

JEFFERSON COUNTY ECONOMIC DEVELOPMENT CONSORTIUM (JCEDC) & THRIVE ED BOARD AGENDA

Thursday, June 27, 2024

8:00 a.m. - Continental Breakfast / Networking

8:30 a.m. - Meeting

UW Extension/Workforce Development, 864 Collins Road, Room 8, Jefferson, WI 53549

AND VIA Zoom

Zoom Link: <https://us06web.zoom.us/j/86431259008?pwd=U2FveTM4TTUyTDF1dzJUcGp2SGpZZz09>

Meeting ID: 864 3125 9008

Passcode: 417932

Dial by your location: 1-309-205-3325

Board Members – Jefferson County Economic Development Consortium (JCEDC)

Rebecca Houseman - City of Fort Atkinson, Drake Daily– City of Lake Mills, Timothy Freitag – City of Jefferson, Everett Butzine– City of Waterloo, Emily McFarland – City of Watertown, John Weid– City of Whitewater, Kevin Mehringer – Village of Cambridge, Kyle Ellefson - Village of Johnson Creek, Kathy Weiss – Village of Palmyra, County Supervisor Bruce Degner, County Supervisor Amanda Truax, County Supervisor Karl Zarling

Board Members – ThriveED

David Schroeder, Brian Knox, Casey Malesevich, Tom Dehnert, Scott Lausten, Don Lunak, Sr., Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Stewart Wangard, Rebecca Houseman, Everett Butzine, Paul Ambrose, Tina Crave, Kellie Karpinski, Richard Keddington, Shawna Marquardt, James Nelson, Ben Wehmeier

- I. Call To Order
- II. Roll (Establish a quorum)
- III. Certificate of Compliance with Open Meeting Laws
- IV. Approval of Agenda – June 27, 2024
- V. Approval of JCEDC/ThriveED Minutes – April 25, 2024
- VI. Public Comment – Members of the public who wish to address the board on specific agenda items must register their request at this time.
- VII. Discussion Regarding Proposed Update to Bylaws
 - a. Include dba for LLDF (Section 1.1)
 - b. Director-Level Investors (Article IV: 3)
 - c. Election and Terms (Section 5.2)
- VIII. Discussion Regarding Updating Strategic Plan
- IX. Election of Officers for JCEDC
- X. JCEDC/ThriveED Reports
 - a. Discussion and Approval of Finance Reports for JCEDC
 - b. Discussion and Approval of Finance Reports for ThriveED
 - c. Update: ThriveED Website
 - d. Board
 - i. Update: Finance Committee
 - ii. Update: Housing Committee
 - e. Staffing Update
 - i. Update: Financial Partnership Manager
 - f. Thriving Business
 - i. Presentation: Opportunity Pipeline
 - ii. Update: Contract with Michael Best Strategies LLC
 1. Follow-up re: Utilities discussion from April Meeting

- iii. Update: Proposal from Karl James & Company PR + Marketing
- g. Diverse Housing
 - i. Report: Jefferson County Housing Counseling
 - 1. Prepurchase
 - 2. Rehab
 - ii. Report: Watertown Housing Grant Program
 - iii. Report: Habitat for Humanity
 - iv. Report: Live Local Development Fund (LLDF)
 - 1. Update: Investors
 - 2. Update: Applications
- h. Activated Workforce
 - i. Update: Jefferson County SHRM: EMPLOYER: “How-to-Hire” International Workers Conference August 6th
- i. Trust & Partnerships
 - i. Report: Recent Presentations
 - 1. South Central Workforce Development Board
 - 2. Every Child Thrives Transformation Council
 - ii. Report: Upcoming Presentations
 - 1. Edgerton Chamber of Commerce
 - iii. Report: Celebrations
 - 1. Habitat for Humanity – Women Build Volunteer Group
 - 2. Kikkoman Groundbreaking
 - 3. Habitat for Humanity Gala
 - 4. Aztalan Bio Open House
 - 5. Biz Times Media
 - iv. Community Discussion
 - 1. JCEDC board members are encouraged to share a brief update about their community, initiatives and/or challenges
 - v. Thrive Board Discussion
 - 1. Thrive board members are encouraged to share a brief update about their company, initiatives and/or challenges
- j. General Updates
 - i. Upcoming Events
 - 1. July 25, 2024 – 8:30 am-9:30 am – Education Session – State of Jefferson County – Ben Wehmeier
 - 2. August 7, 2024 – 4:00 – 5:30 pm – Conversations with ThriveED, Whitewater Innovation Center
 - 3. August 22, 2024 – 8:30 – 10:00 am – JCEDC/ThriveED Board of Directors Meeting
 - 4. September 26, 2024 – 8:30 am – JCEDC/ThriveED Executive Committee Meeting
 - 5. October 10, 2024 – 8:30 am - ThriveED Annual Meeting – Michelle Comerford, Project Director for Biggins Lacy Shapiro & Co; Site Selector for Kikkoman project
 - 6. April 30 – May 1, 2025 – Wisconsin Rural Partners Annual Summit – Fort Atkinson

XI. Adjournment

A quorum of any Jefferson County Committee, Board, Commission, or other body, including the Jefferson County Board of Supervisors, may be present at this meeting. Anyone requiring special accommodation should contact the County Administrator 24 hours prior to the meeting at 920-674-7101 to make appropriate arrangements.

Our Vision Statement is: JCEDC / ThriveED will lead change necessary to support economic growth in Greater Jefferson County that results in healthy, thriving, and growing communities.

Our Mission Statement is: JCEDC / ThriveED will engage the public and private sectors in actions focused on attracting and supporting business growth that benefits the residents and communities in the Greater Jefferson County area.

A quorum of any Jefferson County Committee, Board, Commission, or other body, including the Jefferson County Board of Supervisors, may be present at this meeting. Anyone requiring special accommodation should contact the County Administrator 24 hours prior to the meeting at 920-674-7101 to make appropriate arrangements.

**Jefferson County Economic Development Consortium (JCEDC) and ThriveED
Board of Directors Meeting
April 25, 2024 – Meeting held in person and via Zoom.**

Zoom Link: <https://us06web.zoom.us/j/86431259008?pwd=U2FveTM4TTUyTDF1dzJUcGp2SGpZZz09>
Meeting ID: 864 3125 9008
Passcode: 417932

Board Members - JCEDC

Rebecca Houseman - City of Fort Atkinson, Drake Daily– City of Lake Mills, Timothy Freitag – City of Jefferson, Everett Butzine– City of Waterloo, Emily McFarland – City of Watertown, John Weidl– City of Whitewater, Lisa Moen – Village of Cambridge, Kyle Ellefson - Village of Johnson Creek, Kathy Weiss – Village of Palmyra, County Supervisor Bruce Degner, County Supervisor Mark Groose, County Supervisor Karl Zarling

Board Members – ThriveED

David Schroeder, Brian Knox, Casey Malesevich, Tom Dehnert, Scott Lausten, Don Lunak, Sr., Karie Martin, Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Stewart Wangard, Rebecca Houseman, Everett Butzine, Paul Ambrose, Tina Crave, Kellie Karpinski, Richard Keddington, Shawna Marquardt, James Nelson, Ben Wehmeier

I. Call to Order - Meeting called to order at 8:32 am.

II. Roll Call – Quorum Established

- JCEDC Board Members Present:
Rebecca Houseman - City of Fort Atkinson, Drake Daily– City of Lake Mills, Everett Butzine– City of Waterloo, Emily McFarland – City of Watertown, Kyle Ellefson - Village of Johnson Creek, County Supervisor Bruce Degner, County Supervisor Karl Zarling
- ThriveED Board Members Present
Tom Dehnert, Kevin Kaufman, Brian Knox, Kellie Karpinski, Don Lunak, Sr., Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Stewart Wangard, Rebecca Houseman, Everett Butzine, David Schroeder, Casey Malesevich, Scott Lausten, James Nelson, Shawna Marquardt
- Staff Present: Julie Olver, Deb Reinbold, RoxAnne Witte
- Others Present: Mason Becker

III. Certification of compliance with Open Meeting Law Requirements

Staff certified compliance for the agenda dated April 25, 2024.

IV. Approval of Agenda

Ellefson/Knox moved to approve agenda as presented. Motion passed.

V. Approval of Minutes

Knox/Butzine moved to approve February 28, 2024, JCEDC & ThriveED minutes as printed. Motion passed.

VI. Public Comments – None

VII. JCEDC/ThriveED Reports

a. Discussion and Approval of Finance Reports for JCEDC

Ellefson/Zarling moved to approve the Finance Reports for Jefferson County Economic Development as printed. Motion passed.

b. Discussion and Approval of Finance Reports for ThriveED

Knox/Ellefson moved to approve the Finance Reports for ThriveED as printed. Motion passed.

c. Discussion and Possible Action on Fees associated with the Live Local Development Fund (LLDF)

Reinbold updated the board on the program and the grant that was received from WEDC. Due to the additional legal expenses incurred in setting the program up staff is asking for an additional \$20,000 to complete the setup. Discussion was held on the funding of this expense. It was the consensus of the board that a memo would be sent to the ThriveED board members asking for their approval of up to \$20,000 to be used to complete the setup of the LLDF program.

d. Board

i. Update: Committees

Finance, Audit & Compliance – Tom Dehnert will serve as chairperson.

Investors Relations Committee – Kevin Kaufman will serve as chairperson.

Ad Hoc Committee – Housing – Karl Zarling will serve as chairperson

ii. Update: Bank First – Reinbold reported that Josh Patterson is no longer employed with Bank First.

e. Staffing Updates.

Reinbold reported to the board that Deb Sybell is no longer with the organization and that she is working with Human Resources on next steps. No action taken.

f. Thriving Business

i. Presentation: Opportunity Pipeline

Reinbold gave an update on projects in the Opportunity Pipeline. No action taken.

ii. Update: Jefferson County Food & Beverage Innovation Campus

Reinbold updated the board on the plans for expansion and the upcoming groundbreaking for Kikkoman Foods. No action taken.

Discussion was held on how we position ourselves to work with local/area providers as we continue to receive more requests for expansion from our existing businesses or requests to locate a new business in Jefferson County.

g. Diverse Housing

i. Report: Jefferson County Housing Counseling

Prepurchase – Witte updated the board on the homebuyer activity for the year. No action taken.

Rehab – Witte updated the board on the City of Watertown's rehab program. No action taken.

ii. Report: Live Local Development Fund (LLDF)

Reinbold reported that they continue to meet with potential investors and the committee will be accepting applications in the near future. No action taken.

h. Activated Workforce

i. Update: Jefferson County SHRM: Seeking Asylum Seekers Conference.

Reinbold updated the board on the conference that will be held in August. No action taken.

i. Trust & Partnership

i. Report: Investor Presentations

Presentations given to Watertown City Council, Watertown RDA, and Cambridge Economic Development Committee. Presentation scheduled for the City of Fort Atkinson. No action taken.

ii. Community Discussion

JCEDC board members are encouraged to share a brief update about their community, initiatives, and/or challenges.

Updates were given on community initiatives, current projects, and challenges. No action taken.

iii. Thrive Board Discussion

THRIVE board members are encouraged to share a brief update about their company, initiatives, and/or challenges.

Updates were given on business activity, initiatives, and challenges. No action taken.

j. General Updates

i. Upcoming Events

- May 8, 2024 Conversations with Thrive - 4:00 pm – 5:30 pm, The Drafty Cellar in Watertown
- May 22, 2024 – JCEDC/ThriveED Executive Committee – 8:30 am, UW Extension Building Jefferson
- June 27, 2024 – JCEDC/ThriveED Board of Directors – 8:30 am, UW Extension Building Jefferson

VIII. Adjournment

There being no further business to come before the JCEDC or ThriveED board for consideration at this time Knox/Dehnert moved to adjourn.

Meeting adjourned at 9:35 am.

Minutes prepared by:

RoxAnne L. Witte

Program Specialist, Jefferson County Economic Development Consortium

Memo

To: ThriveED Board of Directors
From: Deb Reinbold
Date: 6/21/2024
Subject: Discussion re: GHDP Bylaws

On the agenda for our 6/27/2024 board meeting includes a discussion regarding proposed update to our bylaws. This is truly meant to be a discussion, and I wanted to give you all an overview of what I'd like discussed for you to review prior to the meeting.

A. Include dba for LLDF (Section 1.1)

- a. Our attorney has advised that there is no limit on the number of dba's an organization can operate under, and we have decided to operate the LLDF as a dba for Glacial Heritage Development Partnership (GHDP).

Current language in the bylaws reads "The Partnership Board of Directors approved the use of the name ThriveED for business services and communication in January of 2018."

B. Director-Level Investors (Article IV: 3)

- a. Director-Level Investors are individuals or entities who must invest in the Partnership at a level equal to at least twice the approved Minimum Investor Level (currently at least \$5,000 annual investment), or ii) have been appointed by the Board of Directors as a Regional or Community Member. The amount is set annually at the Annual Meeting of the Board of Directors, which will be held on October 10, 2024.

Would we like to continue with this investment level for Director-Level Investors? At least one-half of the members of the Board are required to be elected by the investors (ie. Non-appointed). We currently have 9 appointed members and 13 Director-Level Investors, although Jones Dairy Farm and Bank First seats are currently vacant.

C. Election and Terms (Section 5.2)

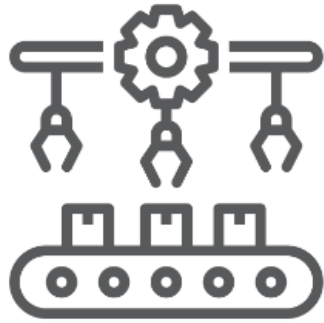
- a. No elected Director shall serve consecutively more than three (3) terms, unless serving on the Executive Committee. An officer upon completion of his or her term as an officer may remain on the Board of Directors for an additional term, even if it exceeds three consecutive terms.

A Director-Level Investor is tied to the individual or entity that invests in the partnership. I interpret this to mean that the organization that invests is the Director, which would tie the term limit to the organization, not to the representative. Three of our Directors terms would term-out on 12/31/2025: Illuminus, Concordio and W.D. Hoard & Sons. Is this what we want or do we want to have the term limit tied to the representative from the organization?

OUR AREAS OF FOCUS



Diverse Housing



Thriving Businesses



Activated Workforce



Trust & Partnerships

Jefferson County Economic Development Consortium
May 31, 2024

| | | | May 31, 2024 | | |
|---|---------------------|----------------------------|---------------------|---------------------|---------------|
| | May 31, 2024 | April 30, 2024 | Year To Date | 2024 Budget | |
| Revenue | Forecast | Year to Date Totals | Forecast | | |
| JCEDC GHDP Service fees | - | - | - | 135,000.00 | 0.00% |
| GHDP Reimbursable Expenses | - | 14.50 | 14.50 | 1,500.00 | 0.97% |
| JCEDCV Service Fees - Homebuyer Program | 1,500.00 | 27.00 | 1,527.00 | 10,000.00 | 15.27% |
| JCEDC Service Fees - LLDf | - | - | - | 35,000.00 | 0.00% |
| V-Cambridge | - | 151.50 | 151.50 | 151.50 | 100.00% |
| V-Johnson Creek | - | 5,097.00 | 5,097.00 | 5,097.00 | 100.00% |
| V-Palmyra | - | 2,566.50 | 2,566.50 | 2,566.50 | 100.00% |
| C-Fort Atkinson | - | 18,753.00 | 18,753.00 | 18,753.00 | 100.00% |
| C-Jefferson | - | 11,620.50 | 11,620.50 | 11,620.50 | 100.00% |
| C-Lake Mills | - | 10,039.50 | 10,039.50 | 10,039.50 | 100.00% |
| C-Waterloo | - | 5,469.00 | 5,469.00 | 5,469.00 | 100.00% |
| C-Watertown | - | 22,000.50 | 22,000.50 | 22,000.50 | 100.00% |
| C-Whitewater | - | 6,465.00 | 6,465.00 | 6,465.00 | 100.00% |
| Jefferson County | - | 129,897.00 | 129,897.00 | 129,897.00 | 100.00% |
| ARPA Funds | - | - | - | 131,379.00 | 0.00% |
| WEDC Funds | - | - | - | 50,000.00 | 0.00% |
| TOTAL | 1,500.00 | \$212,101.00 | \$213,601.00 | \$574,938.50 | 37.15% |

| | | | May 31, 2024 | | |
|---|---------------------|----------------------------|---------------------|--------------------|-----|
| | May 31, 2024 | April 30, 2024 | Year To Date | 2024 Budget | |
| Expenditures | Forecast | Year to Date Totals | Forecast | | |
| Personnel | 28,163.04 | 152,691.50 | 180,854.54 | 507,867.00 | 36% |
| Professional Services | - | 14.50 | 14.50 | 25,000.00 | 0% |
| Web Page Development | - | 1,969.31 | 1,969.31 | 4,000.00 | 49% |
| Office Expense | 597.86 | 3,790.50 | 4,388.36 | 9,663.00 | 45% |
| Instructional Materials - Homebuyer Program | - | - | - | 500.00 | 0% |
| Membership | - | 151.67 | 151.67 | 4,000.00 | 4% |
| Professional Development | 196.00 | 2,045.54 | 2,241.54 | 8,750.00 | 26% |

| Expenditures | May 31, 2024 | April 30, 2024 | May 31, 2024 | | |
|-------------------------------|--------------------|---------------------|-----------------------|-------------------|------------|
| | Forecast | Year to Date Totals | Year To Date Forecast | 2024 Budget | |
| Meeting Expenses | 433.11 | 91.41 | 524.52 | 1,000.00 | 52% |
| Subscriptions | 1.00 | 8,167.48 | 8,168.48 | 9,000.00 | 91% |
| Internet/Phones/Mis | 1,522.66 | 6,025.19 | 7,547.85 | 18,502.00 | 41% |
| Other Operating | - | - | - | 1,000.00 | 0% |
| Travel Related | 156.50 | 323.73 | 480.23 | 5,300.00 | 9% |
| Other Insurance | 291.08 | 1,164.32 | 1,455.40 | 4,057.00 | 36% |
| Railroad Consortium | - | 14,000.00 | 14,000.00 | 14,000.00 | 100% |
| Vehicle Repair | - | - | - | - | 0% |
| Fleet Allocation | 158.33 | 633.32 | 791.65 | 1,900.00 | 42% |
| Repair & Maintenance - Office | - | - | - | 500.00 | 0% |
| TOTAL | \$31,519.58 | \$191,068.47 | \$222,588.05 | 615,039.00 | 36% |

2024 SUMMARY

| | May 31, 2024 | April 30, 2024 | May 31, 2024 | |
|---------------------------------|--|---------------------|-----------------------|--------------------|
| | Forecast | Year to Date Totals | Year To Date Forecast | 2024 Budget |
| Revenues | 1,500.00 | 212,101.00 | 213,601.00 | 574,938.50 |
| Expenses | 31,519.58 | 191,068.47 | 222,588.05 | 615,039.00 |
| Total Profit/Loss | (30,019.58) | 21,032.53 | (8,987.05) | (40,100.50) |
| 1/1/2024 | JCEDC Operating Reserve Carry Forward Balance | | | |
| Vested Benefits Balance | (36,783.00) | | | |
| JCEDC Operating Reserve Balance | \$425,914.00 | | | |

9:50 AM
 06/07/24
 Cash Basis

Thrive ED
Balance Sheet Prev Year Comparison
 As of June 6, 2024

| | Jun 6, 24 | Jun 6, 23 | \$ Change | % Change |
|---------------------------------------|-------------------|-------------------|------------------|-------------|
| ASSETS | | | | |
| Current Assets | | | | |
| Checking/Savings | | | | |
| 1002 · Checking - Badger Bank | 223,094.04 | 185,516.24 | 37,577.80 | 20.3% |
| 1003 · Savings - FCCU | 100,105.60 | 100,058.81 | 46.79 | 0.1% |
| 1004 · Checking - FCCU | 4,007.79 | 23,395.85 | -19,388.06 | -82.9% |
| Total Checking/Savings | 327,207.43 | 308,970.90 | 18,236.53 | 5.9% |
| Total Current Assets | 327,207.43 | 308,970.90 | 18,236.53 | 5.9% |
| TOTAL ASSETS | 327,207.43 | 308,970.90 | 18,236.53 | 5.9% |
| LIABILITIES & EQUITY | | | | |
| Equity | | | | |
| 3200 · Unrestricted Net Assets | 202,900.65 | 245,871.55 | -42,970.90 | -17.5% |
| Net Income | 124,306.78 | 63,099.35 | 61,207.43 | 97.0% |
| Total Equity | 327,207.43 | 308,970.90 | 18,236.53 | 5.9% |
| TOTAL LIABILITIES & EQUITY | 327,207.43 | 308,970.90 | 18,236.53 | 5.9% |

Thrive ED
Profit & Loss Prev Year Comparison
January 1 through June 6, 2024

| | Jan 1 - Jun 6, 24 | Jan 1 - Jun 6, 23 | \$ Change | % Change |
|--------------------------------------|-------------------|-------------------|-------------------|---------------|
| Ordinary Income/Expense | | | | |
| Income | | | | |
| 4100 · Event revenue | 530.00 | 500.00 | 30.00 | 6.0% |
| 4200 · Investor Support 2022-2026 CC | 104,250.00 | 93,250.00 | 11,000.00 | 11.8% |
| 4250 · Housing Initiative | 37,188.25 | 0.00 | 37,188.25 | 100.0% |
| 4300 · Grants Received | 500.00 | 0.00 | 500.00 | 100.0% |
| Total Income | 142,468.25 | 93,750.00 | 48,718.25 | 52.0% |
| Expense | | | | |
| 5100 · Events | 923.20 | 203.51 | 719.69 | 353.6% |
| 5600 · Filing fees | 54.00 | 54.00 | 0.00 | 0.0% |
| 5700 · Postage | 0.00 | 63.00 | -63.00 | -100.0% |
| 5800 · Accounting Services | 14.50 | 0.00 | 14.50 | 100.0% |
| 6100 · Void Checks/Transactions | 0.00 | 0.00 | 0.00 | 0.0% |
| 6300 · Housing Initiatives | 0.00 | 28,582.50 | -28,582.50 | -100.0% |
| 6400 · Training | 0.00 | -500.00 | 500.00 | 100.0% |
| 6700 · Meals | 55.95 | 145.00 | -89.05 | -61.4% |
| 6800 · LLDF | 17,253.00 | 2,300.00 | 14,953.00 | 650.1% |
| Total Expense | 18,300.65 | 30,848.01 | -12,547.36 | -40.7% |
| Net Ordinary Income | 124,167.60 | 62,901.99 | 61,265.61 | 97.4% |
| Other Income/Expense | | | | |
| Other Income | | | | |
| 9000 · Interest income | 139.18 | 179.93 | -40.75 | -22.7% |
| 9010 · Miscellaneous Income | 0.00 | 17.43 | -17.43 | -100.0% |
| Total Other Income | 139.18 | 197.36 | -58.18 | -29.5% |
| Net Other Income | 139.18 | 197.36 | -58.18 | -29.5% |
| Net Income | 124,306.78 | 63,099.35 | 61,207.43 | 97.0% |

Glacial Heritage Development Partnership

ThriveED

Capital Campaign - Accounts Receivable

June 6, 2024

2022-2026 CC Investor Pledges Invoiced and unpaid as of 06/06/2024

| | | |
|---|-------------------------|--------------------|
| 2022 Pledges | | \$1,500.00 |
| Landmark Credit Union | \$1,500.00 ² | |
| 2023 Pledges | | \$7,000.00 |
| Caine Companies | \$3,000.00 | |
| State Bank of Reeseville | \$2,500.00 ¹ | |
| Landmark Credit Union | \$1,500.00 ² | |
| 2024 Pledges | | \$79,750.00 |
| Caine Companies | \$3,000.00 | |
| Bender, Larson, Chidley, Koppes & Associates | \$1,000.00 | |
| Fort Community Community Credit Union | \$10,000.00 | |
| Greater Watertown Community Health Foundation | \$20,000.00 | |
| Illuminus | \$25,000.00 | |
| Premier Bank | \$1,500.00 | |
| R J Roehl Investments | \$5,000.00 | |
| Thermo Tech Mechanical Insulations | \$1,250.00 | |
| UW Whitewater | \$3,000.00 | |
| WD Hoard & Sons | \$5,000.00 | |
| WDS Construction | \$5,000.00 | |

TOTAL INVOICED **\$88,250.00**

¹ State Bank of Reeseville- did commit during interview, but never signed commitment letter, did invoice

² Landmark Credit Union did sign a commitment letter on 5/11/2021

Jefferson County Position Description

Name: **Department:** Economic Development

Division:

Position Title: Financial Partnership Manager **Pay Grade:** 11 **FLSA:**

Date: June 2024 **Reports To:** Executive Director of Economic Development

Purpose of Position

The purpose of the Financial Partnership Manager position is to bridge the gap between financial institutions, investors, and various Jefferson County financial departments and Committees by fostering collaborative relationships that leverage financial expertise and data insights for mutual growth and success.

Essential Duties and Responsibilities

The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Oversees the administration of multiple revolving loan funds, including processing loan applications, monitoring and reporting on status of loan portfolios, ensuring compliance with funding requirements, and coordinating with borrowers to facilitate repayments.
- Manages the loan application process from start to finish, including initial consultation with applicants, assessing loan viability, advocating for the project in loan committee, and ensuring timely disbursement and repayment.
- Identifies and engages potential investors for the revolving loan funds. Cultivates and manages relationships with current investors to ensure their interests are met and provide regular updates on fund performance.
- Develop and propose unique financing structures that responsibly support strategic priorities.
- Assists with the development of a long-term revenue strategy in collaboration with the Executive Director, Executive Committee and Finance, and Audit & Compliance Committee. This includes becoming CDE, CDFI, or CHODO and would also include identifying grant funding to support the work.
- Provides oversight to our HUD program, including compliance with reporting requirements, program monitoring, and ensuring adherence to federal guidelines.
- Acts as a primary liaison to our Finance, Audit & Compliance Committee, preparing reports, facilitating meetings, and ensuring effective communication between the committees and the organization.
- Supports the Executive Director in developing annual budgets for the organization. Monitors budget performance and provide insights and recommendations to ensure financial stability and growth.

Participates and supports the Intentional Economic Growth and Housing Initiatives established by the County as outlined in the Strategic Plan.
Demonstrates dependable attendance.
Complies with County HIPAA Policies and Procedures, if applicable.
Adheres to and promotes safety as a priority in the workplace.
Performs other duties as assigned or that may develop.

Additional Tasks and Responsibilities

While the following tasks are necessary for the work of the unit, they are not an essential part of the purpose of this position and may also be performed by other unit members.

None.

Minimum Training and Experience Required to Perform Essential Job Functions

Bachelors degree in Economics, Finance, Accounting, Real Estate Economics, or Business Management or related field of study.
2 years related experience or training.
Ability to communicate with everyone from county citizens to C suite. Strong interpersonal skills, with the ability to collaborate effectively with colleagues in a team environment.

Preferred Training and Experience Required to Perform Essential Job Functions

3 years related experience or training
Demonstrated capacity to understand overarching goals and objectives and to grasp the broader implication and strategic implications of tasks and decisions.

Other Requirements - Certificates/Licensures

Valid Wisconsin Drivers License

Knowledge, Skills, Abilities

Ability to think outside the box and create financial solutions that meet our goals.
Strong analytical and problem-solving skills to assess financial scenarios and devise optimal solutions.
Capable of making sound decisions and solving problems autonomously.
Skilled in self-motivation, prioritizing workload, and identifying and addressing potential issues proactively to maintain productivity and efficiency.
Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents.
Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community.
Ability to effectively present information to top management, public groups, and/or boards of directors.
Ability to work with mathematical concepts such as probability and statistical inference.
Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.
Ability to define problems, collect data, establish facts, and draw valid conclusions
Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

Supervision

None.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this position, the employee is regularly required to sit; use hands to finger, grasp, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl. Lifting, moving, pushing or pulling up to 10 pounds does not generally occur, but may occur when lifting boxes, books or paper. Specific vision abilities required by this job include close vision, color vision, depth perception and ability to adjust focus, distance vision.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities.

While performing the duties of this position, the employee is not regularly exposed to adverse conditions. The noise level in the work environment is usually moderate. This position requires occasional traveling throughout the County.

Jefferson County is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act as Amended, the County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

I have read and understand the duties of this job description and, by signing below; I agree that I can perform the duties of this position with or without reasonable accommodation.

Employee

Date

Supervisor

Date

Human Resources

Date

Pipeline Activity Between 4/25/2024 - 6/19/2024

| Active Date | Project Name | Project Stage | Locations Considered | Opportunity Type | Pipeline Description (Public) |
|-------------|--------------|--------------------------------|----------------------|-------------------------|--|
| 4/2/2024 | Acquisition | ACTIVE - LOW | Jefferson County | Attraction | Assist with site selection |
| 2/7/2022 | All Saints | ACTIVE - LOW | Jefferson (J) | Residential Development | Redevelopment project - historic tax credits |
| 3/18/2024 | Bio | ACTIVE - 50/50 | Aztalan (J) | Business Expansion | Assist company with incentive application |
| 1/14/2020 | Corner | ACTIVE - 50/50 | Jefferson County | Mixed-Use Development | Assist developer with mixed-use development |
| 3/28/2024 | Ettore | PRELIMINARY - Too new to know! | Jefferson County | Attraction | RFP - Build 100k sf manufacturing facility |
| 1/8/2024 | Goldeneye | ACTIVE - 50/50 | Jefferson (J) | Attraction | RFP - International FaB Manufacturer; Site visit in May |
| 4/9/2024 | Groomer | PRELIMINARY - Too new to know! | Fort Atkinson (J) | Business Expansion | Assist with site selection & possible RLF application |
| 3/15/2024 | Intrepid | ACTIVE - 50/50 | Fort Atkinson (J) | Residential Development | Assist developer with residential development |
| 1/2/2024 | Martini | ACTIVE - 50/50 | Watertown (J) | Residential Development | Assist developer with residential development |
| 4/19/2024 | Opportunity | PRELIMINARY - Too new to know! | Jefferson County | New Business | Assist developer with identifying Opportunity Zone development opportunities. |
| 9/6/2022 | Pink | Eliminated | Jefferson (J) | Mixed-Use Development | Mixed-use development. |
| 5/14/2024 | Potential | ACTIVE - LOW | Ixonia (J) | New Business | Assist property owner interested in selling land for development. |
| 2/20/2023 | Senior | ACTIVE - 50/50 | Fort Atkinson (J) | Residential Development | Assistance with identifying a development partner |
| 4/9/2024 | Tienda | ACTIVE - 50/50 | Jefferson (J) | Business Expansion | Retail store requesting assistance with site selection / landlord support. Tenant is moving. |
| 5/15/2024 | Timely | ACTIVE - HIGH | Jefferson (J) | Existing Business | Assistance with site selection and zoning. |

June 3, 2024

VIA EMAIL:

Deborah Reinbold
President
Thrive Economic Development
864 Collins Rd, Ste 111
Jefferson, WI 53549

Dear Ms. Reinbold:

We are pleased to confirm our engagement to provide ThriveED with Government Relations assistance to promote economic development in Jefferson County. We have performed a conflict-of-interest check and determined that we have no current conflicts of interest that would affect our representation of ThriveED in connection with this matter. Michael Best Strategies LLC offers a full range of services in areas such as government relations, strategic political relationships, public affairs, and business and community solutions, and we are available to represent ThriveED in any other matters upon your request. If you would like us to represent you on other matters, such representation should be the subject of additional discussions.

At the outset, it is necessary for me to clearly communicate that you have retained Michael Best Strategies LLC. Michael Best Strategies LLC is affiliated with and owned in part by the law firm of Michael Best & Friedrich LLP. Your retention of Michael Best Strategies LLC does not constitute or otherwise create an attorney-client relationship with the law firm of Michael Best & Friedrich LLP. Additionally, Michael Best Strategies LLC cannot and will not provide any legal services as part of this representation. If during the course of your representation by Michael Best Strategies LLC it becomes apparent that your interests will be furthered by the provision of legal services, you may at your discretion choose to enter into an attorney-client relationship with Michael Best & Friedrich LLP. However, your retention of Michael Best Strategies LLC does not require you to use Michael Best & Friedrich LLP for any such legal services.

We have determined that an important factor in maintaining the trust and confidence of our clients is clearly communicating the scope of our professional engagement and our procedures for billing and payment. This letter attempts to fulfill the same. Please review it carefully and if you have no questions, sign where indicated below and return it to your Michael Best Strategies LLC contact. If you have any questions, please do not hesitate to contact your Michael Best Strategies LLC contact.

SCOPE OF ENGAGEMENT AND EXPECTATIONS

You have asked us to represent ThriveED in relation to economic development in Jefferson County including engaging key decision makers at WE Energies, the Wisconsin State Legislature, and Gov. Evers Administration, as well as Congressman Scott Fitzgerald and Sen. Tammy Baldwin to promote the energy readiness of WE Energies communities in Jefferson

County. The efforts will be directed at ensuring WE Energies communities in Jefferson County can successfully compete for, and land new high energy load projects, as well as directed at making the food and beverage innovation campus and other projects in the pipeline a success. Strategies will:

WE Energies

- Identify and advocate for investment opportunities for WE Energies within Jefferson County to allow Jefferson County to compete for high energy load projects.
- To the extent WE Energies assistance is also necessary to make the food and beverage innovation campus a success, or other projects in the pipeline, we will facilitate those items, as well.

State and Federal Government

- Educate local lawmakers, the Governor, and state agency heads and key personnel on the tools needed to bring the food/bev innovation campus to fruition and capitalize on other high energy load projects moving forward, and potential improvements needed with existing state resources to provide more utility, or ease of use, at the local economic development level. This work would attempt to create solutions that can be implemented without a law change and, where a law change is necessary, build the bipartisan foundation for a 2025 state budget lobbying effort.
- Work with Congressman Fitzgerald and Senator Baldwin on a potential earmark for local infrastructure.

FEES, COSTS, BILLING AND PAYMENT COSTS OF COLLECTION

ThriveED shall pay Michael Best Strategies LLC in equal installments of \$5,000 per month for the first 90 days. The initial term of this engagement begins on June 1, 2024, through August 31, 2024. If extended to include a 2025 lobbying effort, the price would increase to \$7,500 per month beginning on September 1, 2024. This Agreement shall automatically renew for successive one-month terms on the same payment terms until such time that the Agreement is terminated by either Party giving the other Party 30-days written notice of termination. Upon such termination, ThriveED shall pay Michael Best Strategies LLC the amount due for the full calendar month within which the termination occurs.

In addition, ThriveED shall reimburse Michael Best Strategies LLC for all direct out-of-pocket expenses including transportation, hotel, meals, and registration or licensing fees (including lobbying fees). Michael Best Strategies LLC agrees to provide ThriveED a detailed invoice itemizing each reimbursable expense. ThriveED shall have the right to audit the record of such expenses upon reasonable request.

Invoices are generated monthly and sent approximately one month in advance of services being provided. All invoices are payable within 30 days of the invoice date. All payments shall be made within the agreed time period, without any deduction or set-off for any reason whatsoever, unless specified otherwise in the invoice.

In the event of non-payment of any fees or charges invoiced by Michael Best Strategies LLC by the due date specified, Michael Best Strategies LLC shall give notice of non-payment to ThriveED, and, in such an event, ThriveED shall have the right to pay the unpaid fee within thirty (30) days after receipt of notice from Michael Best Strategies LLC before Michael Best Strategies LLC contemplates suspension of services. Michael Best Strategies LLC may suspend its services hereunder during any period for which ThriveED does not pay for a period of time exceeding sixty (60) days past the due date agreed to herein. If Michael Best Strategies LLC notifies ThriveED that it is suspending services for nonpayment, upon payment of the unpaid fees, Michael Best Strategies LLC will resume services and this Agreement shall resume in full force and effect and the applicable term of the Agreement shall be extended by the amount of time that services were suspended.

Continued nonpayment of fees may result in Michael Best Strategies LLC terminating the Agreement. If Michael Best Strategies LLC terminates the agreement for nonpayment of fees during the initial Agreement term, the total fee agreed to above shall be due immediately upon termination. If Michael Best Strategies LLC terminates the Agreement for nonpayment of fees during an automatic extension of the Agreement, all fees invoiced prior to the date of termination shall be due immediately.

All invoices submitted by Michael Best Strategies LLC for payment of expenses shall be in the name of Michael Best Strategies LLC. No extraordinary expenses will be incurred without the prior authorization of ThriveED. You will be obligated to pay all costs and expenses (including, without limitation, reasonable attorneys' fees) incurred by us in obtaining payment of our fees and disbursements.

By default, we will email your invoices to the address provided in this engagement letter. If you prefer to have your invoices sent by another method, please contact your Michael Best Strategies LLC point of contact or email BillingTeam1@michaelbest.com (cc your Michael Best Strategies LLC contact in your communication).

LIMITATION OF LIABILITY TO CLIENT

Notwithstanding any other provision of this Agreement, in no event shall Michael Best Strategies LLC be liable to ThriveED for ThriveED's lost profits, or special, incidental, punitive or consequential damages (even if Michael Best Strategies LLC has been advised of the possibility of such damages). Furthermore, in no event shall Michael Best Strategies LLC's liability to ThriveED under any circumstances exceed the amount of compensation actually received by Michael Best Strategies LLC from ThriveED under this Agreement as of a date certain. Further, Michael Best Strategies LLC will not be liable for delays or performance failures due to circumstances beyond Michael Best Strategies LLC's control.

INDEMNIFICATION OF CONSULTANT

ThriveED shall indemnify, defend and hold Michael Best Strategies LLC harmless from and against any and all third party claims, liability, suits, losses, damages and judgments, joint or several, and shall pay all costs and expenses (including counsel's fees and expenses) as they are incurred in connection with the investigation of, preparation for, or defense of any pending or threatened claim or any action or proceeding arising therefrom, that Michael Best Strategies LLC incurs as a result of having performed services on behalf of ThriveED.

Thank you for placing your trust in us. We are excited about working on your behalf.

Sincerely,

MICHAEL BEST STRATEGIES LLC

Susan L. Hollender
Managing Director

ACKNOWLEDGED, AGREED AND CONSENTED:





ThriveED

By: _____
Deborah Reinbold, President

Dated: _____

Client Billing Intake Form & Billing Instructions

Please provide the following billing information:

Accounts Payable Contact: 
Billing Email Address: 
Phone: 
Billing Address: 
Payment Term: 30 days

Michael Best Strategies offers the following payment options:

1. **ACH/Wire Authorization**

Bank Name: BMO Harris Bank, N.A.
Bank Address: 111 W. Monroe Street, Chicago, IL 60603
Name of Acct: Michael Best Strategies LLC
ABA Routing#: 071000288
Acct #: 003288735
EIN: 46-4875435
SWIFT Code: HATRUS44

Please send all remittance to accounting@michaelbest.com. Please indicate the invoice number(s) being paid.

2. **Check**

Michael Best Strategies LLC
Two Riverwood Place
N19 W24133 Riverwood Drive
Suite 200
Waukesha, WI 53188

3. **Credit Card**

Enter information via this link [Michael Best Payment Portal](#)

PO Notifications

Please send all remittance to BillingTeam1@michaelbest.com. Please indicate invoice number(s) being paid.

If you have any questions about your invoice, please contact us the following email address BillingTeam1@michaelbest.com.

Thank you for placing your trust in us. We are excited about working on your behalf.

Sincerely,
MICHAEL BEST STRATEGIES LLC

https://madison.com/news/local/business/jefferson-wisconsin-foreign-investments-residents-skeptical/article_61288566-2ce0-11ef-8871-afdf25959f4d.html

[ALERT](#) [FEATURED](#) [TOP STORY](#) [TOPICAL](#)

This small Wisconsin city is getting a flood of industry. Some residents are skeptical

Seth Nelson | Wisconsin State Journal

Jun 20, 2024

JEFFERSON — When Maria MacPherson moved to Jefferson as a teenager from Cuba more than 50 years ago, it was far from an "international" town, she said. For over a decade, it felt like she was the only Spanish-speaking person out of Jefferson's 1,000 people.

But times have changed. Today, Jefferson, which numbers just over 7,000 residents, is going "international" in a different way, as three foreign companies have announced in recent months they are collectively pouring \$1.3 billion into the small city to construct new factories and production facilities.

But some residents like MacPherson, who have watched their small town change over the decades, are skeptical, even as city, county and corporate officials tout the investments as a net good for Jefferson.

"I just wonder: Why? Why are they building here?" the 71-year-old resident said while waiting for a taxi outside of the Jefferson Chamber of Commerce building.

People are also reading...

- 1 **Freshmen lead Oregon girls soccer back to state championship game**
- 2 **Madison business owner convicted of COVID-19 business relief fraud**
- 3 **These standout front row players could be on Wisconsin volleyball's call list for 2026**
- 4 **New apartment building proposed for Langdon Street lot**

She, like other residents who echo similar concerns, believes the investments will be a boon for the local economy, but is wary of what the companies hope to do and how her city might change.

"They must want something," she said. "That's all it can be."

From teachers to baristas to local business owners, few objected to foreign

investment in principle. But most of the residents who spoke with the Wisconsin State Journal said they're yet to be persuaded the projects will be to the city's benefit.

"I don't want want to live in a big city," MacPherson said. "I moved to a small town for a reason."

But that's not a view shared by local officials, who say the community is generally excited about the influx of money and jobs hitting Jefferson even as questions arise over the town's ability to support such major developments.

Community members and officials alike point out that Jefferson may not have the population nor the availability of housing to fill all the jobs being created by corporate expansion.

Further, some worry that foreign companies will drive out local business and change the face of the city they call home.



Jefferson Mayor Dale Opperman acknowledged "there's been questions" from residents, but described community sentiment as "very positive, upbeat and optimistic."

"Whatever their degree of speculation is, and there might be some degree of error in whatever the speculation is, I would say the response from the community has been very positive," he said.

The innovation campus

At the heart of Jefferson's investment surge is a planned "Food and Beverage Innovation Campus" covering 175 acres just south of downtown.

It would serve as the industrial hub for the city and open spots for more corporate investment in the future, said Jefferson Chamber of Commerce Executive Director Megan Cooper.

"It's something that I know the Jefferson County Economic Development Consortium has been working on for a significant amount of time," she said. "It's always been a chunk of land that's been talked about and what they could do with it."

Development of the campus kicked off in 2023 when Milwaukee-based frozen pizza manufacturer **Palermo Villa announced** it would convert a former Tyson Foods plant at the site into a facility capable of producing about 50 million pizzas a year, creating 180 jobs in Jefferson.

Palermo Villa declined to tell the State Journal how much money it was investing into the new plant, but company officials said last year the project would be sizeable enough to ratchet up its stake in an increasingly competitive frozen food industry.

The heavyweight of the new campus, though, will be Japanese company Kikkoman Foods, which broke ground earlier this month on a **\$560 million soy sauce production plant** that will eventually generate over 100 jobs for Jefferson.

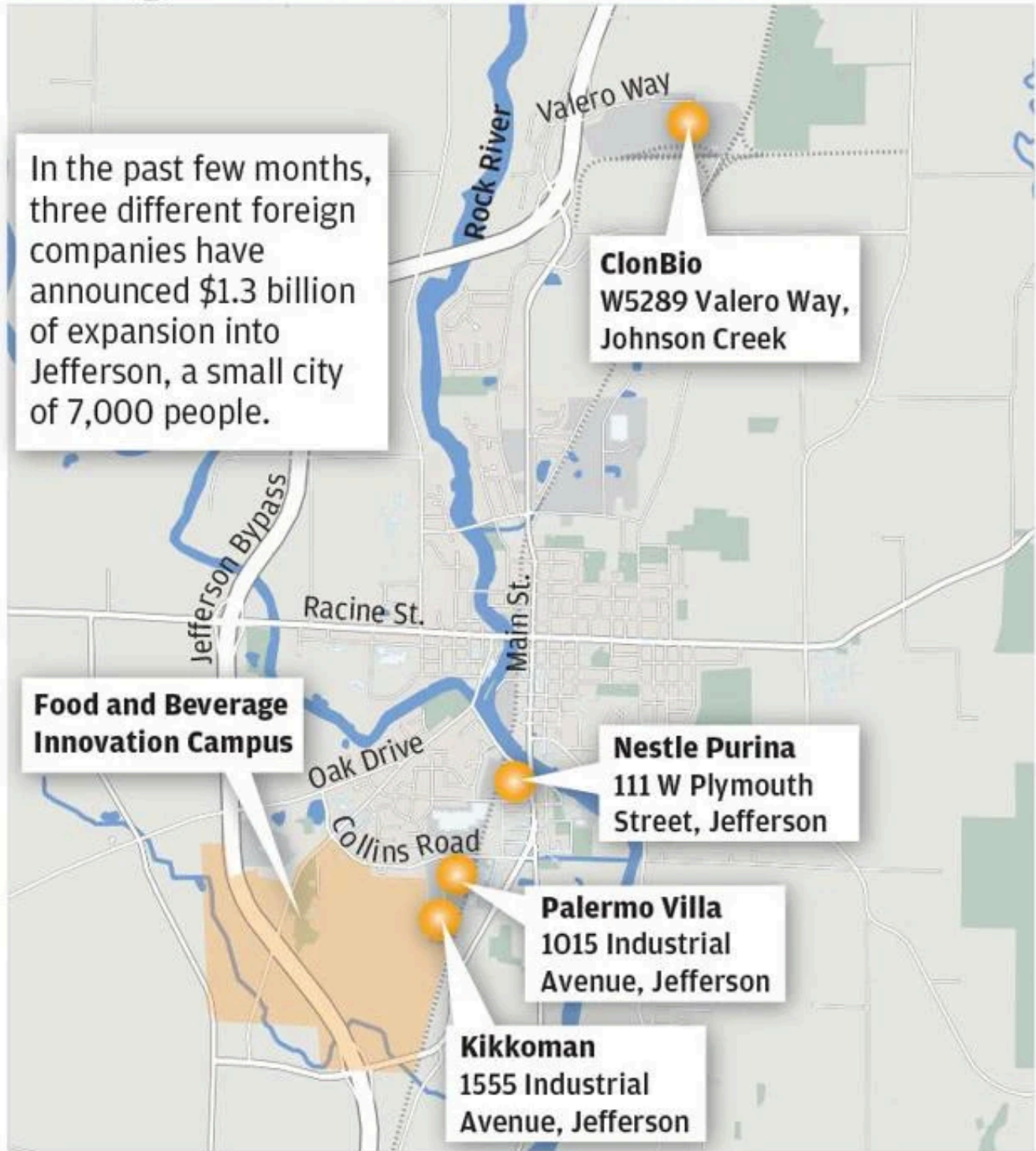
The 240,000-square-foot plant will be the second-largest soy sauce production facility in the world, just behind Kikkoman's plant in Walworth about a mile south of Jefferson, Kikkoman honorary CEO Yuzaburo Mogi said.

In April, Swiss company **Nestlé Purina Petcare Co. announced** it plans to invest \$195 million into expanding its pet food factory adjacent to the innovation campus, which the company has already operated in Jefferson for more than a century.

The 35,000-square-foot expansion would create over 100 more jobs for Jefferson, the company said.

Foreign investments in Jefferson

Residents skeptical about foreign investments into Jefferson



But investment isn't limited to the new campus. In March, Irish company ClonBio Group announced a \$500 million expansion of its ethanol plant just north of Jefferson that it purchased in 2022.

The biofuels and food products company said the expansion will create about 130

jobs at the plant, which will begin producing ethanol, animal feed, plant-based human food and fertilizer, and will also serve as a plant-based renewable natural gas plant.

At the groundbreaking of the Kikkoman facility, officials highlighted the diversity of investments being brought to Jefferson. Speaking at the event, former Wisconsin Gov. Tommy Thompson called the surge a leap forward in making the city a nationally relevant spot.

"They've got an Irish company coming in, they've a Swiss company and now they have a Japanese company," he said. "That's economic development."

A rapidly expanding job market

Some of the foreign companies staking \$1.3 billion on Jefferson are newcomers. Others have been there for years. But they and local officials all see the city's location — almost halfway between Madison and Milwaukee in a strip Opperman calls the "Madiwaukee corridor" — as vital for industry and an opportunity for rapid job market growth in Jefferson.

Though ClonBio's ethanol plant expansion will create 130 jobs on site, the company says it expects well over 1,000 jobs to be created in the surrounding area and at local farms as a result of the expansion.

Kikkoman also touts the economic development its new plant will bring to Jefferson, with the company planning to create "peripheral jobs" as it begins construction on the facility.

"This will take the investment into this project beyond just the boundaries of this property," Jefferson County Administrator Ben Wehmeier said. "It reinforces our placement along the Madiwaukee corridor."

Most of the jobs being created by the investments, especially by Kikkoman and ClonBio, will be high-paying tech jobs, Wehmeier said, while bringing more innovation and investment to Jefferson.

"From the local level, it's not just the number of jobs, it's the type of jobs and the quality of jobs," he said. "Those jobs require higher technical skill sets, so it often leads to higher pay, which often leads to higher amount of income. So then we start looking at affordability of housing, and all those factors can work together."

Many residents said they're excited at the prospect of a larger, higher-paying job market in Jefferson. Anthony Leibitzke, sitting by the Rock River which runs through the center of Jefferson, said he hopes the whole city will "profit" from the new jobs.



Work progresses on the Nestle/Purina plant along the shores of the Rock River in Jefferson, Wis. Monday, June 17, 2024. JOHN HART, STATE JOURNAL

JOHN HART STATE JOURNAL

Most of the workers at the already existing facilities in the town, such as at Palermo Villa and Nestlé Purina, don't actually live in Jefferson but commute from surrounding cities to fill the jobs, Cooper said. With Jefferson County's workers already occupying jobs in other sectors, out-of-towners will have to take up the bulk of the newly created spots, she said.

"I would think primarily the employees (at the new plants) will still be coming from the rest of Jefferson County," Cooper said. "And there are quite a few larger border cities like Oconomowoc and Janesville. Even Beloit isn't that far away."

Jefferson's place along the "Madiwaukee corridor" is even a large reason why companies are choosing to invest in the town, Opperman said. With Madison and Milwaukee only about an hour in either direction, the plants won't have trouble drawing workers from a large labor pool.

But despite looking forward to a more robust job market, some residents said they aren't sure how they feel about a large influx of workers from other communities coming into Jefferson every day.

One resident who wouldn't give her name said she just wants to tell out-of-town workers to "go away." Another said he doesn't want to see Jefferson's population artificially inflate every day during work hours.

But Jefferson is also short on housing, and until the availability of homes catches up with the expanding job pool, employers will have no choice but to employ out-of-towners.

Last year, 25 single family homes were built on the outskirts of Jefferson, and in less than a month, 48 more multifamily units will open on the west side. City officials are also eyeing a 59-unit development just south of downtown and a potential 300-unit development to be started by the fall.

Despite all this construction, City Administrator Tim Freitag said it still won't be enough to accommodate Jefferson's growing workforce.

"To tell you the truth, it's going to be a while until housing development catches up with industrial development," he said. "And if Jefferson can't attract housing, it's going to be hard to attract employees."



Aztalan Bio ethanol plant in Jefferson, Wis. Monday, June 17, 2024. JOHN HART, STATE JOURNAL
JOHN HART STATE JOURNAL

Large companies and incentives

A lot of local skepticism around recent investments in Jefferson seems to center around the nature of the investments themselves — originating from large, multinational corporations, and spurred on by heavy tax incentives.

Kikkoman was granted \$15.5 million in tax credits to begin its investment in Jefferson, the governor's office announced in April. For Nestlé Purina, the Wisconsin Economic Development Corporation also approved \$1.7 million in tax credits that month for its expansion.

ClonBio said it's set to also get tax credits in addition to a \$400 million loan from the U.S. Department of Energy.

Residents skeptical about foreign investments into Jefferson

Opperman conceded so much public investment in Jefferson's private sector is stirring distrust among some residents, but said any public funding will "come back many times over" to Jefferson.

"They say 'Why are you giving a big profitable company tax incentives?' Well, because that's the market today," he said. "If Wisconsin wants to compete with other states, or in some cases other countries, we need to be competitive from an incentive standpoint."

But not everyone's convinced.

"I guess I'm just suspicious," said one resident, Kathy, who declined to give her last name. "It's always scary when this happens because they gradually start taking over."

Questions over local business

Officials say they hope the influx of people traveling into Jefferson to work at the factories will mean more money spent at local businesses downtown.

These hopes, though, haven't assuaged residents' fears that large corporations could push out small business, which thrives in Jefferson.

Floral shop owner Peggy Bare, said she isn't distrustful of large corporations investing in Jefferson, "as long as they follow our rules."

What's most important to Bare, she said, is why the corporations are investing in the first place.

"Why did they choose us?" she asked. "Like yeah, the growth is pretty amazing, but what does that mean for us?"

But Opperman said local business owners have no reason to worry about large companies cutting into their business.

"We don't already have a soy sauce factory right now," he said, referencing

Residents skeptical about foreign investments into Jefferson

Kikkoman's new facility. "So no, it won't be cutting into anybody else's business."



Visitors to downtown Jefferson, Wis. walk past a mural on the side of the City Hall Monday, June 17, 2024.

JOHN HART, STATE JOURNAL

JOHN HART STATE JOURNAL

Amy Maresch, the executive director of the **Main Street Association**, a collection of small businesses in the town which advocates for community development and small the growth of local business, echoed Bare's sentiments that investment is good, but a lot of questions have gone unanswered.

"I really can't say what effect this is going to have," she said. "The future is hard to predict, I suppose."

By Seth Nelson | Wisconsin State Journal

May 3, 2024



Jefferson Co. is uniquely positioned to impact the outcomes of a variety of issues related to economic revitalization and growth. With revitalization comes change and challenges, along with opportunity. Ongoing communications is crucial to efficiently and effectively navigate the demands of key stakeholders throughout the process.

With all communications plans, it's imperative to understand key motivators and personas of audiences, whose actions will determine the desired outcomes. Research-informed strategies and planning will drive all communications among audiences identified during our research and planning phases.

Strategically, we will focus on building awareness, credibility and relationships for Jefferson Co. within circles of influence inside and outside its borders. Our efforts will be aligned with key organizational objectives and executed in a fashion that demonstrates desired outcomes. Subsequent pages outline our research, strategic planning and communications development process. This process will inform and establish the most valuable outcomes for Jefferson Co. and identify the messages and channels to support achieving those outcomes.

Our decades of experience provide seasoned counsel to public officials navigating myriad issues confronting governments. We anticipate our communications plan may use paid, earned, shared and owned media (defined below), depending on what's required after we dive into the organization, determine what it wants to achieve, and how best to support those efforts.

Paid Media

Establish advertising campaigns across platforms to create awareness by getting your message consistently in front of stakeholders, influencers and decision makers.

Earned Media

Create opportunities for engagement with relevant media as well as influential bloggers and events where our key stakeholders read, watch and assemble to consume information.

Shared Media

Leverage online communities of stakeholders where content and experiences are shared and developments are discussed in a give-and-take form across social media channels.

Owned Media

Develop stories, executive communications, news, events, digital and email content, videos, and other messaging to illustrate your position across traditional, social and digital media platforms.

We look forward to working with you to determine your goals and how we can advance your agenda.

A handwritten signature in blue ink, appearing to read 'Karl', is positioned to the left of the typed name.

Karl Robe, APR, Agency Principal
Karl James & Company LLC

Strategic Research, Planning and Communications Development Process

What follows is a systematic approach to develop a research-based communications plan to support achieving the organization's goals. We will develop opportunities to create awareness, understanding, belief, and action by audiences needed to achieve success.

Research will ground all of our communications planning efforts by identifying and understanding target audiences, as well as the problems and opportunities we must address to achieve organizational objectives. Strategic planning with leadership will guide our efforts based on identifying who we need to reach, how to reach them, what we want them to do, and how we will measure success.

Please Note: Using the wheel graphic below, this proposal calls for 2-4 weeks focused on the Preparation area. Implementation as well as Measurement and Insights will follow over the subsequent 12 months with regular reporting outlined at the bottom of this proposal.



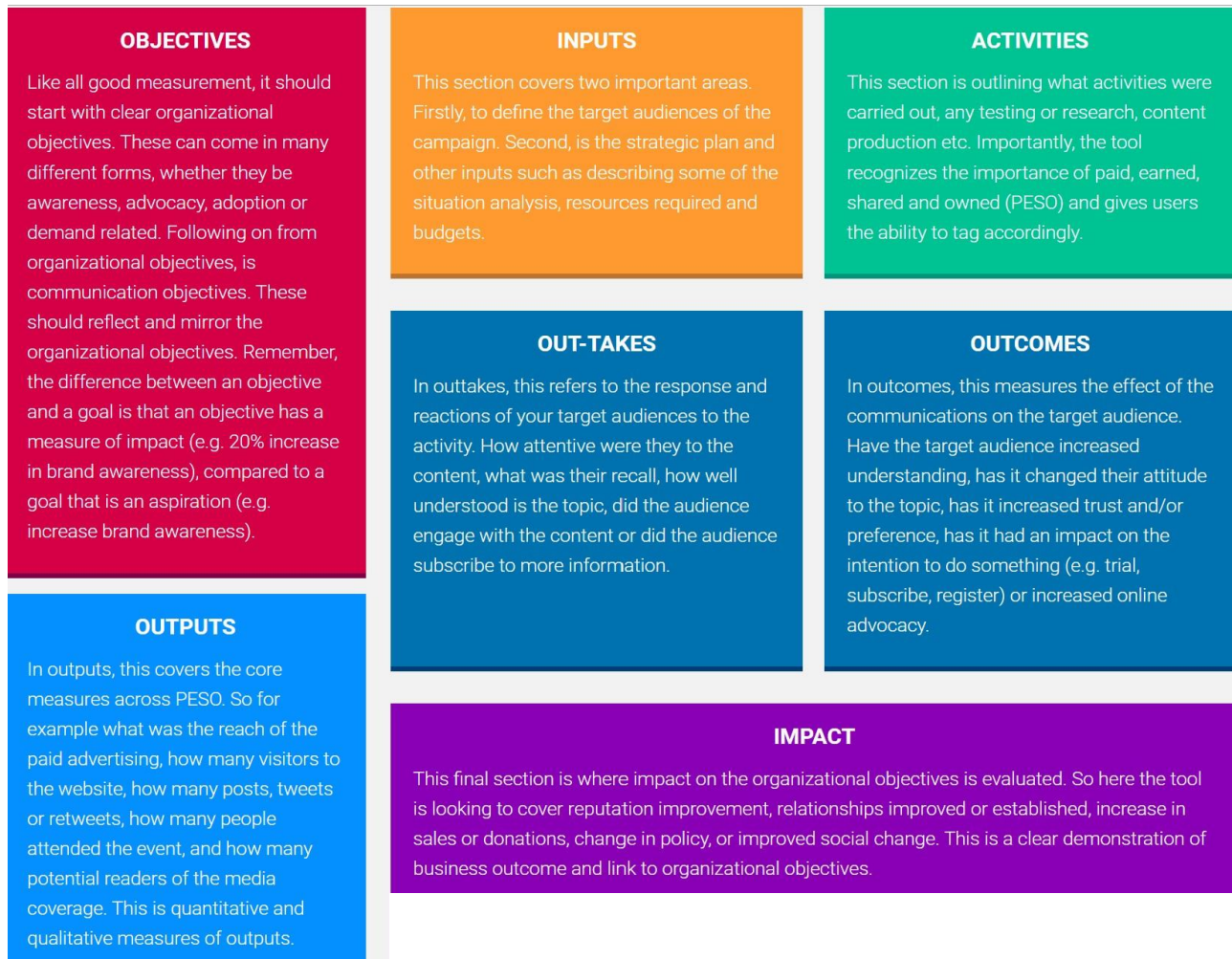
Research, Planning, Communications Development Expectations

To better understand what to expect during this phase, executed over the course of 2-4 weeks, we provide a break out below to define further the elements we will develop together. This will shape the overarching annual communications plan.

Research

Immersion into all things Jefferson Co. with the expectation that this consulting arrangement with Karl James & Co. produces a comprehensive understanding, insight and planning to support organizational objectives. This may include reviewing existing research, plans, and materials, community perceptions, internal challenges, media coverage and more. Research can also include on-site visits and meetings with key personnel across functions, such as: executives, elected-officials, and partner interviews, interviews of influential community members, and other influential audiences required for the organization to advance its agenda.

Note About Graphic Below: *This process is what to expect during our strategic planning phase*

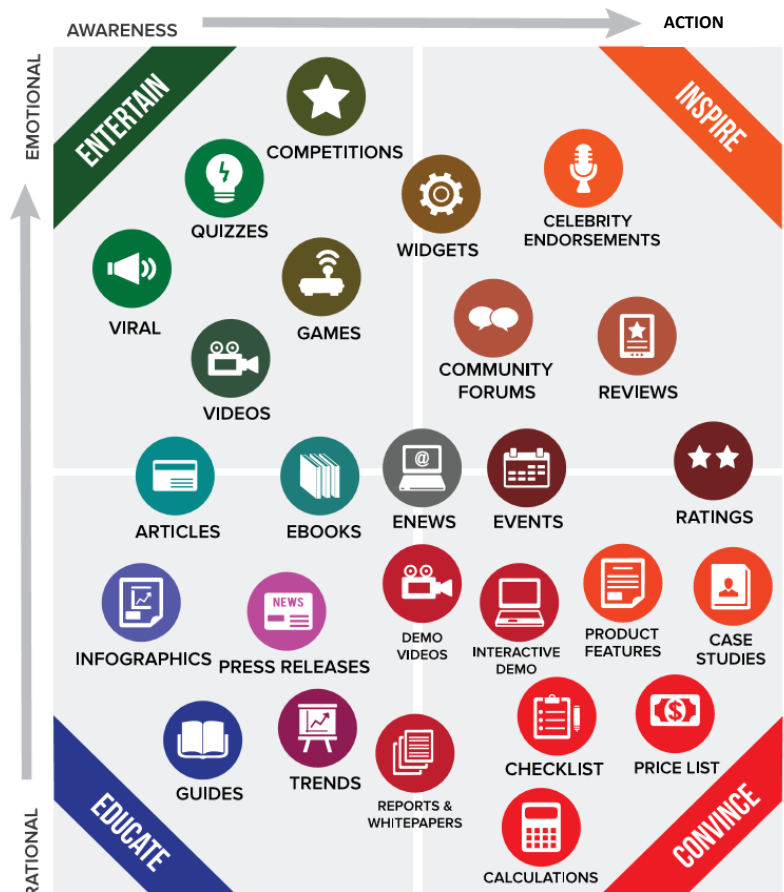


Communications Plan Development

While our research and strategic planning establishes the foundation for our efforts, our communications road map determines the path to bring our message to key audiences who are crucial to our success. Without a solid roadmap, our communications efforts likely would unfold in many directions. Unchecked, we risk diluting our efforts, overspending, and not tying our efforts to measurable effect. To protect against this, we must agree on the highest value actions, establish timeframes for completion and define measures. To that end, we will develop a comprehensive plan to map out success markers that align communications/organizational objectives by establishing communications goals and Identifying and prioritizing audiences.

Deliverable will be a plan that may include a mix of paid, earned, owned and shared media channels to reach audiences required to affect the outcomes desired for the organizational objectives.

This could include actions, (such as advertising, social media, blogs, media outreach & coaching, trust-building content development, sponsorships, events, PR, internal communications, stakeholder engagement, partner engagement, etc.) required for the execution of this plan over the course of a year. *Creation of the elements in the graphic above will depend on what our audiences require based on our research and planning.*



Timeline

Research & Planning: Over the course of 2-4 weeks, immerse ourselves in Jefferson Co. by reviewing all communications and organizational strategies and functions that will inform a strategic and communications planning process with leadership to set the course to advance Jefferson Co.'s agenda.

Flat Fee: \$5,000

Communication Plan Execution: Over 12 months, execute the communications plan designed to support organizational efforts identified during research and planning. These could include but are not limited to a mix of paid, earned, shared, and owned media channels defined above, as well as ongoing story pitching to news media and managing those relationships, content development via blog posts, social media posts, coalition building, repurpose assets for direct communications with email distribution lists, providing ongoing public opinion insights, meeting support and public relations counsel in support leadership and other efforts that support client's agenda.

Monthly Retainer \$3,000 (billed at hourly rate of \$200)

Client Communications

Ongoing Communications: Weekly emails, calls and exchanges of information with designated contacts

Monthly Recap: Schedule regular month-end call with main points of contact to discuss progress/needs

Quarterly Reviews: Schedule quarterly review with key leadership to discuss progress and what to expect in the coming quarter so we can adjust our efforts, if necessary.

ANNUAL FINANCIAL COMMITMENT*

\$41,000

***To the client:**

Prices may vary due to changes, alterations or additions by the client. Prices subject to change. It is further understood by the client that the final responsibility for the content provided is that of the client and not of Karl James & Company LLC. Note: This estimate is valid for thirty (30) days. Terms: Net 7 days. Past due invoices subject to finance charges at the rate of 1.5% per month. Unless noted above, costs do not include postage, shipping/handling or sales tax. Media buys, printing, promotional item purchases, speaker fees, and out-of-pocket expenses, such as travel and news subscriptions, will be billed as costs are incurred.

Payment schedule:

For Karl James & Company LLC to move forward, we kindly request payment of **research & planning flat fee of \$5,000**. Invoices are emailed the first of the month. To prevent work stoppage, we kindly request payment be received within 7 days of invoice receipt for monthly retainer. Costs beyond the agreed-upon estimates will require client approval prior to moving forward. Please email signed estimate to karl.robe@karljames.com and provide research & planning flat fee so we can begin. Thank you.

Indemnification

Client agrees to indemnify, defend, and hold Karl James & Company LLC harmless, as well as its officers, employees, and agents, from and against all claims, demands, actions, liabilities, losses, expenses, damages, judgements and costs, including attorneys' fees resulting from the actions by Client, the inaccuracy of the information provided by Client to us, or as a result of work on your behalf.

Estimated by:



Karl Robe, APR Date
Karl James & Company LLC

Approved by:

Mr. Ben Wehmeier Date
Jefferson Co. Administrator

JEFFERSON COUNTY HOMEBUYER/REHAB REPORT

January 29, 2024 – June 20, 2024

Seminars Held to Date – 5

Attendance – 40

Home Purchased as of 6/18/2024 - 6

| City Purchased in | Purchased by | Purchase Price | Grants Received | Pre-Purchase Rehab Loan to get property to code |
|-------------------|---------------|----------------|--|---|
| Fort Atkinson | Single Male | \$280,000 | \$10,000 Down Payment Plus \$10,000 Down Payment Plus | |
| Fort Atkinson | Single Male | \$132,000 | \$10,000 HOME Consortium | \$6,345.00 |
| Watertown | Single Female | \$175,000 | \$10,000 HOME Consortium | \$4,000.00 |
| Watertown | Single Female | \$173,000 | \$10,000 HOME Consortium | |
| Beloit | Single Female | \$122,500 | \$10,000 Down Payment Plus | |
| Hartford | Single Female | \$245,000 | \$10,000 HOME Consortium | |

City of Watertown – Housing Rehab Grant Program - This program is intended to provide access to capital to assist property owners, both owner-occupied and landlords, with the necessary maintenance of their properties to preserve and increase housing stock and property values. The program is administered by the Watertown Redevelopment Authority (RDA) - 13 applications received to date

Denied – 2

Approved – Rental – 1

Approved – Homeowner – Layering with HOME Consortium – 3

Not moving forward due to lack of funds – 3

Applications in process – waiting on paperwork or their decision to move forward – 1

Applications in process – working with families - 2

Application in process – waiting on decision on projects - 1



*Please Join Us:
August 6th, 2024*



EMPLOYER: “How-to-Hire” International Workers Conference



University of Wisconsin
Whitewater



The **Jefferson County Human Resources Management Association (JCHRMA)** has recently embarked on an exciting new chapter! We are laser-focused on empowering local and Wisconsin HR professionals and business owners to tap into the talent of newcomer workers from immigrant, ESL and refugee communities through ***programs like humanitarian parole, Welcome Corps, visas, and international workforce/asylee initiatives.***

Join us for this groundbreaking event designed for business owners and hiring managers to gain invaluable insights into hiring best practices, cultural understanding and the nuances of employing diverse populations.

We'll cover successful integration strategies for newcomers with your existing workforce, including transportation, housing, ESL/ELL support with technology, and retention tactics. Success stories will be highlighted.

Additionally, we'll discuss training opportunities surrounding basic skills, soft skills, and available resources to facilitate a smooth onboarding process.

Keynotes from industry leaders will kickstart enlightening discussions. A comprehensive hiring manual and website will be developed after the conference, putting valuable resources at your fingertips.

Let's make a real impact together in Wisconsin and beyond. Register now and be part of this transformative conference. For more details or to get involved, reach out to Matt Glowacki at President@JCHRMA.org.

Register Here: <https://www.eventbrite.com/e/seeking-asylum-seekers-conference-tickets-879609083447?aff=oddtcreator>