

2006 Economic Assessment of the Connecticut Commercial Lobster Industry

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Cover photograph by John Collins

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Introduction

In 2007, at the request of commercial lobstermen concerned about the lack of recovery of their industry from the 1999 lobster die-off, a study was initiated by Connecticut Sea Grant to assess the economic status of the Connecticut commercial lobster industry as of 2006. A questionnaire was developed and mailed to all individuals holding commercial lobster licenses in Connecticut. The response rate was very low. In spring of 2008, in an effort to increase the number of responses received, undergraduate student Emily Keiley called lobstermen to encourage their participation in the economic assessment study and discussed the survey and handed out additional copies at a meeting of the Connecticut Commercial Lobstermen's Association. Ultimately, 13 usable responses from self-declared full-time commercial lobstermen and 13 usable responses from self-declared part-time lobstermen were received. These responses represented about 43% of the full-time lobstermen and about 10% of the part-time lobstermen active in 2006.

Therefore, it must be recognized from the start that the small sample of returned questionnaires made any accurate extrapolations of costs to the entire fishery difficult at best. The results should be reviewed with this limitation in mind, and used with caution accordingly. The goal was to conduct an economic impact analysis, but the small sample size did not allow for the development of an economic multiplier for the impact of the industry on the state's economy.



Photo: John Collins

The economic data collected included both fixed costs and operating costs associated with commercial lobster fishing. Additional open-ended questions were used to determine general perceptions held by industry participants. A summary of those results follows the economic data.

Part I: Economic Assessment

The tables that follow provide a summary of the raw data received from the lobstermen. Data for the full-time fishermen are provided in Tables 1 – 4, followed by data for the part-time fishermen in Tables 5-7. Combined summary information follows both in Table 8.

In all tables, “Category” stands for the specific type of fixed or operating cost; “No. of Respondents” indicates the number of individuals who provided a useable response to that particular question, “Average” is the average of the total number of responses for that specific category type, and “Range” shows the lowest and highest responses for a specific category type.

A. FULL-TIME CONNECTICUT COMMERCIAL LOBSTERMEN

Table 1. 2006 Fixed Costs: Full-time Lobstermen (N=13)

Category	No. of Respondents	Average	Range
Insurance	12	\$3,750	\$900 - \$14,500
Moorage	12	\$2,937	\$200 - \$7,200
Warehouse	6	\$1,967	\$500 - \$4,453
Vehicle	9	\$6,676	\$3,000 - \$27,000
Vehicle Maintenance	7	\$1,492	\$600 - \$3,600
Business Admin.	2	\$609	\$217 - \$1,000
Professional Fees	8	\$1,124	\$250 - \$3,500
Travel & Entertainment	5	\$1,643	\$100 - \$6,000
Interest	3	\$3,603	\$1,294 - \$7,600
Depreciation	6	\$12,677	\$359 - \$55,000
Dues and Licenses	13	\$1,252	\$275 - \$3,550
Boat Registration	2	\$89	\$77 - \$100
TOTAL*		\$25,142	\$7,413 - \$78,503

**Depreciation not included in totals*

Table 2. 2006 Operating Costs: Full-time Lobstermen (N= 13)

Category	No. of Respondents	Average	Range
Fuel and Oil	13	\$10,835	\$950 - \$25,000
Provisions	6	\$2,315	\$200 - \$7,000
Gear Maintenance	10	\$3,166	\$300 - \$10,000
Vessel Maintenance	11	\$6,448	\$800 - \$25,000
Ice	2	\$1,700	\$100 - \$3,300
Bait	13	\$11,743	\$2,237 - \$40,000
Supplies & Equipment	12	\$8,599	\$2,000 - \$35,160
Taxes & Fees	9	\$1,728	\$127 - \$7,500
Transportation	1	\$305	-
Crew	7	\$35,538	\$1,000 - \$92,525
Cell Phone	9	\$1,072	\$600 - \$1,818
Food	3	\$873	\$120 - \$2,000
Vessel Upgrades	0	\$0	-
Equipment Rental	1	\$230	-
Office Supplies	1	\$267	-
Electricity (dock)	2	\$1,831	\$1,817 - \$1,844
Water (dock)	1	\$100	-
TOTAL*		\$51,212	\$9,251 - \$158,622

**Crew costs figured in separately (below)*

Table 3. 2006 Total* Cost of Fishing Activity: Full-time Lobstermen

Category	Average	Range
Full-time Fixed Costs (per)	\$25,142	\$7,413 - \$78,503
Full-time Operating Costs (per)	\$51,212	\$9,251 - \$158,622
Total Full-time Cost (per)	\$76,354	\$16,664 - \$237,125
Total Full-time Cost (N=30)	\$2,290,620	\$499,920 - \$7,113,750

**Excluding depreciation and crew costs*

A discussion with Matthew Gates of the Connecticut Department of Environmental Protection, Marine Fisheries Division in June 2009 resulted in the following determinations with respect to the 2006 commercial lobster fishery:

- 159 individuals holding commercial licenses reported landing lobsters in 2006
- The range of the lobster landings was 1 pound to 74,000 pounds
- Landings totaled 784,725 pounds
- The landings data were reviewed to develop an estimate of the number of full-time and part-time lobstermen in 2006. Thirty (30) individuals landed more than 1% of the total

catch each, ranging from 8,500 to 74,000 lbs. These individuals were designated full-time fishermen (N=30) for the purposes of making additional calculations to the dataset. The dataset had 13 complete responses from self-identified full-time lobstermen (13/30 = 43.3% of total full-time lobstermen as determined from the landings data).

- 129 individuals were considered part-time lobstermen for the purposes of the calculations, landing between 1 pound and 7,000 pounds each; 97 of these individuals landed more than 1000 pounds each. (13/129 = 10% of total part-time lobstermen as determined from the landings data.)

Based on discussions with lobstermen and agency staff about the commercial lobster fishery in the state, an assumption was made that eight full-time lobsterman worked east of the Connecticut River, and 22 west of the River, in 2006. Mike Theiler, vice president of the Connecticut Commercial Lobstermen’s Association (February 2009), estimated that the 6-8 full-time lobstermen working east of the Connecticut River had two paid crew members, while those working west of the River had one paid crew member. For the purpose of making additional calculations, it was assumed that 8 of the 30 full-time lobstermen had two (2) paid crew members; the remaining 22 had one paid crew member. It was also assumed that the part-time lobstermen (N=129) had no paid crew members.

To aid in determining the number of full-time versus part-time lobstermen, in hindsight, it would have been useful to ask on the survey form whether the respondent had a commercial fishing tax exempt number, rather than looking at individual landings data. These numbers are only issued to individuals who prove that 50% or more of their income comes from fishing.

According to NOAA National Marine Fisheries Service (NMFS) annual landings data for American lobster (www.st.nmfs.noaa.gov/st1/commercial/landings/annual_landings.html), the average ex-vessel price per pound received for lobsters landed in Connecticut in 2006 was \$5.08. **Gross value of Connecticut landings = \$5.08 x 784,725 pounds = \$3,986,403.**

The above information and declared assumptions were used to determine crew expenses for the full-time lobstermen, below.

Table 4. 2006 Crew Expense Calculations: Full-time Lobstermen

Category	Average	Range
Operating Cost – Crew (per)	\$35,538	\$1,000 - \$92,525
8 Full-time with 2 crew = 16 crew	\$568,608	\$16,000 - \$1,480,400
22 Full-time with 1 crew = 22 crew	\$781,836	\$22,000 - \$2,035,550
30 Full-time crew costs	\$1,350,444	\$38,000 - \$3,515,950
Total Full-time Costs (per)	\$76,354	\$16,664 - \$237,125
Total Full-time Costs (N=30)	\$2,290,620	\$499,920 - \$7,113,750
Total Full-time Costs plus crew (N=30)	\$3,641,064	\$537,920 - \$10,629,700

B. PART-TIME CONNECTICUT COMMERCIAL LOBSTERMEN

Table 5. 2006 Fixed Costs: Part-time Lobstermen (N=13)

Category	No. of Respondents	Average	Range
Insurance	9	\$745	\$300 - \$2,000
Moorage	9	\$1,306	\$100 - \$2,800
Warehouse	-	-	-
Vehicle	6	\$6,367	\$400 - \$20,000
Vehicle Maintenance	5	\$1,040	\$200 - \$3,000
Business Admin.	2	\$275	\$250 - \$300
Professional Fees	2	\$450	\$300 - \$500
Travel & Entertainment	1	\$100	-
Interest	1	\$500	-
Depreciation	3	\$2,167	\$500 - \$4,000
Dues and Licenses	10	\$604	\$200 - \$1,500
Boat Registration	1	\$98	-
TOTAL*		\$11,485	\$1,750 - \$30,100

**Does not include depreciation*

Table 6. 2006 Operating Costs: Part-time Lobstermen (N=13)

Category	No. of Respondents	Average	Range
Fuel and Oil	10	\$2,273	\$200 - \$5,976
Provisions	4	\$725	\$100 - \$2,500
Gear Maintenance	10	\$2,030	\$100 - \$6,300
Vessel Maintenance	9	\$1,834	\$400 - \$5,000
Ice	3	\$350	\$50 - \$600
Bait	9	\$1,811	\$100 - \$5,325
Supplies & Equipment	8	\$3,248	\$200 - \$11,000
Taxes & Fees	5	\$1,230	\$100 - \$3,000
Transportation	6	\$1,970	\$200 - \$4,220
Cell Phone	5	\$888	\$100 - \$1,900
Food	3	\$1,367	\$100 - \$3,000
Vessel Upgrades	1	\$500	-
Equipment Rental			
Office Supplies			
Electricity (dock)			
Water (dock)			
TOTAL*		\$18,226	\$1,650 - \$48,821

**Assumption is part-time lobstermen have no paid crew*

Table 7. 2006 Total* Cost of Fishing Activity: Part-time Lobstermen

Category	Average	Range
Part-time Fixed Costs (per)	\$11,485	\$1,750 - \$30,100
Part-time Operating Costs (per)	\$18,226	\$1,650 - \$48,821
Total Part-time Costs (per)	\$29,711	\$3,400 - \$78,921
Total Part-time Costs (N=129)	\$3,832,719	\$438,000 - \$10,180,809

**Does not include depreciation*

C. COMBINED FULL-TIME AND PART-TIME CONNECTICUT COMMERCIAL LOBSTERMEN

Table 8. 2006 Total* Costs for Full-time and Part-time Lobster Fishery Combined

Category	Average	Range
Total Full-time Costs plus crew (N=30)	\$3,641,064	\$537,920 - \$10,629,700
Total Part-time Costs (N=129)	\$3,832,719	\$438,000 - \$10,180,809
Total Full-time + Part-time Costs (N=159)	\$7,473,783	\$975,920 - \$20,810,509
Gross value of 2006 Lobster Landings**	\$3,986,403	

**Does not include depreciation*

***Based on average ex-vessel per pound price of \$5.08*

The part-time data collected only represents an estimated 10% (n=129) of the total pool of part-time lobstermen in 2006, while the full-time data collected represents an estimated 43% (N=30) of the total pool of full-time lobstermen in 2006. Therefore, the extrapolated part-time fishery data should be viewed keeping this in mind.

D. SUMMARY

In summary, the number of responses (N=26 total; 13 full-time, 13 part-time) did not support the development of an economic multiplier to determine the full impact of the commercial lobster fishery on the Connecticut economy. However, 30 full-time and 129 part-time lobstermen reported landings ranging from 1 lb. to 74,000 lbs., totaling 784,725 pounds with an ex-vessel value of \$3,986,403. The full-time fishery total costs, including crew and excluding depreciation and based on responses from about 43% of the total number, were on average, \$76,354, ranging from \$16,664 to \$237,125 in 2006. Total part-time fishery costs, excluding depreciation and keeping in mind the extrapolation was based on responses from about 10% of the total number, were on average, \$29,711, and ranged from \$3,400 to \$78,921 in 2006.

The gross value of Connecticut landings in 2006 is estimated at \$3,986,403. The direct economic impact of the lobster industry to the economy through the goods and services

purchased by the lobstermen from businesses such as marine suppliers, bait dealers, fuel sales, and insurance is estimated to be an average of \$7,473,783 in 2006. As already stated, the small sample size did not allow us to develop an economic multiplier for the impact of the industry on the state’s economy.

Part II: Open-Ended Questions

In addition to the economic assessment part of the questionnaire, additional open-ended questions were used to determine general perceptions held by industry participants. Twenty-one people responded to this part of the survey, all of whom were male. The respondents can be broken down into several categories based on full/part-time, age, and experience. The groupings used have been displayed in Tables 9-12 below, along with the percentage of respondents that fell within each category.

Table 9. Experience - Group Breakdown of Respondents

Experience (Years)	Respondents (%)
10 – 19	28.5%
20 – 29	23.8%
30 – 39	38.0%
40 +	9.5%

Table 10. Age – Group Breakdown of Respondents

Age (Years)	Respondents (%)
30 – 39	4.7%
40 – 49	33.0%
50 – 59	33.0%
60 – 69	14.0%
70 +	9.5%

Table 11. Full-time or Part-time Status of Respondent

Full / Part Time	Number of Respondents
Full	10
Part	10
Hobby	1

The following is an analysis of the responses to each open-ended question. The underlined responses were listed by the highest percentage of respondents. Respondents could list as many responses as they wished. The responses were reviewed according to the three independent variables discussed above: age, full/part-time status, and years of experience. For the majority of the open-ended questions, there was virtually no correlation between the responses based on any of these variables.

Survey Question 1: What issues concern you the most about your industry?

Overall respondents were primarily concerned with three variables: management, declining stocks, and pollution. More specifically, respondents answered;

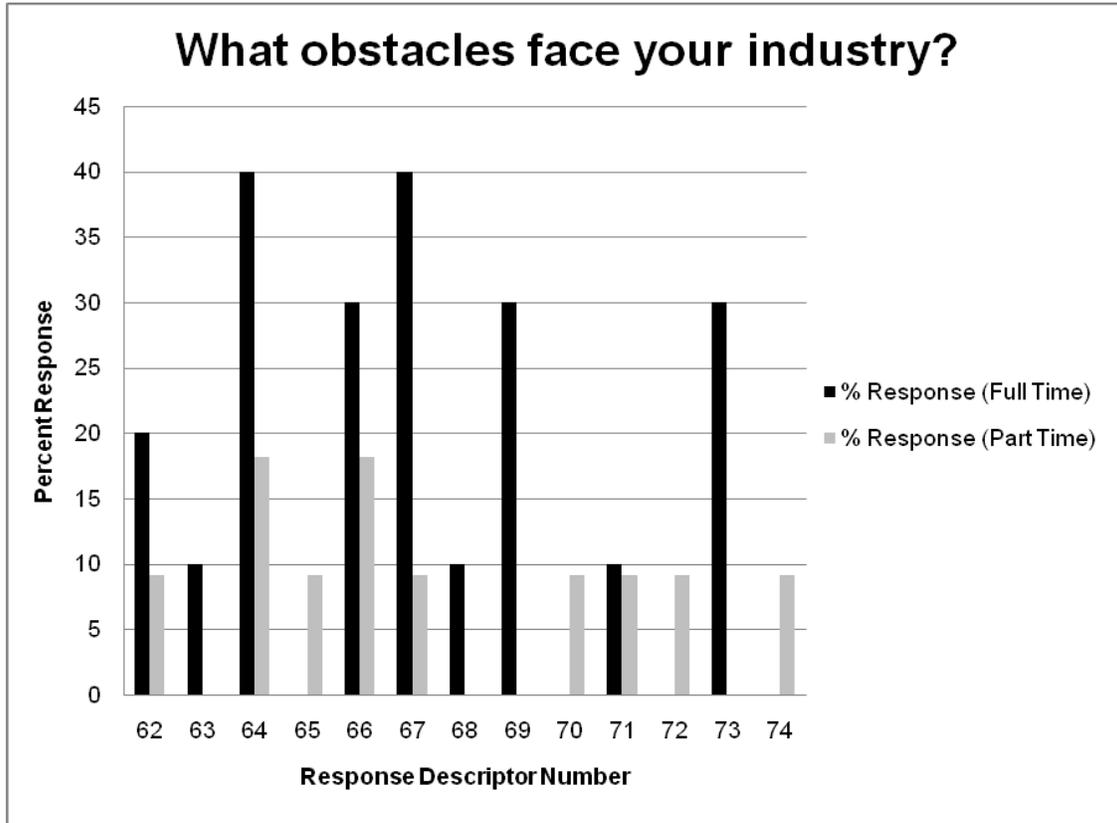
- Poor management/over-regulation/inability of fed/state to balance restoration of resources with viability of industry
- Need trap limit
- Decline in numbers of stock / lobsters may never come back
- Pollution / water quality

Survey Question 2: What obstacles face your industry?

Respondents indicated that regulatory pressure, rising operating costs and declining resources (lobsters) as the primary obstacles currently facing the industry. Operating costs such as fuel, bait and dockage were mentioned specifically. Both part and full-time respondents (Figure 1) felt that regulatory pressures were of the most concern; however a significantly greater percentage of full-time respondents indicated that declining resources was an obstacle.

- (62) Water quality
- (63) Predation
- (64) Regulations / regulatory pressure / over-regulation / restrictions
- (65) Overfishing
- (66) High bait and fuel costs (rising operating costs – fuel, bait, dockage)
- (67) Continued decline in resource population
- (68) Shell disease
- (69) Financial loss
- (70) Global warming
- (71) No marina dockage for commercial fishermen
- (72) Inequality in trap allocation among industry members
- (73) Mismanagement (e.g. gauge increase) (LCMT has advocated everything but trap limit)
- (74) Viable market

Figure 1: Question 2 Responses by Full / Part-Time



The Response Descriptor Numbers is the number assigned to each different category of response to facilitate analysis.

Survey Question 3: What are the positives you see for your industry?

The majority of respondents could not identify any positive aspects of the industry, indicating that “there are none”. Other responses provided are listed.

- There are none
- Prices (ex-vessel) higher last 6 months
- Shell rot appears to be getting less frequent
- Getting v-notch program started
- Enjoy fishing
- Slight comeback of lobsters
- The people working for the industry
- Most of the “bad eggs” have been shaken out of the industry
- Effort is under control
- Legislative support for industry (funding for v-notch program; property tax reform)
- No one steals gear anymore
- Abundance of small lobsters
- Fewer fishermen

Survey Question 4: What are the negatives you see for your industry?

Poor management and overfishing accounted for the majority of responses. The lack of a trap limit and increased gauge sizes were specifically mentioned as examples of poor management.

Survey Question 5: In your opinion, what do you think is the best way to conserve the lobster resource while maintaining a viable commercial fishery?

Four concepts were primarily suggested to conserve the resource while maintaining a viable fishery: the V-notch program, pot limits, size limits and closures. In terms of pot limits, many respondents cited 700 – 800 pots. Closures specifically suggested were:

- 1) Close Western LIS from June to Sept for a few years / Jan-Feb-Mar closed seasons
- 2) Close fall fishing; open for spring because hard lobsters, better price and quality

Size limits, such as the protection of large females and reducing the size limit for males, were also suggested.

Survey Question 6: What percent of your trap allocation would you like to use regularly?

The majority of respondents felt that they should be able to use 100% of their trap allocation; however responses ranged from 40% to 3000%.

Survey Question 7: In your opinion, should new commercial lobster licenses be issued?

The most common response was “NO”. Many respondents included a brief explanation as to why as well. Such explanations were as follows:

- 1) The present industry can't be sustained, so why increase pressure on resource?
- 2) No new entries, too many (fishermen) already
- 3) Need to get pressure down to sustainable level and keep it there

Survey Question 8: In your opinion, should there be a moratorium or cap on commercial lobster licenses issued?

Most answered “YES”. However some respondents felt there should be exceptions such as the sale or transfer of an existing license.

Survey Question 9: In your opinion, under what circumstance(s) should a commercial lobster license be transferable?

Circumstances considered by the majority of respondents to be applicable for the transfer of a license were as follows:

- 1) Upon retirement
- 2) Death (family should be able to decide)
- 3) Whatever the case, without consequences / no restrictions / without 10% reduction

Survey Question 10: Has coastal access for your business changed over the past 10 years?

71.4% responded YES

If yes, in what way?

The majority of the respondents that indicated affirmatively that coastal access has changed in the last ten years felt that industrialization, and a lack of commercial dock space, have had the greatest impact. Reduced access was generally attributed to the industrialization of the shore front.

Survey Question 11: What do you envision for your fishery in 5 to 10 years?

Most of the respondents felt that the industry would be “extinct” in 5 to 10 years, or that it would continue to deteriorate.

SUMMARY

Although the survey resulted in a small number of usable responses, those responding expressed similar thoughts in their answers to the open-ended questions, reflecting a group of commercial fishermen disheartened about the future prospects of the American lobster fishery in Connecticut. They stated concerns about the management of the lobster stock, and the inability of state and federal resource managers to balance the viability of the resource with the viability of the fishery; they also expressed concern about the effects of pollution and degraded water quality on the lobster resource. The two greatest obstacles to the industry most often expressed were regulatory pressure and the decline in the resource, which are closely linked.

The majority felt there were no positives for the fishery, but they did articulate several ideas for ways to conserve the resource while maintaining a viable commercial fishery. Among those listed were imposing a pot limit and/or seasonal closures, keeping the v-notch program viable, and protecting larger females.

When asked how much of their trap allocation they should be able to use, the majority responded 100%, although the range in responses was 40% to 3000%. It would have been useful to have asked each respondent to indicate his/her current trap allocation, in order to better judge the meaning of each response (e.g., they felt they were fishing an adequate number of traps, too few, or too many).

As for expanding the size of the current fishery, the majority of respondents felt that no new commercial lobster licenses should be issued, but that existing licenses should be able to be sold or transferred. Some listed specific conditions under which a sale or transfer could take place; others thought it should be possible under any circumstance.

When asked whether coastal access has changed for an individual's business, more than 70% responded in the affirmative. Loss of commercial dock space and preservation of working waterfronts is not only a local concern, but also a national concern.

The overall assessment of the future of the Connecticut commercial lobster fishery, as expressed by those individuals who responded to this survey, is that the outlook is a bleak one. The opinions expressed were that the situation will continue to deteriorate, resulting in the possible "extinction" of the entire fishery in five to ten years. Whatever the future brings, it is clear that the 1999 lobster die-off continues to have lingering, devastating impacts on the both lobster resource and the lobster fishery.

Appendix 1. Copy of Survey Form

2006 Economic Study of CT Lobster Industry

The purpose of this survey is to conduct an economic assessment of the 2006 commercial lobster fishery in Connecticut, and to gather input on issues of concern to lobstermen about the fishery. This assessment is being conducted at the request of the Connecticut Commercial Lobstermen's Association, in order to better understand the economic value of the lobster industry in Connecticut. Participation in the survey is voluntary, but the more full- and part-time commercial lobstermen that participate, the more accurate and more reflective of the industry the outcome will be. The survey is anonymous and all survey data will be aggregated before they are released. **Please fill out the enclosed survey using your numbers for the calendar year 2006 and return it in the enclosed business reply envelope by August 3, 2007.** Any questions, please contact Nancy Balcom (above).

Demographic information:

1. Age _____
2. Gender: M / F
3. Years of experience lobstering commercially: _____
4. Vessel length: _____
5. Did you lobster commercially in CT at any time during calendar year 2006? Y / N
6. If yes, did you lobster: Full-time / Part-time
7. Did you fish for other species at any time during calendar year 2006? Y / N
8. Did you have a non-fishing related job during calendar year 2006? Y / N
9. If yes, was this job: Full-time / Part-time

If you DID NOT commercially fish for lobster at any time during calendar year 2006, please skip to page 4 and complete questions 45-63.

For those individuals that fished for lobster either full-time or part-time during calendar year 2006, the following questions are to collect information on your 2006 direct costs (those directly associated with lobstering), as well as some of your 2006 indirect costs (costs indirectly associated with lobstering). We

want to assess not only fishing operation costs, but your economic impacts on the community from buying food items to purchasing vehicles and equipment. Multipliers will be used to calculate the broader impact of the industry as a whole.

2006 Fixed Expenses:

- 10. Insurance \$ _____
- 11. Moorage and haul-out \$ _____
- 12. Warehouse and storage \$ _____
- 13. Vehicle \$ _____
- 14. Vehicle maintenance \$ _____
- 15. Business administration \$ _____
- 16. Professional fees \$ _____
- 17. Travel and entertainment \$ _____
- 18. Interest \$ _____
- 19. Depreciation \$ _____
- 20. Dues and licenses \$ _____

There may be other fixed costs associated with your business that are not reflected here. Please list them here.

- 21. Other: _____ \$ _____
- 22. Other: _____ \$ _____
- 23. Other: _____ \$ _____
- 24. Other: _____ \$ _____
- 25. Other: _____ \$ _____
- 26. Other: _____ \$ _____

2006 Operating Costs:

- 27. Fuel and oil \$ _____
- 28. Provisions \$ _____
- 29. Gear maintenance \$ _____
- 30. Vessel maintenance \$ _____
- 31. Ice \$ _____
- 32. Bait \$ _____
- 33. Supplies and equipment \$ _____
- 34. Taxes, fees, assessments \$ _____
- 35. Transportation \$ _____
- 36. Crewshare \$ _____
- 37. Business-related cell phone expenses \$ _____
- 38. Food expenses (on way to/ from) \$ _____

There may be other operating costs associated with your business that are not reflected here. Please list them here.

- 39. Other: _____ \$ _____
- 40. Other: _____ \$ _____
- 41. Other: _____ \$ _____
- 42. Other: _____ \$ _____
- 43. Other: _____ \$ _____
- 44. Other: _____ \$ _____

Looking Ahead 5 to 10 years:

45. Are you lobstering or do you plan to lobster in 2007? Y / N

46. Do you plan to be lobstering in 2012? Y / N

47. If yes: Full-time / Part-time?

48. If no, why not? _____

49. Do you plan to be lobstering in 2017? Y / N

50. If yes: Full-time / Part-time?

51. If no, why not? _____

52. What issues concern you the most about your industry?

53. What obstacles face your industry?

54. What are the positives you see for your industry?

55. What are the negatives you see for your industry?

55. In your opinion, what do you think is the best way to conserve the lobster resource while maintaining a viable commercial fishery?

56. What percent of your trap allocation would you like to use regularly?

57. In your opinion, should new commercial lobster licenses be issued?

58. In your opinion, should there be a moratorium or cap on commercial lobster licenses issued?

59. In your opinion, under what circumstance(s) should a commercial lobster license be transferable?

60. Has coastal access for your business changed over the past 10 years? Y / N

61. If yes, in what way?

62. What do you envision for your fishery in 5 to 10 years?

Thank you for your time and information. Please mail the completed survey to Nancy Balcom in the enclosed business reply envelope by August 3, 2007. If you wish to retain confidentiality, please do not include a return address.