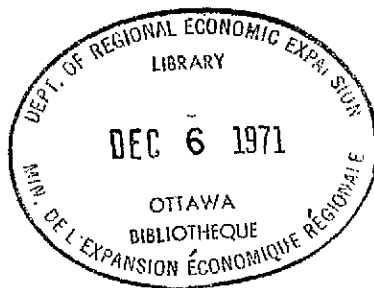
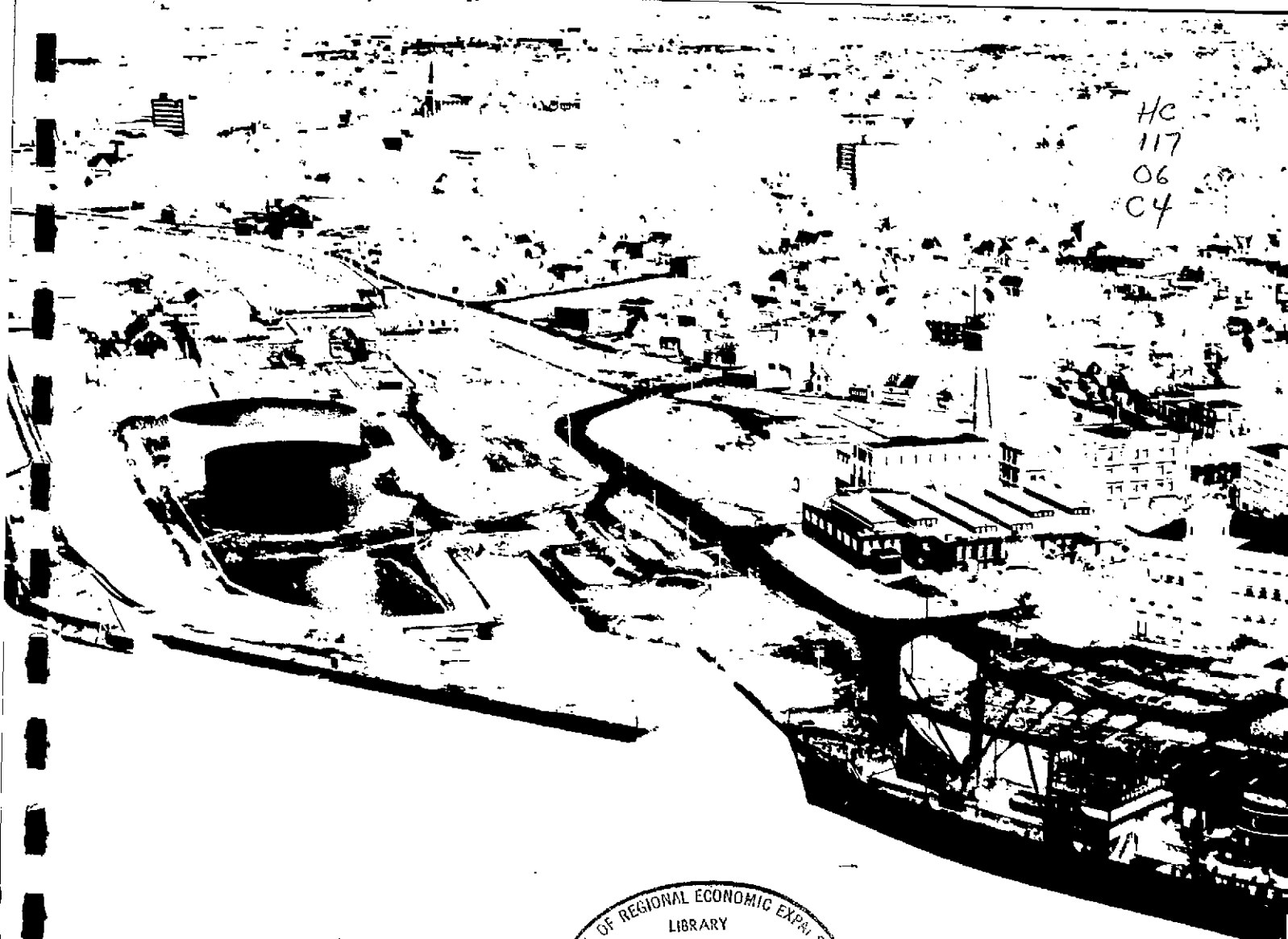


A REVIEW OF THE INDUSTRIAL OPPORTUNITY STUDY FOR THE CANWALL AREA

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A REVIEW OF THE INDUSTRIAL OPPORTUNITY STUDY FOR THE CORNWALL AREA

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by J. Earl Clubb
(Price Waterhouse Associates)

A REVIEW OF THE INDUSTRIAL
OPPORTUNITY STUDY FOR THE
CORNWALL AREA

INTRODUCTION

When the Honourable Jean Marchand, Minister of Regional Economic Expansion, was here last November he informed you, at the formal dinner which was held at the close of the Industrial Exhibition, that he had authorized the carrying out of a study of industrial opportunity for Cornwall and the surrounding area. Our firm was engaged for that purpose. And I think it is one of the most interesting and rewarding pieces of work that we have carried out. First of all, I would like to say a few words about how we went about the study because I think you will be interested in knowing something of what we did and how long it took.

We used a team of eight men, and work was started on January 4. Most of the team spent the greater part of January in Cornwall carrying out interviews, making notes, comparing their ideas with other members of the team and generally analysing the situation on an organized basis. Over 100 formal interviews were carried out during that period, and those interviewed represented the following walks of life:

the Mayor and Council members;
the Reeves and Clerks of the adjoining townships;

officials of the Federal, Provincial and
Civic governments;
welfare officers;
business leaders;
labour leaders;
educators;
newspaper and radio people;
students, and others.

We advised each of those whom we interviewed that their remarks would be given to us in confidence, that they would not be directly quoted, *but* that we would use their information in forming opinions and recommendations. Without exception, everyone co-operated fully with us, and for this we are deeply appreciative.

Our team of consultants met almost nightly to discuss their findings and exchange views, and, consequently, we obtained a good overall picture of Cornwall. We approached the study on two levels. On the one hand, we looked at the community in purely factual terms as a possible site for industry. On the other hand, we attempted to understand the character of Cornwall in human terms.

We took this approach because, to paraphrase the late President Kennedy, it is essential to find out not only what can be done for Cornwall but, more importantly, what can Cornwall do for itself. To do this, we had to understand what motivated the people of Cornwall, what were their attitudes as well as determining purely physical resources.

We explored how the needs, energies, aspirations and strengths of the community can be applied to the development of the community, and

also how those weaknesses which are here can be corrected. Principally, we were interested in the strong points of Cornwall, of which there are many, and how these can be harnessed and made to work for the overall good of the community.

Our impression is that Cornwall has the potential to become a vital city. It has suffered a good deal of unemployment caused by plant closings and the termination of major construction projects over the past several years, and this has created in the minds of some residents a defeatist attitude. On the other hand, Cornwall has shown, and continues to show, the strength to bounce back, and this is reflected in charity drives and other community projects which have been brought to a successful conclusion through the combined efforts of a large number of its citizens.

We found that relative new-comers to Cornwall think that the city has a bright future, but that it requires a strong and concerted effort on the part of everyone to bring this about. We found the people of Cornwall are proud of their city and have faith in it. There is a strong sense of communal unity and we detected a ground swell at all levels of 'desire to do it ourselves'. In our opinion, the people of Cornwall are prepared to give an impressive amount of support to leadership which will unify and inspire the latent urge to revitalize the community, and to give it its proper place in the provincial and national sun. We believe that the results of this study could be used as a tool to organize and develop the drive necessary to place Cornwall in its rightful place.

In carrying out the study we developed a number of recommendations that are included in our report. I would now like to deal with the highlights of the study and the most important recommendations, which, if carried out, could benefit Cornwall considerably.

MANPOWER

There are about 10,000 males currently employed in Cornwall, and about one-half of those are in manufacturing. A substantial portion of these are employed in paper, textiles, synthetic fabrics and fibres, which traditionally has been the backbone of Cornwall's manufacturing industry. The employed group has a relatively high average age and long seniority with their present employer, and this, of course, lessens their desire to move to other positions which might be developed through industries coming to Cornwall. However, a new industry should be able to count on a stable work force due to the non-migratory nature of Cornwall's people. If the new industry is progressive, it should be able to attract and retain and motivate employees in the under 25 age group, and it should also be able to tap the existing pool of lower and middle management of the area.

There are approximately 2,800 unemployed males in Cornwall, and half of those are unskilled, having no specific trade. About 30 percent have structural work or construction experience, including carpentry, painting, electrical, assembly, welding and plumbing. The majority of the remaining unemployed male work force covers a broad spectrum of skills and experience.

There are about 5,000 employed women in Cornwall, and generally they can be described as diligent workers, but with a relatively low level of career motivation. Many are employed in the textile industry, mainly in jobs requiring good manual dexterity. Those in non-textile work are mainly in light assembly or packaging type operations which are characterized by short learning curve and low skill requirements. It is believed that any new industry requiring a high degree of female manual dexterity can draw on a trained employed force, provided that their wages are somewhat higher than those presently paid. Provided tangible financial benefits accompany any staff training program, it is believed that a company involved in packaging or light assembly should be able to train female staff to its requirements in a relatively short time.

There are about 1,400 unemployed women in Cornwall, and it is significant that some 25 percent of these have an education of Grade XII or better, and the average school level is between Grades X and XII. On an age basis, close to half of the unemployed females are under 25. Any industry locating in Cornwall will find that a minimum of educational up-grading is necessary, and it can be expected that the majority will have ability to learn their job requirements easily and quickly. Because of the high educational levels, the productivity potential of these women should be high. Any business requiring a large female clerical work force should be attracted to Cornwall.

Any industry wishing to locate in Cornwall will examine the characteristics of available labour in relation to its own requirement. One of the particular features that industry will be concerned with is the

union climate. We estimate that close to 80 percent of the manufacturing labour force is unionized. The unions generally are well organized, and we found that the membership is receptive to good leadership. In our opinion, the leadership of unions in the community is today generally reasonable and responsible in its attitudes to management, in its desire to make a contribution to Cornwall's well being and in its willingness to cooperate in attracting new and responsible industry to the city. We would, therefore, describe the union climate in Cornwall as a basically healthful one, and a positive factor from an industrial prospect's point of view.

FINANCIAL CLIMATE

Any industry researching a community as a potential plant site must be concerned about the community's financial strength, its ability to finance and supply essential services as well as those services which contribute to the community's human and social appeal. Cornwall, in common with most other communities, faces problems in balancing its revenues with steadily increasing costs. This situation can be improved through industrial expansion which will achieve two major objectives; first, to broaden the tax base, thus creating more tax revenue and secondly, it should reduce the number of those on welfare, a significant item of expenditure.

The City of Cornwall has been successful in borrowing funds on satisfactory terms for capital projects of one kind or another. In order to meet current financing problems, the city is able to borrow freely on current account from the chartered banks at prime interest rates. This is a very commendable record. However, in order to make the greatest possible

use of its resources, we believe that the city should engage the services of a professional consultant in financial planning where the community's problems and needs are great. This financial consultant should be selected, in part, for his experience for bringing public and private funds together in joint ventures and projects of a kind which would be of significant benefit to the community.

Another recommendation is that spending objectives and priorities should be established and it should be the responsibility of the City Treasurer and the Clerk Administrator to carefully supervise and approve the preparation of financial budgets for all departments and to ensure that they are in accordance with the objectives and priorities established or with economic and businesslike management of the city.

There is no major local concentration of wealth in Cornwall and, for the most part, the industries which are established here are owned by non-residents. Although the amount of capital available locally in Cornwall for investment is relatively small in relation to the total, nevertheless there has been some activity in this direction and we suggest that this aspect of investment should be stimulated to a greater extent than has been the case. For example, Cornwall businessmen some years ago formed a company entitled "Cornwall Industrial Development Limited" to take over the land and buildings formerly occupied by Canadian Cottons when that company ceased operation, and we understand that the local company, CIDL, has been very successful in either renting or selling the premises to new industries coming to Cornwall. This sort of development should be encouraged to the maximum extent.

In this connection, we point to the fact that several parcels of land suitable for industrial development are owned by people as far afield as Montreal, Ottawa, Hamilton, New York and Los Angeles. We believe it can safely be said that these owners have little interest in Cornwall's urban and industrial development in terms of the good of the community, and it appears that the land is held for purely speculative purposes. We suggest that consideration might be given to forming a development corporation in which both the City and private investors would have an interest, and that this corporation should be used for the purpose of obtaining options or buying outright this prime industrial land and developing it for industrial purposes properly laid out with roads and municipal services. Although the corporation would be on a profit oriented basis, its prime responsibility would be to have available a good selection of good industrial land to encourage development of the community.

REAL ESTATE AND URBAN PLANNING

One of the most important factors in the industrial development of any community is the availability of good industrial land which is serviced with sewers, water, electricity and roads. It is equally important that the land can be purchased by industrial companies at a competitive price. Many progressive communities have obtained options on or purchased land, and installed the necessary services in order to attract new industry to their community; Cornwall must follow the same course.

At the time of our study earlier this year Cornwall had only 93 acres of what could be described as prime industrial land for sale and

this was divided into four separate parcels. This is completely inadequate and provides no choice to prospective new industries that might wish to settle in Cornwall. Furthermore, the industrial land which is held for sale should be cleaned up, boundaries marked and identified with informative signs for the benefit of prospective purchasers. To demonstrate the effect of a limited amount of land for sale - if the 93 acres was sold and immediately developed it could be expected to create only about 1,400 jobs.

As mentioned earlier, practically all undeveloped industrial land is privately owned by individuals and corporations. There are additional parcels of land zoned for industrial use which could become available if the owners wish to sell. Furthermore, there are other sites in the city which might be considered as potential industrial land but these are presently zoned as residential, commercial or agricultural and could be available if re-zoned to industrial. In this connection we think it is important to examine zoning policies with a view towards re-zoning these undeveloped areas. This could result in a considerable additional amount of land being zoned as industrial. However, in carrying out the re-zoning we strongly urge that the Urban Planning and Renewal Authority should be provided with the services of a qualified professional in order that all available land can be put to the very best use for the long-term benefit of Cornwall.

In conjunction with re-zoning, the city must give early consideration to the extension of water and sewer lines to improve the marketability and usefulness of industrial land. Most industries are not

interested in having to provide their own septic tanks and dig their own wells for services which are normally provided by the city or community.

It is obvious that our comments on this particular feature of Cornwall are negative, but much can be accomplished through positive and early action.

LOCAL INDUSTRY

The industries which are already established in a community are of interest to a new industry for several reasons. They may be a convenient customer or supplier. Overall they will influence the skill orientation of labour. They influence labour rates and labour-management relations and, to some extent, they will have an effect on the intangible which is the character of a city.

At the moment, industry in Cornwall is heavily weighted to basic commodities, electro-chemicals and paper, primary rather than consumer product industries. But certainly this need not be a deterrent to new industries as evidenced by the existence in Cornwall of a direct mail house and a record pressing company. There is plenty of room for industrial variety in Cornwall, and this should indeed be encouraged. Existing industries employ as many as 1,800 people in a large mill and as few as eight people in a small plant. Average employment is 150 people, and this suggests that the city can accommodate a wide range of industrial sizes within the limitations of the total labour force.

We interviewed eighteen companies, and this represents 40 percent of local industry and close to 75 percent of the employed work force. Of the eighteen industries we interviewed, four have recently completed expansion programs, two are in the process of expanding and nine have plans for some sort of expansion in the future. Only three have no expansion plans and these are primarily the industries which have been adversely affected by economic restrictions or technical changes. Local industry has confidence in Cornwall.

The majority of the industries interviewed have indicated that the factors which originally led them to select their Cornwall site have remained valid to the present time. A few felt that they might have settled in other areas with equal advantage, but were not dissatisfied with Cornwall in a comparative sense.

It is significant that of the eighteen companies interviewed, thirteen had non-resident ownership. This fact of absentee ownership is very much ingrained in Cornwall's history and is not necessarily a healthy or positive factor. Absentee ownership and consequently its management does not become involved in the community, its activities and its welfare or provide the leadership which can help a community grow successfully. Absentee owners cannot easily identify with the community. This does not mean that non-resident owners and management are unwilling to interest themselves in the community. Social responsibility is very much a part of the new management style. It does imply that there should be better communications between the city and absentee top management, and this should become the responsibility of the Mayor and/or the Industrial Commissioner.

We found in some cases that the medium to small companies were not as familiar as they might be with the Federal and Provincial Government Assistance programs which are available to them. It is important that they take advantage of all of these programs and this could be a stimulant to expansion. One of the key responsibilities of the Industrial Commissioner should be to keep himself and local industry fully and regularly informed about these assistance programs, and to assist industry in taking advantage of them.

Local industry is, on the whole, optimistic about Cornwall's future and its managers, in our opinion, need only to be more involved by the city in well planned projects in order to make a real contribution to its vitality and attitude. There is nothing about the make-up, policies and attitudes of local industry which should deter a new industry from locating in Cornwall. Industry is now relatively stable, local management is generally capable and progressive and the current labour and union stance is one of responsibility and co-operation. Cornwall, far from being isolated, is close to the major markets of Montreal, Ottawa and New York State. There is a good variety of industry in the city, indicating that Cornwall is not a "one-industry city" and can accommodate many types of manufacturing.

The city should encourage companies located in Cornwall to have their public relations and advertising programs express a closer identification with the life and plans of the community. Where possible, these programs should indicate that the products being promoted or advertised are produced in Cornwall.

MUNICIPAL AND OTHER SERVICES

Industries seeking a place to locate would find municipal and other services in Cornwall on the whole to be favourable.

The fire and police departments appear to be excellent. We rate the fire department's protection services as better than average. The department offers prevention training courses to plants and other institutions on request and these are well designed. Good fire prevention inspection service is offered to industry. Fire insurance rates in the city are good.

One problem does exist, however, and that is that in certain parts of the city the water supply system is inadequate to permit hydrant or sprinkler pressure at full flow. This is a matter known to city officials and is receiving their attention.

The police force we rate as excellent. It is well staffed, well trained and well equipped. There appears to be a very low incidence of serious crimes and minor criminal activity seems to be well under control. The public can be characterized as law-abiding and appear to respect the police force.

Cornwall, with its three medical hospitals and 620 hospital beds, is very well equipped for a city of its size. These services attract patients from outside the city, notably from Massena in New York State.

All of the essential health organizations are located and active in Cornwall, and service clubs are active in supplying services or aids not covered by health legislation.

In the area of welfare, Cornwall's problems, programs and services can be favourably related to those which obtain in comparable communities.

A primary sewage disposal plant operated by the Ontario Water Resources Commission provides adequate and sanitary treatment. At the moment, this plant is operating at about 60 percent capacity, and this will be an advantage in the growth of Cornwall and to the adjacent Township of Charlottenburg.

On the other hand, the sewage mains do not extend fully throughout the city so that industries in some areas must use septic disposal systems. Sewer trunks should be extended to all developing areas as soon as this is economically feasible.

The city has a good supply of clear water which is slightly on the hard side. The source is Lake St. Lawrence, and it is filtrated, chlorinated and fluoridated at the city's new modern filtration plant. It is estimated that the present supply system is ample to provide for an increase in population of some 75 percent.

However, the city's water distribution system is poor. In some areas there are no mains at all so that industry and others must drill wells. Also, no fire hydrants exist in these areas. In some areas existing mains

are too small, providing sufficient water for drinking, washing and toilet flushing but have insufficient flow capacity for fire control, sprinklers and hydrants and for industrial process usage. This is a situation which requires early attention.

Air and water pollution are serious problems in Cornwall for the time being. However, private initiative and provincial legislation will have overcome these problems by 1975. The industries involved are co-operating well with government pollution control agencies, and plans for abatement have been largely completed. The most obvious manifestation of pollution for the time being is the heavy odour which is sometimes apparent in the city. This, until it is removed, could be a serious deterrent to some industries, particularly in the food processing sector.

COMMERCIAL TRANSPORTATION

The availability and cost of commercial transportation is critical to a locating industry. Cornwall has several advantages - it is located on Highway 401, it is on principal lines of both the C.N.R. and C.P.R. and has limited access to the St. Lawrence River. These advantages are offset by a serious disadvantage with regard to trucking rates.

Cornwall is well located for road transportation, being situated on Highway 401, the direct road link between Canada's two largest cities - Montreal (79 miles) and Toronto (264 miles). The international bridge across the St. Lawrence connects Cornwall with Massena, New York and provides a gateway to the United States.

Although commercial truck carrier service between Cornwall and Montreal is good, the rates charged by the companies who have licensed rights to this route appear to be excessively high on a per ton mile basis relative to other routes. For any shipper without his own trucks or the resources to buy them, this fact can be a major deterrent. Montreal is both an essential market and a source of materials, and the trucking rates charged for the Cornwall-Montreal trip puts Cornwall at a serious disadvantage relative to other Ontario communities west of the city.

The question of trucking tariffs is a complex one, but the following figures which were provided to us indicate that the situation deserves immediate examination. Two informants gave us the following figures for the rate per cwt. for 40,000 pounds:

| | <u>Source 1</u> | <u>Source 2</u> |
|-------------------|-----------------|-----------------|
| Cornwall-Montreal | 41 cents | 35 cents |
| Cornwall-Toronto | 64 cents | 43 cents |

Another source gave us these rates per cwt. per mile:

| | |
|-------------------|-------------|
| Cornwall-Montreal | .0707 cents |
| Cornwall-Toronto | .0183 cents |

On this basis, one must conclude that Montreal-Cornwall trucking rates represent a serious deterrent to any industry requiring reasonably priced trucking service to Montreal. This is borne out by the fact that at least one major company in Cornwall has acquired its own fleet of trucks rather than pay the going rates.

With regard to water transportation, the Federal Government has announced plans to deepen a channel from the main shipping lane in the St. Lawrence, and in the harbour itself, to a minimum depth of 27 feet, which will equalize with the depth of the main shipping lane. This will be a considerable advantage to some of the companies in Cornwall, who have had limited access to water transportation since the construction of the St. Lawrence Seaway.

Air transport, both passenger and freight, is available at Dorval International Airport approximately one hour away by road.

With the exception of the very high trucking rates between Cornwall and Montreal, Cornwall transportation facilities compare favourably with any Ontario city.

MUNICIPAL ORGANIZATION

For government to be effective, there must be a clear distinction between the policy makers (elected officials) and the policy implementers (appointed officials). The policy makers are elected for their judgment and their ability to make policies which are a clear expression of the will of the people. Appointed officials, or department heads, by contrast, must be selected on the basis of their professional expertise and their ability to translate policy into action within reasonable parameters of time. Great care must be taken to ensure that the relationship between and responsibilities of elected and appointed officials are clearly defined, and that all participants accept and obey the rules. Some of the ground rules are:

- Once policies and priorities have been set by the elected officials in response to public need, involvement of these officials in the planning and execution processes must be minimal, providing the implementers are competent to the degree required by the system. Given the necessary expertise the effectiveness of departmental heads can be seriously diminished if there is not genuine delegation of responsibility by the policy makers.
- The politician is involved in the art of the desirable; the civil servant must be an expert in the art of the possible. The two are often in conflict. It is therefore essential that the calibre of the civil servant, should be the best available.

In order to achieve effective management of the community, the most up-to-date management techniques such as management by objectives and PPBS should be applied. This suggests that a community leader should be aware of these techniques and their application.

The character of a city and, therefore, its appeal to locating industry is a direct product of the city's management and leadership, and these are the responsibility of the community as a total cohesive unit, not as a collection of individuals.

Later on we outline the role, responsibilities and qualifications of an Industrial Commissioner. Because industrial development is of such great importance to any community, and particularly to Cornwall, we recommend that consideration be given to the formation of an Industrial Development Commission, and that a formal combined approach be taken towards industrial development by the three authorities, namely the City of Cornwall,

the Township of Cornwall and the Township of Charlottenburg. We understand that on past occasions the Industrial Commissioner for the city has lent assistance to the adjacent townships and we think this is commendable. We believe that there is much to be gained from a joint arrangement, and two of these advantages that we see are - sharing of the costs, thus enabling a more sophisticated and dynamic approach to be taken than would be the case of each community operating on its own - and a more orderly establishment of the industrial community providing a wider choice of location.

We believe there is considerable merit in the formation of an industrial development commission and in the city and the two townships combining their efforts and resources in promoting industrial development. It is suggested that a committee be set up to study this matter. If the proposal to form a commission is adopted, membership on the commission should include representatives of city council, the two townships, and industry and labour. The representatives from industry and labour would be appointed for one-year terms, and both should be selected for their abilities for leaders in and promoters of the community. Neither should hold any elected political office. The term "industry" is used here in its broadest sense, and is intended to include commercial and retail operations as well as manufacturing.

We cannot emphasize too strongly how important it is for negotiations, between the Industrial Commissioner and a company seeking an industrial site, to be kept completely confidential, even though this very fact may be irritating to the elected representatives of Council. An inadvertent leak of a company's plans in many cases is all that is needed to decide a company against settling in a particular community.

EDUCATION

The educational system in Cornwall impressed our team as ranging from good to excellent as to curricula and teaching staff. In our opinion there is no aspect of the system which should deter an industrial prospect from the point of view of - the education of their children and those of his staff - the quality and motivation of men entering the labour force from this system, or - the availability of adult education and of vocational training.

Our examination of the school system did not include the primary schools. We concentrated on the secondary school level, at which higher education begins and which is primarily responsible for the academic quality of a community as a whole, and its labour force in particular; and the post-secondary level at which the earlier base is built upon and embellished. We found that enrolment in Grades XII and XIII has almost doubled in the last five years. Over 60 percent of 1970 Grade XIII graduates are now at university, which is an impressive statistic for any community. On the other hand, about one-third of 1970 Grade XII graduates did not continue their education. Enrolment at the St. Lawrence College of Applied Arts and Technology is presently over 500, from a standing start approximately three years ago. Current drop-out rate is about five percent, compared with 20 percent for the other two campuses of this college. The Cornwall Campus of the University of Ottawa currently has approximately 400 students, following courses of study leading to BA or M.Ed. degrees.

Needless to say, these facts are having a meaningful and positive influence, qualitatively and sociologically, on the community. However, many secondary and post-secondary school graduates are not inclined, or do not have the opportunity, to build a career with existing local employers in Cornwall. Consequently they move away from Cornwall, and this trend can only be checked or reversed by the expansion of existing industry or the infusion of new job opportunities into the community.

The following points are of interest to potential new industries:

- most major employers have in-house training programs;
- an increasing number of students are staying in school to junior matriculation, and those who enter the labour force should be well equipped to assimilate training and skilled operations or any operations requiring sound high school grounding;
- because of the Cornwall Community College, a new employer should be able to recruit locally an adequate number of skilled men and women with post-secondary school education in technical and business fields;
- the number of employed adults with up-graded skills should increase steadily during the next few years as greater emphasis is placed on collaboration between industry and the Community College in night school courses;
- any new employer must be prepared to conduct his own management development program since, for the time being, the educational system does not offer any comprehensive courses directed at management skills and techniques as such;

- the Cornwall Trades and Labour Council conducts seminars for local union leaders which stress the responsibility of shop stewards and union officers in the labour-management process. An employer can therefore expect to find, in Cornwall, a better informed and more responsible union management than is found in many intensive labour organized communities;
- the CMC's long-range plans for up-grading all unemployed to a Grade XII equivalent will give any new employer in Cornwall assurance that the unemployed labour force will be susceptible to specialized industrial training within a reasonable time.

COMMUNICATIONS (MASS MEDIA)

Mass media in Cornwall are represented by a daily newspaper, "The Standard-Freeholder", and two radio stations, "CJSS" (AM - FM) broadcasting in English and "CFML" (AM) broadcasting in French. There is no television station. "The Standard-Freeholder" with a circulation of nearly 15,000 virtually saturates the total population in readership. It is part of the Thomson chain.

The radio stations are independent and locally owned.

In carrying out our examination we were impressed by the senior representatives of all three media with whom we talked. They are capable, concerned, involved and great believers in the future of Cornwall. There is a considerable amount of dialogue and co-operation between the three. All are community minded and progress oriented, and given to taking strong editorial stands. This means that they are fulfilling their responsibility

to the community, and as media. Our assessment of the three is very favourable.

Most significantly we believe that the media, individually and co-operatively, can be expected to give strong, steady and influential support to any action plan in which they believe and about which they are kept fully and continuously informed. It should be stressed that the growth, revenues, and profits of mass media are closely tied to the successful growth of the community which they serve. Responsible, lively and concerned media can be expected to make every contribution they can to their community's growth. We believe that Cornwall's media can be described in this way.

CULTURAL, RECREATIONAL AND TOURIST RESOURCES

While cultural and recreational facilities will not be an overriding consideration for a locating industry, it can be an important one. Responsible management will want to be assured that its employees and their children have adequate opportunity for recreational activities for reasons of both physical and mental health. They are part of the community whole, which will help attract or, because of their absence in some cases, repel organizations which are examining a community as a place in which to work and live.

For a city of its size, Cornwall is remarkably and perhaps uncommonly active and progressive in its cultural life. We observed cultural vitality and dedication to cultural affairs which impressed us considerably.

This cultural activity is supported by private citizens, members of the teaching community and, to some extent, by the service clubs. It receives almost no official support from the city government and only token support from industry. The people involved sometimes, therefore, feel they are working against considerable odds.

Activities include a little theatre group; Glen Productions puts on one major musical production a year; courses in theatre and creative drama are given in the high schools; there is a considerable amount of musical activity in the city including the Kinsmen's musical festivals; concerts are given by Les Jeunesses Musicales; several good choirs exist in the city; the Cornwall art association is active and is responsible for two or three exhibits a year; good instruction is available in ballet and other forms of dance, and various arts and crafts groups are strong.

There is an excellent modern public library in the city, and some 30,000 individuals are registered, which is impressive in a population of 47,000.

The parks and recreational facilities and activities available to the people of Cornwall - particularly its young people - are exceptional for a city of its size. Strong support is given to the local sports scene by the service clubs and by individuals who act as coaches, officials, and executives and referees for the various league teams. These include Junior A hockey and Junior B lacrosse, which draw well from Massena.

There are eighteen parks of varying size in the city, of which four have swimming pools. Athletic grounds at Marlborough and 4th Street

contain four baseball diamonds, a football field and other facilities. Perch and muskie fishing in the area is reported to be excellent. Sailing and boating can be enjoyed on the St. Lawrence, and skiing country is reasonably accessible in New York State, the Laurentians and the Gatineau Hills.

The parks and recreation budget represents a net annual cost to the city of some \$300,000, but is large enough only to maintain existing facilities and leave little room for improving them. Of importance is the fact that there are still opportunities to improve the recreational facilities in such areas as the water front area from Bryden to Gray's Creek and in the old canal area running east and west from the bottom of Pitt Street. Long-term planning for these areas is important in order that they will not be lost for future development.

Its ability to attract tourists is perhaps the weakest link in the chain of Cornwall's characteristics. Tourism is in itself an industry, and when combined with conventions can represent an important influx of money into any community's economy. As we see it, the problem is two-fold.

- Cornwall is situated between the important tourist attractions of Montreal and the St. Lawrence parks and Upper Canada Village - the latter being associated with Morrisburg rather than Cornwall. Cornwall, therefore, tends to be by-passed by tourists.
- Cornwall does not in itself possess and has not developed unique tourist attractions.

Cornwall is mentioned or shown in a variety of literature published by the Federal and Provincial Governments, such as the Ontario Department of Lands

and Forests, the St. Lawrence Development Corporation, the Ontario St. Lawrence Parks Commission and a joint venture booklet published by the Ontario and Quebec government. But the attention given to Cornwall is very little. This is largely because Cornwall is surrounded by parks, campsites and major tourist attractions which it does not itself have. This, of course, suggests that Cornwall must develop an important tourist attraction of its own if it is to be put on the map in literature published by bodies other than itself. But existing tourist attractions in the general area could be capitalized on by Cornwall.

Conventions not only attract money to a community; they are also a way of promoting it. The Tourist and Convention Committee has an annual grant from the city of \$6,500 which must cover administration, promotion, travel and expenses. In spite of their small budget, the Committee has had some quite impressive success in attracting conventions. In 1970, six conventions of over 200 delegates were brought in. For 1973, the Committee has booked a Lions Convention of 3,000 delegates. It is estimated by the Chairman of the Committee that this one convention will represent close to \$1,000,000 of direct and indirect business for the community.

We understand that the tourist and convention promotion budget in cities of comparable size in Ontario is of the order of \$1.00 per capita. On this basis, the Chairman feels that Cornwall's budget should be around 50 cents per capita or about \$23,000 a year, and that this investment would result in a meaningful return in terms of business for hotels, motels, restaurants, merchants, suppliers and in employment.

In summary, we feel that Cornwall is in a strong competitive position in respect of parks and recreation. It has potential as a tourist and convention centre which is not being exploited.

With one exception, Cornwall seems to be reasonably well provided with hotel and motel accommodation. There are 34 hotels, motels and tourist homes and 25 of these have facilities to stay open all year. Thirteen have dining rooms, and of these eight are licensed. Eight have indoor or outdoor swimming pools.

The biggest short-fall in the area of public accommodation is the absence of a modern downtown hotel or hotel/motel. We believe this to be an important factor in attracting new industry as well as tourists and conventions. Such a hotel should be an entertainment, meeting and convention centre. It should ideally be part of a chain since this would assure inter-unit promotion of Cornwall facility. Thus, we feel that an early project should be that of approaching major hotel/motel chains to encourage one of them to build a unit close to the downtown area. Such a development could be associated with a marina if a suitable site were available on the river front. Alternatively, other mid-town locations could be considered.

MISCELLANEOUS SERVICES, AGENCIES AND GROUPS

Cornwall appears to be strong in the area of service clubs, religious and other organizations. This is further evidenced, in our opinion, in the strong undercurrent of community pride which is waiting only to be tapped and given common objectives in order to become a strong working force for the growth of the city.

All religious faiths are represented in Cornwall. About 70 per cent of the population is Roman Catholic and of this about 75 percent is French speaking. Our impression is that there is co-operation rather than friction between the two major religious groups. Cornwall prides itself on the ease with which the English and French live together.

Service clubs are well represented in Cornwall. They are active and are well supported in their fund raising activities.

The downtown merchants have recently re-activated their association, and are in the process of canvassing their members with regard to the creation of a shopping mall in the downtown area. If response is positive, the plan is to give financial support to construction of the mall, beautification of the downtown area and the improvement of parking facilities. This is an excellent example of the kind of local initiative which exists in Cornwall.

NEIGHBOURING TOWNSHIPS

One cannot consider the city of Cornwall without taking into account the two adjacent townships of Cornwall and Charlottenburg. These with the city make up a geographic and in a sense a social whole, and in some respects it is difficult to think of them otherwise. In some cases, people who work in Cornwall have their homes in one of the two townships and, conversely, some of those who work in the townships live in the City of Cornwall. Therefore, in any search for new industry, one should not think of one in isolation but rather each contributes to the others for their general well being.

There is a considerable amount of land in each of the two townships that is well suited for industrial development. However, it is extremely important that both townships immediately undertake urban planning in order that industrial development can take place on an orderly and economic basis. Industries should not be allowed to locate helter-skelter, thus spoiling the area for future use.

As mentioned earlier in these remarks, we think there is much to be gained through the two townships and the city combining in their industrialization program so that the three can grow cohesively.

INDUSTRIAL PROFILES

It is logical to try to match the industrial characteristics of Cornwall with the needs of prospective industries in order to identify the industries that should be encouraged to settle in Cornwall. But there is a danger in carrying this process too far as some desirable prospects might be overlooked. There are several companies operating in Cornwall that do not follow the traditional primary industries pattern of companies such as paper and electro-chemicals. Some of these are - a direct mail house, a musical record and tape producer, an artistic glass-blowing factory - and there are others.

Generally, three important factors which influence a company to select a site are the availability and type of labour and its access and proximity to raw materials and to the market place. Cornwall is admirably situated with respect to first class highways and rail lines. It also has a good supply of labour and it is the quality and character of this work

force which has had a large part to play in selecting the industry sectors most likely to be attracted to Cornwall.

The industry profiles which have been selected as most appropriate to Cornwall have been provided to the Department of Regional Economic Expansion on a confidential basis. The industries selected are representative and are intended to assist the Industrial Commissioner in promoting Cornwall. However, before any use can be made of the list of industries selected, considerable research must be carried out by the Industrial Commissioner to closely identify Cornwall's characteristics with the specific requirements of each industry. It must be emphasized that the companies mentioned should not be approached until all relevant information has been assembled.

In making use of the industrial profiles, it is suggested that approaches should be made to industry associations, appropriate departments of the Ontario and Federal Governments and companies indicated in the profiles. Where feasible, formal presentations to company officials should be arranged; they should be invited to visit Cornwall for a first-hand inspection and periodic follow-ups should be arranged.

MARKETING ORGANIZATION

Earlier in these remarks reference was made to our recommendation that an Industrial Development Commission be formed which would be headed up by the Industrial Development Commissioner. In an organization of this kind, the Commission helps develop realistic objectives, plans, programs and budgets in the context of the community's overall objectives and resources.

The role of the Industrial Development Commission in Cornwall and the two adjacent Townships might be summarized as follows:

- Promote and encourage new business and industry to locate in the community.
- Promote and encourage the expansion of existing business and industry.
- Establish and maintain good relations with local organizations interested in continued development.
- Initiate and assist in any projects which are recognized to be of economic benefit.
- Formulate and maintain a sound public relations program for internal and external consumption.
- Maintain close liaison with all Civic Departments involved in commercial-industrial development.
- Compile and maintain an accurate record of economic facts on the City of Cornwall and the two adjacent Townships.
- Provide supporting statistics for all projects which are of economic importance.
- Prepare and maintain an overall plan for commercial and industrial development.
- Prepare and recommend to the municipal governments for inclusion in a Capital Works program, major engineering projects related to industrial development, such as extension of roads and essential services.

The key figure in the Commission is the Industrial Commissioner.

In terms of representing a city to the market-at-large, it is second in importance only to that of the Mayor. The Industrial Commissioner must have the stature, the experience, the authority and the backing to act

confidently as the city's spokesman, to be able to make commitments and to make decisions without continual reference to City Hall. The ability of an Industrial Commissioner to inform fully and to negotiate confidently and rapidly may mean the difference between making a sale and losing it. He must have in-depth business experience and he must be an intelligently aggressive salesman. He must be highly organized and self-motivated and be able to evaluate and express information and statistics in terms of what the prospect requires. He must be closely involved in the community's affairs so that he can relate industrial development to the general life of the community.

Apart from these important qualifications, the Industrial Commissioner must have the full support of the community and of the Mayor and Reeves. He must be responsible to the Industrial Commission and not directly to the Council. It is suggested that a detailed job description must be prepared which clearly defines the Commissioner's duties, responsibilities and authority, and the support which he is to receive from other departments including the Mayor and the Reeves. The Industrial Commissioner should be able to call upon the Mayor and leading citizens in the community to assist him when he considers such assistance is necessary. He should be expected to be a leader in the community since the community is the product which he has to sell. He should have a close relationship with the industrial, labour, commercial, service club, educational, religious and mass media sectors of the community. They should be kept informed regularly of his plans and activities since they are looking to him as the key factor in the growth of their community.

SELLING CORNWALL

These remarks so far have dealt with Cornwall as we have seen it. In many respects, Cornwall is not fully competitive with other similar Ontario communities. This applies to some of its basic characteristics and to its selling methods.

The recommendations which we have made are intended to help Cornwall place itself on a par with aggressive communities with which it must compete. If it can achieve this parity, it is likely to get its fair share of new industries.

We have found many positive things to say about Cornwall. But these are, for the most part, latent strengths. They require an action program, supported by the people as a whole and most particularly by the leaders of the various sectors of the community to become elements in a unified and purposeful program directed at successful growth. And successful growth is the responsibility of all the people, not just the Civic Government.

The comments which follow are intended to give some ideas on how a better job can be done of selling Cornwall. Any community has a pool of salesmen at its disposal. These would include the Industrial Commissioner, the Mayor, certain civil servants, and certain non-political leaders of the community. It is a matter of judgment as to how many of these salesmen should be used, and requires careful planning as to when they should be used.

The brochure presently used by Cornwall for industrial promotional purposes entitled "Statistics for Industrialists - City of Cornwall" is inadequate and puts Cornwall at an immediate disadvantage. This brochure must be up-graded considerably, and it is essential that professional assistance be obtained to advise on the design, the organization and the content of the material used in the brochure. In addition, we believe that a 35 mm slide presentation should be prepared under professional guidance and used regularly for visual presentation.

Many of the major institutions, including the banks, trust companies, the railroads, industrial realtors, trade associations and appropriate Provincial and Federal Government departments, maintain their own industrial development services. These organizations are constantly seeking places where their customers can locate. Therefore it is of the utmost importance that proper lines of communication be developed with these various organizations and that they be kept fully informed on a current basis of developments in Cornwall.

Representation at national meetings and conventions or at trade associations, at trade shows, at civic affairs conventions, and similar meetings is an excellent way of bringing to the attention of many, the opportunities that Cornwall has to offer to a company seeking a place to locate. Consideration should be given to a portable booth which could be easily transported from one place to another and set up at these meetings which would provide interesting and timely information about Cornwall.

Many residents of Cornwall, particularly those in business, attend a variety of meetings and conventions during the course of the year. They should be encouraged to use every opportunity to "sell Cornwall" to those they meet, and, if it is appropriate, to arrange for the Industrial Commissioner to forward specific data to those who might be interested.

We believe that a review should be made by professionals of all printed material produced in Cornwall and by other bodies which include mention of Cornwall. This review would include an assessment of the adequacy of the distribution, the quality of design, the degree to which the most important attractions are featured and how promotion can be better coordinated. Thought should be given to identifying Cornwall with a specific and tourist oriented slogan; for example, "where the world's lacrosse sticks are made" and "the capital of the champion Cheddar cheese country". It is interesting to note, for example, that only one tourist booklet of the many that we have perused mentions the Harold Town mural in the penthouse lobby of the Power Dam Station.

It is not difficult to do big things with unlimited capital. But it takes imagination to get projects going with severely limited resources. In this context we mention the bath tub derby which has met with a mixed reception in Cornwall; but it was included on the national news and certainly supports a lively rather than a depressed image of Cornwall. For this reason, we think that it is an *innovative* idea and it is this sort of thing that should be stimulated in the city.

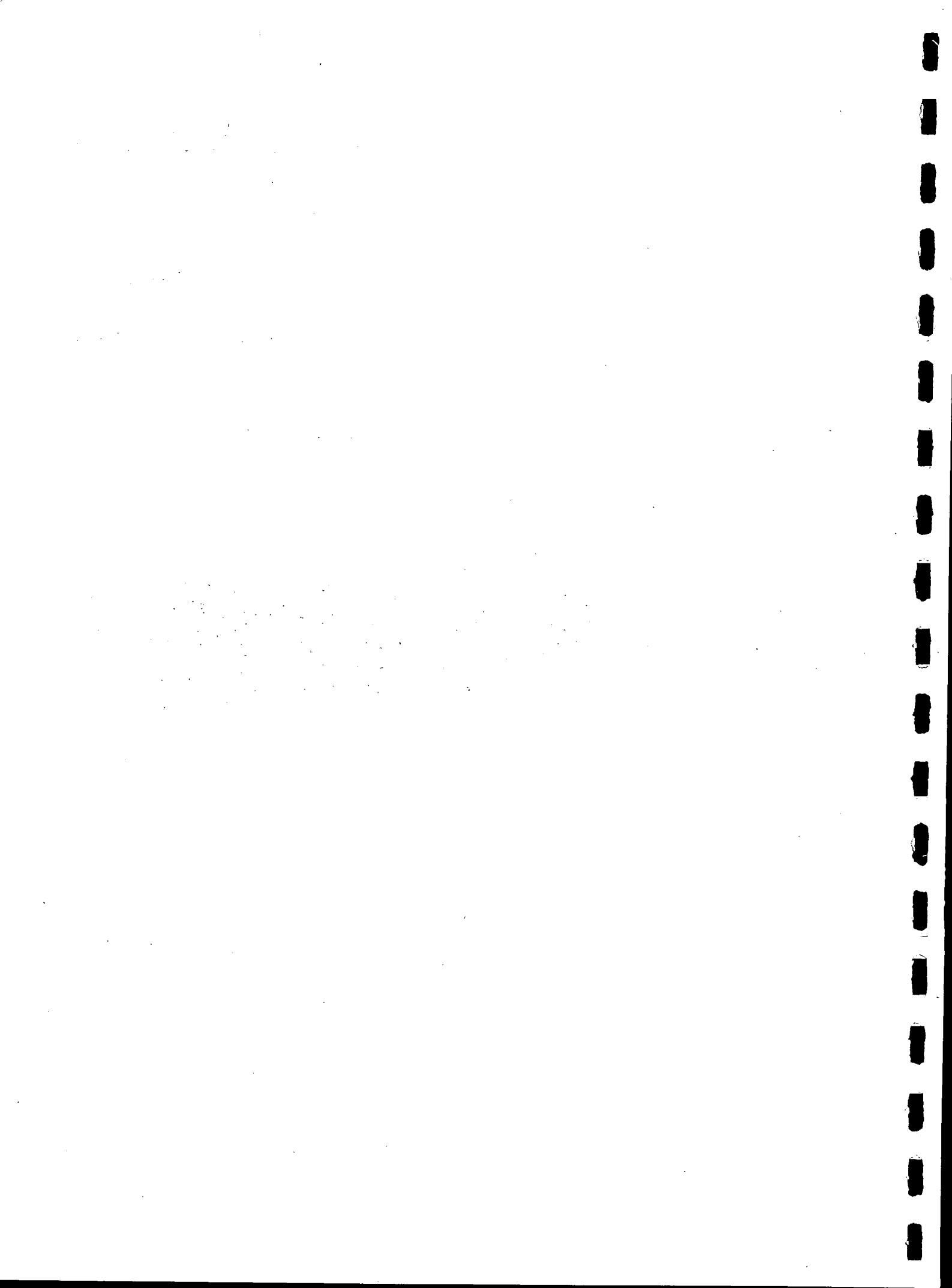
The problem is how does one generate ideas for one major or several community promoting projects. Too frequently, people are inclined to say "no" to a new idea rather than "yes". Because of this, the founder of one of the world's largest advertising agencies invented what he called "brainstorming" which he developed into a formal course in creative thinking at the University of Buffalo. We recommend that a series of formal "brainstorming" sessions be held in Cornwall involving cross-sections of the population in groups, particularly service clubs. Out of these will come literally a hundred or more ideas which can be screened, the best of which can be seriously and realistically evaluated for their usefulness in promoting Cornwall.

Market research is important in selling any community. Any capable Industrial Commissioner will make available to himself and use the wealth of economic, industrial, statistical and prospect information which is available. These sources are well covered in the well-prepared booklet entitled "Municipal Industrial Development Guide" prepared by the Ontario Department of Trade and Development.

It is important that the Industrial Commissioner follow up with all those prospects with which he has had dealings, to find out whether they have decided to locate elsewhere or whether they are still weighing the various possibilities. If they have decided to locate elsewhere, he should find out from them why they picked a place other than Cornwall because it is important to know why Cornwall was not selected. Possibly the reason that it was not selected is one that can easily be corrected for other prospects that might come along.

We have covered a great deal of ground in our study and suggested many ideas for how improvements can be made. Our contact with Cornwall and its people has resulted in a real and basic belief in the ability, energy, vitality and confidence of the city and its citizens.

All of the people with whom we talked were encouraged that this study was taking place and were impatient to learn of its findings. Most of them also expressed a willingness to support recommendations which would benefit the community. We think this is very encouraging, and if the people will unite and work together for the improvement of the community and in promoting industrial activity, we believe that their actions can meet only with success.



SUMMARY OF RECOMMENDATIONS

Priority

Manpower

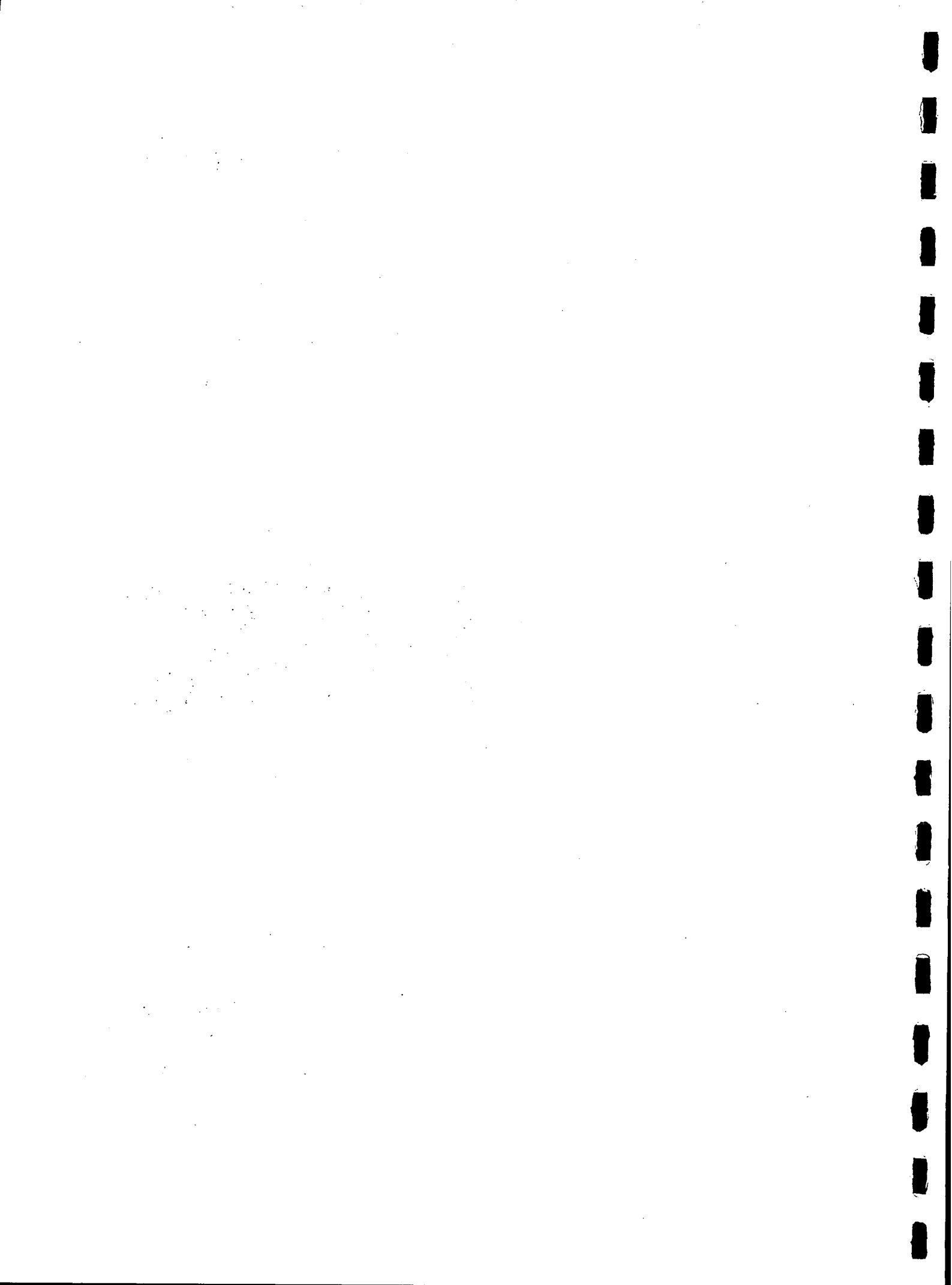
- . The Industrial Commissioner should maintain close liaison with the Cornwall office of the Canada Manpower Centre and fully utilize the services that the Centre has to offer. Medium

- . The Industrial Commissioner should collaborate with the St. Lawrence College on the development of training courses and he should enlist the cooperation of the labour unions in obtaining acceptance of the courses. Medium

Financial Climate

- . Spending objectives and priorities should be established and it should be the responsibility of the City Treasurer and the Clerk-Administrator to carefully supervise and approve the preparation of financial budgets for all departments and to question and to pass judgment on spending estimates included therein which are not in accordance with the objectives and priorities established or with economic and businesslike management of the City. High

- . Where reductions in the spending estimates are decided upon by the Finance Committee or by Council, such reductions should be on a project basis and pro rata reductions across the board should only be considered as a last resort because of the inequalities that they generate. High



Priority

- . We recommend the retention of a professional consultant in financial planning in which area, we believe, the community's problems and needs are great. This financial consultant should be selected, in part, for his experience in bringing public and private funds together in joint ventures and projects of a kind which, in the case of Cornwall, would be of significant benefit to the community.

High

- . The City, either directly or through a 'development corporation', should acquire industrial land and develop it for sale to industrial prospects. Such a corporation could be owned jointly by the City and private investors, would operate on a profit-oriented basis and would ensure orderly development and a supply of readily available land.

High

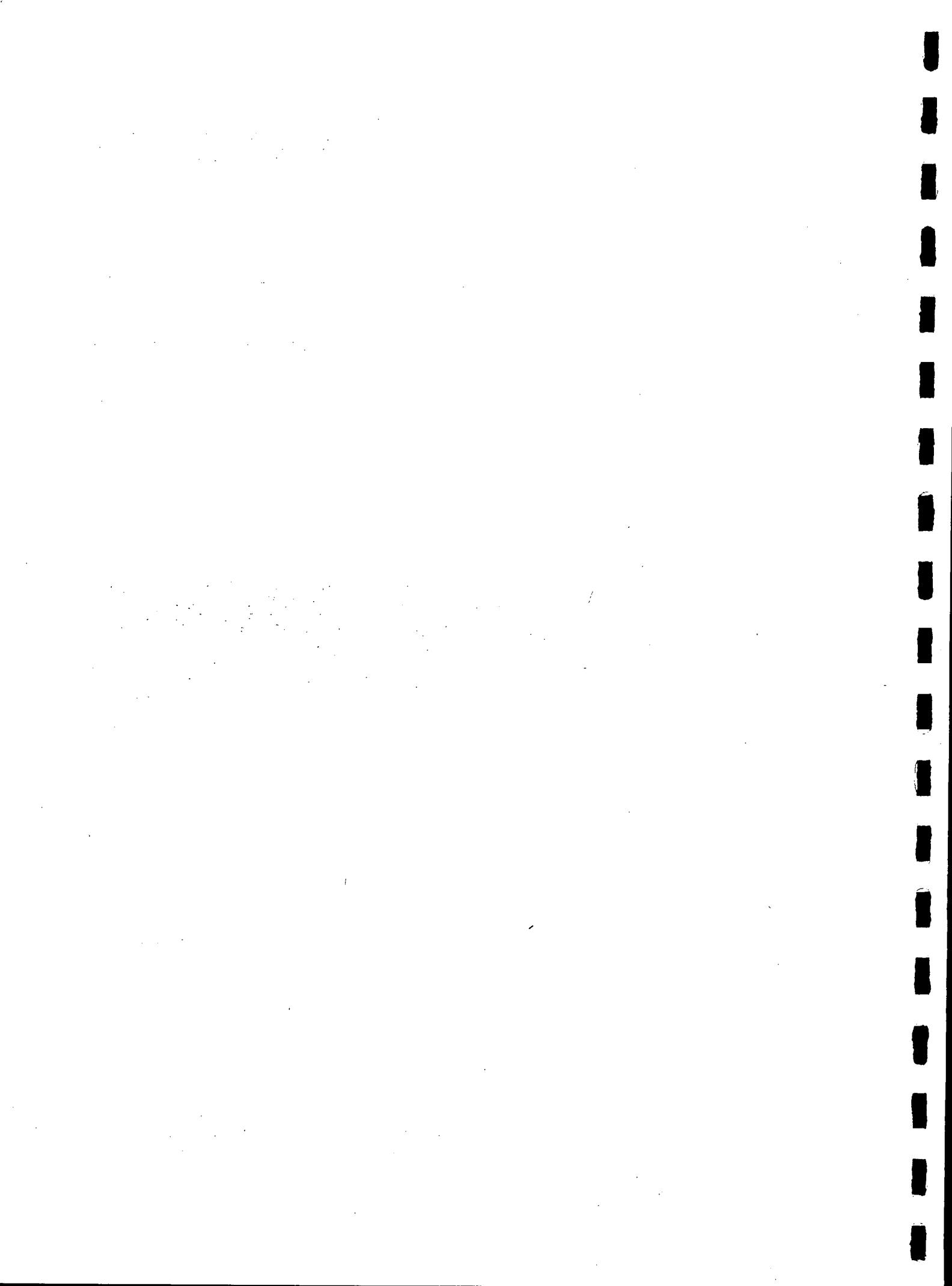
- . Encourage investment by residents of Cornwall in local viable business projects, even though individual amounts invested might be relatively small.

Medium

Real Estate and Urban Planning

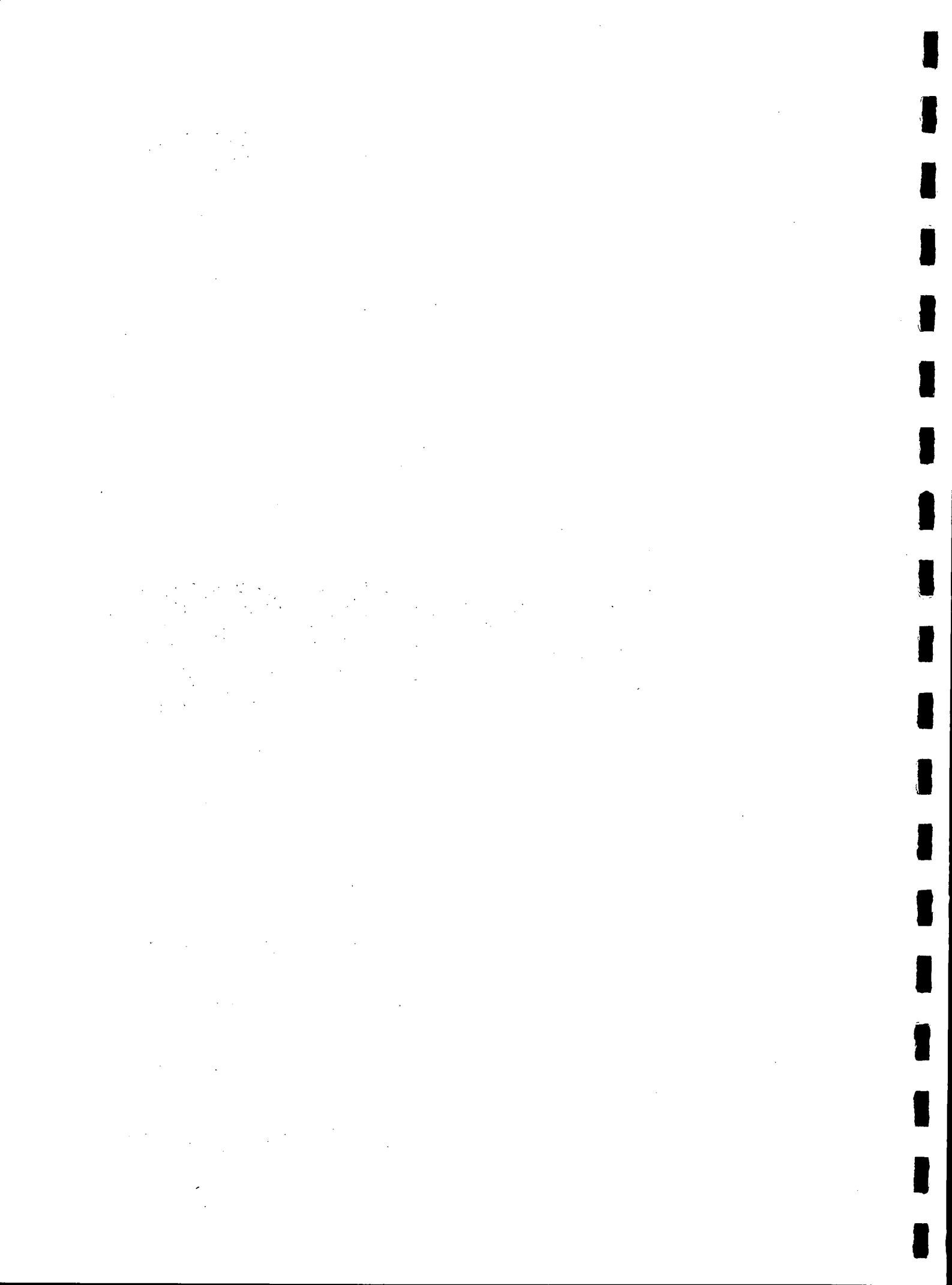
- . Zoning policies should be re-examined because some land which is suitable for industrial development is zoned residential, commercial or agricultural.

High



Priority

- . Prime industrial land available for sale amounts to only 93 acres and not 595 acres as claimed. Industrial development promotional material should be corrected accordingly. High
- . Industrial land which is available for sale should be cleaned up, boundaries marked and identified with informative signs for the benefit of prospective purchasers. High
- . Consideration should be given to obtaining options from the owners of vacant prime industrial land, or otherwise ensuring its availability, in order to attract and accommodate new industries. High
- . The functions of urban planning and urban renewal should be combined within the Planning Board and this body should be revitalized and given the responsibility and authority which it does not now seem to have. High
- . The Urban Planning and Renewal Authority must have available the services of a qualified professional in that field. High
- . Water lines should be extended to improve water pressure in certain parts of the city. High
- . Sewer lines should be extended to eliminate the requirement for septic tanks. High



Priority

Local Industry

- . Improved communications should be established between the City, probably in the person of the Mayor and/or the Industrial Commissioner, and the top management of the companies whose head offices are not in Cornwall. These communications should include personal contact and written communications on a regular basis. Medium

- . Strive for greater support from all Cornwall industries for the community's civic and private programs. Medium

- . Encourage companies located in Cornwall to have their public relations and advertising programs express a closer identification with the life and plans of the community. Medium

- . The City must 'sell' industry on its social responsibilities to the community and spell out the benefits - many intangible - which it can expect from greater involvement. The strongest and best boosters the City can have is existing industry. Medium

- . The Industrial Commissioner must keep local industry fully informed on all Federal and Ontario incentives and assistance programs so that they will have every opportunity to take advantage of the many and varied programs available. High



Priority

Natural Resources

- . Carry out a feasibility study on increased corn and cattle production as an inducement to industries which require those products to locate in Cornwall. Low

Municipal and Other Services

- . The City must actively strive to extend water lines to improve water pressure in certain parts of the city. High
- . Sewer lines should be extended as soon as economically possible to eliminate the requirement for septic tanks. High
- . Air pollution controls, aimed primarily at eliminating obnoxious odours, should be pressed forward as rapidly as possible. Medium

Commercial Transportation

- . The excessively high trucking rates on a per ton/mile basis between Cornwall and Montreal relative to other routes must be investigated and be justified publicly or corrected immediately. High
- . A preliminary feasibility study should be undertaken to determine whether there are alternative adjacent sites for a viable deep water port which, if developed, would be an important inducement to some industries to locate in Cornwall. There has been considerable publicity and discussion on this subject in Cornwall and it should be settled one way or the other. Medium



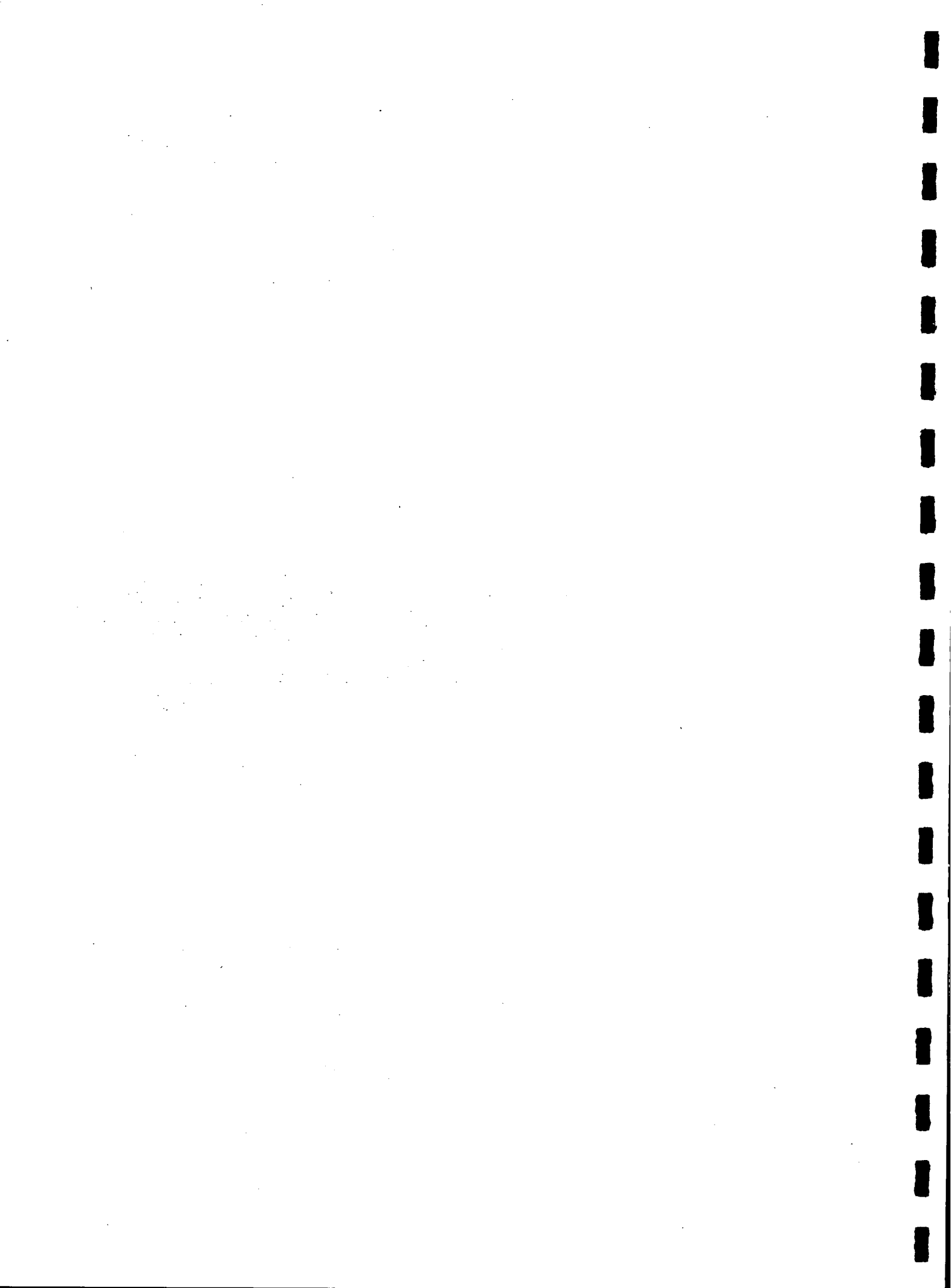
Priority

Municipal Organization and Leadership

- . Establish clearly defined lines of authority and responsibility between elected officials and appointed officials. Medium
- . Elected officials should establish policy and set priorities. Appointed officials should execute the plans. High
- . Implement Management by Objectives and Planning Programming Budgeting Systems in the city administration. High
- . Consider a joint Industrial Development Commission which would be responsible for the industrial development of the City of Cornwall, the Township of Cornwall and the Township of Charlottenburgh. High

Education

- . Existing industries and especially new industries should be encouraged to make full use of the Adult Retraining Centre which is well equipped and anxious to help industry design and conduct educational upgrading and skill training programs. Medium
- . A formal and effective system should be established to ensure clear and continuing communications between industry, the educational system and students. Its primary objective would be to closely match skills and career expectations with industry's needs and career offerings. Medium



Priority

- . As the inaugural step in this regard, we recommend that an "Education Dialogue Symposium" be convened to bring representatives of industry, education and the student population together to lay the foundation for this vital communications system. Medium

- . Emphasis on skill and educational upgrading should be directed principally at the younger work force which, on the one hand, can benefit most from it and, on the other, is most receptive to it. Medium

- . An objective, cost/benefit study should be undertaken to evaluate whether a permanent university campus, with full-time faculty, can be justified and when, in terms of contributing to the overall vitality of the City and the three counties. Medium

Communications (Mass) Media

- . Investigate the development of a civic TV broadcast facility of a non-commercial or semi-commercial nature, as a step towards putting Cornwall on the North American map and the major involvement of many citizens and service clubs in the project. Medium

Cultural, Recreational and Tourist Resources

- . The City government and local industry should be encouraged to provide greater financial and moral support to the principal cultural groups in Cornwall who have achieved considerable success through their own initiative. High



Priority

- . Build a cultural centre which would include a modern theatre, concert hall, art gallery and arts and crafts facilities. This project should be mainly financed out of community fund-raising projects in which Cornwall has already demonstrated a considerable degree of success. Medium
- . Develop a long-term plan for parks and city beautification. Medium
- . Develop part of the old canal into an attractive park area for the benefit of Cornwall residents and as a tourist attraction. Medium
- . Develop the "Bryden Avenue to Grays Creek area" as a wildlife or nature oriented park. Low
- . The annual grant to the Tourist and Convention Committee should be increased to a minimum of 50 cents per capita. High
- . Endeavor to have Cornwall attractions included in literature published by the Federal and Provincial Governments and their agencies promoting the St. Lawrence Valley and environs. High
- . Cornwall's potential as a tourist and convention centre must be exploited; - professional assistance is indicated. High
- . Promote the construction, through one of the hotel/motel chains, of a large modern hotel/motel in downtown Cornwall. High



Priority

- . Consider the promotion of an annual "Week of Chinese Gastronomy" as a tourist attraction. Medium

Miscellaneous Services
Agencies and Groups

- . The Service Club council should explore the possibility of pooling their energies and resources for the launching of a major community project. Medium
- . Every opportunity for favorable publicity should be taken by the combined service clubs when they take innovative action on joint community projects. Medium

Neighboring Townships

- . Urban planning in the Townships of Cornwall and Charlottenburgh is essential now in order to prevent haphazard development of the two townships. High
- . Carry out a preliminary feasibility study to determine the suitability or otherwise of Glengarry Point as a port location. Medium

Industrial Profiles

- . It is important that the Industrial Commissioner attaches a high priority to carrying out the research into community and industrial data as indicated in this chapter and that the profiles be utilized promptly to attract industry to the area. High



Priority

Marketing Organization

- . Develop criteria to be used in establishing the qualifications of Industrial Commissioner. High
- . Develop a detailed job description for the position of Industrial Commissioner including his working relationship with other City officials. High

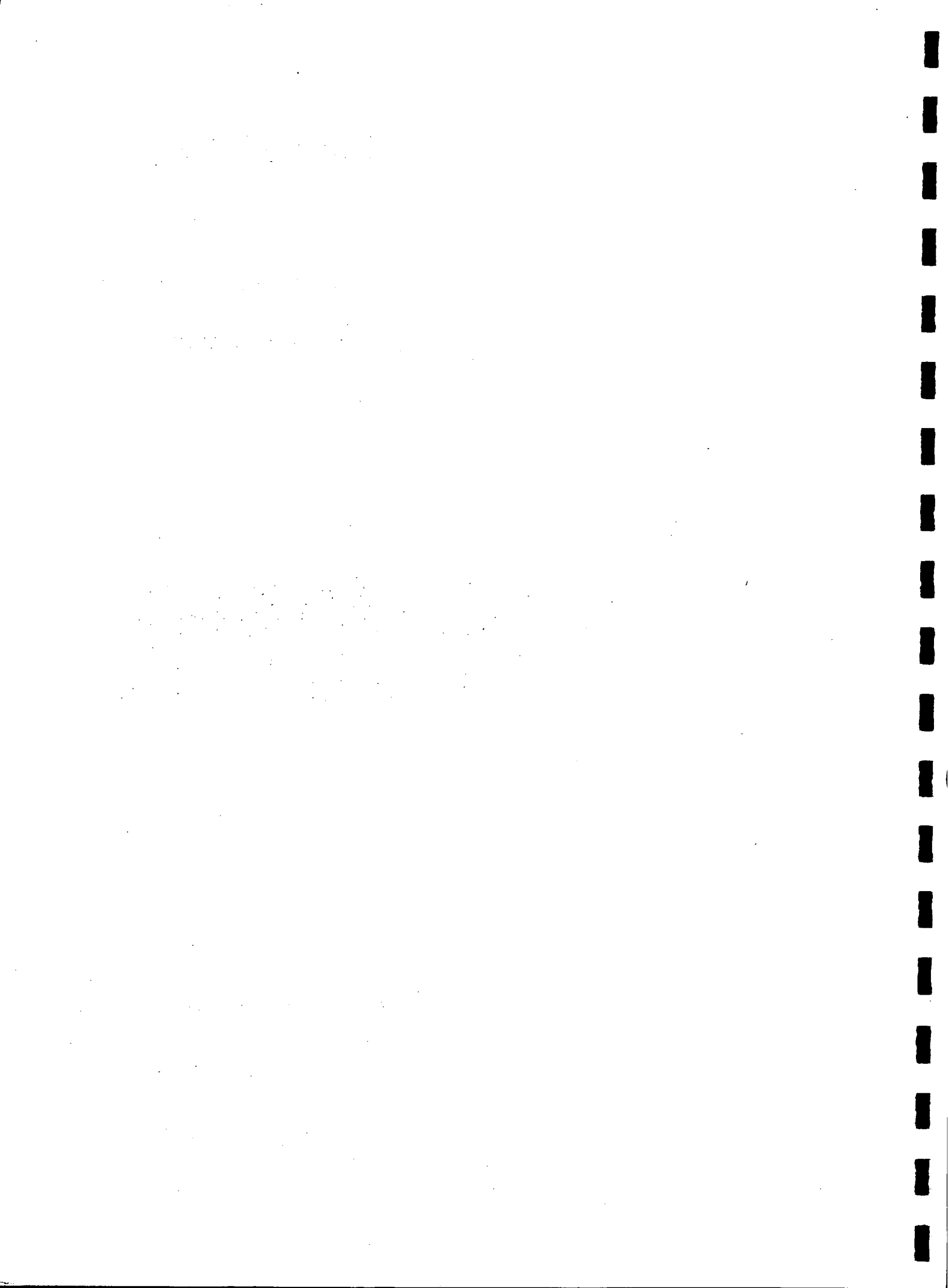
Selling Cornwall

- . Select a pool of 'salesmen' from leading and involved citizens, which can and will support the Mayor and the Industrial Commissioner. High
- . Redesign the basic selling tool "Statistics for Industrialists" with professional help. High
- . Produce a 35 mm slide presentation for use by the "selling team", but particularly by the Industrial Commissioner. High
- . Make a grant to a local student to produce a colour film about Cornwall. Medium
- . Plan a program of personal presentations to relevant officers and departments of banks, trust companies, railroads, industrial realtors, trade associations and appropriate Provincial and Federal departments. High
- . Ensure follow-up to these presentations by a Cornwall Newsletter. High



Priority

- . Ensure representation of the City at a carefully selected number of key industrial conventions each year. High
- . Plan to have the City represented at certain important trade shows in the form of a small but professionally designed promotion booth. High
- . Plan to have representatives of the City attend key conventions having to do with City management. High
- . Hold regular meetings by the Mayor and Industrial Commissioner to keep community leaders informed of industrial development plans and progress. High
- . Establish a pool of community hosts who are prepared to entertain important prospects in their homes. Medium
- . Evaluate a limited number of insertions in a select list of industrial association journals and special issues of business papers. Medium
- . Develop and promote a public image slogan for Cornwall. Medium
- . Review all printed material promoting Cornwall to ensure adequate distribution, quality of design, complete information and promotional coordination. High



Priority

- . Organize a series of brainstorm sessions (with professional guidance) in order to produce innovative community project ideas for evaluation. High
- . Organize a system of market research including follow-up on lost prospects. High
- . Present and sell the contents of this report to a broad spectrum of invited Cornwall citizens as well as representatives of the mass media. High
- . The Industrial Commissioner must make active use of the industrial profiles. High

