their probable understanding of/tolerance for statistics and their preferences for words versus tables versus graphical presentation of results.
- Having a knowledgeable person not directly involved in the process review your report is beneficial.

## Western Wisconsin Renewable Energy Survey Case Study

8. **Reporting.** The report for the Western Wisconsin Renewable Energy Survey was presented in both text and graphics format. The report included an executive summary with research results and conclusions, and selected graphs and tables of data generated by the survey.

# Summary

A few tips based on the case study.

- Start with achievable plans and projects. In order to make the ‘case study’ project manageable, we identified a set of public entities on which to focus in the project. We sought a modest number of pieces of data, resulting in a very short questionnaire.
- Allow additional time for data collection. In addition to the mail-out portion of the study, the SRC contacted non-responding organizations by phone, sometimes making several contacts per organization. The majority of the data regarding electricity usage was provided by a single utility provider. Obtaining utility information from providers required additional mailings, phone calls, and multiple follow-ups. It is highly recommended to allow yourself additional time to obtain your data.
- Cooperation is the key to completing a successful survey project. Many individuals/organizations were involved in the ‘case study’ project. Outside individuals were asked to review survey drafts, local organizations were called prior to starting the survey to help us best identify individuals within targeted organizations from whom to seek the information we needed, and in the later stages of the project, utility providers were contacted for electricity usage information.
- Expect the Unexpected. Most public organizations that replied to the survey did not know their electricity usage or renewable energy usage. We had anticipated this might occur and had provided a ‘release’ section that would give us permission to contact the utility provider for an organization’s electricity usage.

# Definitions

**Confidence interval** - is the plus-or-minus figure usually reported in opinion poll results. For example, if you use a confidence interval of 5 and 47% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 42% (47-5) and 52% (47+5) would have picked that answer.<sup>1</sup>

**Confidence level** - a measure of how reliable a statistical result is, expressed as a percentage that indicates the probability of the result being correct.<sup>2</sup>

**Green Power** - utilizing "green" resources such as biomass, solar, wind, and water to generate electricity.

**Qualitative Information** - input that is generally descriptive in nature and that is not readily analyzed using statistical methods. Qualitative information often provides a more nuanced understanding of an issue.

**Renewable Energy** - any naturally occurring, theoretically inexhaustible source of energy, as biomass, solar, wind, tidal, wave, and hydroelectric power, that is not derived from fossil or nuclear fuel.<sup>3</sup>

**Sample** – a portion or subset of a population.

**Sample Size Needed** – number of returns that one needs to get precise and reliable findings.

**Validity** – the accuracy of the information gathered by a survey.

**Variable** – a measurable characteristic that varies in a population.

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<sup>1</sup> The Survey System. Creative Research Systems. <http://www.surveysystem.com/sscalc.htm>

<sup>2</sup> Encarta® World English Dictionary [North American Edition] © & (P) 2007 Microsoft Corporation.

<sup>3</sup> Dictionary.com Unabridged (v 1.1) Based on the Random House Unabridged Dictionary, © Random House, Inc. 2006.

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Ag Marketing Resource Center (AgMRC)

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# Appendix

- **Cover Letter – Mail 1**
- **Postcard Template**
- **Cover Letter Mail 2**
- **Case Study Questionnaire**

## Survey Cover Letter – Mail One



Cooperative Extension  
St. Croix County Extension Office

### University of Wisconsin-Extension

Agricultural Service and Education Center  
1960 8<sup>th</sup> Avenue, Suite 140  
Baldwin, WI 54002  
715-684-3301 Ext. 5  
715-684-2666 (fax)

January 18, 2008

With energy prices at record-high levels, concerns about future supplies, and the threat of global climate change, interest in renewable energy is growing. The enclosed survey is designed to determine current demand for energy coming from renewable sources and anticipated future demand for energy from such sources among key public organizations in Western Wisconsin.

Your participation is voluntary but would be greatly appreciated. **Please complete and return the survey in the enclosed self-addressed envelope by February 1, 2008.** If you are not the person in your organization that would best be able to answer the renewable energy survey questions, please pass the questionnaire on to that person.

The Survey Research Center (SRC) at the University of Wisconsin-River Falls is implementing the survey on our behalf. The bar code on the survey is for mailing purposes only. This number will be used to keep track of the returned surveys so that follow-up reminders won't be mailed to organizations that have already returned their surveys.

If you have questions or comments about this survey, please contact Pete Kling at 715-684-3301 ext. 141 or [pete.kling@ces.uwex.edu](mailto:pete.kling@ces.uwex.edu).

This survey is a unique opportunity to understand the current and potential demand for green power within Western Wisconsin. Thank you for your time and participation.

Sincerely,

Two handwritten signatures in black ink. The first signature is "Pete Kling" and the second is "Andrew Dane".

**Pete Kling, Community Development Agent  
St. Croix County - UW Extension  
Andrew Dane, Community Development Agent  
Barron County - UW Extension**

## Template for Postcard Reminder

A couple of weeks ago, we sent you a xxxxxxxxxxxxxxxxxxxxxxxx Survey on behalf of xxxxxxxx. The survey is designed to collect information that will xxxxxxxxxxxxxxxxxxxxxxxx. At the time of this mailing, a completed survey has not been received from (your household, your organization, etc.). If the survey has already been completed and returned, please accept our thanks and disregard this reminder. If it has not been completed yet, please take some time to fill out the survey and return it. If you did not receive a survey or no longer have it, another one will be sent in the next couple of weeks. Please watch for it and return it upon receipt. Thank you.

Survey Research Center  
University of Wisconsin—River Falls  
124 RDI Building  
410 S. Third Street  
River Falls, WI 54022

## Survey Cover Letter – Mail Two



Cooperative Extension  
St. Croix County Extension Office

### University of Wisconsin-Extension

Agricultural Service and Education Center  
1960 8<sup>th</sup> Avenue, Suite 140  
Baldwin, WI 54002  
715-684-3301 Ext. 5  
715-684-2666 (fax)

February 15, 2008

A couple of weeks ago we wrote you seeking your participation in a renewable energy study — an important survey to determine current demand for energy coming from renewable sources and anticipated future demand for energy from key public organizations in Western Wisconsin. This information will be used as an integral part of developing the market, delivery system and production of renewable energy in our area.

I am writing you again because of the importance of each survey to the usefulness of this study. The deadline to complete the survey is February 29, 2008. As of this mailing, your completed response has not been received. If you have already completed and returned the survey in the past couple of days, please accept my thanks and disregard this reminder. Your participation is voluntary but would be greatly appreciated. If someone else is better suited to complete the survey, please forward it to the appropriate person. After the deadline passes, non-responders will be contacted by phone to gather the information necessary for this very important study.

The Survey Research Center (SRC) at the University of Wisconsin-River Falls is implementing the survey on our behalf. The bar code on the survey is for mailing purposes only. This number will be used to keep track of the returned surveys so that follow-up reminders won't be mailed to organizations that have already returned their surveys.

If you have questions or comments about this survey, please contact Pete Kling at 715-684-3301 ext. 141 or [pete.kling@ces.uwex.edu](mailto:pete.kling@ces.uwex.edu). Thank you for your time and participation.

Sincerely,

Two handwritten signatures in black ink. The first signature is "Pete Kling" and the second is "Andrew Dane".

**Pete Kling, Community Development Agent**

**St. Croix County - UW Extension**

**Andrew Dane, Community Development Agent**

**Barron County - UW Extension**

University of Wisconsin-Extension provides equal opportunities in employment and programming including Title IX and ADA Requirements.

# Case Study Questionnaire

## WESTERN WISCONSIN RENEWABLE ENERGY SURVEY

**\*\*PLEASE RETURN BY FEBRUARY 1, 2008\*\***

Using blue or black ink, please fill the circle that most closely describes your perspective on the following:  
Please fill the circle:

Like this: ● Not like this: ✓ ✗ /

1. Has your organization set a goal for kilowatts coming from renewable sources in the future (defined as wind, solar, biomass, or hydro)?
- Yes → **Go to Q1a**                      No → **Go to Q4**
- 
- 1a. What is your organization's goal for kilowatts from renewable energy sources by annual percentage of use?
- Goal - Annual Percentage of Use \_\_\_\_\_ %
- 1b. **OR** by annual kilowatt-hours?
- Goal - Annual Kilowatt-Hours \_\_\_\_\_ (kWh/year)
2. By when do you hope to achieve your goal?    Goal - Year \_\_\_\_\_
3. In achieving your organization's goal for renewable energy, does your energy policy place any emphasis or importance on sourcing that energy from:
- |  | Yes                   |  | No                    |
|--|-----------------------|--|-----------------------|
| a. On site (for example, solar panels on the roof) | <input type="radio"/> |  | <input type="radio"/> |
| b. Purchasing from a provider within your County   | <input type="radio"/> |  | <input type="radio"/> |
| c. Purchasing from a provider within Wisconsin     | <input type="radio"/> |  | <input type="radio"/> |
- |   | No Change             | 1-10%                 | 11-25%                | 26-50%                | 51-75%                | 76-100%               |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 4. Currently a common price for renewable energy blocks is about \$3.00/300 kWh. If this increased to \$4.00/300 kWh by how much do you think your organization would <b>reduce</b> your renewable energy block purchase? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 5. If the price of renewable energy blocks decreased from \$3.00/300 kWh to \$2.00/300 kWh by how much do you think your organization would <b>increase</b> your renewable energy block purchase?                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

6. How many total kilowatt-hours of electricity did your organization use in calendar year 2006? \_\_\_\_\_ (kWh/year) Don't Know

If you do not know, please fill-in "Don't Know" circle

6a. Of the electricity used, what percentage came from renewable sources (defined as wind, solar, biomass, or hydro)? \_\_\_\_\_ % Don't Know

If you do not know, please fill-in "Don't Know" circle

- If you answered "Don't Know" to Question 6 or Question 6a (above), do we have permission to access this information from your energy provider? If yes, please provide your signature and title. Yes  No

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

7. Who is your organization's utility provider? \_\_\_\_\_

**Thanks for completing the survey!**

Please return your survey by **February 1, 2008** to:  
Survey Research Center - University of Wisconsin - River Falls  
410 S. Third St. 124 Regional Development Institute  
River Falls, WI 54022-5001



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