Handout 2018



2017-2021

# STRATEGIC PLAN UPDATE





Jefferson Dodge Counties WI

# THRIVE

Economic Development • It's Happening Here



DATES COVERED: 9/1/16-5/31/18

#### **GOAL: BUSINESS RECRUITMENT AND RETENTION**

# Grow business, capital investment & employment opportunities

Strategy One: Focus on retaining and expanding existing businesses

#### **Tactics:**

Netention & Expansion Visits: 60/year

Progress to Date: 100

#### Semi-Annual reports to investors

- Progress to Date: Campaign Kickoff 5/31/17
- Annual Meeting November 2017
- Provide Expansion Assistance: Direct and indirect assistance to support existing businesses making capital investments
  - Progress to Date: 33
- Coordination of business surveying activities across agencies in both counties
  - Progress to Date: Dodge County worked with county and multiple groups on survey initiative that began with Easter Seals grant to study transportation needs, to ultimately use that money to support a much larger county-wide survey being done by the Gathering Place, for the purpose of identifying a range of issues affecting resident ability to access living wage work. Have also formally proposed to Dodge County to engage in a county-wide housing study. Have discussed need for a REGION-wide housing study for all counties excluding Dane, with MadREP. Have had numerous discussions with Watertown and Ft. Atkinson Chambers re: combining resources to complete a wage & benefit survey.
- Partnerships to deliver training programs that address training needs expressed by business leaders
  - Progress to Date: Engaged with Madison College to host a 'listening session' to bring businesses forward to
    discuss their training needs. Engaged with Watertown HS's Tech Ed group to address business & education
    mix for high school students. Continuing engagement with Dodge County MBA on their members' training
    needs; started discussions with MPTC on same. Engaged with Dodge County SHRM to address similar issues.
- Expand Locally-Controlled Incentives
  - Progress to Date: Through JCEDC, brought forth resolution to have County adopt PACE, which provides funding for businesses investing in energy saving initiatives.
- Business-to-Government Affairs: Host Annual Meetings with State & Federal Reps in partnership with Chambers, CDAs/RDAs; focused on ED issues/concerns
  - Progress to Date: One 1:1 meeting with me and Rep. Horlacher





## Strategy Two: Recruit/Attract New Driver Industry Businesses

Progress to Date: Pipeline report/successes

79 project opportunities in pipeline since 9/1/16

- 46 NEW Business Opportunities
- 33 Existing Business Opportunities
  - o Eliminated 29
  - Successful 10
  - Active 40 (in various stages from preliminary to delayed)
- Partner with MadREP, M7 and WEDC to attend specific events to promote the business assets of the region
  - Progress to Date: None; insufficient funding to attend trade shows, etc.
- Build relationships with decision-influencers in Madison & Milwaukee regions to promote doing business in two-county area
  - Progress to Date: Relationships at board level with Wangard and Dickman. Working regularly with Boerke (Cushman & Wakefield), Oconomowoc Realty, MSI, Vandewalle. Attending some events as time and money allows to connect with targets; i.e., IBAW, M7 Economic Forums. Following up with emails.
- Enhance website and develop targeted sector marketing materials
  - Progress to Date: New website in construction now. Short-term help with gathering information on available sites and buildings; getting updated photos and ensuring these are uploaded into searchable database.
     Target industry marketing materials will be done, and will include worker information from Labor Availability Analysis. Targeted sectors are: Agribusiness; Food Processing and Advanced Manufacturing.
- Execute a prospect development strategy- promoting local assets to businesses within a 3-hour drive
  - Progress to Date: Developing list of assets we want to promote. This includes:
    - Data from Labor Analysis
    - Sites and buildings that are high-quality and appropriately zoned
    - Communities that have available capacity in their water and wastewater services (important for food processors). Gathering information NOW.
    - Permitting processes (that affect costs of doing business) survey to gather this information to go out mid-June.
- Develop and maintain relationships with regional, national and global site selectors, developers and commercial/industrial realtors/brokers
  - Progress to date: Board level relationships with Wangard and Dickman; regularly interacting with Kuenzi, Boerke and Oconomowoc Realty.





- Develop & maintain accurate demographic data, site and buildings database and other resources and make available to community leaders, business executives and business decision-makers
  - Progress to Date: Data is being gathered AND data is now available in searchable site and building section of website. We continue to respond to requests to provide data and do so, when possible. We have access to a lot of data. Goal is to connect with requesters to ensure a customized response.

Strategy Three: Building Business investment capacity (actions proposed to support and grow the area's competitiveness and stature as a prime location)

#### Tactics:

- Complete an Asset Inventory: Assets/resources that are important to business
  - Progress to Date:
    - Completed Labor Availability Analysis
    - Survey out to all municipalities to document capacity in their water and wastewater treatment & delivery systems. To date, 31 muni's have responded 37 missing.
    - Next Survey: Document permitting processes in all municipalities. This will document the process, timelines and costs associated with businesses making new capital investments, by municipality.
    - Research completed to build Incentive Matrix!
- Build and promote area assets & infrastructure: Work with municipalities to promote continued investments in connectivity/bandwidth, processes and timelines impacting expansion plans, etc., all necessary to spur growth
  - Progress to Date:
    - Reported out to Dodge County on recommendations to spur growth that includes these types of investments.
    - Jefferson County has included some of these investments in their Strategic Plan.
    - Working with Alliant Energy to develop large industrial sites in Dodge County.
- Create a marketing/promotion strategy to promote the area's assets
  - Progress to Date: Strategy has been crafted and reviewed by Committee; awaits finalization of website and asset inventory for revision.
- Corridor Development: I-94; WI 26 and WI 151 all need corridor development plans to promote competitive locations for pre-permitted, appropriately zoned business investments
  - Progress to Date: Discussions have begun with Envision FDL, Waukesha Business Alliance and with local economic development entities regarding creating corridor plans. This will be a multi-year project.
- Work with municipalities to promote world-class 'Development Readiness' across the region
  - Progress to Date: Results of the Asset Inventory surveys will start these discussions.





- Brownfield Redevelopment: Develop and grow the area's brownfields program to add to inventory of shovel-ready properties
  - Progress to Date: EPA granted extension until 9/30/18 of current brownfields grant. Funding will be used up by then on steps necessary to get Hertel property in Watertown and Biwer property in Waterloo ready for new development.
- Execute a Labor Availability Analysis specific to the manufacturing sector
  - Progress to Date: Completed
- Quantify primary employer short-term future worker needs, in partnership with area Chambers
  - Progress to Date: Chambers are all working independently; can't get a county-wide focused effort in place.
     MBA in Dodge County is looking at this for its members only. Some discussions with Dodge County SHRM and a list of most difficult positions to fill was compiled (2017 data).
- Continued participation with WI River Rail Transit Commission
  - Progress to Date: Ongoing
- Support municipal efforts to identify and develop amenities necessary to attract workers and employers
  - Progress to Date: Recommended that Dodge County conduct a housing study. Recommended to MadREP that they seek WEDC funding to help all counties in their region complete housing studies.

# GOAL: ATTRACT, DEVELOP AND ALIGN TALENT

Strategy One: Work to ensure that the skills of the workforce match employer needs, and that area employers are informed on competitive wage and benefit packages necessary to attract & retain talent

## Progress to Date:

- Completed the Labor Availability Analysis
- Invited all manufacturing businesses in both counties to attend roll out of results on May 23<sup>rd</sup>
- Placed Executive Summaries of LAA on website
- Alerted all businesses wanting full reports to email us
- Delivering results to Jefferson School District School Board in July
- 22 requested full survey results





#### Strategy Two: Talent attraction

- Work collaboratively with business leaders, municipal leaders and other business organizations to support efforts to create an environment conducive to attracting workers from outside Jefferson and Dodge counties to accept employment within the two counties
  - Progress to Date: Advised/counseled at individual and group levels with municipal leaders and business leaders regarding successful talent attraction programs being run in other locations. Individual businesses are actively recruiting using radio, social media and billboard ads; and we have not been part of that work.

# GOAL: BRANDING, MARKETING AND COMMUNICATIONS FOR SUCCESS

Build a brand that raises awareness & promotes the area's QOL amenities and ED assets. Communicate with all audience segments to promote assets and success stories; become the 'go-to' EDO for Jefferson and Dodge counties.

Strategy One: Develop a 'must see' business destination.

#### Tactics:

- Complete an asset inventory to quantify the value of existing business assets
  - Progress to date: Work has begun; anticipate completion YE2018
- Develop marketing materials for all aspects of the organization's activities (programs and services offered)
  - Progress to Date: Materials completed to date include Home Buyer Program, BRE outreach, Revolving Loan Fund and campaign related collaterals. We are not doing mass collateral development. We have and will continue to produce materials that are customized for the customer requesting information.
- Continued work with Branding/Marketing/Communications Committee and expand committee membership
  - Progress to Date: Committee meets regularly (every 4-6 weeks); a few members have been added.
- Supporting and promoting events that build the brand and strengthen opportunities to bring visitors to the area and/or build awareness of the area's many amenities to the local population base
  - Progress to Date: We do pass on information about Chambers of Commerce events however believe <u>this</u> tactic should be eliminated.

#### Strategy Two

#### Tactics:

- Upgrade website and social media platforms to appeal to targeted audiences
  - Progress to Date: Website revision work underway.





- Develop/maintain online dashboard of key economic & community development indicators to track impact of programs against goals
  - Progress to Date: Online dashboard is an expensive add-on for website. LOTS of important data is now embedded in new searchable database for sites and buildings. (Probably should reconsider this tactic.)
- Promote area successes in regional & national publications
  - Progress to Date: placement through submissions to MadREP and to WEDC. None on our own due to lack of funding. Since 9/1/16, we have had 113 media placements. These include articles written for area publications, articles written about Agency activities and radio & TV interviews.
- Provide regular update presentations to local governments, nonprofits and community organizations
  - Progress to Date: Have completed many presentations; however, do these only as requested. To date, 23 ED-related presentations have been delivered.
- Coordinate communications and marketing opportunities with partners at WEDC, MadREP and M7
  - Progress to Date: ThriveED communicates regularly with WEDC and MadREP re: successes/wins/events.

Strategy Three: Ensuring professional staffing. As a knowledge-based business, our success relies upon the skills and abilities of the workforce (This strategy was added to iterate the professional staff desired over time to enhance effectiveness.)

These include up to 7 professionals as follows:

**Business Development Professional** 

Investor Relations Professional

Housing/Community Dev. Professional

**ED Specialist** 

Marketing Professional

Research Professional

Administrative Support (BRE visit scheduling)

 Progress to Date: No new staff has been hired. Existing staff does engage in ongoing professional development. Actively working with Nate Olson in Dodge County and engaging him in BD and CD efforts.
 Staff will not be added without commitment to additional funding.

Strategy Four: Cultivate & motivate board and working committee participation to ensure that Thrive ED is governed by business leaders from both counties who are committed to economic growth.

#### Tactics:

- Develop a working committee structure to bring local business leaders and rising talent together to drive Thrive ED forward in key areas.
  - Progress to Date: Committees have been assigned; board members as chairs, as follows:
     Finance, Audit & Compliance Committee: Mike Wallace Chair
     Projects/Prospects Management Committee: David Schroeder Chair





Investor Relations Committee: Brian Knox – Interim Chair Product Improvement Committee: Steve Wilke – Chair

Branding, Marketing & Communications Committee: Nata Salas - Chair

Currently, only the Branding/Marketing/Communications Committee meets regularly.

- Develop a sustainable investor relations strategy to ensure fiscal stability
  - Progress to Date: None
- Develop the capacity of the board members over time to enhance their ability to take on leadership roles that impact the area's overall economic competitiveness
  - Progress to Date: None
- Engage in semi-annual ED general education sessions (suggest wording change to "engage board" and/or "deliver ED general education sessions")
  - Progress to Date: None
- Conduct semi-annual topic specific board and municipal leadership education programs that enhance competitiveness such as: streamlining the permitting process; getting consistency in zoning language across municipalities
  - Progress to Date: Proposal is to begin this once we complete the asset inventory so we have all these issues documented.

Strategy Five: Maintain efforts from inaugural 5-year campaign to ensure adequate resources are available

#### Fundraising should:

- Raise awareness of the need for professional ED programming and services
- Raise awareness of the unique business assets in the 2-county area, and the organizations efforts to attract business investment.
- Raise awareness of the origination as the sole entity focused on initiatives designed to increase primary employment options for residents.
  - Progress to Date: IRC working with staff to revise fundraising collaterals. OF NOTE: We have received no
    responses from previous meeting requesting feedback on benefits by investor level.

#### INVESTOR RELATIONS OPPORTUNITY - STRATEGIC PLAN UPDATE

There may be an opportunity for some of the tactics in the Strategic Plan to be fleshed out as 'project funding opportunities' which the IRC could use to solicit funding from key groups such as foundations, etc. Recommend that staff work with members of the Finance Committee to identify initiatives that could be pulled out as stand-alone projects, to determine an appropriate funding level for these.





G/13 Handout

## Study shines light on labor availability

# tudy looks at labor availability in area —

#### MANUFACTURING

By Steve Sharp

# steves@wdtimes.com

JEFFERSON — The results of a "Labor Availability Analysis" related to workers willing and able to ply their skills in manufacturing in Jefferson and Dodge counties were presented Wednesday in both county seats, with the Jefferson event covered by the Daily Times.

Mike Walker, assistant director of the Docking Institute, was on hand to present the findings and answer questions at the Jefferson Area Business Center, a beautiful former nill on the west bank of the Rock Liver, downtown.

The study sought to answer a variety of questions about the Dodge/Jefferson county "laborshed," as Walker called it the 10-county region from which Dodge and Jefferson county employers draw workers.

Questions addressed included what the area's labor pool looks like, the number and types of workers willing to work in manufacturing and what pay and benefits need to look like to attract these workers to manufacturing. The distance people are willing to commute to work was addressed, as well, along with what might prevent them from accepting a position in manufacturing. The event was packed with valuable data and statistics but at times

remember as a very long day in a college lecture pit with a longwinded professor.

# (Continued on back, col. 3)



Mike Walker of the Docking Institute discusses his findings resembled what some readers might regarding the potential of the Jefferson County manufacturing workforce Wednesday afternoon with an attendee of Thrive's Jefferson event.

STEVE SHARP/ Daily Times

# Study shines light on labor availability

# Study looks at labor availability in area —

# (Continued from page 1)

The Jefferson County Labor Basin includes all or portions of Columbia, Dane, Dodge, Jefferson, Rock, Walworth, Washington and Waukesha counties. The purpose of — The five most important benefits Valker's report was to assess the available labor pool in this labor basin, with an emphasis on those interested in manufacturing employment.

those interested in manufacturing employment is about 50 years old, and 33.1 percent are women. Practically all have a high school diploma.

for those interested in manufacturing employment are, in order, good salary/hourly pay, onthe-job or paid training, good

— About 41 percent of the available labor pool report having training or experience, and 47 percent report being interested in employment in manufacturing. Of those with manufacturing experience, 47 percent report working in production.

— The average age for those interested in manufacturing employment is about 50 years old,

Walker said the available labor pool retirement benefits, good health represents those who are looking for employment or are interested in new jobs for the right employment opportunities.

The Docking Institute's and Walker's independent analysis of this labor basin showed: — The population of the Jefferson County Labor Basin is 713,048. The civilian labor force is 400,895. The available labor pool contains 238,289 individuals.

- Of the nonworking members of the available labor pool, an estimated 14,556 (6.1 percent) are currently looking for work and 43,703 (18.3 percent) are interested in working for the right opportunities. Of the working members of the available labor pool, 33,998 (14.3 percent) are currently looking for work, while 146,032 (61.3 percent) are right opportunities.
- About four-fifths (80.6 percent) of the available labor pool have at least some college experience and 98.7 percent have at least a high school diploma. The average age for members of the pool is about 48 years old and women make up nearly half of the pool.
- Almost 20 percent of the available labor pool are currently employed as general laborers, while currently looking for work, while an additional 6.1 percent work in government services or technical/highly skilled blue collar occupations. About 30 percent of the pool work in service sector jobs, — About four-fifths of the available jobs in 2018 "still resemble those of while 19.3 percent work in professional white collar jobs. About a quarter are not currently orking.
- More than three-quarters of the available labor pool are "willing to work outside of their primary field

benefits and good vacation benefits. Practically all have a high school

— The mean average desired hourly wage for those willing to work in manufacturing in Jefferson County for a day shift job is \$25.12. manufacturing employment are, in The average hourly wage for the second shift is \$26.80. The average hourly wage for the third shift is \$29.

Walker made a summary of his Dodge County presentation available to the Daily Times and the work in manufacturing in Dodge comparisons are worth noting. The Dodge County Labor Basin includes all or portions of Columbia, Dane, Dodge, Fond du Lac, Green Lake, Jefferson, Washington and Waukesha counties.

The Docking Institute's independent analysis of this labor basin shows that: — The population the event. Among many area nterested in different jobs given the of the Dodge County Labor Basin is 657,906. The civilian labor force is 384,778. The available labor pool contains 223,727 individuals.

- Of the nonworking members of the available labor pool, an estimated 12,540 (5.6 percent) are currently looking for work and 41,495 (18.5 percent) are interested Pratt said she has heard consistently in working for the right opportunities. Of the working members of the available labor pool, 32,381 (14.5 percent) are 137,311 (61.4 percent) are interested in different jobs given the right opportunities.
- labor pool have at least some college experience and 98.6 percent outdated mind-set he said the local have at least a high school diploma. populace must combat. The average age for members of the pool is about 49 years old, and women make up about 43 percent of the pool.

and 28 percent are women. diploma.

- The five most important benefits, for those interested in order, good salary/hourly pay, good vacation benefits, good health benefits, good retirement benefits and on-thejob or paid training.
- The mean average desired hourly wage for those willing to County for a day shift job is \$25.65. The average hourly wage for the second shift is \$28.50. The average hourly wage for the third shift is \$30.80.

Vicki Pratt is the executive director of Thrive, formerly the Jefferson County Economic Development Consortium and was the emcee of business owners in attendance was governmental representative, Jefferson County Administrator Ben Wehmeier. Mark Rollefson, the superintendent of the Jefferson School District, could also be seen paying rapt attention to the details of the Docking Institute report.

over the course of her tenure as head of Thrive about a shortage of workers in Dodge and Jefferson counties willing to work in manufacturing.

Walker said it is his belief there is a common misconception among the local population that manufacturing the 1950s assembly line." This is an

Walker also said the survey, which was conducted by phone, revealed more males than females are interested in occupations in manufacturing — not terribly

of employment for a new or different employment opportunity."

- More than a third of the members of the available labor pool will commute up to 45 minutes, one way, for an employment opportunity, while 80 percent will commute up to 30 minutes for employment.
- An estimated 16,442 members (7 percent) of the available labor pool are interested in a new job at \$10 an — About three-quarters of the hour, 62,670 (26 percent) are interested at \$15 an hour, and 103,418 (43 percent) are interested at \$20 an hour.
- About 41 percent of the available labor pool report having training or experience, and 48 percent report being interested in employment in manufacturing. Of those with manufacturing experience, 55 percent report vorking in production.
- The average age for

- A fifth of the available labor pool are currently employed as general laborers, while an additional 7 percent work in government services or technical/highly skilled blue collar occupations. Almost 30 percent of the pool work in service sector jobs, while 19 percent work in professional white collar jobs. About a quarter are not currently working.
- available labor pool are "willing to work outside of their primary field of employment for a new or different employment opportunity."
- More than a third of the members of the available labor pool will commute up to 45 minutes, one way, for an employment opportunity, while 79 percent will commute up to 30 minutes for employment.
- An estimated 12,976 members (6 percent) of the available labor pool are interested in a new job at \$10 an hour, 55,932 (25 percent) are interested at \$15 an hour, and 95,979 (43 percent) are interested at \$20 an hour.

surprising to him — and he also noted this was his first such study in the state of Wisconsin. For the most part, Walker has done his studies in Kansas, Missouri and Oklahoma.

"There are the available workers here, they just want more money to work than in some other labor basins," Walker said. "You have a solid available labor pool, but (their wage expectations here are higher)."

Pratt concluded the Jefferson event with some encouraging words for the employers.

"The Dodge and Jefferson county comparisons are very interesting," she said. "Clearly, we have available workers in the area. There are people to hire. They just want more money than you are offering."

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#### **CDBG RLF for Economic Development**

#### Summary of Proposed Program Changes - June 2018

From Amendment sent 6/8/18 - State of WI, Dept. of Administration, Division of Energy, Housing and Community Resources

Proposal: Liquidate the State's fund by closing ALL municipal Revolving Loan Fund programs; as follows:

- All existing RLF bank fund balances AND all "Accounts Receivable" will be 'held' (apparently by DOA
- Communities will be allow to access 'grants' for up to TWO projects that add up to the amount in their community's 'Closeout RLF Account'. Some communities may be eligible for more than 2 projects no guidelines yet on that.
- Communities can also access funding for 'planning project' only one.

Community RLF Closeout Amount will be determined by DOA as follows: (amounts are as of 5/31/18)

Existing RLF bank balance (County's is \$302,609.63); plus current AR (County's is \$421,195.20); MINUS RLF losses (\$11,784.54 written off 6/16/15 for Punzel Hardware); MINUS the 'state administrative costs' (we do not know what this is) = RLF Closeout Account \$\$

DOA will send an official RLF Closeout Account balance to the County; probably by 10/1/18

Communities with RLF Closeout account funds can apply for Annual/Competitive CDBG public facilities grants. IF they do apply for these, they must first use any dollars in their RLF closeout account before accessing the competitive allocation funds. This is also true for any community applying to the state directly for non-competitive ED grants.

We apparently need to 'apply for funding' to use the dollars in our RLF Closeout Account Fund. The steps to do this appear to be:

- 1. Sending ALL locally held RLF dollars (as indicated in the final report) to the DOA
- 2. Officially dissolving our RLF (DOA will be dictating this process in the future)
- 3. Completing all DOA documents as required.

Closeout RLF Account dollars can be used for: (NO Matching funding mandated!)

- Public Facilities (up to \$3 million)
- ED Projects (up to \$3 million)
- Public Facilities for ED Projects (up to \$3 million)

- Planning Projects (up to \$75,000)
- Housing Rehabilitation (existing CDBG-H costs apply)

Funds may also be used for other 'special purpose' projects including:

- Broadband/high-speed internet access for LMI residents up to \$3 million
- Mitigation of natural hazards tied to impact on LMI residents up to \$3 million
- Other public services up to \$300,000

We will have up to 24 months to apply to DOA/DEHCR to use CDBG Closeout Account Funds; and any projects we receiving an award for, must be completed within 24 months of receiving award.

DAVIS BACON – applies to ALL ED projects where construction will exceed \$2,000. Semi-annual labor standards enforcement reports will be required to DEHCR. Also, applies to housing projects: multifamily projects with 8+ units in the building or for ANY mixed use buildings.

CITIZEN PARTICIPATION PLAN: Every community applying must have and submit a Citizen Participation Plan. County adopted such a plan in 2003; have it on file. The CPP mandates:

- All projects subject to public meetings/public hearings with sign in sheets
- 14 days published public hearing notice
- Open records kept on use of all funds

Environmental Review: mandatory and DEHCR must approve of each and will send approval letters on each prior to anything happening.

Single Audit required for any entity spending >= \$750,000 of Fed money

Funds cannot be used to relocation any business outside of a labor market area (anti-pirating) – focused on projects of >=25 jobs being displaced.

All proposed projects must meet one of these:

- Benefits LMI residents
- Aides in prevention/elimination of blight
- Mitigates serious threats to resident health & welfare.