

Shore & More Bicycles



Company Description

Why Shore & More Bicycles?

Shore & More Bicycles is the maker of mountain, touring, and racing bikes for adults and children, accessories for bikes, and branded apparel. Bike frames are made of new alloys created by the owners for strength and reduced weight of the frame and wheels. **New Shore & More** bikes are only available through licensed dealerships.

The mission of **Shore & More Bicycles** is to design and build lightweight, affordable bicycles for those desiring to ride along the shore, tour along the road, or tackle mountain trails. Bicycles made by **Shore & More Bicycles** are made to last with strong welds and wear-resistant parts.

"Our expectations are to create the quality of bike the employees of **Shore & More Bicycles** and their families want to ride!" - Jon Stephis, Owner

Shore & More People

The people who work for **Shore & More Bicycles** include bike riders, racers, and enthusiasts of all levels of experience. Each person has told the story of their first bike ride. These stories can be found on the company website.

Shore & More Bicycles employees personally test the bicycle designs on the paths, roads, and trails around their homes in addition to testing the designs on the computer and in the lab.

Shore & More Products

Shore & More Bicycles makes 20 styles of bicycles for men, women, and children. Specialty parts are available to customize the original style for a unique look for each owner.

Bike Parts

Brake levers
Handlebars
Frames
Forks
Wheels
Tires
Spokes
Fenders
Kickstands
Seats and Clamps

Bike Accessories

Bags
Baskets
Bells
Bottle holders
Lights
Mirrors
Odometers
Mud flaps
Racks (front and rear)
Valve caps

Bike Apparel

Backpacks and bags
Eyewear
Hats
Helmets
Jackets
Shirts
Tank tops
Shoes
Shorts
Pants

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Shore & More Process

The **Shore & More** process begins with a design informed by more than 100 years of riding and racing experience and sound, scientifically created materials. Each part is built for durability and riding comfort.

Each bike is individually numbered for registration, identification, warranty, and service records.

Shore & More Plans

The **Shore & More** team is working to complete the following online options for **Shore & More Bicycles'** customers:

- Expand orders to Internet orders with delivery at a licensed dealership for adjustments to the new owner.
- Create an online system to simulate the appearance of the bicycle to be ordered and any accessories or apparel.
- Develop a system for a customer to follow the bicycle from order to delivery with images of the bicycle at completion stages and the timeline for processing.

Shore & More Bicycles owners Jan and Jon are prepared for the work involved in the development of a prospectus for SEC filing pursuant to Rule 424(b)(4). Investors can complete an online form to receive updates on the IPO announcement.

Shore & More IT Expansion Plan

Shore & More Bicycles is in its initial phase as a company. The IT system needs to be integrated to share documents and design files with the other locations in a secure manner. Currently, the 3D software used in Rome, Italy, is on a standalone machine. All files need a way of being backed-up for storage and to prevent loss in case of a computer malfunction.

Weather has played havoc with productivity. Two sites have lost electrical power during the work day. Data losses occurred for those working at the workstations and on the desktop PCs. Plans are being considered for the integration of uninterruptible power supplies (UPS) and generators. Plans are also being made to integrate renewable energy systems into the electrical system. These systems would need IT monitoring and management capabilities.

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The current personnel and performance management systems are on standalone machines. Integration of these systems for all site access in a similar manner to the self-report payroll system is being considered by the IT Team.

Other changes will be made based upon the analysis and plans of the new IT team member. The owners have agreed that \$243,000.00 is available for the project.

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Global & Local Marketplace Data

The **Shore & More Bicycles** marketing research and analysis team identified the following about international and domestic markets.

Competitors

- A number of low-end bicycles are sold in box stores and department stores that are recognized by shoppers and are easily accessible.
- Several high-end bicycle companies have been on the market for more than 20 years, which makes entry into the field quite competitive.
- Differentiation will be important for **Shore & More Bicycles** to be selected over lower priced or higher priced bicycles.
- **Shore & More Bicycles** are only delivered to licensed dealerships for proper fitting. The number of dealerships is still growing and competitors may already be serving more rural areas.
- Competitors are using a heavier metal for their bicycles.
- Competitors sponsor races and racers. Their logos are quite visible by spectators at the track and during media coverage.

Customers

- The number of people who commute to work via a bicycle is expected to increase as workplaces install bike racks, showers, locker rooms, or other changing room facilities and as communities designate lanes as bike lanes for improved safety.
- The number of people who ride a bike for recreation is expected to multiply as the amount of leisure time increases and communities continue investing in bicycle route plans, installing bike paths, and creating bike trails.
- Consumers desire to have a light bicycle they can pick up and carry if necessary if an area is not conducive to riding or pushing the bike.
- Consumers want to be able to carry items while biking, thus making it necessary to have a basket or racks for attaching bags.
- Consumers are fearful of riding on the road with cars due to safety concerns.
- Consumers in hilly regions have indicated that a power assist feature on the bike would be helpful to pedal uphill or at least have some type of device that makes choosing a gear easier.
- Consumers have more real disposable income.

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Markets

- Foreign markets may be subject to duties and tariffs, changes in currency exchange rates, or import restrictions.
- Mountain biking is perceived to be an extreme sport and the tires are not viewed as trail-friendly due to their rugged appearance.
- Bicycles are popular in heavily congested areas where bicycling reduces the commute time.
- Economic conditions of some regions may make automobile ownership more difficult and commuters may decide to purchase a bicycle for travel.
- Some media portray bicycling as something that is done in lesser developed countries rather than in more affluent areas.
- Regions are developing bicycle travel plans for improved safety.
- Rural communities are gaining Internet accessibility through telecommunication expansion and may be ordering goods and services for home delivery.

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Owner Biographies

Jan Wilkons started riding when she was two years old. That first tricycle was quickly traded for a two wheel bicycle. The training wheels were shed before she turned three. Jan never looked back.

Jan is from a long line of athletes. Jan's mother was a triathlete and a great inspiration to her. Jan's mother would ride her bicycle to the local park with Jan and watch her ride the trails beside the ball field. Jan soon collected a series of bikes for different purposes—trail, road, and racing.

At age 15, Jan created a new derailleur to help change gears more easily on her touring bike. Jan worked at a local bike shop to coach riders and help adjust their bikes. She attended college where she studied mechanical engineering and joined the cycling team.

Along with Jan's 20 years of experience riding bicycles, she has a bachelor of science degree in mechanical engineering with a minor in materials. Jan's honors research was in the development of new, lightweight alloys with increased strength and a competitive cost compared to aluminum. Jan also worked with the development of composite materials and nanotechnology.

Jan's newfound knowledge of materials helped her with the exploration of new alloys and fibers for bicycles to help reduce their weight. With the owner of the local bike shop, Jon Stephis, Jan founded ***Shore & More Bicycles*** last year.

Jon Stephis is a long time rider and racer. Jon's participation in regional, national, and international races has netted him several top-ten place finishes. Jon has surrounded himself with talented and passionate cyclists at his bike shop. He has experimented with bicycle designs using a CNC machine to create new parts that could handle the demands of mountain bike riding and urban commuting.

The local bike shop has been in business for more than 60 years. Jon worked for the previous owner of the bike shop before buying the shop 20 years ago. Jon purchased the shop after completing his bachelor's and master's degrees in mechanical engineering design. Jon has more than 40 years of bicycling experience including 20 years of competitive riding.

Jon and Jan partnered to begin ***Shore & More Bicycles*** to supply those desiring the thrill of a mountain ride or the exhilaration of a tour along the coast with a bicycle that responds to the riders' demands and comfort.

Jon is the chief executive officer of **Shore & More Bicycles**. Jan is the chief operating officer and oversees product innovation.

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Management Biographies

Senior Product Manager for Bicycles

Vincenzo Di Lucca holds degrees in engineering drafting and design and engineering science. Vincenzo works closely with the IT team to develop 3D models of and perform theoretical tests on the parts before prototype development.

Vincenzo has racing experience and rides into the Rome office from his home outside Ladispoli, which is about 35 km from the headquarters in Rome, Italy, by bicycle. Vincenzo recommends testing specifications for each bike design to the compliance and performance testing team, at the Aurora, Colorado site for the company. His recommendations are based upon his knowledge of the design tests and personal experience as a bicycle rider and racer. Vincenzo manages design specifications for the bike accessories and bike parts produced at the Taichung City, Taiwan, facilities.

Vincenzo met Jon 15 years ago at a racing event. Vincenzo has 10 years of experience designing parts for bicycles, motorcycles, and automobiles.

Chief Information Officer

Sara Beresi holds a bachelor's degree in computer science and a master of science degree in information technology. Sara is fluent in three languages Spanish, English, and Italian. She has 17 years of experience in global information technology management and security management.

Sara has developed information systems tools to help companies succeed in the global environment, has adapted new and emerging technologies to solve business problems, has led teams to manage complex technology projects from inception to completion, and has demonstrated excellent communication skills with stakeholders.

Sara worked with the owners and the IT team to develop the information technology strategic plan for **Shore & More Bicycles**.

Sales and Service Manager

Georgieanna Cerasoli holds a bachelor's degree in communications and a master of business administration degree with an emphasis in marketing. Georgieanna's primary responsibility has

been to direct, coordinate, and review the sales and marketing activities and communicate with advertising services.

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Georgieanna oversees the sales and customer service staff. Her experiences as a triathlete are beneficial when representing **Shore & More Bicycles**, along with the members of the sales staff, at regional, national, and international trade shows and races.

Georgieanna's 18 years of experience as a customer service representative (CSR) and manager have created informed processes for resolving customer complaints and developing FAQs for customer quick reference.

Call Center Specialist

Kai Garczynski is a lead member of the call center team (CCT) and offers telephone and e-mail support activities for customers and potential customers.

Like all the members of the CCT, Kai frequently bikes on the trails and roads near the call center. Kai believes real experience allows for more authentic answers to customers and a better understanding of the customer's problems. Kai developed a training program for the CCT to help them become more familiar with bike parts, accessories, and the types of bikes most appropriate for different terrains.

Compliance Testing Engineering

Raphaela Holmstad holds a bachelor's degree in mechanical engineering and has 12 years experience creating product-testing models to comply with industry and ISO standards. Raphaela contributes to monthly communication with others in the company about regulatory requirements and any changes in those requirements.

Raphaela is a member of the American Engineering Association and the National Society of Professional Engineers.

Dealership Training Coordinator

Larita Saka holds degrees in adult education and training and development. She has 12 years experience designing, developing, and presenting educational programs in face-to-face and computer-based formats. Larita has created a database for monitoring, evaluating, and recording training activities for the dealership employees and employees of **Shore & More Bicycles**.

Larita is working with the human resource director to develop a performance management system for the dealership employees.

Dealership Licensing Manager

Alvaro Leiber has more than 20 years experience as a licensing manager for fast-food and retail chain store companies. Alvaro has developed the legal documents necessary for licensing dealerships.

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Alvaro's experience has been beneficial in navigating the various procedures and regulations in many dealership locations.

Alvaro holds a certification as a paralegal.

Warranty Claims and Service Manager

Nenita Pummilla holds a bachelor's degree in applied statistics and has 9 years experience managing warranty claims. Nenita also has 19 years experience riding and repairing bicycles. Nenita has developed innovative techniques to organize the types of claims for faster service. She has analyzed prior claims to improve design, reduce warranty claims, improve service plans, and maintain the high performance requirements of the customers' bikes.

Bike Parts Plant Manager

Xi-Pai Ming holds degrees from universities in Taiwan and the United States in business administration and engineering. Xi-Pai Ming has 25 years experience as a production manager and plant manager.

Xi-Pai Ming is responsible for the overall operations of the manufacturing of bike parts including frames, forks, seat clamps, wheels, and handle bars. Xi-Pai Ming has received awards for production standards. The company's bike parts plant in Taichung City, Taiwan, meets ISO standards.

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Current & Future Business Process Needs

These are the current IT systems and programs in operation to perform the business processing at **Shore & More Bicycles**. The new IT team member will analyze the systems and make additional recommendations for the business process needs related to the IT infrastructure.

System	Processing Capacity	Current System Evaluation & Suggested Improvements
Payroll	<ul style="list-style-type: none">• Allows for employee self-report and manager approval of hours worked and vacation time	<ul style="list-style-type: none">• Meets current company size needs• Will not be adequate for any future company growth
3D Engineering Design and Testing	<ul style="list-style-type: none">• Allows for a single user to design new styles• Can view designs in 3D• Can make 3D model on prototype printer• Can test the limitations of the design on the computer	<ul style="list-style-type: none">• Cannot share the functioning of the program with other sites ; limited to view only via a screen share• Need to be able to use at multiple sites for collaboration and approvals
E-mail	<ul style="list-style-type: none">• Adequate for up to 100 users• Space and speed are limited by amount of filtering for more than 100 users with average use	<ul style="list-style-type: none">• System needs updating to manage increased number of e-mails and increased amount of filtering for spam• Storage capacity for messages on the server needs to be expanded to avoid missed messages due to filled space

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System	Processing Capacity	Current System Evaluation & Suggested Improvements
Performance Management	<ul style="list-style-type: none"> • Human resource records information on a server with access only available at the U.S. headquarters site • Storage is in a company-made database that is adequate for the company size • Dealership training and evaluations are recorded in a database on a standalone machine and not integrated 	<ul style="list-style-type: none"> • Need a performance management system that can record employees and dealership performance, training, and other categories as needed
Customer Orders	<ul style="list-style-type: none"> • Customer orders are made primarily through phone calls or at dealership sites • Orders are sent via email with a monthly report that is reconciled to ensure all orders are in process 	<ul style="list-style-type: none"> • Would like to have Internet ordering capacity with monitoring of order status • Need to have a single system for customer orders to reduce possibility of order loss or duplication
Internet Access	<ul style="list-style-type: none"> • Current access is through a local provider • Ethernet is a wire from the modem to a switch then to workstations or desktop PCs • Wireless router is attached to modem for wireless access with password protection 	<ul style="list-style-type: none"> • System is not robust and connection is lost if one has technical difficulty with modem or router • Possible noise in the system reduces speed and connectivity • Cannot support high bandwidth applications on the current level of subscription
Financial Systems	<ul style="list-style-type: none"> • All financial records are documented at headquarter sites on servers that are not accessible from other sites 	<ul style="list-style-type: none"> • Duplication of reports and lack of integration for analysis is due to inaccessibility • Back-up is limited to weekly back-up to an external hard drive at the site

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System	Processing Capacity	Current System Evaluation & Suggested Improvements
Employee Computers	<ul style="list-style-type: none"> • Use the operating system that was on the computer when the computer was purchased • All software is loaded one program at a time for each machine • No encryption is used for data on the hard drives • Tech support must physically have the machine for any repairs 	<ul style="list-style-type: none"> • Need to have a computer image for faster set up of computers • Need remote access by administrator of computer for repairs • Need security measures
Call Center	<ul style="list-style-type: none"> • Current center is limited to 50 seats • Current waiting time may be as long as 20 minutes for a Customer Service Representative (CSR) to get to a customer 	<ul style="list-style-type: none"> • Need to determine FAQs for electronic response to common questions • Develop a system that is more efficient and timely to access the CSR necessary to answer questions or take order

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Business Strategy

Introduction

Shore & More Bicycles owners and employees desire to develop bicycle designs and grow the company to supply every-day users as well as high-end racers with bicycles that meet their needs.

The riding and racing experience of the owners and employees informs new, innovative designs for touring, road, racing, and mountain bicycles for riders of all levels and ages. As it is only their third year in business, the company is lean in staffing, has low overhead costs, has networks for international suppliers and designs, has access to international and domestic markets, and has a competitive price structure. They have been very successful in their first two years and it is their expectation that the third year figures will be even better.

Business Drivers

Shore & More Bicycles business drivers are:

- Marketing
- Sales
- Engineering and design operations and functions
- Human resource operations and functions

Mission

The **Shore & More Bicycles** mission is to design and build lightweight, affordable bicycles of all types and models for those desiring to race nationally or internationally, compete globally, or to ride along the shore, tour along the road, or tackle mountain trails.

Vision

The **Shore & More Bicycles** vision is to be the lifelong bicycle choice for riders of all ages, experience levels, and all performance levels.

Strategic Goals

Shore & More Bicycles has the goal to be the first choice for riders of all ages, experiences, and levels of competition. **Shore & More Bicycles** has the following strategic goals:

- Grow international competitiveness
- Grow domestic competitiveness

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- Increase the number of staff(as the numbers of bicycles, accessories, and apparel ordered are increased), but maintain or increase worker productivity levels to remain competitive
- Develop safety programs for elementary or primary students to further establish the brand

Objectives

To meet the strategic goals, **Shore & More Bicycles** needs to complete the following objectives:

- Establish an international marketing campaign to raise brand awareness that includes a 10% increase in exhibiting at international racing events, 15% increase in apparel sales, and a 30% increase in bicycle sales.
- Establish a domestic marketing campaign to raise brand awareness that includes a 20% increase in racer sponsorships, a 20% increase in apparel sales, and a 25% increase in bicycle sales.
- Establish job descriptions to target job searches for the specific skills needed to best advance the productivity of the company.
- Establish at least five educational internships to gather new information from students, test the ability and knowledge of the students, and examine their fit with the company.
- Develop safety programs for elementary and primary students in domestic and international schools to introduce the brand to the students and have them utilize the bicycles during the safety programs.

Building Blocks

The building blocks to meet the strategic goals are:

- Develop an innovative international marketing campaign
- Develop an innovative domestic marketing campaign
- Determine which international racing events are best to exhibit the bicycles, accessories, and apparel
- Identify domestic riders in need of sponsorship and identify who will draw positive media attention
- Develop online ordering capacity for bicycles, accessories, and apparel

- Develop job descriptions
- Develop a performance management system to better analyze productivity and performance

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- Determine the most innovative educational programs and advertise in those programs for educational interns

Strategic Focus Areas

The strategic focus areas for ***Shore & More Bicycles*** are as follows:

- Marketing
- Sales
- Service
- Human resources
- Performance management
- Training and education
- Engineering and design

Metrics

The metrics for ***Shore & More Bicycles*** to assess if the strategic goals are to be met are as follows:

- Apparel sales measures for international and domestic markets
- Bicycle sales measures for international and domestic markets
- Productivity measures for each employee
- Counts of international races
- Return on investment for international races
- Number of domestic racer sponsorships
- Return on investment for sponsorships
- Number of students attending safety classes
- Return on investment for safety classes
- Number of internships
- Number of new hires

Initiatives

The employees of ***Shore & More Bicycles*** will need to participate in the following initiatives in order for the company to meet the strategic goals:

- New techniques for analyzing data related to marketing campaigns to determine which are most effective at increasing brand recognition in the international and domestic markets

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- Performance management participation with the goal to measure productivity for each employee

Initiatives (cont.)

- Mentoring of racers to teach them the benefits of the brand in addition to what they feel and experience while racing with the bicycles, using the accessories, and wearing the apparel
- Teaching interns and primary school children about the brand
- Teaching primary school children bicycle safety rules

Summary

Shore & More Bicycles employees will need to apply analysis, performance management, mentoring, and teaching skills in order to grow the company. Through use of marketing campaigns they will target specific markets to raise brand awareness. Using educational internships they will seek the most qualified candidates for positions that will drive the company forward with innovation. Through their participation in safety programs they will introduce the brand to primary school children.

The strategic goals of **Shore & More Bicycles** are to increase sales and subsequently increase staff to meet the new demand.

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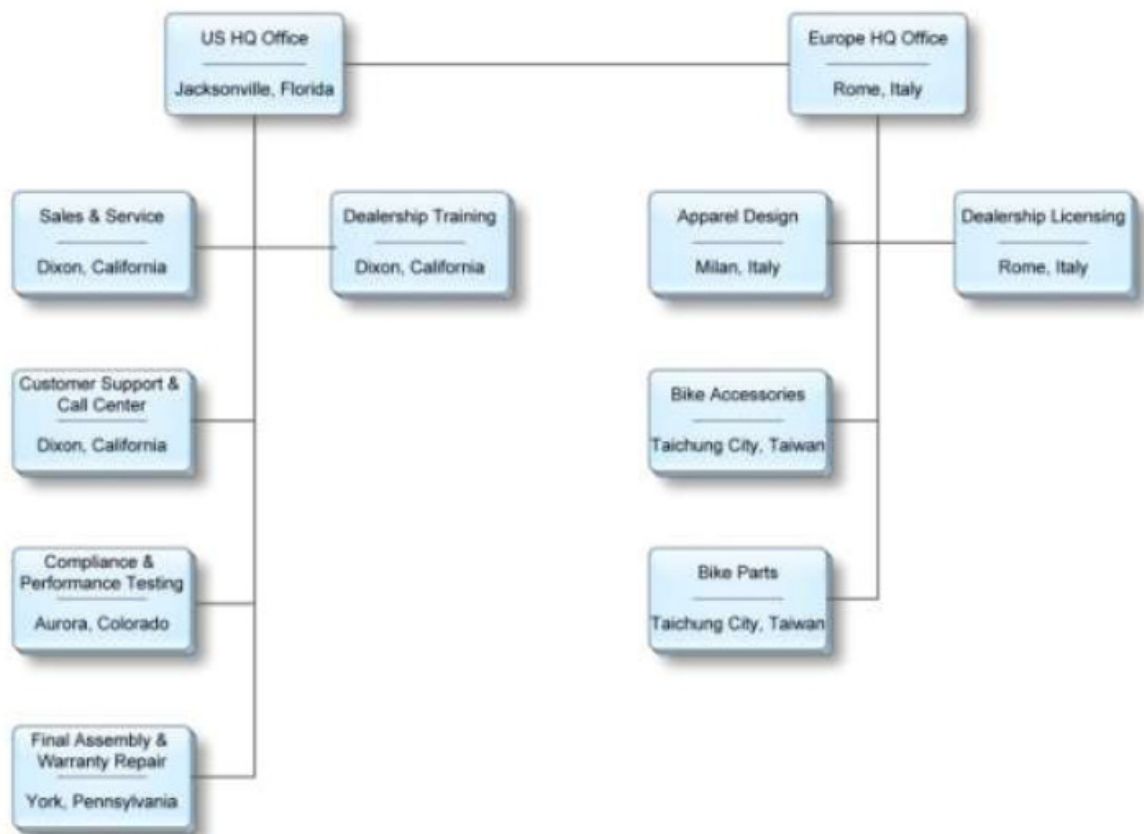
Organizational Chart

Shore & More Bicycles is a privately owned company with its main headquarters in Jacksonville, Florida, and a second headquarter office in Rome, Italy.

Several **Shore & More** executives have offices at the Jacksonville headquarters, including the chief executive officer, chief operating officer, chief innovation officer, chief marketing officer, human resource director, chief financial officer, chief information officer, and chief procurement officer.

The European office in Rome, Italy, allows for work with new bicycle development, apparel design, dealership licensing, and manufacture of bike accessories and bike parts. The senior product manager for apparel, senior manager for design and development, and the senior product manager for bicycles have offices in Rome, Italy.

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IT Infrastructure Description

Shore & More Bicycles is an emerging company that has adopted only the necessary technology to perform the functions required at the sites. An examination of the current IT Infrastructure has revealed the following notes about the extent of the systems.

The website is hosted by an outside service and managed by a hired webmaster. The call center has the potential for expansion to 50 seats before it would need to be moved to a new, larger location. The system for managing e-mail is limited to 100 users. The design team in Rome has a 3D engineering design software program on a stand-alone machine that is not integrated with any other computers. There are no central servers for storing data; the company uses servers at each site for the documents stored and programs served or storage in Internet-based storage locations. Each office has a server for document storage. Back-up of files is completed by periodic storage on an external hard drive by each user. The employees use a local phone system, cell phones, or smartphones to communicate. Occasionally, they have used some Internet programs to talk with people at the other sites to help reduce costs. The sales and service team use only laptops for mobility. Each site is subscribed to an Internet provider.

The diagram depicts the current state of the IT infrastructure.

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IT Strategic Plan

Executive Summary

Shore & More Bicycles is an owner-operated company with technology adaptation based upon the individual skills of each employee. The management team has developed an IT strategic plan that will help them change the current technology for more integrated systems to achieve the business strategy goals.

The IT strategic plan strives to improve the IT systems by addressing technology updates by layer. The business layer develops secure systems and processes. The applications and services layer places software and systems in place that increase the productivity of the employees to increase the competitiveness of the company. The data layer secures a central location for data storage that is accessed through secure channels for analysis and reporting. The technology layer implements universal systems to improve networking, establish centralized data and application sharing, and increase security of information.

Metrics to determine the success of the plan are indicated. The tactical initiatives necessary to support business operations in order to improve efficiency, cost effectiveness, service quality, and enhance business development are the metrics.

Introduction

Shore & More Bicycles is using technology in the manner known by the current employees. The IT team plans to look at a number of innovations related to using technology for doing business, increasing productivity through the use of applications and services, storing data and analyzing data, and increasing the robustness of processes and engineering design.

Purpose

Shore & More Bicycles must examine its current use of technology and its IT infrastructure assets and determine what technology skills, software, and equipment are necessary to apply technology in a manner that will help the employees achieve the business strategy goals for the company.

Scope of IT Strategic Plan

The scope of this IT strategic plan is to examine the business needs, the applications and services used, the types and volumes of data used by each department, and what technology assets make up the IT infrastructure.

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IT Mission and Vision

The mission of the **Shore & More Bicycles** information technology team is to provide each employee with the needed technological skills, software, and equipment to be productive. The vision of the **Shore & More Bicycles** IT team is to contribute to the success of **Shore & More Bicycles** by increasing customer service through improved employee and product performance.

IT Goals

The goals of the **Shore & More Bicycles** IT team is to:

- Improve the opportunities of brand identification in international and domestic markets.
- Increase customer satisfaction of the company's website usability and bicycle, accessory, and apparel products.
- Integrate systems for improved functionality of the departments.

Systems

Each department has identified the current IT assets that make up the IT infrastructure. As a start-up company, these assets have been adequate. Continued growth requires changes. The systems are functional yet are not practical as the company desires to move to shared systems to have the company operate more as an enterprise.

The IT system for **Shore & More Bicycles** can be organized by layer: business, applications and services, data, and technology. Each IT layer helps **Shore & More Bicycles** achieve its business strategy goals.

Business Layer

Each department has systems that inform the financial department. A need has been identified for a system that allows for program oversight by the financial department. Improved technology integration will permit increased accuracy for planning and budgeting as the company grows. Data security and disaster management are high priorities in the strategic plan for IT. The current method of onsite back-up to external hard drives is not completed daily and the external hard drives are not password protected.

The goal for the business is to have secure systems and processes that share data with the financial and innovation teams for analysis, planning, budgeting, and product development and production.

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Applications and Services Layer

Only one application is accessible by all members; however, the accessibility is limited to the current company size. Any growth in personnel will render the payroll system unable to function. The IT applications require an asset management system, a performance management system, a document management system, a web content management tool, a company portal and intranet, a disaster recovery plan, a system for supply chain management and logistics, and a data security system with secure identity management.

The goal for applications and services is to implement the software and systems that increase the productivity of the employees in order to increase the competitiveness of the company. Each of the business strategic goals is more easily achieved with improved applications and services.

Data Layer

The data records in the current system are kept on individual computers. Some databases are kept on a common server at the site; however, they are not integrated with each other. Shared web content at this time is stored within sites that are not at the level of security desired by the IT team. Analysis for the return on investment for the sponsorships, exhibits, and education planned in the business strategic goals would currently require a large number of work hours in order to integrate the databases.

The goal for data is to have a secure central location for data storage that is accessed through secure channels for analysis and reporting.

Technology Layer

The current technology is individualized and lacks integration with company-wide systems. Time-saving techniques for computer set up, network systems, and planning for the IT infrastructure are necessary for company growth. Sharing of computer files and programs is limited to viewing and not to collaboration.

The goal for technology is to have universal systems to improve networking, centralized data & application sharing, and increased security of information.

Personnel and Skills

Growth of technology is dependent upon the adoption of the technology. Improved skills related to technology will improve adoption rates and have the potential to improve productivity.

Training and performance management are necessary to achieve the return on investment expected through developing the business systems, adding applications and services, integrating

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and securing data, and updating technology. To achieve the business strategy goals in an efficient and effective manner, the employees of **Shore & More Bicycles** will need to use technology in an integrated system with additional functionality compared to the systems currently in use.

Management

Management of the IT strategic plan and the goals for the systems layers will be documented through a series of metrics:

1. The number of employees with skills for essential programs required to operate the shared data systems, the training systems, and performance management systems
2. Feedback from employees on the systems and how well the systems are helping the employees perform their duties and save time on tasks
3. The amount of energy inputs into the system through the use of centralized and shared systems
4. The reduced loss of data due to back-ups and power management
5. The productivity value for each employee, especially the tech support staff when setting up or repairing technology issues
6. The market share of the company as a measure of competitiveness

Conclusion

Changes in the IT infrastructure, the business systems, the applications and services, the data shared, and the technology tools in use are expected to result in tactical initiatives to support business operations. In turn, this will improve efficiency, cost effectiveness, and service quality and enhance business development.



Location Profiles

Jacksonville, FL

Home to more than 860,000 residents in a convenient location and mild climate, Jacksonville is located along the St. Johns River around the intersection of Interstates 95 and 10. Jacksonville is home to four seaport facilities, an international airport, and the crossroads of three major railroads.

Description

Jacksonville covers 841 square miles and is the largest city in land area in the contiguous United States. The city's cost of living is 92.6% of the national average, making Jacksonville a desired location for business development due to lower costs associated with housing and utilities. The number of workers in the labor force is greater than the national percentage; 68.6 % of the population of Jacksonville age 16 or older is employed. Approximately 13% of the housing units in the city are vacant.

Socio-Economic Status

The average family size is 3.11 persons. Civilian veterans make up 14% of the population. Approximately 87% of the population has graduated from high school and at least 24% have a bachelor's degree or higher. Almost 12% speak a language other than English at home even though only 8.5% are recorded as foreign born. The median household income is nearly \$50,000.00. The per capita income is \$25,233.00 and 10.2% of families and 13.5% of individuals are below the poverty level.

Currency and Inflation Rates

Jacksonville uses the United States (U.S.) currency. The rate of inflation for the Jacksonville metropolitan area is 4.3 % and the consumer price index is above 110.

Energy Sources

The Jacksonville area is supplied with a number of different sources for electricity including wind spires, solar arrays, methane, diesel fuel, and coal/petroleum coke. The city uses alternative fuel fleet vehicles that are powered by biodiesel, ethanol, and electricity.

Economic Events

The population of Jacksonville has grown more than 11% between 2000 and 2010. The management of growth is important in the large city area as there is much room to grow. More than \$1.1 billion in development has been completed during the last ten years. Empowerment Zones and Enterprise Zones are available to help support business development through incentives, tax credits, and refunds.

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Aurora, CO

Known as “The Gateway to the Rockies,” Aurora is located along Interstate 255 near Denver. The city has been working on a Bicycle and Pedestrian Master Plan, which aims to promote an increased use of bicycles and an increase in safety. With an average high temperature of 64 degrees Fahrenheit and low relative humidity, Aurora is a desirable place to live with its four distinct seasons.

Description

Aurora has more than 310,000 residents with a median age of 34.5; the state of Colorado has a median age of 35.8 years. The number of workers in the labor force is greater than that national percentage; 71.4 % of the population of Aurora age 16 or older is employed. Approximately 9 % of the housing units in the city are vacant. Aurora is home to career training centers. One of these centers is a school that transformed a vacant building into a campus with solar arrays and wind turbines. The school and the courses offered inspire businesses and shopping centers to adopt wind turbines, solar panels, solar trees, and energy efficient lighting.

Socio-Economic Status

The average family size is 2.62 persons. Civilian veterans make up 11.9% of the population. Approximately 83.7% of the population have graduated from high school and 25.2% have a bachelor's degree or higher. Almost 30% speak a language other than English at home even though only 19.9% are recorded as foreign born. The median household income is nearly \$50,000.00. The per capita income is \$23,798.00 and 12.9% of families and 15.9% of individuals are below the poverty level.

Currency and Inflation Rates

Aurora uses the United States currency. The rate of inflation is above 3% and the consumer price index is above 219 for the Denver- Boulder-Greeley metropolitan area.

Energy Sources

Businesses are encouraged to adopt wind turbines and solar arrays. Natural gas is available as an energy source. Over 83% of electricity generated in Colorado is from fossil fuels. Over 300 days of sunshine in Colorado are beneficial to electricity generation using solar photovoltaic and solar thermal energy systems. Aurora is home to the nation's largest solar energy research park. The eastern plains near Aurora have the potential to generate electricity using wind resources.

Economic Events

The city has eight urban renewal areas established to provide assistance to current and prospective

businesses and property owners. Aurora has low tax rates and a competitive cost of doing business.

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Businesses serve regional, national, and international markets due to the city's location in the central United States near Interstates 470, 255, and 70.

Dixon, CA

Dixon is located between Sacramento and San Francisco along Interstate 80 near the corridors for Interstates 505 and 5 and Highway 113. Founded in 1852 during the Gold Rush, Dixon has been known for its agriculture, horseracing, and county fair. The city is 62 feet above sea level and the average daily temperature is 60 degrees Fahrenheit.

Description

Dixon is an affordable community with “abundant land, outstanding public facilities,” and infrastructure designed with a plan for community growth (Solano Economic Development Corporation). Solano County has a countywide bicycle plan to support bicycle travel. Federal, state, and regional funding has been used to support the development of a unified bicycle system. Dixon has more than 310,000 residents. Dixon's median age is 32.7 years; the state of California has a median age of 34.6. The number of workers in the labor force is greater than that national percentage; 71.6 % of the population of Dixon age 16 or older is employed. Approximately 5 % of the housing units in the city are vacant.

Socio-Economic Status

The average family size is 3.65 persons. Civilian veterans make up 10.5% of the population. Approximately 78.7% of the community have graduated from high school and at least 19.4% have a bachelor's degree or higher. Almost 37.6% speak a language other than English at home even though 22.5% are recorded as foreign born. The median household income is nearly \$69,500.00. The per capita income is \$25,843.00; more than 4.8% of families and 6.4% of individuals are below the poverty level.

Currency and Inflation Rates

Dixon uses U.S. currency. The rate of inflation for the state of California is between 2.5 and 3.5%. The consumer price index for the San Francisco metropolitan area has increased about 2.5% over the last 12 months.

Energy Sources

Contractors are available to install solar electrical and solar thermal systems. Sources of electricity generation include hydropower, solar power, wind power, and traditional generation. One local

company uses a Biomax generator to generate electricity with biogas from walnut shells.

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Economic Events

Solano County, home of Dixon, has clusters for Life Science, Energy, and the Food Chain. County partners are working on how to have these clusters collaborate to create a more thriving economy in the region.

York, PA

York is located along the Interstate 83 corridor between Harrisburg, PA, and Baltimore, MD. York features a number of businesses in an array of industries including manufacturing, agriculture, construction, tourism, and medicine. In May, York has a Bike to Work Week to promote the use of bicycles for commuting to and from work.

Description

York has more than 40,000 residents; the median age is 30. The number of workers in the labor force is less than the national percentage; 62.8 % of the population of York age 16 or older is employed. Approximately 14 % of the housing units in the city are vacant. Within a 500-mile radius of York are six major market areas in the United States and within a four-hour drive of York is 40% of the United States population.

Socio-Economic Status

The average family size is 3.25 people. Civilian veterans make up 8.8% of the population. Approximately 73.7% have graduated from high school and 11% have a bachelor's degree or higher. Almost 23.7% speak a language other than English at home even though 6.8% are recorded as foreign born. The median household income is nearly \$29,233.00. The per capita income is \$14,639.00; 27.5% of families and 32.3% of individuals are below the poverty level.

Currency and Inflation Rates

York uses the U.S. currency. The rate of inflation for the United States has been over 3.6%. The consumer price index for the United States has increased to 225.9.

Energy Sources

The municipal waste disposal site can process more than 1,000 tons of refuse to generate electricity. A number of companies in the region are seeking employees to work in solar related jobs.

Economic Events

York offers a number of incentives for doing business in the city including tax abatements, tax reductions, and grants. Land use and zoning plans designate areas for residential, commercial, industrial,



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and open space future development. The transportation strategies include plans for bicycle accessibility and safety.

Rome, Italy

Rome is known as the "Eternal City" due to its founding thousands of years ago. Historic and modern buildings line the streets for a balance of business and tourism. Rome is the only city with another state inside it; Vatican City lies within the city boundaries. The 20 kilometers of Rome's coastline is situated in the middle of three ports: Civitavecchia, Ostia, and Fiumicino. Civitavecchia is a commercial port that handles 11 million tons of goods per year.

Description

Rome is made up of more than 155,000 businesses and 10 universities and research centers. It has a population of 3.36 million. Large numbers of tourists swell the population of the city as they come to visit the highest concentration of historical and architectural sites in the world. The literacy rate for Italian residents age 15 and older is 98.4%. The number of years of education from primary to tertiary is 16 years. Communication devices include 21.3 million telephones, 90.6 million mobile cellular phones, 23.2 million Internet hosts, and 29.2 million Internet users.

Socio-Economic Status

The median age of Italian residents is 43.5 years. The labor force is estimated to be 24.98 million. Households in the lowest 10% of household income make up 2.3% of the total consumption. Those households in the highest 10% of household income make up 26.8% of the total consumption. The estimated gross domestic product per capita of the country is estimated in U.S. dollars at \$30,500.00.

Currency and Inflation Rates

Italy is a member of the European Union and uses the Euro as its currency. The rate of inflation is estimated at 1.6%.

Energy Sources

Traditional methods of generating electricity are combined with projects using renewable sources, hydrogen energy, and positive energy. New environment plans are seeking ways to power cars with hydrogen and methane. It is proposed that Italy could benefit more from solar power and geothermal than other European countries that have a more natural advantage for wind compared to Italy.

Economic Events

Roman leaders have developed an environment and energy plan to create jobs, increase adoption of energy from renewable resources, and inspire technology innovation. Small businesses in Rome and its

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province have owners or members that are immigrants to Italy. These businesses generate 9% of Rome's gross domestic product. Rome is upgrading its digital networks to improve communications.

Milan, Italy

Milan is the capital city of Lombardy. Milan is home to many world-famous designers in addition to other successful businesses in the finance, automotive, rubber, iron, manufacturing, and telecommunication sectors.

Description

The cost of living index for Milan equates with other high-cost-of-living locations. The population of the city is 1.3 million. The literacy rate for Italian residents age 15 and older is 98.4%. The number of years of education from primary to tertiary is 16 years. Communication devices include 21.3 million telephones, 90.6 million mobile cellular phones, 23.2 million Internet hosts, and 29.2 million Internet users.

Socio-Economic Status

The median age of Italian residents is 43.5 years. The labor force is estimated to be 24.98 million. Households in the lowest 10% of household income make up 2.3% of the total consumption. Those households in the highest 10% of household income make up 26.8% of the total consumption. The estimated per capita of the gross domestic product of the country is estimated in U.S. dollars at \$30,500.00.

Currency and Inflation Rates

Italy is a member of the European Union and uses the Euro as its currency. The rate of inflation is estimated at 1.6%. The exchange rate has averaged about 0.8 E to each 1 USD.

Energy Sources

Milan was host to more than 400 exhibitors related to “photovoltaic and thermal solar energy, biomass, cogeneration, mini hydroelectric, the pellet industry, geothermal energy, photovoltaic machinery, and technologies” from Italian and international companies (International Online Expos Inc, 2011). Traditional methods of generating electricity are combined with projects using renewable sources, hydrogen energy, and positive energy. New environment plans are seeking ways to power cars with hydrogen and methane. It is proposed that Italy could benefit more from solar power and geothermal than other European countries that have a more natural advantage for wind compared to Italy.

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Economic Events

Milan is dependent upon industrial exports to maintain its economy. Declines in industrial production are being offset by increases in publishing, finance, banking, food production, IT technology, logistics, transportation, and tourism.

Taichung City, Taiwan

Taichung City is located in the middle of the Taiwan Province and is the third largest city in the Province. The terrain is high in the north, low in the south, and mountainous on the west. The mountains protect Taichung City from typhoon threats.

Description

Taichung City is the center of the Taiwan Province economy, communication, and culture. Many colleges and universities of higher education are located in Taichung City. The total population of Taiwan is estimated to be 23 million. Residents have nine years of compulsory education with a 99.3% attendance rate. Literacy is estimated to be 97.8%. Nearly 16,000 student visas were issued to Taiwan passport holders to study in the United States for advanced education. Communication devices include 14.6 million telephones, 26.96 million mobile cellular phones, 6.3 million Internet hosts, and 16.1 million Internet users.

Socio-Economic Status

The median age of Taiwan residents is 37.6 years. The labor force is estimated to be 11 million. Households in the lowest 10% of household income make up 6.4% of the total consumption. Those households in the highest 10% of household income make up 40.3% of the total consumption. The estimated per capita of the gross domestic product of the country is estimated in U.S. dollars at \$35,700.00.

Currency and Inflation Rates

The currency in Taiwan is the New Taiwan dollar. The exchange rate has averaged about 32 NTD to each 1 United States Dollar (USD). The inflation rate in Taiwan has averaged between 1 and 2%. The consumer price index for Taiwan is approximately 110.

Energy Sources

Taiwan has passed legislation that promotes the use of renewable energy and diversification of the energy requirements. Tariffs have been passed for wind energy, geothermal energy, photovoltaic cells,

biomass, waste, and other renewable sources.

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Economic Events

Taiwan's population is aging and the total fertility rate is just over one child per woman. This rate increases the prospect of future labor shortages, falling domestic demand for products and services, and declining tax revenues. Exports generate about 70% of Taiwan's gross domestic product. The greatest percentage of exports is made up of technology and machinery. Taiwan firms manufacture parts for photovoltaic installations.

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Internal Documents

*The following are internal
copies of documents
from e-mail communications,
meeting minutes, and company memos.*

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Child Labor Laws and Fair Wage Concerns

From: Elaine Detro
To: Jan Wilkons; Jon Stephis; Vincenzo Di Lucca
Cc: Larita Saka;
Subject: Child Labor Laws Question

Jan, Jon, and Vincenzo:

I was reading an article online today (<http://www.youthrules.dol.gov/jobs.htm>) about child labor laws and fair wages and was a bit concerned about the employees in our supplying firms. There are rules forbidding children under the age of 18 from doing hazardous jobs including:

- Driving a motor vehicle
- Operating power-driven hoisting machines
- Operating power-driven metal forming, punching, and shearing machines
- Operating power-driven paper products machines, scrap paper balers, and paper box compactors
- Operating power-driven circular saws, band saws, and guillotine shears
(U.S. Department of Labor. (n.d.) What Jobs Can Youth Do? Retrieved from <http://www.youthrules.dol.gov/jobs.htm>)

And there are rules that workers are to receive overtime for work that exceeds the standard work week.

There must be some type of software where we can keep track, through our computer systems, to be sure that our suppliers are not hiring in such a way that violates any of these rules. Please check and get back to me.

Thanks for checking,

Elaine

Elaine Detro,
Senior Compliance Manager
Compliance & Performance Testing Division
Shore & More Bicycles
Aurora, Colorado
(XXX) XXX-XXXX
<mailto:edetro@shoreandmore.fileextension>

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Sweatshop Concerns

Excerpt from the minutes of the last owners' and managers' meeting...

- Proposal for text to be included in the documentation labels with each **Shore & More Bicycle** Apparel garment:

*With your purchase of **Shore & More Bicycles** Apparel is the assurance that this garment was made in facilities that have paid a fair wage to their workers. The farmers who have grown the cotton, bamboo, and soy used to make this product have received a fair price for their product. Your purchase helps invest in the future by increasing safety and developing sustainable communities.*

- Bicycles are not a product that is certified as a Fair Trade product as this time.
 - Apparel is a product that can be certified.
- A motion was unanimously passed and seconded that **Shore & More Bicycles** apparel would seek the Fair Trade Certification.
 - We need to determine what systems are necessary to put in place to document that suppliers and makers of **Shore & More Bicycles** Apparel are paid a fair price and a fair wage.
 - Research has been assigned to the compliance and apparel managers
- Compliance and apparel managers are to report at the next meeting which is on the third Thursday of next month.

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Project Report at IT Team Meeting

Minutes of the Fourth IT Team Meeting

*The IT team is composed of the CIO, an outsourced web designer and website coordinator, and the tech support person. Other members of the **Shore & More Bicycles** staff were invited and attended the fourth IT team meeting.*

In attendance at the meeting were

- Sara Beresi CIO, U.S. Headquarters, Jacksonville, FL
- Merrilee Jarred Web Designer and Website Coordinator, Outsourced Agent
- Laurinda Jinenez Customer Service, Customer Service and Call Center, Dixon, CA
- Quint Radakovic Online Marketing Manager, Sales and Service, Dixon, CA
- Cliff Lamarta Tech Support, Compliance and Performance Testing, Aurora, CO
- Ji Vizeni Payroll, U.S. Headquarters, Jacksonville, FL
- Deedra Giannet Product Manager, Final Assembly and Warranty Repair, York, PA
- Dane Viemas Supply Manager, European Headquarters, Rome, Italy

Discussion points:

1. Tactical initiatives to support business operations in order to improve efficiency, cost effectiveness, service quality, and enhance business development
2. Independent uses of technology that could be integrated
3. Current organizational technology strategic plan
4. Review of the current IT assets

Notes:

- *Sara commented that the IT assets of the company are in need of security. Each site has an independent Internet provider that is connected to a modem at that site. The modem is then linked to a switch to create the Ethernet system and to a wireless router for wireless access. The wireless router is secured only by a ten-digit password.*
- *Ji reported the payroll system has data entry by the employees and managers who approve the time for the employees they supervise. The system is adequate now for the size of the company. Any growth in employees will exceed the number of users in the self-report system.*

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Project Report at IT Team Meeting (cont.)

- *Quint and Merrilee have been working together to have online marketing and dealer locations on the website. Quint has plans for more interactions for customers to be able to see the bike in a completed image with the colors and options chosen by the website user. Options to order bikes are being developed and linked to directions to the nearest dealership for receiving and fitting.*
- *Dane commented on how he has to e-mail reports to the York facility product manager in order to communicate the number of each product that will be sent from Taiwan to York for final assembly.*
- *Deedra and Laurinda are storing documents in Internet cloud-based sites to communicate the status of bikes ordered by customers and dealerships. Deedra voiced her concerns on the security of the information because she really could not guarantee that hackers or others are not accessing the data where it is currently stored.*
- *Cliff reported that he has rebuilt two computers this past month that had viruses and malware. Some data was lost on each machine. There is no common image for the computers to load all the drivers and connections to printers in an expedient manner.*

The next meeting was scheduled via the same web connection on the second Tuesday of next month at 8:00 AM (Greenwich minus 8:00 hours).

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New Ideas for Designs

From: Georgieanna Cerasoli
To: Vincenzo Di Lucca
Cc: Jan Wilkons; Jon Stephis; Bryon Mitrason
Subject: Design Suggestions

Vincenzo:

The feedback from the owners has been very positive. They have rated their satisfaction as 4.95 out of 5 points on the performance of their new bikes. The comments of the few that did not rate their satisfaction as a 5 make me believe they are not satisfied with the time they have to ride or their locations rather than the bike's actual performance. You have designed marvelous bikes.

Jan and Jon were in the office last week to review the purchase satisfaction surveys and the follow-up surveys we sent to the owners. In the review, we noticed several riders commented about the need for additional shock absorption on the front fork when mountain biking. We sought some feedback on the issue from the riders in our California and Colorado offices. They responded that the shock absorption is good now if you are not landing too hard on the front tire.

Jan thought a new style of bike for the extreme mountain biker would be a great addition to our selection of bikes. Jan and Jon discussed the idea with Byron, our new Chief Innovation Officer. Jon and Byron asked me to contact you about designing and computer testing a new design that would take a higher level of shock on the front fork and wheel. A new design for both women and men with a lower top bar would be great! The market research and analysis we completed reveals that the lower top bar on the frame was rated highest for both male and female riders that are interested in a **Shore & More** mountain bike.

Please send Byron a response and copy Jan and Jon with the time frame you need to create the new design and complete the computer tests. Byron will communicate your time frame to the prototype team for them to plan to create the new prototype for testing.

We all look forward to the new design,
Georgieanna

Georgieanna Cerasoli,
Sales and Service Manager
Shore & More Bicycles
Dixon, CA
(XXX)-XXX-XXXX
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Internal Memo

From: Sara Beresi, CIO

To: All Staff

RE: Internet Reliability

Over the last week a number of storms have plagued parts of the United States. These storms have wiped out power and Internet connections to our Dixon, CA, and our Jacksonville, FL, sites. A small amount of data was lost by those working on the workstations and desktop computers during that time.

We are looking into uninterruptible power supplies (UPS) and back-up generators for the sites.

Please forward any suggestions, comments, and/or reviews you have for these devices to my office. Your insights and solutions have always been cutting edge and I know they will be innovative this time also.

Shore & More Bicycles



Desire to use Renewable Energy Sources

From: Marlin Debari
To: Jan Wilkons; Jon Stephis
Cc: Bryon Mitrason
Subject: Use of Renewable Energy Sources

Jan & Jon

As requested I have been examining our energy usage costs and the costs of various renewable energy sources.

An integrated wind and solar system for thermal and photovoltaic energy will pay for itself in 6 years at our current operation level at the Aurora, CO site. As we increase operations in Colorado, we will reduce the payoff time.

The Rome office would benefit most from a solar thermal and photovoltaic system, at this time, with the shortest payoff. The wind system is nice but not optimal in the current office location. We might want to consider moving into a new location that would allow us to use an integration of both resources.

Our York and Dixon offices would benefit from solar thermal and photovoltaic systems. The payoffs for the systems are 6 and 6.3 years respectively.

The Jacksonville office is already using solar thermal and photovoltaic sources. The new vertical wind turbine would be attractive and permit capture of the wind in Jacksonville.

I will prepare a presentation plus the costs and benefits for each site for your review. Adopting the renewable energy sources will help extend your combined \$5 million owner investment in this company.

Marlin

Marlin Debari,
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