

RESOLUTION NO. 2023-06

RESOLUTION AUTHORIZING THE VILLAGE OF CALEDONIA TO ENTER INTO A CONTRACT WITH THE RACINE COUNTY ECONOMIC DEVELOPMENT CORPORATION FOR ECONOMIC DEVELOPMENT TECHNICAL ASSISTANCE FOR 2023

WHEREAS, the Village of Caledonia has contracted with the Racine County Economic Development Corporation for economic development technical assistance for many years, and RCEDC has been very helpful in the Caledonia Business Park improvements, the creation and expansion of TID #4 and various other economic development activities in the Village; and

WHEREAS, the Village of Caledonia would like to continue contracting with RCEDC in 2023.

NOW, THEREFORE, BE IT RESOLVED by the Caledonia Village Board that a contract between the Village of Caledonia and the Racine County Economic Development Corporation for economic development technical assistance for 2023 as set forth in Exhibit A, which is attached hereto and incorporated herein; at the cost of \$43,775 is authorized and approved, and the Village President and Village Clerk are authorized to execute said contract.

BE IT FURTHER RESOLVED that the funds for the said contract shall be allocated based on annual activity between current TIDs.

14 Adopted by the Village Board of the Village of Caledonia, Racine County, Wisconsin, this day of February 2023.

VILLAGE OF CALEDONIA

By: 

James R. Dobbs, Village President

Attest: 

Joslyn Hoeffert, Village Clerk

January 11, 2023

Jim Dobbs
Village President
Village of Caledonia
5043 Chester Lane
Racine, WI 53402

Dear Mr. Dobbs:

This letter is intended to serve as a letter agreement between the Village of Caledonia hereinafter referred to as "Caledonia" and the Racine County Economic Development Corporation (RCEDC). In accordance with this agreement, the RCEDC agrees to continue to provide economic and community development technical assistance to Caledonia. Such assistance will be coordinated on a day-to-day basis with the Administration and, regarding policy-related issues coordinated with the Village Administrator, Village President and Village Board.

PURPOSE

The purpose of the agreement is to further the overall goals of community and economic development by facilitating job growth and investment, resulting in new tax base for Caledonia, through interagency cooperation and services provided by the RCEDC.

AGREEMENT

The RCEDC agrees to provide direct economic and community development assistance to Caledonia in accordance with the objectives promulgated by the Village President, Village Board and Village Administrator. The RCEDC has assigned Laura Million, Deputy Director as the lead economic development staff person to Caledonia with direct support from Jordan Brown, Business Recruitment Specialist. Ms. Million will act as the Village's economic development advocate, in partnership with other RCEDC staff, and will expend best efforts to promote business retention and expansion, business attraction, talent attraction, community development and business finance resources to support Caledonia and its companies.

This agreement is broken into two sections. First, RCEDC's 2023 strategic plan focuses efforts to deliver financial and technical resources in the Village and throughout Racine County as described in Sections I-VII. Second, the Village

leadership has assigned a number of special projects to RCEDC to complete (Section VIII). The RCEDC Board of Directors adopted the 2023 RCEDC Strategic Plan at its December 2022 meeting. All of the goals have measurable outcomes and are shown in the attached Snapshot document.

In addition to the monthly scheduled meetings and ongoing communications, RCEDC will deliver written and if allowed, verbal semi-annual reports to the Village President, Village Board, and Village Administrator.

I. Business Retention and Expansion

Existing businesses are the primary source of job creation in the local economy. RCEDC implemented a Business Retention & Expansion Call Program to meet one-on-one with business owners throughout Racine County. The primary objective, through one-on-one meetings, is to identify and address the needs of businesses to facilitate growth and expansion that leads to new jobs and capital investment, and to inform the municipality of any concerns or opportunities

In 2023, RCEDC's Business Retention and Expansion activities will include the following:

- a. Engage with Racine County's existing businesses through an active outreach program to support retention and expansion needs. When meeting with local companies, RCEDC staff will provide information on existing State, federal and local economic development resources that may assist the needs of local businesses. These programs include low-interest loans, tax credit programs, grants and workforce development assistance.
- b. Provide business loans and grant programs to meet the needs of Racine County businesses, including an emphasis on supporting Disadvantaged Business Enterprise (DBE) companies.
- c. Enhance the likelihood of new "homegrown" success stories by dedicating time and resources to "economic gardening" programs to grow small and mid-sized businesses (5-100 employees) through programs such as the CEO Roundtable and Living as a Leader.

II. Business Attraction

Racine County is a highly competitive location for businesses. RCEDC's business attraction activities will leverage Racine County's location in the Chicago-Milwaukee corridor and assets such as connectivity to transportation networks,

quality and quantity of water, competitive cost of living and doing business, access to experienced professional economic development staff, and access to talent in the area needed to attract new industrial, residential and commercial development to grow the local tax base and facilitate additional job creation.

In 2023, RCEDC's business attraction activities will:

- a. Through an active outreach program to real estate professionals, developers and site selectors, position Racine County's assets in a manner to attract new development and investment. These actions may be done independently or in partnership with WEDC and Milwaukee 7.
- b. In partnership with Racine County municipalities, work cooperatively to pursue new development in the Wisconsin Innovation Technology Park and other business parks in Racine County.
- c. In support of our local communities, support the recruitment and development of new residential development.
- d. Through the provision and administration of business loans and incentives, support recruitment efforts.
- e. Provide assistance through the development of customized proposals to businesses interested in establishing a location within the Village per direct contact or referral from the Village President or Village Administrator. This activity includes providing copies of such proposals, when requested, to the Village President and Administrator, as well as a status report on such businesses as part of this agreement's semi-annual reports, coordinating regular meetings with the Village President and Administrator, and maintaining a periodic business follow-up procedure.

III. Talent Attraction and Development

Talent supply is vitally important to any community's long-term competitiveness. RCEDC will continue to market Racine County to those seeking employment by promoting the Greater Racine County talent initiative. This marketing initiative was developed in 2018 and includes job board featuring local employers, promotional materials about communities, and local housing developments, with more video content and resources added each year.

In 2023, RCEDC's talent attraction activities will include:

- a. Promoting the Greater Racine County website (www.GreaterRacineCounty.com) as the “front door” for talent considering a relocation to Racine County and offer support to employer’s efforts to attract talent to Southeast Wisconsin.
- b. Through outreach to local employers and HR professionals, identify near – and long-term workforce needs of primary industries in Racine County. Facilitate best practice sharing and resource connections to increase businesses’ success to attract and retain talent during outreach visits and talent-related events.
- c. Partner with local coalition of manufacturers to brand Greater Racine County as a manufacturing hub, resulting in increased awareness of job opportunities in manufacturing and quality of life assets in Racine County with a long-term goal of attracting new manufacturing talent to Racine County.
- d. Based on the feedback resulting from outreach initiatives, advise workforce training and educators of the findings.
- e. Working with regional higher education institutions, identify and implement opportunities to engage and retain young talent in Southeast Wisconsin.

IV. Entrepreneurship

Start-up and small businesses contribute to a prosperous community, spurring innovation, encouraging business diversity, and creating job opportunities. Increased requests for assistance from start-up and small businesses, especially women-owned and ethnic-minority-owned businesses, to RCEDC suggest an opportunity to broaden resources and better connect entrepreneurs in Racine County to increase businesses’ near- and long-term success.

In 2023, RCEDC’s Entrepreneurship activities will include:

- a. Work with existing partners to identify initiatives that are successfully increasing the positive outcome of start-ups and small businesses with the goal to deliver these initiatives in Racine County.
- b. Increase awareness of entrepreneurial resources available to start-up and entrepreneurial businesses, especially women, ethnic minority, and veteran-owned businesses, in Racine County.

V. Community Development

Quality of place plays a significant role in community and economic development, particularly when it comes to talent attraction and retention. Research shows that community attachment is heavily influenced by factors such as how a place looks and the availability of opportunities and places to socialize. Additionally, many talented and educated workers are increasingly attracted to various types of

communities in which they do not have to use a car to access shops, restaurants or even jobs. In 2023, Community Development efforts will include:

- a. In partnership with Racine County Executive, work with local municipalities and partners to identify needs and barriers to encourage community development.
- b. Assist municipalities with the implementation of special projects that support short and long-term development goals that result in higher tax base, more jobs, and residents.
- c. Continue to support Racine County's Convention & Visitor Bureau (currently known as Real Racine) in a manner consistent with the adopted Management & Administrative Services Agreement between RCEDC and Real Racine.

VI. RCEDC – Business Finance

- a. Through business retention and recruitment activities, provide existing and potential businesses with information and assistance relative to available State, federal and local business development financing programs. This activity includes providing business loans to businesses utilizing appropriate RCEDC business finance staff to develop loan applications.

VII. Promotion and Marketing

Racine County is home to amazing businesses that generate tax base, spur new development, and offer employment opportunities for talent. RCEDC's strategic promotion and marketing activities are integral to businesses accessing financial and technical resources as well as new talent to their businesses. Promotion and marketing efforts include the development of promotional materials and presentations, maintaining RCEDC's website and social media platforms, hosting of events, and sharing of success stories enable RCEDC staff to connect with our customers and partners to facilitate development projects across our service area.

In 2023, RCEDC's promotion and marketing activities will:

- a. Showcase financial and technical resources available to assist existing businesses through RCEDC and BLP's website and social media channels and promotion of business success stories.
- b. Promote positive engagement with RCEDC contributors, businesses, lenders, and community partners by hosting events that inform, connect, and celebrate successful projects.

- c. Support Business attraction efforts by positioning Racine County as the premier location for new business development through hard copy and digital marketing campaigns, sharing the benefits of a Racine County location to developers, site selectors, real estate professionals and businesses seeking to invest in Southeast Wisconsin.
- d. Increase awareness of Racine County as a prime location to visit, work, and live through the Greater Racine County website and social media. Highlight the breadth of local job opportunities, quality of life, as well as racial, ethnicity and cultural diversity. Seek opportunities for increased funding to accelerate results and seek to partner with local employers and residential developers to highlight assets and opportunities.
- e. Tourism is economic development and often the first occasion to showcase Racine County as a place to potentially live and work. Coordinate promotional efforts with partner organizations, including Real Racine, Chambers of Commerce, local municipalities, and others to encourage more visitors that can experience all the assets of Racine County so that if a job opportunity occurs, the acceptance is more likely given the positive experience.

VIII. RCEDC Special Projects, Caledonia Specific Activities

In addition to the above activities, RCEDC will work in partnership with the Village on the special projects detailed below:

- a. Assist in implementation of recruitment plan for Highway K development.
- b. Assist in the creation and implementation of recruitment plans for key sites, including but not limited to 7017 Douglas Avenue; Kmart; and Caledonia Business Park.

TIME PERIOD FOR THIS AGREEMENT AND COMPENSATION

The above-referenced assistance will be provided by the RCEDC staff during the time period beginning January 1, 2023 to December 31, 2023. The annual cost of this assistance to Caledonia is \$43,775. Payments will be made during the first week of each quarter, upon the receipt of an invoice from the RCEDC. The cost of developing any additional materials and significant printing and mailing of items necessary to implement these services are outside the scope of the Agreement and will be negotiated on an as necessary basis.

INDEPENDENT CONTRACTOR

RCEDC shall be an independent contractor of Caledonia. Neither RCEDC nor any of its officers, employees, or agents shall be considered to be an employee of Caledonia as a result of the obligations undertaken pursuant to this agreement. RCEDC's officers, employees and agents shall make no commitments or representations to third parties without prior approval of Caledonia. In addition, RCEDC hereby holds harmless Caledonia and its departments, officers, employees and agents from and against all claims, demands and liability for damages to third persons of any type whatever arising solely out of the actions of RCEDC under this agreement.

LIABILITY INSURANCE

The RCEDC is to carry liability insurance and list Caledonia as an additional insured on the policy.

TERMINATION

This agreement may be terminated by either party upon thirty (30) days written notice in the event of default by the other party of any material provision hereof which remains unremedied for thirty (30) days following written notice of such default.

NOTICES

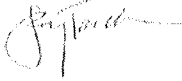
Notices under this agreement shall be mailed by registered mail to the Caledonia Village President and Village Administrator, 5043 Chester Lane, Racine, WI 53402, for Caledonia, and to Jenny Trick, Executive Director, 2320 Renaissance Blvd., Sturtevant, WI 53177, for RCEDC, or shall be personally served on either said person of the person in charge of either respective office.

ASSIGNMENT

RCEDC agrees that it will not assign this agreement or any portion thereof, or any of its responsibilities hereunder, to any other party without first obtaining the written permission of the Village.

If the terms and conditions of this proposal are satisfactory, please sign the two original documents where indicated and return to the RCEDC for RCEDC final signature.

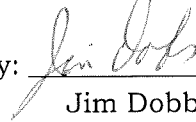
Sincerely,



Jenny Trick, Executive Director

IN WITNESS WHEREOF, the parties hereto have executed this agreement on the 14
day of FEBRUARY, 2023.

VILLAGE OF CALEDONIA

By: 
Jim Dobbs, Village President

Witness: 
Joslyn Hoeffert, Village Clerk

**RACINE COUNTY ECONOMIC
DEVELOPMENT CORPORATION**

By: _____
Jenny Trick, Executive Director

RCEDC 2022 STRATEGIC PLAN YEAR-END RESULTS REPORT

OUR MISSION

Ensuring the economic vitality of Racine County by working with our partners to support innovation and creativity that leads to business investment.

OUR GOAL

Facilitate business expansion projects that result in the creation and retention of jobs and increase the tax base in Racine County.

A TOTAL OF 107 PROJECTS WERE APPROVED DURING THE 2022 CALENDAR YEAR.

Through the 4th quarter of 2022, RCEDC has ensured more than \$289 million in total private investment (289% of annual goal), and over \$124 million in total construction investment (250% of annual goal) in Racine County.



STRATEGY 1: BUSINESS RETENTION AND EXPANSION

Identify and address the needs of businesses through relationship and provision of resources. The strategy will be accomplished by successfully completing technical assistance requests, developing and implementing leadership programs, conducting outreach, and providing loans, grants and incentives to businesses.

RESULTS:

Business Retention & Expansion	Annual Goals	Q4 2022	% of Target
Technical Assistance	250	343	137%
Leadership Training Programs	4	3	75%
Outreach	405	366	90%
Businesses Assisted through Lending, Grants & Incentives	115	101	88%
Total Private Investment	\$100,000,000	\$289,406,442	289%
Total Construction Investment	\$50,000,000	\$124,801,889	250%
Assistance provided to Racine County Businesses	68	81	119%
RLF Loan and Grant Amounts	\$3,020,000	\$3,299,699	109%
Businesses Assisted through SBA 504	47	20	43%
SBA 504 Loan Amounts	\$28,800,000	\$15,078,000	52%

STRATEGY 2: BUSINESS RECRUITMENT

Take advantage of Racine County's location and opportunities to pursue development with the highest potential to spur other development including industrial, residential, and commercial development. The strategy will be accomplished through outreach to real estate professionals, implementing business park development, residential development, and administering incentives to spur development.

RESULTS:

Business Recruitment	Annual Goals	Q4 2022	% of Target
Outreach Activities to Real Estate Professionals, Developers and Site Selectors	50	65	130%
Businesses Assisted in Business Park Development	4	4	100%
Residential Development Projects	2	2	100%
Business Recruitment Marketing (Direct Marketing Campaigns)	2	3	150%

STRATEGY 3: TALENT ATTRACTION

Through RCEDC's talent attraction website, www.GreaterRacineCounty.com, RCEDC will effectively market Racine County to encourage more people to explore, work, and live in Racine County. The strategy will be accomplished through refining and implementing a digital advertising campaign that, in the end, results in an increase of visitors, talent, and residents to Racine County.

RESULTS:

Talent Attraction	Annual Goals	Q4 2022	% of Target
Increase awareness of GRC through website and social media-2022	2,220 visitors/month	2,496	112%
	2,410 social media followers	2,265	94%
Digital Manufacturing Campaign	100,000 impressions/month	213,811	214%
Front Door to Talent: Engage local employers and HR professionals (Business Profiles/Job Posts Monthly)	130/400	127/425	98%/106%
Feedback to Partners on Talent Demand and Programming (Quarterly Communications)	4	4	100%
Partner with regional higher education institutions to engage and retain young talent	1	1	100%

STRATEGY 4: COMMUNITY DEVELOPMENT

In partnership with Racine County Executive, RCEDC will work with local municipalities and partners to identify barriers that when addressed will result in higher tax base, more jobs and residents. The strategy will be accomplished by working closely with our community leaders to ensure the development process is transparent and predictable.

RESULTS:

Community Development	Annual Goals	Q4 2022	% of Target
Assist contract communities with implementation of special projects	28 special projects for 8 contract communities	3 Completed 25 Underway	11%
<i>Explore. Work. Live.</i> Build on Visit/ Explore messaging in GRC website	30	23	77%

STRATEGY 5: LEADERSHIP

RCEDC leadership is committed to continuous improvement, regular evaluations of RCEDC priorities, asking the right questions, and pushing for solutions. The strategy will be accomplished through diligent review of resources and programs, securing private contributions to support RCEDC's mission, and continued engagement of diverse leaders to join RCEDC's volunteer committees.

RESULTS:

Leadership	Annual Goals	Q4 2022	% of Target
Program Review	Inventory programs and activities, determine measure of effectiveness and success	Targeted for 4th Quarter	
Internal Talent Development Initiative	14	14	100%
Private Contribution	\$160,000	\$163,295	102%
Diverse Leadership	3	4	133%
Sound reputation	1	1	100%

RCEDC 2022 YEAR IN REVIEW

February 14, 2023

RCEDC

Racine County Economic Development Corp.

BLP BUSINESS LENDING PARTNERS
A Division of RCEDC, A Wisconsin Corp.

BRE BUSINESS RECRUITMENT & EXPANSION
A Division of RCEDC

GREATER RACINE COUNTY
where your future takes root



BRC BUSINESS
RECRUITMENT
& EXPANSION
A Division of RCEDC

- CEO Call Program
- Market Research & Data
- Small Business Resources
- Land & Building Searches
- Free Property Listing Tools
- State & Local Incentives

BLP BUSINESS
LENDING
PARTNERS
A Division of RCEDC & Wisconsin Corp

- Low-Interest Financing
- Matching Grant Programs
- Community Loan Funds
- Small Business Administration SBA 504

 GREATER
RACINE
COUNTY
where your future takes root

- Employee Recruitment Support
- Free Job Board
- Leadership Resources
- Educational Partnerships
- Workforce Partnerships

RCEDC
Rocky Mountain Economic Development Center

107
BUSINESSES
ASSISTED

\$289 million Private Investment

**\$124.8 million Construction
Investment**

SMALL BUSINESS ASSISTANCE

- **343 Technical Assists**
 - 115 Letters for Main Street Bounceback Grants
- **60 Grants:**
 - 27 Racine County Matching Grants
 - 26 CDBG CV Grants
 - 7 Community MGP (Burlington, Sturtevant, Union Grove)

SMALL BUSINESS LOANS

38 Total Loans

\$ Loans Approved

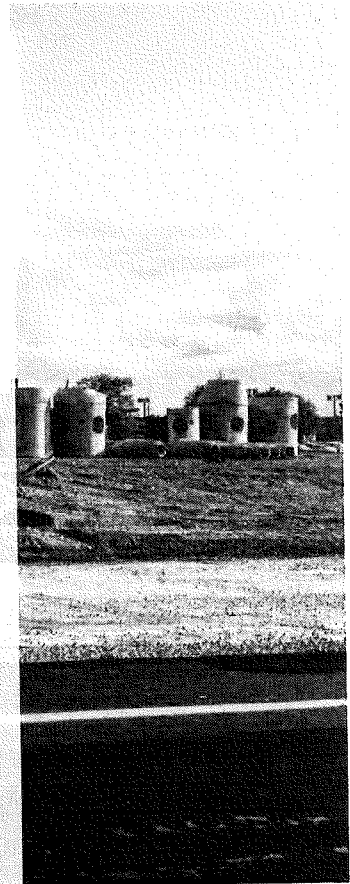
- Racine County: \$2,863,340
- SBA 504: \$15,078,000



INDUSTRIAL BUSINESS ATTRACTION

1.23M SF Under Construction (Q3 '22)

- 3.6% Vacancy
- Investments by:
 - Announced: Zilber, Likewise
 - Complete: Hillwood, Scannell
 - Under Construction: Ashley Capital, Endeavor, HSA, Scannell



INDUSTRIAL BUSINESS GROWTH

- **Oterra, Mount Pleasant**
 - 115 Jobs
 - \$40,000,000 investment

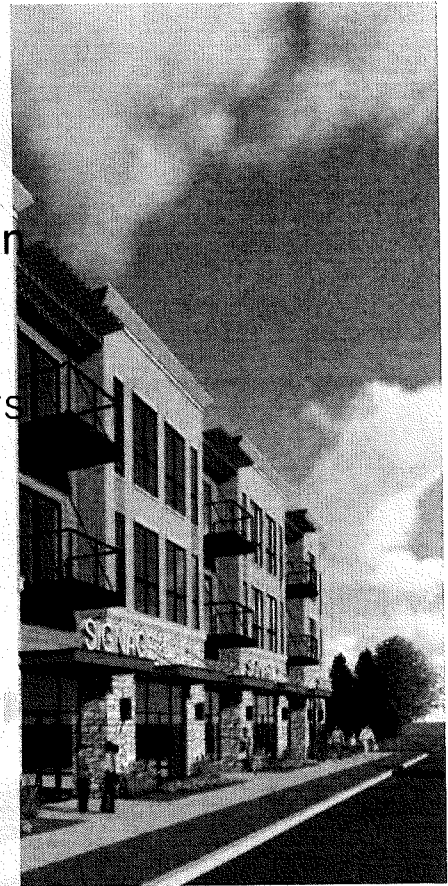
- **Summit Packaging, City of Racine**
 - 145 new jobs
 - \$25,000,000 investment



Courtesy of Oterra™

RESIDENTIAL DEVELOPMENT

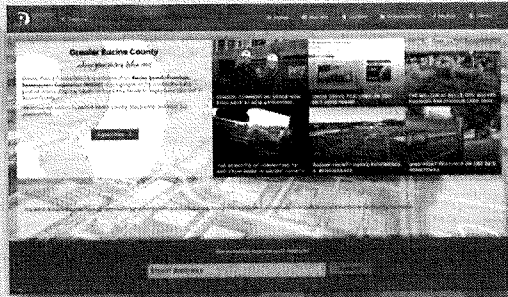
- Over 3,600 units under construction or complete
- Waterford Lofts:
 - Mixed-use with 12 Condo Units
 - WEDC CDI Grant
- Cornerstone Development, Caledonia
 - 30 Single Family Homes



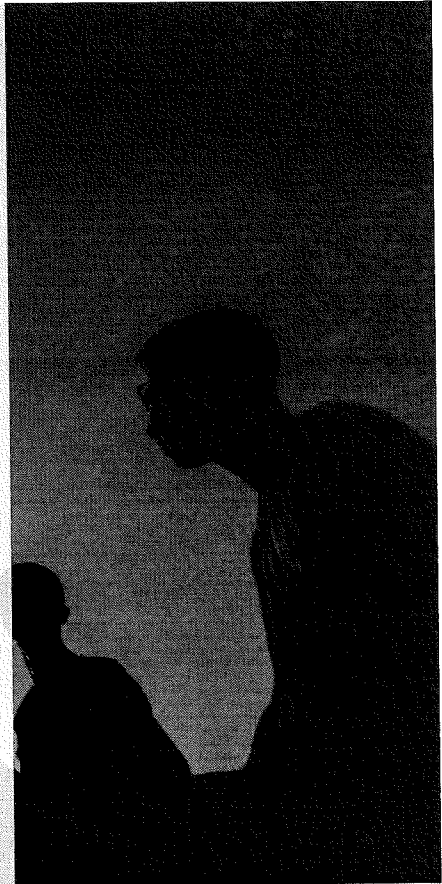
HIGHLIGHTS & TRENDS

TALENT ATTRACTION

- Promoting Website & Job Board
GreaterRacineCounty.com



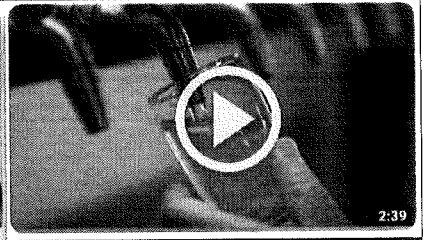
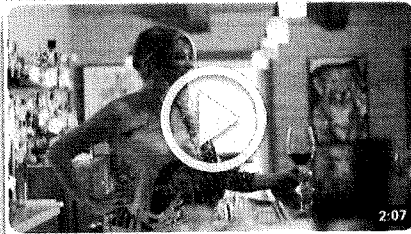
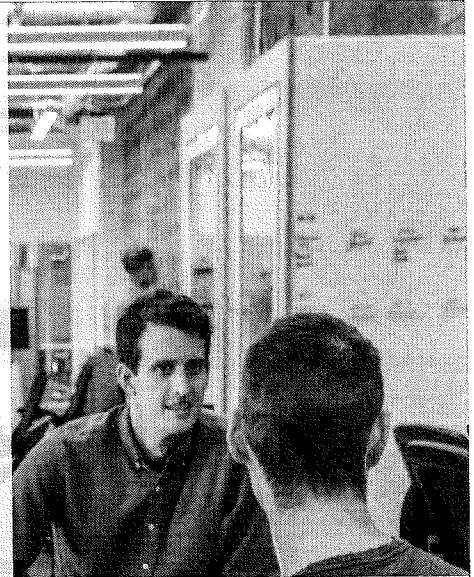
- Familiarization Tours
 - 27 HR Reps
 - Individual Talent



HIGHLIGHTS & TRENDS

TALENT ATTRACTION

- Partner with Higher Ed to Retain Young Talent
- Partnership with Manufacturers
- Mount Pleasant Tourism Grant
 - Relocation Guide
 - 3 Videos



7

CALEDONIA PROJECTS

- Zilber Business Park
- Likewise Partners
- Cornerstone Development
- Stephan's Auto Service
- Cabbage Heads
- Struckn Design, LLC
- Sherwood Game Farm

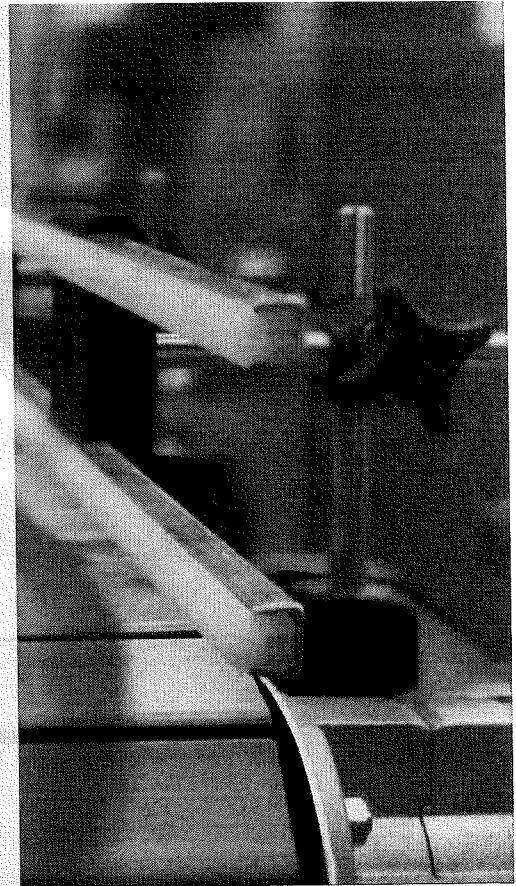
OTHER:

- 32 Prospects
- 11 Technical Assists
- 2 Business Mailings, 6 Business Call Visits



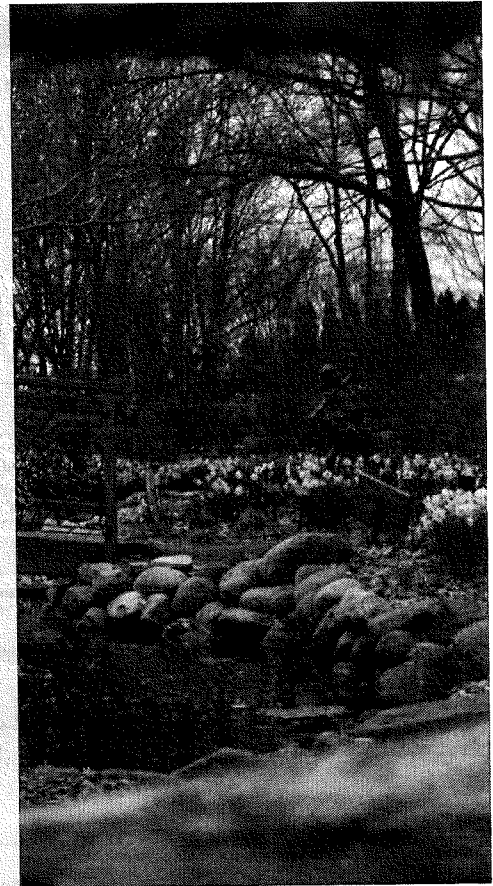
2023 CONTRACT & STRATEGIC PLAN

- Business Retention & Expansion
- Business Attraction
- Talent Attraction
- Community Development



2023 STRATEGIC PLAN - NEW

- Entrepreneurship
- Promotion and Marketing





QUESTIONS

Attachment

2023 RCEDC Strategic Plan

Goal: Facilitating business expansion projects with financial and technical resources that when successfully implemented result in the creation and retention of jobs and new tax in Racine County. Said quite simply, Grow good paying jobs and tax base in Racine County.

Mission: Ensuring the economic vitality of Racine County by working with our partners to support innovation and creativity that leads to business investment.

Strategy		2023 Annual Goals	2023 Actual Q1	2023 % of Target	Status
Summary Totals*					
	Total Businesses Assisted	75			
	Total Private Investment	\$150,000,000			
	Total Construction Investment	\$75,000,000			
* Totals of businesses assisted in 1 c, 2 b, and 2 c.					
1.	Business Retention & Expansion				
a.	Technical Assistance	210			
b.	Outreach	330			
c.	* New * Financial assistance provided through loans, grants and incentives, #	69			
d.	* New* Financial assistance provided through loans, grants and incentives, \$	\$21,300,000			
e.	* New* Loan Closings, \$	\$27,800,000			
f.	Leadership Training Programs	2			
2.	Business Attraction				
a.	Outreach Activities to Real Estate Professionals, Developers and Site Selectors	100			
b.	Businesses Assisted in Business Park Development	4			
c.	Residential Development Projects	2			
3.	Talent Attraction				
a.	Front Door to Talent: Engage local employers and HR professionals (Active Business Profiles Monthly/Relocation Guide Downloads Total)	40/240			
b.	* New * Facilitate best practice sharing between HR professionals through talent-related events	3			
c.	Digital Manufacturing Campaign (Ad Clicks/Video Views per Month)	500/1,000			
d.	Feedback to Partners on Talent Demand and Programming (Quarterly Communications)	4			
e.	Partner with regional higher education institutions to host event to engage and retain young talent	1			

Strategy		2023 Annual Goals	2023 Actual Q1	2023 % of Target	Status
4.	Entrepreneurship				
a.	* New * Work with partners to implement Biz Start Institute in Racine County	1			
b.	* New * Increase awareness of entrepreneurial resources by maintain list of entrepreneurial focused resources on RCEDC's website	1			
5.	Community Development				
a.	* New * Maintain relationship with local municipal partners	8			
b.	Assist contract communities with implementation of multi-year projects	27 multi-year efforts			
c.	* New * Support Racine County's Convention & Visitor Bureau (currently known as Real Racine) consistent with the adopted Management & Administrative Services Agreement (Monthly Oversight)	12			
6.	Promotion and Marketing				
a.	* New * Showcase financial and technical resources through promotion of success stories	8			
b.	* New * Promote engagement with contributors, businesses, lenders, and community partners through events	6			
c.	Business Recruitment Marketing (Direct Marketing Campaigns)	4			
d.	Awareness of Racine County to talent through Greater Racine County website, social media, and digital advertising campaign (monthly website visitors/social media followers)	2,500/2,500			
e.	Build out messaging for GRC via features, posts, and newsletters featuring message of Explore.Work.Live. (Social media posts/videos)	50/4			

Strategy		2023 Annual Goals	2023 Actual Q1	2023 % of Target	Status
7.	Leadership				
a.	Inventory BLP Programs, criteria and educational materials to ensure sound decision making	1			
b.	* New * RCEDC divisions to review existing and new programs, initiatives, and activities to ensure they align with priorities, strategic plan, and advance the mission of RCEDC	3			
b.	RCEDC Staff to continue to include professional development to work plans to ensure retention of RCEDC talent	14			
c.	Private Contributions	\$160,000			
d.	Ensure diverse leadership of RCEDC Leadership Council and Loan Advisory Committees	3			
e.	Retain RCEDC's sound reputation that includes progressive work culture and positive reputation among community leaders and stakeholders	1			