

Technical Proposal

**MADISON
PUBLIC
MARKET**

Madison Public Market Business Plan RFP # 8297-0-2013/DK



MADISON PUBLIC MARKET
Madison, WI • CAP Project #2130519 • 07-31-13

Economic Development Partners, LLC
Public Market Development
University of Wisconsin-Whitewater,
Fiscal & Economic Research Center
Wisconsin Innovation Service Center
Cuhaci & Peterson Architects

August 5, 2013

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August 5, 2013

Mr. Dan Kennelly, Economic Development Specialist
City of Madison Economic Development Division
210 Martin Luther King Jr. Blvd.
Madison, WI 53703-3346

Dear Mr. Kennelly;

The Economic Development Partners' (EDP) team is excited to present The City of Madison with this proposal for a Comprehensive Business Plan for the Madison Public Market and to guide the City of Madison's effort to create a Public Market to be located in Madison, Wisconsin.

The Madison area has seen recent success in expanding upon its strengths and assets, particularly in manufacturing, agriculture, financial services and biotechnology. It has many important advantages that will allow it to achieve greater prosperity in the future, such as an excellent university system; highly valued land and natural assets; funding for high-tech and bio-tech research. However, there is a recognized need for Madison to capitalize upon its competitive assets in creating a Food Hub and Public Market that will serve the local population and provide Madison residents with convenient and affordable access to fresh and locally produced food. A Madison Public Market will support existing and future food businesses and create a more integrated regional food system. This effort will be vital in creating hundreds of new jobs, recruiting and expanding scores of food businesses, generating significant new taxes, and supporting sustainable economic growth while increasing the standard of living of Madison's residents.

For this project, EDP will partner with Aaron Zaretsky, founder of Public Market Development, a leading national firm that specializes in developing and building working Public Markets throughout the U.S. The combined expertise of our two teams will allow us to create a highly effective economic strategy specifically tailored to the goals of the City of Madison for its Madison Public Market project in the region. We clearly understand and enthusiastically support the City's commitment to have the Public Market first and foremost serve the residents of Madison.

Public Market Development has worked with over 40 clients throughout the U.S. to develop, redevelop and create vital Public Markets and by providing management, operational and site location services. The expertise and qualifications of our team makes it a perfect match for creating an economic strategy that will allow the Madison community to achieve its vision for the future.

Our team is looking forward to working with you. If there is any part of this proposal that you have questions about, please do not hesitate to contact Cynthia Jaggi at 608-712-1980 or at cjaggiedp@tds.net and we can further refine our services as needed.

Sincerely,

Cynthia K. Jaggi

Cynthia K. Jaggi, Principal Executive Officer
Economic Development Partners, LLC
(608) 712-1980
cjaggiedp@tds.net

Aaron Zaretsky

Aaron Zaretsky, Principal Owner
Public Market Development
(828) 645-9291
pohlzaret@aol.com

CHAPTER 1: REQUIRED RFP FORMS

RFP FORM A: SIGNATURE AFFIDAVIT

RFP FORM A: SIGNATURE AFFIDAVIT

Note: This form must be returned with your proposal response.

In signing this proposal, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal, hereby agrees with all the terms, conditions, and specifications required by the City in this Request for Bid, and declares that the attached proposal and pricing are in conformity therewith, and attests to the truthfulness of all submissions in response to this solicitation.

Proposer shall provide the complete information requested below. Include the legal name of the Proposer and signature of the person(s) legally authorized to bind the Proposer to a contract.

Local Preference: (Refer to Section 1.19.8)

We are a registered local vendor
(Mark ONLY if currently registered on
the City website)

We intend to register as a local vendor

Cooperative Purchasing: (Not required for this RFP – please disregard)

Proposal Invalid Without Signature	
SIGNATURE OF PROPOSER: <i>Cynthia K Jaggi</i>	DATE: <i>8/5/13</i>
NAME AND TITLE OF PROPOSER: <i>Cynthia K. Jaggi, Principal Executive Officer</i>	COMPANY NAME: <i>Economic Development Partners, LLC</i>
TELEPHONE: <i>(608) 712-1980</i>	ADDRESS: <i>Economic Development Partners, LLC 1972 Oakwood View Drive Verona, WI 53593</i>
FAX NO.: <i>(512) 356-2751</i>	
Person to Be Contacted If There Are Questions about Your Proposal (if different from above)	
NAME: <i>Same as above</i>	TITLE:
TELEPHONE:	FAX NO.:

FP FORM B: RECEIPT FORMS and SUBMITTAL CHECKLIST

SUBMITTALS CHECKLIST.	
The undersigned hereby acknowledges the submittal of the following forms: (Initial all applicable forms.)	
Chapter 1: REQUIRED RFP FORMS RFP FORM A: Signature Affidavit RFP FORM B: Receipt Forms and Submittal Checklist RFP FORM C: Contractor Profile RFP FORM D: Proposer References	CK-J
Chapter 2: EXECUTIVE SUMMARY	CK-J
Chapter 3: QUALIFICATIONS, EXPERIENCE, REFERENCES	CK-J
Chapter 4: PROJECT APPROACH	CK-J
Chapter 5: COST PROPOSAL	CK-J
ELECTRONIC COPY	CK-J

PROPOSER: Cynthia K. Jaggi, Principal Executive
Economic Development Partners, LLC
Officer

RECEIPT OF FORMS.		
The undersigned hereby acknowledges the receipt of the following forms:		
Request for Proposal (Initial all applicable forms)	Initial to acknowledge receipt of RFP Documents	<u>Required Submittals Checklist</u> Initial all submitted documents
RFP SECTIONS:		
Section 1: General RFP Administrative Information	CK-J	
Section 2: Project Vision, Purpose, and Goals	CK-J	
Section 3: Scope of Services	CK-J	
Section 4: Proposal Submission Requirements	CK-J	
Section 5: Required Forms	CK-J	
ATTACHMENTS		
Attachment A: Sample Contract for Purchase of Services	CK-J	
Attachment B: Standard Terms and Conditions	CK-J	
ADDENDA		
Addendum No. ___ Dated: _____		
Addendum No. ___ Dated: _____		
Addendum No. ___ Dated: _____		

RFP FORM C: CONTRACTOR PROFILE

RFP FORM C: CONTRACTOR PROFILE

1. **Proposing Company Name:** Economic Development Partners, LLC

2. **FEIN** 27-3593490 OR (If Sole Proprietorship, provide SSN upon award, if FEIN is N/A)

DUNN AND BRADSTREET NO.

3. **Form of Organization:** Corporation Limited Liability Company General Partnership
 Sole Proprietor Unincorporated Association Other: _____

4. **Location of Main Office:**
ADDRESS 1972 Oakwood View Drive CITY Verona, STATE WI ZIP+4 53593

5. **Location of Office servicing City of Madison account:**
ADDRESS 1972 Oakwood View Drive CITY Verona, STATE WI ZIP+4 53593

6. **Principal Information and Contact:**
NAME Cynthia K. Jaggi **TITLE:** Principal Owner
TEL (608) 712-1980 **TOLL FREE TEL** _____
FAX (512) 356-2751 **E-MAIL** cjaggiedp@tds.net

7. **Contact Person about your proposal if different from above:**
NAME Same as above **TITLE:** _____
TEL _____ **TOLL FREE TEL** _____
FAX _____ **E-MAIL** _____

8. **Orders and Billing Contacts and Mailing Address:**
NAME Cynthia K. Jaggi **TITLE:** Principal Owner
TEL (608) 712-1980 **TOLL FREE TEL** _____
FAX (512) 356-2751 **E-MAIL ADDRESS** cjaggiedp@tds.net
ADDRESS 1972 Oakwood View Dr. CITY Verona, STATE WI ZIP+4 53593

9. **Affirmative Action Contact:**
 The successful Contractor, who employs more than 15 employees and whose aggregate annual business with the City for the calendar year in which the contract takes effect is more than twenty-five thousand dollars (\$25,000), will be required to comply with the City of Madison Affirmative Action Ordinance, Section 3.58(8) within thirty (30) days of award of contract.
NAME _____ **TITLE:** _____
TEL _____ **TOLL FREE TEL** _____
FAX _____ **E-MAIL** _____
ADDRESS _____ **CITY** _____ **STATE** _____ **ZIP+4** _____

10. **Local Preference Status:**
 The City of Madison has adopted a local preference purchasing policy granting a one percent request for bid or a 5 percent request for proposal scoring preference to Dane County based suppliers. Only suppliers registered prior to the bid's due date will receive the preference. Proposers seeking to obtain local preference are required to register on the City of Madison online registration website:
<http://www.cityofmadison.com/business/localPurchasing/index.cfm>

We are a registered local vendor (Mark ONLY if currently registered on the City website) _____ We intend to register as a local vendor

RFP FORM D: PROPOSER REFERENCES

Reference for: Public Market Development – Aaron Zaretsky

498 Upper Flat Creek Rd., Weaverville NC 28787 (828) 645-9291

Website: www.publicmarketdevelopment.com Email: pohlzaret@aol.com

Additional projects for (4) similar projects located in the Experience – Chapter 3 of the RFP.

Company Name Downtown Community Alliance

Address (include ZIP) 700 W. Locust Street, #150, Des Moines, Iowa 50309

Contact Person Glenn Lyons, CEO

Phone No. 515-286-4932 or 515-782-1723 c

Contract Period 5 – 6/13

Services Provided Public Market for Des Moines, Iowa – similar-sized Midwestern city with a hugely successful downtown Farmers Market

Reference for: Economic Development Partners, LLC – Cynthia Jaggi & Ruth Dumesic

1972 Oakwood View Drive, Verona, WI 53593 (608) 712-1980

Website: www.edpwi.com Email: cjaggiedp@tds.net

Company Name Kickapoo Culinary Center

Address (include ZIP) 17193 Old 61 Road, Gays Mills, WI 54631

Contact Person Brad Niemcek, Executive Director

Phone No. 608-624-3409 or 608-458-3413 c

Contract Period August 2012

Services Provided Assessed the feasibility of developing a shared-use Regional kitchen incubator in southwestern Wisconsin. EDP worked with project partners to develop goals for the proposed facility, conduct a market analysis, research existing facilities, perform a survey of potential users and completed a Financial Feasibility Study for the kitchen. Provided preliminary recommendations regarding facility design, equipment, organizational structure, and management and staffing.

Reference for: Economic Development Partners – Cynthia Jaggi & Ruth Dumesic

Company Name World Cheese Discovery Center, Monroe, WI

Address (include ZIP) 1421 14th Avenue, Monroe, WI 53566

Contact Person David/Sharon Riese, WCDC Executive Team Phone No. 608-325-7549

Contract Period 2010-2012

Services Provided EDP assessed the feasibility of developing a World cheese Discovery Center for cheese downtown Monroe, WI that would include an indoor cheesemaking and retail market, a storage, processing, and distribution facility, and office space for tourists and agriculture groups. EDP provided preliminary recommendations regarding facility design, equipment, organizational structure, and management and staffing. EDP worked to develop goals for the proposed facility conducted a market analysis, research existing facilities, perform a survey of potential users and complete d a Financial Feasibility Study for the Center.

Reference for: UW-Whitewater, Fiscal & Economic Research Center – Dr. Russ Kashian
University of Wisconsin – Whitewater, Whitewater, WI 53190 (828) 645-9291
Website: www.uww.edu/FERC Email: kashianr@uww.edu

Northstar Consulting Group, 185 East Walnut St., Room 120, Sturgeon Bay, WI 54235

Contact Person David Ward

Phone No. 608-441-8060

Contract Period: 2011

Reference for: Wisconsin Innovation Service Center – Sandra Beccue

Wisconsin Innovation Service Center – UW-Whitewater, 432 North Lake St., Room 423, Madison, WI 53706

Contact Person: Gayle Kugler

Phone No: 608-263-7794

Contract Period 2012

Services Provided: Needs Assessment of Second Stage Wisconsin Companies – surveyed Wisconsin companies with revenues of \$750,000 to \$50 million, 10 to 100 employees regarding profitability and growth history and perspectives, perceived challenges to growth, and resources and training needed to overcome challenges.

D. Disclosure of Conflict of Interest. Economic Development Partners, LLC and Public Market Development and its subcontractors, have received, read and understood the City of Madison’s Disclosure of Conflict of Interest Policy.

To the best of our collective knowledge, we are certifying that no member of our firm's ownership, management, or staff has vested interest in any firm, consultant or sub consultant involved in the project, or any aspect of the project, or with the Department of Planning and Community and Economic Development or the City of Madison.

E. Disclosure of Contract Failures, Litigations. Economic Development Partners, LLC and Public Market Development and its subcontractors, have received, read and understood the City of Madison’s Disclosure of Contract Failures and Litigations.

To the best of our collective knowledge, we are certifying that no member of our firms’ ownership, management, or staff has any alleged significant prior or ongoing contract failures, contract breaches, any civil or criminal litigation or investigation pending within the last three (3) years which involves our firm and all subcontractors involved in the project. None of our contracts with EDP and our subcontractors has been found guilty or liable, which may affect the performance of the services to be rendered herein.

F. Financial Capability. Economic Development Partners, LLC and Public Market Development and its subcontractors, have received, read and understood the City of Madison’s Financial Capacity statement.

To the best of our collective knowledge, we hereby certify that EDP and Public Market Development and their subcontractors have the financial stability and capability to perform the work outlined within the Scope of Services. In addition, we would be happy to further demonstrate financial capability prior to execution of a contract if selected.

CHAPTER 2: EXECUTIVE SUMMARY

Mission

Economic Development Partners and Public Market Development aim to offer comprehensive consulting services to assist the City of Madison with the Madison Public Market Project and is committed to supporting its mission: The City of Madison envisions the Madison Public Market as a thriving and bustling center point of the region's food system. More than a stand-alone retail operation, the Public Market will be the nucleus of a food innovation district, blending food retail sales, prepared food sales, wholesale operations, aggregation/distribution of regional produce, and food processing. Working in partnership with a variety of stakeholders, the City hopes the market and surrounding district will be a catalyst for new food businesses and facilities attracted by the synergies of co-location.

The Market and surrounding food innovation district will serve to aggregate the bounty of regional producers, incubate the creation of new food processors, distributors, and retailers while accelerating the development of existing food businesses to create more jobs and wealth for area residents.

To this end, the City of Madison seeks to build a Market that can help increase regional economic integration and connection by leveraging the region's diverse agricultural assets to build a stronger food sector as a key anchor for the regional economy.

Together we will jointly focus on providing professional and specialized services to meet each of the nine Work Projects as specified in the Request for Proposal (RFP) # 8297-0-20131/DK. It is the goal of every member of our qualified team of experts to research, investigate, evaluate and make recommendations in order for Madison Public Market to position itself within the community to fill a number of important regional food gaps that do not already exist for both the local and regional communities.

Keys to Success

Economic Development Partners and Public Market Development have joined together, along with their Team, to bring over 40 years of leadership, expertise and experience in the value-added agriculture, food, beverage, tourism and public market industries. This highly qualified team will work in close collaboration to achieve the nine Work Product goals as defined in the RFP. This group brings the following keys to success:

1. A group of professionals with a broad range of specialty areas that relate directly to the MPM project and complement each other
2. A high level of experience in the value-added agriculture, food, beverage, tourism and public market specialty areas,
3. A collaborative team approach of working closely with the public, private, community and governmental agencies to bring this important vision to 'reality.'

Our Unique Team Qualifications

❖ Economic Development Partners (EDP)

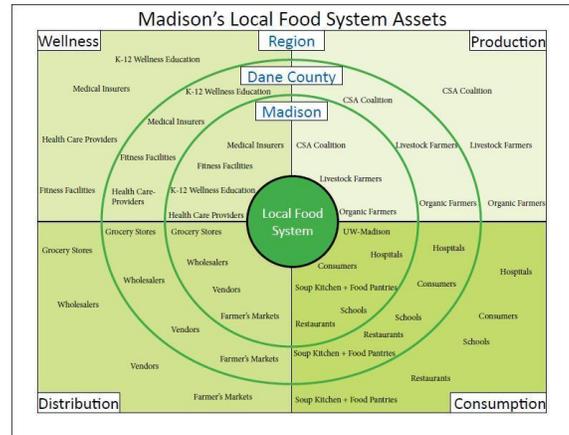
- Economic Development Partners (EDP) – Cynthia Jaggi, Principal Executive Officer and Ruth Dumesic, Partner, have assisted numerous counties, cities and regions in developing highly effective economic development strategies and projects that have allowed for greater job growth, business investment and better lifestyles around the State and the region. Our goal is to gain a complete understanding of our clients' objectives in order to structure a solution that leads to informed decision-making and tangible, measurable results. Our unique combination of economic and community development, along with value-added agricultural and food systems expertise allows us to provide our clients with results that combine the priorities of communities with the interests of the businesses/vendors they seek to attract and retain. We share a commitment to

creating a legacy of projects that result in diverse and sustained economic growth that match the client's own definition of success.

- Their success is their innovative approaches in 'connecting all the resources' and working collaboratively with private, public, community and governmental organizations to make decisions, mitigate risks, implement benchmarks and accountability that will move projects forward and bring visions to reality.

❖ **Public Market Development**

- Aaron Zaretsky, the principal in Public Market Development, has nearly four decades of experience in managing and developing Public Markets – including 15 years as a director of Seattle's internationally acclaimed, Pike Place Market. He has helped to raise over \$100,000,000 in grant funds for Public Markets in 40 cities, has helped create or renovate dozens of Public Markets, and is the recipient of many national, regional, and local awards and honors. As a consultant to over 40 Public Market development projects, he can attest that it is far more cost effective to get expert help early, during a project's initial development stage, than to "fix" problems that occur due to the sponsor's lack of Public Market development experience.
- By assisting companies and institutions in their location decisions, Aaron constantly gains fresh insights into the needs and motivations of the kinds of business activities that many regions hope to attract. Aaron assists public markets through all phases of the selection process, from preliminary site assessments through final negotiations. He helps narrow and evaluate the possibilities to those sites that best meet their needs. He has seen firsthand how communities and regions compete and how they win.



❖ **University of Wisconsin-Whitewater's Fiscal and Economic Research Center (FERC)**

- Dr. Dr. Kashian Kashian is the Director of UW-Whitewater's Fiscal and Economic Research Center (FERC) which prepares both reports and peer reviewed academic articles on topics of interest to regional economists and businesses. Dr. Kashian will be the lead consultant on the regional food asset inventory and mapping analysis for the proposed Madison Public Market. Dr. Kashian has been the Principal Investigator on numerous economic impact analysis studies and has extensive experience in conducting agricultural economic impact analyses to a variety of constituents within the food and beverage industries to determine the economic impact on the State of Wisconsin. Dr. Kashian will be leading the Regional Food Asset Inventory and Analysis Work Product #1 and will manage the asset mapping and supply chain analysis for local and regional food systems and producers within the Madison, Dane County and surrounding region. (see graph). Currently, Dr. Kashian is implementing an asset mapping and supply chain analysis throughout Wisconsin.

❖ **Wisconsin Innovation Service Center (WISC)**

- Sandra Beccue, Market Research Manager will conduct the market assessment and Vendor Outreach work products within this project. She has worked with many business start-ups and will be instrumental in helping identify businesses that might be attracted to join the Madison Public Market. Sandra is familiar with a number of public markets across the country. Sandra specializes in market research and is a project oversight specialist with extensive experience in market research and 'gap' analysis, employee training, project direction, and operations analysis.

❖ **Cuhaci & Peterson, Architects, Engineers & Planners**

- Norberto Campos joined the C&P team in 1989 as an Architectural Designer and now serves as both an Associate Partner and Vice President of Design. His years of varied professional experience coupled with his artistic talents are clearly reflected in the unique, elegant designs he produces, each of which creates a beautiful frame for the painting of life. Since 1978, Cuhaci & Peterson has worked on nearly 1,400 design-build architectural projects these numbers continue to grow. They specialize in Farm Markets and Grocery Portfolios.



THE EDP TEAM - WHAT SETS US APART

INNOVATION. We approach every assignment as a unique challenge to provide ‘best practice thinking’ for success.

IMPLEMENTABLE PLANS. We work in lockstep with clients to assure that our recommendations work for you. Not only are our strategic roadmaps clear and realistic, we work hard to see that implementation begins right away, even before our planning work ends.

LONG-TERM SUPPORT. We stay in touch with clients for years as they bring plans to reality. A number of clients call on us for years afterwards to keep the momentum working and the vision in sync with evolving global competition.

STAKEHOLDER INVOLVEMENT. Our plans are in clear and understandable language because that’s what our clients need to gain broad support in their communities. As our work takes hold, clients may see news media take an interest in the process, bloggers blogging, and the language of plans becoming the language of a community.

MARKET AND COMPETITIVE INSIGHT. Our goal is to gain a complete understanding of our clients’ objectives in order to structure a solution that leads to informed decision-making and tangible, measurable results. Our firm works closely with the University of Wisconsin – Whitewater’s FERC which has worked with dozens of clients using leading edge technology and market research to help chart their futures. When it comes to technology, we think like futurists and perform like realists.

LEGACY. We provide the groundwork for our clients to build legacies – not just bulky reports that just get filed. Our process results in real redirection for economic development efforts that will lift and carry communities forward.



REPUTATION FOR RESULTS. We encourage prospective clients to contact Economic Development Partners clients, past and present, to learn firsthand what others have experienced in working with us.

PUBLIC MARKET DEVELOPMENT – OUR COMPETITIVE ADVANTAGE

Public Market Development was created to give communities access to the tools necessary to create or renovate successful Public Markets nationwide. Its professional website – www.publicmarketdevelopment.com provides a wealth of free information relevant to creating a new Public Market.

Public Markets create a common ground that knits a community together around their most important need (fresh food) and in doing so, provides critical community and economic development benefits. The citizens of Seattle recently voted overwhelmingly in the midst of a recession, to tax themselves \$70,000,000 to repair Pike

Place Public Market. This was because they loved “their” Market and they understood the central place it played in their city’s culture, character, and economy.

Zaretsky has an extensive assemblage of Public Market sample lease forms, rules and regulations, staffing patterns, job descriptions, Articles of Incorporation and Bylaws, operating and capital budgets, images, etc. that will be useful as we proceed. He also has also gained extensive International insights from the over 350 Public Markets he has visited in Mexico, the Caribbean, Central and South America, as well as Africa, Canada, Europe and throughout the U.S.

Public Markets, unlike malls and other commercial real estate projects need to be uniquely tuned to the assets, desires, limitations, and character of the communities they inhabit. That is why public input from community meetings, elected representatives, charettes, and market survey questionnaires is critical. This input needs to balance the sometimes divergent views of the City, residential/citizen customers, other impacted food businesses, the Dane County Farmers Market, prospective tenants, and business interests. For example, to assess the residential community’s desires for location, types of businesses, likelihood of attendance, etc., we will conduct a Market Survey among various cohort groups with a sample of 200. We will analyze the survey results and use it as a basis for informing our recommendations regarding size, use, content, etc.

Having lived in Madison for six years, and having been intimately involved in the early creation of the Mifflin St. Coop and the Willy St. Coop, Zaretsky is very familiar with the assets and complexities of Madison’s communities. Zaretsky has written over a half dozen full blown business plans for other Public Markets, several of which are currently under development.

Our Approach

The emphasis of the project is to serve the local population and provide Madison area residents with convenient and affordable access to fresh and locally-produced food, support Madison’s existing and future food businesses, and create a more integrated regional food system. Though the intent is to serve the local population, the Market will likely become a unique destination and gathering place that draws residents and visitors alike.

We envision that the Madison Public Market will be a complimentary community gathering place to the current Farmer’s Market on the Square and source of fresh local food, crafts and other regional specialties for citizens of Madison, Dane County and for tourists. It will be a place that showcases and celebrates the best of Madison. In addition to fresh foods, there will likely be local crafts, and other food related uses, and products will represent the heritage of the rich patchwork that comprises Madison and Dane County. The Market will showcase the best products representing the character, history, and culture of its citizens. We believe that the Market should be programmed for a diverse medley of public entertainment events such as ethnic festivals, concerts, culinary cooking classes, fairs, etc. A robust calendar of events and classes will keep visitors coming back again and again. These events should be located inside the Market itself, in the open performance space. This Public Market should be an indoor year-round operation that could be open 6-7 days per week.

Our Approach is to categorize the MPM Project into four phases. These phases have been categorized in the order that makes the most logical sense to our Team and incorporates all of the Work Project Tasks. The timeframe allows the City to evaluate the conclusions of each Phase and make ‘Go–No-Go’ decisions, based on data and fact –based research. They include:

Phase One

1. Regional Food Asset Inventory & Analysis (Work Product 1)
2. Vendor Outreach and Cultivation (Work Product 2)
3. Community Outreach & Market Assessment (Work Product 3)

Phase Two

4. Site Selection Assistance) (Work Product 7)
5. Conceptual Building Program & Design (Work Product 4)

Phase Three

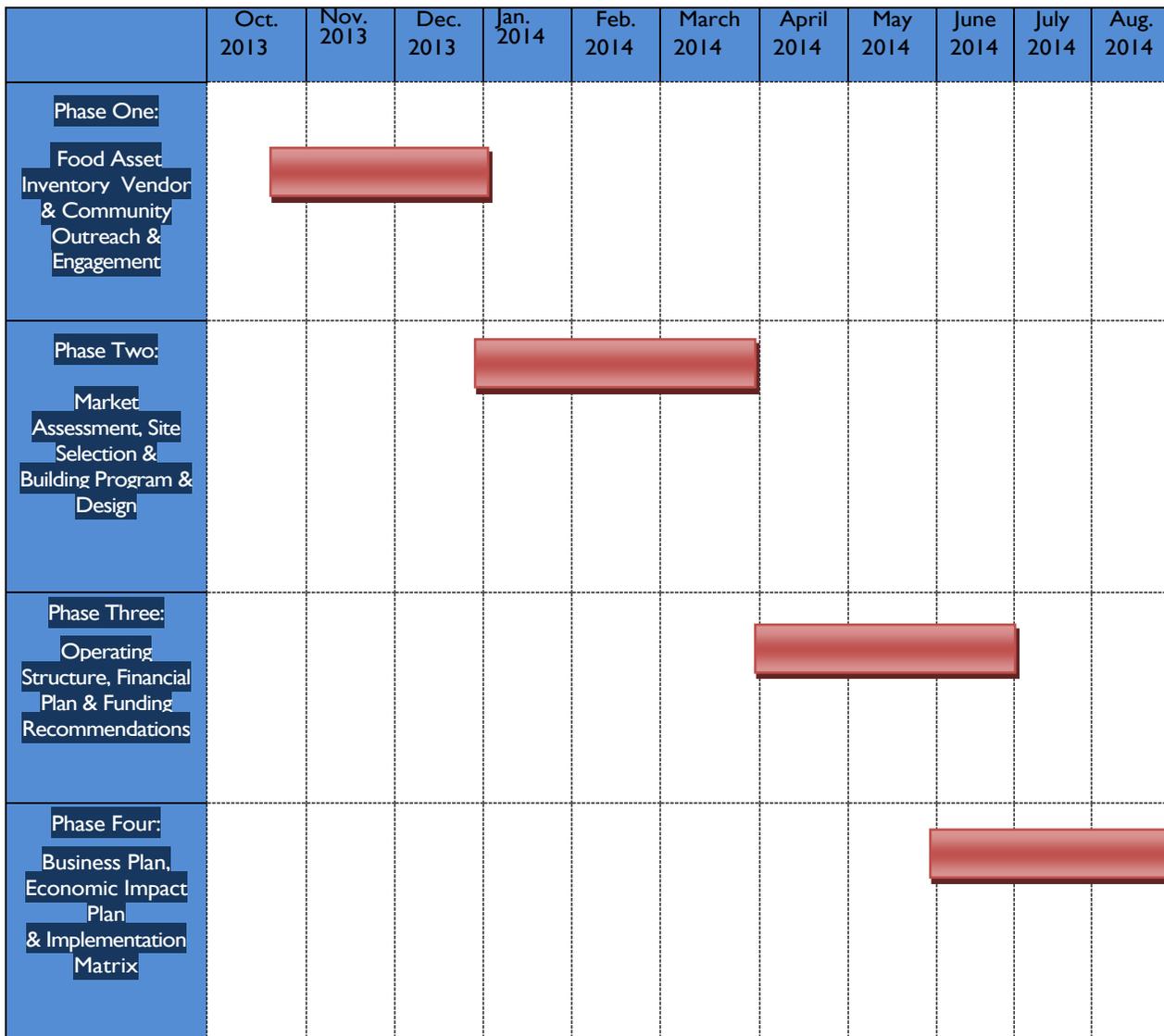
- 6. Operating Structure (Work Product 5)
- 7. Financial Plan & Funding Recommendations (Work Product 6)

Phase Four

- 8. Economic Impact Plan and Considerations (Work Product 8)
- 9. Consulting Team Management (Work Product 9)

Our approach would follow the Timeline and Milestones listed below:

WORK PLAN, TIMELINE & MILESTONES



CHAPTER 3: QUALIFICATIONS, EXPERIENCE & REFERENCES

BACKGROUND AND HISTORY

Two consulting companies, **Economic Development Partners (EDP)** and **Public Market Developmental** have teamed up for this special project. Each company brings a unique set of experience, skills and results that when combined, can give the City of Madison the broad perspective needed to successfully complete the unique and challenging requirements of this project.

ECONOMIC DEVELOPMENT PARTNERS (EDP) BACKGROUND AND HISTORY

Economic Development Partners (EDP) has assisted numerous counties, cities and regions in developing highly effective economic development strategies and projects that have allowed for greater job growth, business investment and better lifestyles around the State and the region. Our unique combination of economic and community development, and agricultural and food systems expertise allows us to provide our clients with results that combine the priorities of communities with the interests of the businesses/vendors they seek to attract. We share a commitment to creating a legacy of projects that result in diverse and sustained economic growth that match the client's own definition of success.

Much of our work involves economies in transition – regions seeking to diversify their economic base, expand job opportunities, foster entrepreneurial growth, attract 'new economy' companies, or conceptualize a new strategic direction for economic development.

Economic Development Partners is located outside of Verona, Wisconsin, has two partners, with combined 50 years of experience in consulting with a variety clients from businesses to non-for-profit and community and governmental agencies. EDP's services include:

1. Strategic planning for economic growth, development, and diversification
2. Target industry identification and niche market segmentation, including cluster analysis and cost benchmarking
3. Competitive organizational benchmarking
4. Performance metric development to measure success and progress over time
5. Strategies to engage diverse stakeholders and gain broad support
6. Market Research and assessments
7. Entrepreneurial environment assessments
8. Tenant/Vendor Prospect identification and development
9. Community and Vendor Outreach and Cultivation
10. Implementation support

PUBLIC MARKET DEVELOPMENT BACKGROUND AND HISTORY

Public Market Development is a national planning firm founded by its Principal, Aaron Zaretsky. For 38 years, it has focused exclusively on working with private developers, local governments, community groups and stakeholders to plan, design, implement, and/or manage Public, Farmer, and Specialty Markets. Aaron Zaretsky, the principal in Public Market Development, has nearly four decades of experience in managing and developing Public Markets – including 15 years as a director of Seattle's internationally acclaimed, Pike Place Market.

Zaretsky has extensive experience in creating and implementing plans for scores of new and/or renovated Market projects in dozens of urban, metropolitan and smaller communities, including several great North American cities.

He has helped to raise over \$100,000,000 in grant funds for Public Markets in 40 cities, has helped create or renovate dozens of Public Markets, and is the recipient of many national, regional, and local awards and honors.

As a consultant to over 40 Public Market development projects, he can attest that it is far more cost effective to get expert help early, during a project's initial development stage, than to "fix" problems that occur due to the sponsor's lack of Public Market development experience.

In addition to nearly forty years of experience in the development and/or management of Public Markets around the country and internationally, Zaretsky has an extensive assemblage of Public Market sample lease forms, rules and regulations, staffing patterns, job descriptions, Articles of Incorporation and Bylaws, operating and capital budgets.

Zaretsky is currently working full time as a Public Market consultant. His consulting experience spans the various aspects of creating and/or redeveloping Public Markets, including the necessary conceptual, feasibility, site analysis, tenant mix, design, fundraising, predevelopment planning, architectural analysis, construction development, project management, marketing, political "positioning", grand opening, and operational stages of development.

Among the 40+ Public Markets that Zaretsky has helped to develop, the Findlay Market in Cincinnati, where he wrote the Master Plan which was successfully implemented, and the Des Moines Public Market which is currently in planning are most similar to the Madison project.

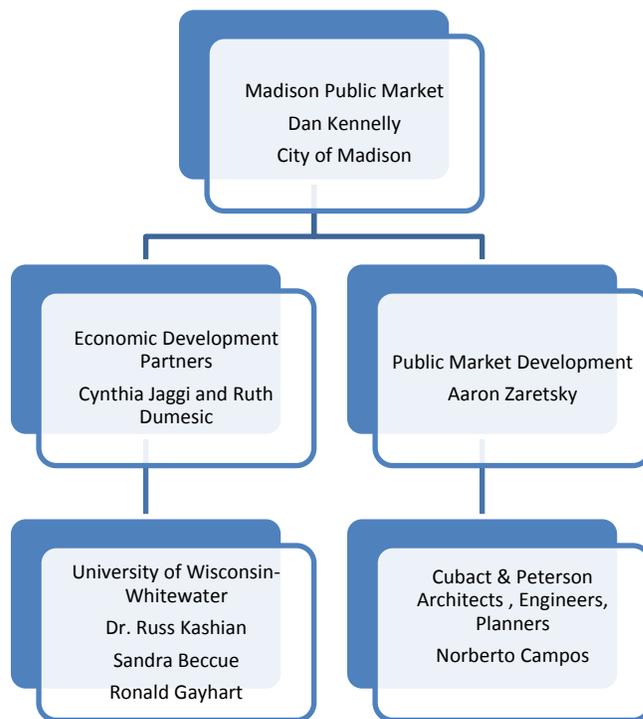
SITE SELECTION

By assisting companies and institutions in their location decisions, Zaretsky sees firsthand how communities and regions compete and how they win and constantly gains insight s into the needs and motivation of the kinds of business activities that many regions hope to attract. PMD assists public markets through all phases of the selection process, from preliminary site assessments through final negotiations

TEAM RESUMES

Resumes of all team members are attached at the end of this chapter.

PROJECT TEAM



Economic Development Partners (Cynthia Jaggi and Ruth Dumesic) and Public Market Development (Aaron Zaretsky) consultants will co-manage the multiple aspects of this project. They have selected other subcontractors with special expertise to accomplish specific tasks within the project. **Resumes of all team members are attached at the end of this chapter.**

RELEVANT EXPERIENCE WITHIN THE PAST FIVE YEARS

Economic Development Partners (EDP) – Cynthia Jaggi and Ruth Dumesic

The EDP Team prepares both reports and peer reviewed articles on topics of interest to regional economists, organizations, agriculture and businesses. Many of EDP's clients are involved in agricultural and food-related industries including:

- **Financial Feasibility Studies:**
 - The World Cheese Discovery Center - Green County, Wisconsin
 - Wisconsin Agricultural Education Center – Manitowoc County, Wisconsin
 - The Kickapoo Culinary Center – Southwestern, Wisconsin
 - World Sustainability Center - Southwestern, Wisconsin
 - Platteville Library Block Redevelopment Study – Platteville, Wisconsin
- **Business Plans:**
 - A cheese manufacturing plants and retail operations
 - Agri- tourism and Culinary Tourism education centers
 - Fork Force, a technology employee-related web site designed to help restaurants qualify, obtain and retain employees
 - Tully Family Creamery, a family-owned dairy equipment manufacturer/distributor/Creamery that produces cheese, milk, yogurt, etc.

- Kickapoo Culinary Center – Innovation Food Kitchen that serves as an incubator for start-up food related businesses.
- **Focus Groups/ Research Studies:**
 - New Food Projects:
 - Value-Added Dairy Products
 - Value- Added Artisan Cheeses
 - Aronia Berries
 - Yogurt
 - Hazelnuts
 - Pressed food oils
- **Tourism Projects**
 - Economic Impact of Silent Sports (Southwestern Wisconsin)
 - Economic Impact of the Ice Age Trail (Wisconsin)
 - Economic Impact of the Fox Wisconsin Heritage Parkway (Wisconsin)
 - Statewide, Multi-County Public Hearings/Focus Groups (Fox Wisconsin Heritage Parkway)
 - Regional Branding for Southwestern Wisconsin - Multi-County Focus Groups (Driftless Wisconsin)

Public Market Development - Aaron Zaretsky:

Zaretsky cut his Public Market teeth as a Director for 15 years at Seattle’s internationally celebrated Pike Place Market during its \$65,000,000 renovation. This Market is universally acclaimed as the economic engine that led the successful renovation of Seattle’s downtown. It is the most visited attraction in an eight state region with over 14,500,000 annual customers. Examples include:

Granville Island Public Market, Vancouver, Canada – where Zaretsky advised the Canadian Federal development team which transformed Granville Island from a decaying industrial site and brownfield into North America’s pre- eminent Public Market. The Market currently enjoys over 10 million annual visitors.

The Global Marketplace in Minneapolis - an 80,000 SF Public Market on the first floor of a 1.2 million SF historic Sears Tower that had been vacant for 40 years. This public/private (Ryan Development) partnership used the Public Market to create the enhanced value for the upper floor private development which includes an upscale hotel, artist housing and an extensive medical office complex.

Findlay Market in Cincinnati – a failing Market that was completely redone and expanded into a much broader Market District. This resulted in scores of new entrepreneurial opportunities and hundreds of new jobs. Findlay Market is now one of the most visited attractions in Cincinnati. It has pioneered the resurgence of the once crumbling Over the Rhine neighborhood where it is located. Zaretsky was responsible for the original master planning.

A number of national businesses worth hundreds of millions of dollars, first started as small, owner-operated “mom and pop” businesses at Pike Place Market. These businesses include Starbucks Coffee, Sur La Table, Wax Orchards, Chukar Cherries, and Cascadian Farm Foods.

Zaretsky has devoted most of his professional life to developing Public Markets because of their demonstrated ability to create jobs and entrepreneurial opportunities for enterprising entrepreneurs. He led the creation of a

Ford Foundation task force that focused on using Public Markets as a proven tool for community and economic development.

Zaretsky is currently advising several federal government officials on a variety of public policy initiatives relating to the funding of Markets. He has helped to raise over \$100,000,000 in grant funds for Markets in dozens of cities, and has helped create or renovate roughly 40 Public Markets. He has visited over 350 Public Markets worldwide.

He is the recipient of dozens of national, regional, and local awards and honors. He has been a featured presenter at a variety of national conferences including the White House Conference on Economic Development, the American Planning Association, the International Downtown Association, and the National Main Street Conference.

Zaretsky believes that Public Markets work best when they showcase the best fresh and local food that a region has to offer while meeting the everyday fresh fare and neighborhood shopping needs of its residential customer base in a socially dynamic and entertaining venue. Public Markets do best when they create a vital, exciting and sensually rich experience for their customers, while providing a common ground that is welcoming to, and provides products for, a diverse customer base that reflects the broader community.

Other Team Members Experience

Dr. Russ Kashian, is the Director of UW-Whitewater's Fiscal and Economic Research Center (FERC) which prepares both reports and peer reviewed academic articles on topics of interest to regional economists and businesses. Dr. Kashian will be working on the regional food asset inventory and mapping analysis for the proposed Madison Public Market. See his resume for references and project specific information, as well as the various economic development considerations and options.

Sandra Beccue, Market Research Manager works with the Wisconsin Innovation Service Center (WISC) through UW-Whitewater. She will be instrumental in working on the vendor outreach and market assessment task for this project and has worked with many business start-ups and will be instrumental in helping identify businesses that might be attracted to join the Madison Public Market. Sandra is familiar with a number of public markets across the country.

Norberto Campos, Vice President of Design/Architect for Cuhaci & Peterson Architects, Engineers, and Planners. Norberto Campos joined the C&P team in 1989 as an Architectural Designer and now serves as both an Associate Partner and Vice President of Design. His years of varied professional experience coupled with his artistic talents are clearly reflected in the unique, elegant designs he produces, each of which creates a beautiful frame for the painting of life. Since 1978, Cuhaci & Peterson has worked on nearly 1400, primarily food related projects across the nation and these numbers continue to grow.

CHAPTER 4: PROJECT APPROACH

The EDP Team supports the vision of the City and Local Food Committee that the Market primarily serve local residents and that an analysis regarding the appropriateness of co-location with a food distribution hub and the possible creation of a food district surrounding the Market. Milestone phases listed earlier in this proposal are opportunities for the City in consultation with the EDP Team to make ‘Go, No - Go decisions’ depending on the findings of the work products.

The following summarizes our general approach as to how we will address the project. City of Madison’s staff requirements will only be listed in the Work Projects if they are required. Many of the Work Projects do not require staff time or data. However, Economic Development Partners and Public Market Development will be in constant communication with the City of Madison’s leaders and committees throughout this project.

WORK PRODUCT 1: Regional Food Asset Inventory and Analysis

Technical Approach

EDP and Public Market Development will be working with the University of Wisconsin – Whitewater’s Fiscal and Economic Research Center (FERC) because of their expertise in supply chain analysis and regional food asset mapping. FERC has handled asset mapping and supply chain analysis for regional food systems and producers (which includes Southwest Wisconsin, Northwest Illinois, and Eastern Iowa). They are dedicated to providing clients with a thorough analysis of applicable supply chains, in order to ensure research and data-based decision-making for resource investments.

FERC methods are designed to provide a clear “map” of where the greatest potential lies in a venture as well as where any shortcomings may be. To do this, we incorporate Industry Research Reports combined with data from Implan to get clear views of the industry’s supply chain in addition to supply/demand data across hundreds of industries in a given area. This ensures we dig down into every venture’s supply chain, a minimum of three levels, and get accurate data to identify the venture’s potential. Recently, the FERC has completed projects involving the economic impact of processed sweet corn, ginseng, cranberries and nutraceuticals on Wisconsin’s economy. By incorporating the ideas of asset mapping and supply chain into the concept of economic impact, we combine opportunity with outcomes.

Work Plan

Identify demand for locally-produced goods. A food hub is by definition a local enterprise which will conduct almost the entirety of its business within a defined trading radius. We will expand that radius into three circles: the City of Madison, Dane County, the region surrounding Dane County. Evidence that there is strong demand for local products in the local market is important to establish and grow the business. Signs of existing demand include:

- A thriving and growing base of farmer markets and CSAs
- A core group of restaurants who promote locally-sourced items on the menu
- Grocery stores which offer local products
- Presence of large institutions and potential customers which may be subject to pressure and/or legislation supporting local procurement
- Reoccurring, positive media coverage of local food activity in the region
- Assessment of oversupply or undersupply of fresh foods in the target areas.

3.1 WORK PRODUCT #1: REGIONAL FOOD ASSET INVENTORY & ANALYSIS (Deliverable Task 1)	Hours
1. Finalize schedule and review scope for asset mapping	12
2. Conduct assessment of MPM documents	6
3. Prepare for and participate in kick-off meeting	15
4. Conduct asset - mapping research	25
5. Research production, distribution, consumption, wellness businesses	20
6. GIS Mapping & Gap analysis	30
7. Organize and make arrangements for focus groups	10
Subtotal Task 3.1:	118

Timeline

Assuming our project commences the first of October; Work Project #1 will be completed by the end of December 2013.

Milestones

In order to create a Business Plan for the Madison Public Market, the FERC will implement comprehensive asset mapping and supply chain analysis of the Madison and Dane County region to identify the assets and 'gaps' that exist to support the Madison Public Market project. In considering a food hub project, this information will provide the research and data to determine if a food hub, aggregation or processing center would be viable and would merit additional investigation—so this stage will center on locating signals that the business could be successful.

Road Blocks

The key to supply chain analysis is to link the suppliers and the producers. Opportunities for economic growth exist where there is a network that is not fully optimized. Our GIS specialists would be able to map the most efficient network for producers/farmers who wish to sell their produce at the food hub. In effect, suppliers of inputs exist, but they are not yet filling the full demand of the producers. 'Gaps' may exist where there is a demand for inputs, but there is no local source of that input. Other road blocks could include:

- Aggregation and traceability of products from small producers
- Labeling and Recalls of product
- Institutional requirements for Food Service
- Working with consumers and Volume Buyers – produce 'placing plans' for products by season
- Site locations
- Types of payments the MPM will be able to accept – ie: Food Share (food stamps) etc.

Deliverables

REGIONAL FOOD SYSTEM ASSET MAP/ANALYSIS FOR MADISON, DANE COUNTY AND SURROUNDING REGION (TASK 1)

WORK PRODUCT 2: Vendor Outreach and Cultivation

Technical Approach

Since the 166 previously surveyed vendors *have already expressed an interest* in receiving future information and expressed a high rate of willingness to participate in future market surveys/focus groups, the team will work with this group of vendors that should be designated for one-on-one interviews and for focus groups. We anticipate conducting between 30 – 40 phone interviews and 2 – 3 Vendor focus groups. The following are topics that could be discussed: Types of items they could process, repack, store, distribute and retail for sale at the Market, types of uses that would be utilized at the Food Hub/Public Market, Space needs of vendors, Business Services that would be needed to support their product development ie: aggregation, washing, cooling, grading, sorting & packing, re-packing, storage, Sales and Marketing, distribution, retailing, branding, packaging/label development, etc. This information would be vital to the Business plan process.

Work Plan

Vendors Already Surveyed: The EDP Team will work with the City of Madison's Local Food Committee and the Mayor to identify the group of vendors (n=166) who were surveyed as of January 13, 2013 and already expressed interest in becoming a vendor within a Public Market and current Farmer's Market Vendors to focus efforts on 'cultivating' this group to engage in the planning and developing process for the proposed new Market by learning more and verify what type of market they would be personally interested in vending within, the product mix they would be offering for sale, the space needs they would require and to educate and provide them with updates on the progress and plans for the Madison Public Market to gain their 'buy-in.' Gaining the 'Buy-in' of this group of Vendors that have already expressed will be vital as they can become 'ambassadors' to help promote the Madison Public Market to other potential, quality vendors and anchor businesses. These vendor survey results and cultivation efforts will be of value in the preparation of a Business Plan.

New Vendors: In an effort to create a food district surrounding the Public Market, the EDP Team would identify and reach – out to chefs using locally grown and produced foods in the City, food bloggers, foodies, food editors/writers, food social media, producer and food organizations within the City, County and State to identify additional vendor opportunities and to gain input regarding the Public Market opportunity development. The EDP Team would work closely with the Dane County Food Council, the UW – Extension office and the Food Coalition as it has food entrepreneurs that are already in place and looking for opportunities to retail and expand their products.

Vendors Cultivation: Interviews, Focus Groups and Communication Strategies

Based on the Public Market Survey conducted, the level of interest in the Market is high. On a scale from just curious to very interested 65% of respondents chose very interested. Potential vendors’ intense interest in the development of a Market was supported in the almost **unanimous response (94.8%)** to receiving future information and emails on the Market planning process. The respondents high rate of willingness (67.8%) to participate in future Market surveys and focus groups is another indicator of their interest in the Market’s development. This group of Vendors wants to become involved in the Public Market and needs to engage in the process!

Since the 166 previously surveyed vendors **have already expressed an interest** in receiving future information and expressed a high rate of willingness to participate in future market surveys/focus groups, the team will work with this group of vendors that should be designated for one-on-one interviews and for focus groups. We anticipate conducting between 30 – 40 phone interviews and 2 – 3 Vendor focus groups. The following are topics that could be discussed: Types of items they could process, repack, store, distribute and retail for sale at the Market, types of uses that would be utilized at the Food Hub/Public Market, Space needs of vendors, Business Services that would be needed to support their product development ie: aggregation, washing, cooling, grading, sorting & packing, re-packing, storage, Sales and Marketing, distribution, retailing, branding, packaging/label development, etc. This information would be vital to the Business plan process.

Business Surveys

Using web-based surveys to efficiently collect input, we will survey potential vendors/producers to gather information on the Vendor’s business model, product mix, space needs, Lease Rates/Stall fee structure. workforce needed, hiring trends; and future opportunities for the Public Market. This information would be vital to the Business plan process.

Public Market Advisory Group Meetings

Critical to the success of this project would be to identify and develop a Public Market Advisory Group comprised of Vendors and stakeholders that have expressed an interest in becoming a part of the Public Market and will assist in gaining significant engagement in each Vendor segment involved in the Public Market. With the assistance of the City of Madison, the Local Food Committee and local partners, the project team will organize and facilitate the Advisory meetings during Phase One. Ideally, the itinerary will include an updates on Vendor Recruitment and Retention strategies, Business Services needed to support vendors, building and space needs updates, market amenities identified and resources for vendors/entrepreneurs.

Communication Strategies:

As suggested by the City’s Local Food Public Outreach Subcommittee, having an active and engaging internet presence will be important tool to draw more people into the conversation about the Public Market. This will include a traditional website hosted on the city of Madison page, as well as using social media.

Homepage - This will be the ‘go to’ source of information on the project. It will be kept up-to-date and will serve as a library for background information including previous reports and studies to document how the public market concept has evolved over time.

Social Media - Per the Subcommittee’s suggestion, City staff will explore creating a Madison Public Market Facebook page and/or Twitter account to post updates and information about the project.

3.2 WORK PRODUCT #2: Conduct Vendor Outreach and Cultivation (Deliverable Task 2)	Hours
1. Facilitate Interviews, workshops for MPM, kick-off mtg. to gain feedback & identify actions and input	60
2. Vendor Input Collection	50
3. Provide workshop documentation and coordination at each workshop venue	30
4. Plan & facilitate focus groups	60
5. Business Survey Dev. & Implementation	40
6. Vendor Assessment & Needs Plan	50
7. Tenant Lease Plan/Stall fee structure	40
Subtotal Task 3.2:	330

Timeline

Assuming our project commences the first of October, Work Project #2 will be completed by December 31, 2013.

City Staff Time/Information Required

The EDP Team will work with the City of Madison’s Local Food Committee and the Mayor to identify the group of vendors who were surveyed and expressed interest in becoming a vendor within a Public Market.

Deliverables

PROSPECTIVE VENDOR ASSESSMENT AND NEEDS, LEASE RATES/STALL FEE STRUCTURE (TASK 2)

WORK PRODUCT 3: Community Outreach and Market Assessment

Technical Approach

The Madison Local Food Committee (Committee) and its Public Outreach Subcommittee (Subcommittee) have asked City staff to create a public outreach plan to guide efforts to engage the public and stakeholders in the Public Market project. Moreover, the committees suggested a public outreach process that goes beyond simply hosting public meetings, but uses a variety of outreach techniques to reach diverse groups within the city. Six “Outreach Strategies” will engage the public over the next 6-12 months, overlapping the development of the Business Plan.

Work Plan

MADISON PUBLIC MARKET PROJECT KICK-OFF, BUSINESS PLAN KICK-OFF MEETING, CITY ADVISORY GROUP MEETINGS & PUBLIC INPUT COLLECTION

The team will engage key public and private sector stakeholders from across the City and county to gather qualitative information on the issues affecting the Madison Public Market, and to build the support and consensus.

Madison Public Market Project Kick-off Meeting

The project will be initiated through a kick-off meeting with The City of Madison staff and the Madison Local Food Committee involved with the Madison Public Market project.

Business Plan Kick-Off and Visioning Meeting

Upon being hired as the Consultant Team on the project, the City will host a community-wide meeting to introduce the Consultant Team to the city. This meeting will likely occur in a central downtown location. This meeting will be designed as a dynamic, interactive, inclusive meeting that encourages meaningful input. This meeting will be thoughtfully facilitated and utilize a variety of techniques to gather input potentially including questionnaires, mapping exercises, small group discussions, “sticky-note” exercises, etc. The EDP Team will develop the approaches used, the agenda, goals for the Kick-Off meeting and act as the facilitator for the meeting. A comprehensive summary and follow-up of the Kick-off meeting would be prepared, presented and incorporated into the Business Plan.

In addition, there will be the following data collection interviews, focus groups and surveys:

- Stakeholder Interviews and Focus Groups
- Vendor Survey
- Consumer Survey
- Neighborhood Meetings

Market Assessment and SWOT Analysis

Utilizing the insight provided by the focus groups, stakeholder interviews, and neighborhood meetings in addition to the data collected from the Vendor and Consumer Surveys, the partners will assess the market potential of the proposed Madison Public Market. The market analysis will include a description of the industry size, growth rate, and sales projections, industry trends, an analysis of the local market potential, the competitive landscape and advantages. The SWOT analysis will look at the strengths and weaknesses of the Madison Public Market from the perspectives of farmer/producers, customers including intuitional and residential, neighboring residents, and cottage industries. Opportunities will include possible remediation of Madison food deserts, synergies with existing food processing clusters, and business development opportunities for producers and food related cottage industries.

3.3 WORK PRODUCT #3: Community Outreach & Market Assessment (Deliverable Task 3)	Hours
1. Plan agenda, materials for Project Kick-off Mtg.	20
2. Facilitate Business Plan Kick-Off and Visioning Meeting	10
3. Stakeholder Interviews 10 - 20	35
4. Prepare & conduct 3 - 4 Focus Groups	40
5. Dev. & implement Vendor Surveys	45

6. Dev. & implement Consumer Surveys	40
7. Prepare for & conduct 4 Neighborhood mtgs.	40
8. Market Assessment	60
9. Conduct SWOT analysis of MPM region	10
10. Synthesize findings to create updated Community Outreach Plan, Market Assessment & SWOT Analysis document	15
11. Prepare and present DRAFT Community Outreach Plan to MPM Board	12
12. Identify requirements/resources needed to implement recommendations	6
Subtotal Task 3.3:	333

Timeline

Assuming our project commences the first of October, Work Project #3 will be completed by December 31, 2013.

Milestones

1. Comprehensive summary of the Visioning meeting
2. EDP Team will conduct these meetings in October/November and will report back and follow-up by the end of December, 2013 Vendor survey initial flight
3. Customer survey initial flight

City Staff Time/Information Required

The City will work with neighborhood associations, business associations, neighborhood planning councils, and Alders in these locations to gain broad public and neighborhood notice and participation at these meetings.

Deliverables

COMMUNITY OUTREACH AND MARKET ASSESSMENT WITH SWOT ANALYSIS (TASK 3)

WORK PRODUCT 4: Conceptual Building Program and Design

Technical Approach

The Madison Public Market and Regional Food Hub development for the building design should be based upon the needs of the potential vendors, food processors, distributors and retailers as identified and researched in Work Products #1, 2 and 3 and should support the vision of the Madison Public Market as outlined in the RFP.

Work Plan – Building Program and Design

Madison Public Market building program and design will be based upon the needs of the potential vendors, producers, food processors, distributors and retailers needs as identified and researched in Work Products #1, 2, and 3. Based on these potential vendors and their identified needs for likely space needed this will greatly influence the building program and design. ***The architecture sets the stage upon which the main event unfolds – the product, not the building, is the main event.*** The structure will be designed to anticipate and gracefully accept the products that they will showcase. Types of likely space that will be required include:

- Permanent stalls
- Permanent Stores
- Carts (moveable)
- Indoor and Outdoor Day Tables

In addition to core spaces provided, other Ancillary services can be offered to benefit food entrepreneurs, growers, local neighborhoods and provide the facility with additional revenue streams:

- Performance Space for Events
- Culinary Education/Community Kitchen
- Packaging/Labeling
- Marketing and Business Development:
- Business Development Services to Growers and Entrepreneurs

Building Rendering With Comprehensive Building Cost Estimates

The EDP Team and Public Market Development will work closely with Cuhaci & Peterson Architects.

Together, they have designed numerous Public Markets around the country and can identify the size, design, materials, and systems needed to support the Madison Public Market as it will be utilized by vendors and will be desirable to customers and visitors as identified in Work Products #2 and 3. “Green and Sustain-able” building materials and technologies will be identified that could and should be incorporated into the facility.

Cuhaci & Peterson Architects will prepare conceptual floor plans, site plans, massing studies, etc. for the Public Market facility and will identify items/elements of the building program and design that are needs/requirements of a facility; and, those items/elements of the building program and design that are optional, but “nice to have.” The EDP Team will explore ways, if appropriate, in which a Market building could incorporate elements of other food-related initiatives already underway, such as the Northside FEED Kitchen Incubator or Wisconsin Food Hub Cooperative.

The Madison Public Market building program and design and Regional Food Hub development should be based upon the needs of the potential vendors, producers, food processors, distributors and retailers as identified and researched in Work Products #1, 2 and 3 and should support the vision of the Madison Public Market as outlined in the RFP

3.4 WORK PRODUCT #4: Conceptual Building Program & Design (Deliverable Task 4 & 5)	Hours
1. Internal Market Design and Floor Plan based on Vendor Input	40
2. Building Rendering to scale & elevations	25
3. Prepare the Site Plan for MPM	20
4. Prepare Comprehensive Building Cost Estimates - materials, systems, etc.	20
5. Prepare comprehensive timeline for design-build process for MPM	10
Subtotal Task 3.4:	115

Timeline

Assuming our project commences the first of October, Work Project #2 will be commence January 1, 2014 and be completed by April 1, 2014.

Deliverables

CONCEPTUAL MARKET BUILDING PROGRAM, DESIGN AND FLOOR PLAN (TASK 4)
BUILDING RENDERING WITH COMPREHENSIVE BUILDING COST ESTIMATES (TASK 5)

WORK PRODUCT 5: Operating Structure

Technical Approach

There will be two phases to developing the Operating Structure. The first, we will develop an optimal organization structure and the second we will develop the operating structure and management/staffing plan for the Madison Public Market. The EDP Team, led by Aaron Pohl-Zaretsky, will utilize his over 30 years of consulting with Public Markets all over the world, to review ‘best operating practices’ and summarize operating structures used to support other Public markets and present our recommendations on the Operating Structure that would be best – suited to the Madison Marketplace. He has put together over a dozen management plans for other Public Markets and had a feel for what works and what does not work.

Work Plan

The goals of the Operating structure should include the ability to:

- coordinate public and private interests
- allow for more flexible, entrepreneurial management
- raise funds from private donors, foundations and corporations
- increase potential for raising state and federal grants
- work with small-scale producers and businesses
- make decisions quickly
- attract volunteers
- establish strategic partnerships
- recruit producers, vendors, and minority populations
- have mechanisms for listening to customers, producers and vendors

Management/Staffing

The EDP Team will recommend the management/staffing plan that will support the programming plan, market schedule, hours of operation per week, positions and job descriptions that would be essential to manage the market along with the staffing configuration and staffing budget required to manage the market

on the "floor" whenever the market is in operation and/or open to vendors. The proposal will identify annual operating costs associated with this plan.

Operating Budget ProForma and Tenant Leasing Plan

The EDP Team will develop the Madison Public Market's capital budget, operating budget and tenant leasing plan which will forecast annual sales based on MPM's operating revenue options and income 'streams' including rental income from vendors based on the tenant leasing plan and forecasted lease rates per square foot annually. The budget will summarize facility operating and maintenance expenses identified in Work Product #4, along with all of the items identified in Work Product #5, prepare several annual operating budget options for the Market. Actual rent will have a range that will take into account such factors as location in the market, importance of a tenant to overall product mix, how a tenant fits with the market mission and cost of servicing the tenant as well as likely annual gross sales of the tenant. Additionally, foot traffic will be driven by aggressive programming and marketing of the common and event space which could gain higher rental rates. The retail spaces themselves will be designed for intensity and density of use which creates a highly efficient lease space, including spillover into the corridors.

3.5 WORK PRODUCT #5: Operating Structure (Deliverable Task 6 & 7)	Hours
1. Operating Structure & Management/Staffing Plan	50
2. Operating Budget ProForma & Tenant Leasing Plan	75
3. Develop MPM Business Plan DRAFT	110
Subtotal Task 3.5:	335

Timeline

Assuming the project work commences on October 1, 2013, this project Work Plan #5 will begin on April 1, 2014 and will be completed by July 1, 2014.

Deliverables

OPERATING BUDGET PROFORMA AND TENANT LEASING PLAN (TASK 6 & 7)

WORK PRODUCT 6: Financial Plan and Funding

Technical Approach

The EDP Team, led by Aaron Zaretsky, has helped to raise over \$100,000,000 in grant funds for Public Market projects. Public Markets typically need between 70-100% grant support for their capital funding – depending on their location, mission and goals. They should not need any operating support once they reach full occupancy, (typically 92-93% occupancy), in year 3 or 4 from their grand opening. To raise the millions of dollars that are often necessary to create a new Public Market, it is often necessary to 'layer' together many funding sources. The EDP Team will develop and recommend the Financial Funding Plan for the capital and operating expenses of the MPM, including 'Sources and Uses' and likely funding agencies/organizations, sponsors, private investment funding opportunities, New Market monies and tax credits, capital campaign feasibility, and community outreach. Zaretsky has led a number of Capital Campaigns for Public Markets and will lend his expertise towards outlining a detailed fundraising plan for the Madison Public Market.

Work Plan

Public Market Development has helped to develop the fundraising plans and capital budgets for dozens of Public Markets throughout the country. In addition, he was a Director during the \$65,000,000 renovation of Pike Pl. Market and the \$13,000,000 renovation of the Grove Arcade Public Market. This hands-on experience will be utilized to develop a financial plan and budget which will be grounded in experience and knowledge. The budget will identify construction costs as well as the various other factors (planning, permits and fees, landscaping, etc. that goes into the development of a total project budget.

3.6 WORK PRODUCT #6: Financial Plan & Funding (Deliverable Task 8)	Hours
1. Financial Plan	45
2. Funding Sources - Identify resources and sources of funding to implement the plan	50
Subtotal Task 3.6:	95

Timeline

Assuming the project work commences on October 1, 2013, this project will begin on April 1, 2014 and will be completed by July 1, 2014.

Deliverables

FINANCIAL PLAN AND FUNDING SOURCES (TASK 8)

WORK PRODUCT 7: Site Selection Assistance

Technical Approach

The roughly 70 factors that need to be weighted in selecting an appropriate site for the Madison Public Market will be detailed. Public Market Development has conducted over a dozen site analysis for other Public Markets. This has resulted in the successful siting of numerous Public Markets. In addition, Zaretsky has produced two Site Analysis for the Madison Public Market and he is very familiar with Madison’s neighborhoods having been a resident for 7 years.

Work Plan

Finding the site that meets the critical factors necessary to develop a successful Madison Public Market is essential. ***“The One way to think about site decision is to either fix a vision and ask what location best serves that vision or fix a location and ask what vision best fits that site.”***

There has been much substantial work completed by past teams of consultants that suggest that a Madison public market to succeed needs to be a regional facility. At a minimum it requires a number of things to thrive:

1. Dense residential base
2. Dense employment base
3. Centrality within the region (Dane County)
4. Needs to be located in an area that is currently not the “turf” of any one particular group (high income, low income, racial group, gays/lesbians, young, old, etc. It needs to be in a location that can become everyone’s “turf”. Given the distinctive nature of Madison’s wonderful neighborhoods, this will be part of the challenge in recommending an appropriate site.
5. Access to parking and transit options – including bicycle access and parking
6. Visibility - Our team will work closely with the City of Madison to find the best possible site/sites for the Market.

The Team will review the previous Site Selection studies and provide the City with the list of criteria for a successful Public Market based on ‘best practices’ used in other urban areas similar to Madison and should the City have several sites or buildings under consideration as potential locations for the Market, we will provide guidance on which site or building is most suitable and why. EDP will provide the City with a list of building criteria needed for a suitable adaptive reuse of an existing structure.

Aaron Zaretsky, consultant will provide the City with information related to the other Work Products that would help the City make a determination about whether or not a specific site or building is appropriate for the Market.

3.7 WORK PRODUCT #7: Site Selection Assistance (Deliverable Task 9)	Hours
1. Dev. list of site selection criteria for MPM based on ‘best practices’	20
2. MPM - Optimal Site Selection Recommendations & Rationale	40
Subtotal Task 3.7:	60

Timeline

Assuming the project work commences on October 1, 2013, this project will begin on January 1, 2014 and will be completed by April 1, 2014.

City Staff Time/Information Required

Our team will work closely with the City of Madison to find the best possible site/sites for the Market.

Deliverables

SITE SELECTION CRITERIA AND RECOMMENDATION (TASK 9)

WORK PRODUCT 8: Economic Development Considerations

Technical Approach

Direct, indirect, and induced economic effects grow out of a Madison Food Hub. The establishment of the Food Hub results in direct effects on that particular industry. These include the wages of people working at the hub, and increased tax revenues from those wages. In addition to direct effects there are also indirect effects. A business, whether new or established, creates indirect effect through inter-industry transactions. Induced effects come out of the direct and indirect effects. The people employed by a Madison Food Hub would earn wages that they would in turn spend and save elsewhere. In addition, since the Madison Food Hub would increase inter-industry transactions, other companies would employ more people, whose wages and taxes would be induced effects of the Food Hub. The subsequent income and sales taxes, created by the increased direct, indirect and induced spending are an additional indirect economic benefit of the Madison Food Hub.

Work Plan

The FERC's GIS specialists will be able to provide supporting documentation by mapping the following:

- Food desert identification with Transportation Overlay and demographic breakdown.
- Producer locations with Transportation Overlay
- Regional Food Clusters – food processor locations
- Commercial and institutional customer locations
- Madison Tourist locations

3.8 WORK PRODUCT#8: Economic Impact Plan and Considerations (Deliverable Task 10)	Hours
1. Prepare and conduct meeting with MPM to finalize Economic Impact Plan strategies	24
2. DRAFT Master Economic Impact Plan	50
3. Use GIS Mapping of Food desert identification with Transportation Overlay	4
4. Use GIS Mapping of Producer identification with Transportation Overlay	4
5. Use GIS Mapping of Regional Food Clusters - food processor identification	4
5. Use GIS Mapping of commercial & institutional identification	4
6. Define Tourism strategies and visitor spending impact and job creation	4
7. Identify & measure the Direct, Indirect & Induced economic impact of the MPM area	6
8. Make recommendations for organization and management of MPM going forward	6
9. Update draft Economic Impact Plan	8
10. Prepare FINAL document for MPM review and acceptance	12
11. Make final revisions	6
12. Prepare support documents based on research	10
13. Issue report in printed and electronic formats	8
Subtotal Task 3.8:	126

Timeline

Assuming the project work commences on October 1, 2013, this project will begin on June 1, 2014 and will be finalized on August 31, 2014.

Deliverables

ECONOMIC IMPACT PLAN AND CONSIDERATIONS (TASK 10)

WORK PRODUCT 9: Consultant Team Management

The most important aspect of this project is the need for a tightly integrated process.

Technical Approach

Throughout this 12 – month period, this project will be under the overall administration of Cynthia Jaggi, as the designated Project Manager. She will be assisted in the research, planning and implementation phases by Ruth Dumesic, partner with EDP, Aaron Pohl-Zaretsky, Public Market Development and Dr. Kashian, UW – Whitewater, Fiscal and Economic Research Center (FERC). Cynthia is the principal of Economic Development Partners, and she will serve as a part of the larger MPM consultant team. With over 30 years of project

management experience with Fortune 500 companies, Cynthia will lead the Business Plan Development strategy and action plan phase, with significant input from Aaron Pohl-Zaretsky, Public Market Development.

Work Plan

Cynthia will be the primary point of contact with MPM Advisory Board, City of Madison either through personal meetings or through teleconferencing technology, including Skype and we will request that MPM also provides us with a single point of contact. Cynthia will report to the MPM Board at bi-monthly meetings over the course of the project. Cynthia will submit bi-monthly progress reports and will guide the planning initiative, facilitate workshops and focus groups, participate in developing engaging strategies and analyze feedback. She will assess Public Market Development and economic revitalization and development opportunities using previous, current and additional resources, recommend strategies to leverage opportunities and will develop a comprehensive Business Plan for the Madison Public Market. Cynthia’s qualifications and experience are provided in Chapter 3 of this RFP proposal.

3.9 WORK PRODUCT #9: Consultant Team Management (Deliverable Task 10)	Hours
1. Develop Implementation Matrix with Timelines	20
2. Facilitate weekly Project Management Mtgs., calls, teleconferences with EDP Team	100
3. Reporting and attendance at MPM City of Madison & board meetings	24
4. Prepare 6 bi-monthly status reports for MPM board & City of Madison	24
5. Participate in MPM board meetings - 6 meetings in person, including final presentation	48
6. Participate in off-site meetings, updates as required (6 meetings)	12
Subtotal Task 3.9:	228

Timeline

Assuming the project work commences on October 1, 2013, this project will begin on June 1, 2014 and will be finalized on August 31, 2014.

City Staff Time/Information Required

As needed to move the project forward.

Deliverables

MADISON PUBLIC MARKET BUSINESS PLAN INCLUDING AN IMPLEMENTATION MATRIX (TASK 10)

At a minimum, the Business Plan will have chapters on the findings referenced above as well as:

1. Market’s mission and goals that reflect the City’s vision for the Market
2. Market Report/Survey –questions specifically geared toward multiple separate cohort groups (nearby residents, city residents, tourists, employees/employers, commercial realtors, etc.). Analysis of these results will provide invaluable information on location, tenant mix, and so on, as well as helping to build an economic model.
3. Tenant Leasing Plan. The scale, type, and quality of recommended tenants.
4. Design Program – A written narrative and technical description of the design of the Public Market with sufficient detail for an architect to base a final design.
5. Simplified schematic layout + bubble diagram showing the relationship between project elements.
6. Parking Analysis and recommendations.
7. Management/ownership/staffing Plan.
8. Preliminary Capital Budget.
9. Rent setting strategy.
10. Trade area definition and analysis.
11. Preliminary Operating ProForma.
12. Financial Impact Analysis – job creation, entrepreneurial development, and new taxes generated.
13. Marketing Plan – PR, special events, advertising.
14. Fundraising plan.
15. Conclusions

**Resumes
of
Economic Development Partners
and
Public Market Development
Team Members**

ECONOMIC DEVELOPMENT PARTNERS

Cynthia K. Jaggi, MBA



Cynthia K. Jaggi, Economic Development Partners, Principal Executive Officer, will serve as the Madison Public Market project manager. Cynthia is an executive with over 30 years of proven ability to successfully direct all facets of Strategic Business Development and Planning, Financial Feasibility, Operational Management, Marketing and Branding. Based in the Verona area, Cynthia has strategic and tactical expertise in marketing planning, competitive analysis, branding, positioning, segmentation, business and consumer segment marketing, marketing communications, product management, financial feasibility, pricing and online marketing. Cynthia has excellent leadership skills in leading large teams, managing vendors, and contract negotiations. Her experience working with Wisconsin's Dairy Business Innovation Center and other agri-businesses in the food industry, brings targeted insight into the opportunities and challenges that would be encountered by the Madison Public Market and their producer/vendor partners. Recent market feasibility studies on behalf of clients seeking information about customer requirements for innovative value-added products and services, customer packaging and product feature requirements; market expansion opportunities for locally – grown food products, Artisan cheeses, aronia berries, production and operations; and the feasibility of establishing an Innovation Kitchen and Food Hub in Wisconsin provides a basis for in-depth research and analysis focusing on the specific needs of the proposed Madison Public Market and its participants. Cynthia's previous work experience includes Dairy Business Innovation Center, Johnson & Johnson, Springs Window Fashions and NovoNordisk. Cynthia has a MBA and a BS in Business-Marketing from the University of Wisconsin-Madison.

As the project manager, Ms. Jaggi delivers results that meet and exceed project and community needs. Her unique combination of branding, creativity, strategic planning and research services helps put communities and destinations in the hearts and minds of citizens, businesses and visitors. For communities this translates directly into more tourism dollars, more satisfied residents and more economic development. She works closely with municipality stakeholders to understand their goals and then communicate these to the project teams. She additionally performs market research and provides Return on Investment (ROI) cost information, comprehensive Business and Marketing Plans and Business Development services.

ECONOMIC DEVELOPMENT PARTNERS (EDP) has assisted numerous counties, cities and regions in developing highly effective economic development strategies and projects that have allowed for greater job growth, business investment and better lifestyles around the State and the region. Our goal is to gain a complete understanding of our clients' objectives in order to structure a solution that leads to informed decision-making

and tangible, measurable results. Our unique combination of economic and community development, and agricultural and food systems expertise allows us to provide our clients with results that combine the priorities of communities with the interests of the businesses/vendors they seek to attract. We share a commitment to creating a legacy of projects that result in diverse and sustained economic growth that match the client's own definition of success. EDP provides clients with the following services:

STRATEGIC ECONOMIC DEVELOPMENT. Our firm supports clients in every phase of economic development. In particular, we work closely with clients to assess and map their leveragable assets and mitigate challenges for economic growth and diversification. Throughout the process, we position our work within the context of global competition and technological change. Much of our work involves economies in transition – regions seeking to diversify their economic base, expand job opportunities, foster entrepreneurial growth, attract 'new economy' companies, or conceptualize a new strategic direction for economic development. We approach each assignment as a unique opportunity to help a region or community imagine and achieve its economic development aspirations. Our services include:

- Strategic planning for economic growth, development, and diversification
- Target industry identification and niche market segmentation, including cluster analysis and cost benchmarking
- Competitive organizational benchmarking
- Performance metric development to measure success and progress over time
- Strategies to engage diverse stakeholders and gain broad support
- Market Research and assessments
- Entrepreneurial environment assessments
- Tenant/Vendor identification and development
- Community and Vendor Outreach and Cultivation
- Implementation support

<http://www.edpwi.com>

FEASIBILITY STUDIES: The EDP Team prepares both reports and peer reviewed articles on topics of interest to regional economists, organizations, agriculture and businesses. Many of EDP's clients are involved in agricultural and food-related industries including:

- **Financial Feasibility Studies:**
 - The World Cheese Discovery Center - Green County, Wisconsin
 - Wisconsin Agricultural Education Center – Manitowoc County, Wisconsin
 - The Kickapoo Culinary Center – Southwestern, Wisconsin
 - World Sustainability Center - Southwestern, Wisconsin
 - Platteville Library Block Redevelopment Study – Platteville, Wisconsin
- **Business Plans:**
 - A cheese manufacturing plants and retail operations
 - Agri- tourism and Culinary Tourism education centers
 - Fork Force, a technology employee-related web site designed to help restaurants qualify, obtain and retain employees
 - Tully Family Creamery, a family-owned dairy equipment manufacturer/distributor/Creamery that produces cheese, milk, yogurt, etc.
 - Kickapoo Culinary Center – Innovation Food Kitchen that serves as an incubator for start-up food related businesses.

- **Focus Groups/ Research Studies:**
 - New Food Projects:
 - Value-Added Dairy Products
 - Value- Added Artisan Cheeses
 - Aronia Berries
 - Yogurt
 - Hazelnuts
 - Pressed food oils
 - Tourism Projects
 - Economic Impact of Silent Sports (Southwestern Wisconsin)
 - Economic Impact of the Ice Age Trail (Wisconsin)
 - Economic Impact of the Fox Wisconsin Heritage Parkway (Wisconsin)
 - Statewide, Multi-County Public Hearings/Focus Groups (Fox Wisconsin Heritage Parkway)
 - Regional Branding for Southwestern Wisconsin - Multi-County Focus Groups (Driftless Wisconsin)

CYNTHIA K. JAGGI - RESUME

1972 Oakwood View Drive • Verona, WI 53593

(608) 712-1980 • cjaggiedp@tds.net

<http://www.edpwi.com>

REGIONAL Economic Development Manager

FORTUNE 500 – EXPERIENCED, BUSINESS DEVELOPMENT MANAGER with over twenty years track record of marketing and business management experience in value – added agriculture, food beverage, healthcare, medical devices and CPG. Proven track record of re-examining the value propositions of products/Brands, new product development and pricing, analyzing and interpreting business growth trends and forecasts, geographic markets and customer segments at every shift in the economy.

Expertise in Project Management in implementing the execution of Economic and Business Development projects/programs. Solid leadership and management skills; able to build and coach top-performing cross-functional teams. Adept at communicating with management, healthcare and food industry professionals, customers, and internal/external departments to manage overall Business Development efforts.

Business Development and Management ♦ Key Account Development ♦ Team Building & Management Skills ♦ Problem Solving Abilities ♦ Business & Strategic Planning ♦ Operations Management ♦ New Product Development ♦ Marketing Strategies ♦ Market & Feasibility Analysis ♦ CRM Customer Relationship Management ♦ P & L, ROI and Budget Responsibilities ♦ Leadership Qualities

PROFESSIONAL EXPERIENCE

Economic Development Partners, LLC – Madison, Wisconsin 2007 - Present **Economic Development/Business Development, Executive Chief Officer**

- Drive cradle-to-grave new business development, sales and product strategies and lead cross-channel Business Development, Marketing/Sales efforts with Consumer and B2B companies, Value-added Agricultural, Food and Beverage industries utilizing proven results at Fortune 500 companies for more profitable outcomes.

NovoNordisk – Princeton, New Jersey 1/2006 – 10/2007

Global provider of bioceuticals and medical devices for Diabetes.

Diabetes Pharmaceutical/Medical Devices Sales

- Drove dramatic territory sales growth and market share, achieving **PQ Ranking =156 % of plan with ranking of 12 out of 89 territories nationwide**, in tightly controlled area by healthcare managed care formularies
- Top National Sales team for exceeding sales/market growth for Launch of New Basal Insulin and Medical Devices, 2006 & 2007. Grew Levemir market share to over 5% in Launch year!
- Successfully implemented practical aspects of bioceutical healthcare studies at the early stages of pre-clinical and Drug Development Design strategies for insulin products and medical devices.
- Educated and promoted to Endocrinologists, Cardiologists, HMO's/Formulary teams, PBM's, Primary Care Physicians, RN's and Certified Diabetes Educators at hospitals and clinics

Economic Development Partners 31
Madison Public Market Business Plan RFP

- Attended Living With Diabetes University in Miami, Florida – Learned how to Manage Diabetes on a 24/7 basis

JOHNSON & JOHNSON – New Jersey 2003– 2006

World's most comprehensive provider of consumer, pharmaceutical and healthcare products.

Pharmaceutical and Medical Device Sales

- Drove market share for six diverse pharmaceutical product lines/medical devices in diverse disease states, in area tightly controlled by healthcare managed care formularies
- **Grew total product package by 248% year over year in 2004 and 262% in 2005**
- **PQ Ranking = 280% of plan with a ranking of 2 out of 90 territories nationwide**
- Top District and Regional Marketing team for exceeding sales growth goals, three years in a row
- Successfully educated and promoted product lines to Gastroenterologists, Cardiologists, Oncologists, Primary Care Physicians, HMO's, PBM's, RN's and other healthcare providers in hospitals and clinics
- Launched three new products, developed strategic marketing/sales plan and executed in 90 – day tactical planning periods

MATTEL, Madison, Wisconsin 2001 – 2003

World's Leading Toy Maker

National Marketing/Business Development Manager, Pleasant Company

- Drove new business development strategies and lead cross-channel Marketing/Sales efforts of American Girl books across Consumer catalog and eCommerce Departments which generated \$20 million or 60% of Book Publication Division Sales
- **Exceeded total sales goal by 40% in 2002, by 52% in 2003 and increased Brand performance 143% in 2002 and 149% in 2003 Year-over-Year**

SPRINGS INDUSTRIES, Middleton, Wisconsin 1991 – 2001

Leader in the Window Treatment Industry with over \$650 million in sales

National Business Development & Senior Product Manager, Springs Window Fashions

- **Directed and managed \$83 million sales** of window products with full P & L responsibility
- **Increased total sales by 34% and new products to over 45%** in mature category
- Developed and introduced nine major new product lines, resulting in over \$13 million in sales
- Responsible for all areas of Marketing/product management including developing marketing strategic and tactical plans, market research, segmentation, targeting, product and channel management, media/advertising planning and placement, pricing strategies, forecasting, promotional plans, sales training, profit margin analysis and budgets

EDUCATION

MBA – Marketing & Strategic Planning, University of Wisconsin – Madison

Bachelor of Agricultural and Life Sciences Degree, University of Wisconsin – Madison

Ruth J. Dumesic, MBA



Ruth Dumesic, Partner, Economic Development Partners, LLC, has been working in the professional services industry for more than 30 years focusing on market planning, market research and business strategic plans and implementation. Ruth has worked with both public and private organizations, including non-for-profit and membership associations, helping these organizations form business plans that makes these organizations successful.

Upon graduation with her MBA in 1981, Ruth Dumesic became one of the first marketing professional in the country to work for a regional certified public accounting firm where she developed the firm's comprehensive business and marketing program. In order to accurately measure the results of the program, she first did a benchmark survey the of firm's business recognition. At the anniversary of the program, Ruth performed another survey to measure results. This second survey indicated that the firm's gross revenues substantially increased and the firm's recognition went from last place to third position.

During this period, Ruth also was responsible for designing the first Services Marketing Conference for the American Marketing Association in Chicago, Illinois. Because of this conference, Ruth, with her co-chairperson, Carole Congram, authored a book that is still used today entitled: *The Accountant's Strategic Marketing Guide*. As well as providing a chapter for the American Marketing Association's Handbook of Marketing for the Service Industries on *How to Market Inside Your Organization or Helping Employees Achieve Service Excellence*, A Case Study with co-author, Margaret L. Friedman.

Ruth became the first Director of Marketing with SVA Certified Public Accountants. In her 21 years with SVA, the firm grew from a single location with nine partners in Madison to a multi-state, five locations business with over 40 partners. Ruth also served as a Strategic Business Consultant for SVA clients and worked with many start-up businesses and companies to help them develop plans for growth and expansion. The one most memorable involved her husband, a co-founder of Virent Energy Systems. She brought them to the firm and she help initially with this start-up energy-based company, which focused on harnessing the use of hydrogen as a biomass replacement for various types of battery and fossil fuel applications. The purpose of the study was to identify major potential markets for this new fuel process and the corresponding size and estimated growth of those markets. Ruth was also responsible for writing the company's first business plan, and helped with organizational operations.

In 2010, Ruth left SVA and partnered with a long-time colleague to form Economic Development Partners (EDP). EDP development and business resource experts assist in all aspects of planning and development efforts for a business or a county, city, village, town, public or non-profit organization.

RESUME

Aaron Zaretsky
Public Market Development
498 Upper Flat Creek Rd.
Weaverville NC 28787
(828) 645-9291

Website: www.publicmarketdevelopment.com

Email: pohlzaret@aol.com

SUMMARY:

C.E.O. - Nonprofit and For-Profit Corporations - 29 years

C.E.O. - Grant Making Foundation - 8 years

Director - Public Corporation - 15 years

Executive Director – Non Profit Development Entity – 13 years

Project Management - 36 years

Developer Multimillion-Dollar Housing and Commercial Renovation and New Construction Projects - 36 years

Developer Human Services - 17 years

Fund-raiser Helped raise more than one Hundred Million Dollars in Public and Private Resources - 36 years

Expert in assembling complex, mixed use projects including retail, housing and offices - Free Acquisition of Federal Property, Historic Tax Credits, Facade Easements, Sale of Air Rights, etc.

RECENT PROFESSIONAL EXPERIENCE:

Founding Principal: Public Market Development – Consultant to a variety of nonprofit, for-profit, and public entities including:

Miami, FL: Site analysis and Vision Statement for a new Public market for a private development consortium. (2013)

Oakland Park, FL: Feasibility Study for a new Public Market for City's C.R.A. (2013)

Des Moines, IO: Feasibility Study for a new Public Market for the Downtown Partnership (2013)

Woodland Park, CO: Feasibility Study for a new Public Market (2013)

San Francisco, CA: Finalist (one of three out of 20 invited international participants) in a design competition for redevelopment of Fort Mason into the San Francisco Public Market District – teamed with nationally known design firm of Bruner/Cott of Cambridge, MA. (2013)

Moscow ID: Development of a 5 year Strategic Plan for the oldest and best Farmers Market in the State of Idaho. (2012)

Baltimore, MD: Development of a comprehensive proposal for the transformation of the historic Hollins Market into a Public Market District. (2012)

Edmonton, Alberta: Development of a feasibility study for an Edmonton Public Market District. (2012)

Riviera Beach, FL, C.R.A.: Development of a site specific comprehensive Business Plan for a new 60,000 SF Public Market. (2011 -2013)

Orlando FL: Central Florida Public Market - Public Market Consultant on the development of a 150,000 SF, privately financed Public Market, 8 miles from Disney World. Developed comprehensive Feasibility Study and Business Plan. (2011-2013)

Palm Beach County, FL: Public Market Consultant on the development of a comprehensive feasibility, business and development plan for 2 new Public Markets in this Florida community. Client - Palm Beach County (2007-2012)

Madison, WI: Sole Public Market Consultant on the development of a comprehensive feasibility study, site analysis, and business plan for a new Public Market. Client - Commonwealth Development/Blue Planet Partners (2007-2011)

Savannah, GA: Consultant to a private developer building a public market-like food complex in Savannah's downtown. (2009)

Willits, CA: Development Consultant regarding the highest and best use for a 152,000 Sq. Ft. building in Northern California. Client - Pepsi America (2009)

Columbia S.C.: Sole Public Market consultant on a project to move an existing state run wholesale farmers market and to add a retail Public Market component. \$23,000,000 state funded project. Teamed with Wilbur Smith & Co. (2005 – 2006)

Atlanta, GA: Atlanta Farmers Market - Sole Public Market consultant on the development of a comprehensive redevelopment plan for the largest farmers market in the U.S.. The plan includes adding a new retail Public Market to the renovated State wholesale farmers Market. Teamed with EDAW. (2005-2006)

New York, NY: Consultant on the redevelopment of a \$25 million, ten block long, historic retail/wholesale Public Market in Manhattan – La Marquette. Client – East Harlem Business Capital Corporation (2004-2005)

Atlanta, GA: Atlanta Farmers Market – Feasibility study for a new retail Public Market at the nation's largest wholesale farmers market. Client – City of Forest Park (2004-2005)

Asheville, NC: Executive Director Emeritus, Grove Arcade Public Market Foundation. Consultant to the Board of Directors of the Grove Arcade Public Market Foundation in the areas of funding, tenant mix, policy development, etc. Asheville, NC (2004)

Ford Foundation - Assisted in creating a multimillion dollar funding initiative, coordinated with a variety of new Federal initiatives, using Public Markets as a vehicle for community economic development in low wealth communities. - Ford Foundation (2003-2005)

Charlotte, North Carolina - Initial Feasibility study for a potential new Downtown Public Market. Client - City of Charlotte (2003-2004)

Minneapolis/Saint Paul, MN: Public Market consultant for a major new public/private partnership - 'Global Marketplace' located in a 1.1 million square foot historic Sears building. Client - Neighborhood Development Center (2003-2005)

Myrtle Beach, South Carolina: New Public Market feasibility study for the City of Myrtle Beach (2002), Comprehensive Development Plan including market and demographic studies, funding and development strategy etc. (2004 - 2005)

STAFF EXPERIENCE

FOUNDING EXECUTIVE DIRECTOR, GROVE ARCADE PUBLIC MARKET FOUNDATION

Asheville, NC. Responsible for award winning redevelopment and management of the historic Grove Arcade. Western North Carolina's largest commercial building (269,000 sq. ft.), into a \$13,000,000, Public Market, including 64 locally owned and operated small retail businesses, as part of a mixed use, \$30,000,000 redevelopment (1992 to 2004).

DIRECTOR OF PRESERVATION AND DEVELOPMENT, PIKE PLACE MARKET PRESERVATION AND DEVELOPMENT AUTHORITY

Seattle, Washington. Part of a 3-6 person executive management team directing a nonprofit public corporation which owns, manages and has redeveloped (\$65,000,000) the nationally acclaimed eleven acre Pike Place Market. The historic Market has grown to almost a million sq. ft. of commercial and residential space, including 300 permanent merchants, 250 craftspeople, 100 local farmers, 800 units of low and moderate-income housing, and a comprehensive network of public and human services. More than 14 million customers visit the Market annually. (1977-1991)

FOUNDING EXECUTIVE DIRECTOR, THE MARKET FOUNDATION

Seattle, Washington. Conceived, organized, and directed a nationally award-winning Foundation which raises and has disbursed millions of dollars in support of a comprehensive network of human services and low-income housing. (1982-1991)

PAST EXPERIENCE - PUBLIC MARKET DEVELOPMENT:

Covington, Georgia - Comprehensive feasibility study for a new Public Market in the historic 'Square'. Client - Arnold Fund (2002-2004)

Los Angeles, California - Ford Foundation funded, comprehensive, assessment of an existing Latino Public Market, El Mercado La Paloma. Client - Ford Foundation (2002)

Waterloo, Iowa - Development study for a Heritage Tourism funded Public Market (1997)

Miami, Florida - Lead development consultant for a private developer planning a Public Market in the historic Pan Am seaplane hanger in Coconut Grove. Client - Lima Development (1996-1998)

Cincinnati, Ohio - Redevelopment action plan and lead consultant for the City of Cincinnati, for a 17 million dollar renovation of the historic Findlay Market into a Public Market District and recommendations regarding the surrounding "Over the Rhine" neighborhood. Client – City of Cincinnati (1994-97)

Baltimore, Maryland - Initial feasibility analysis for the 'Avenue Market,' an African-American Market (previously Lafayette Market) in West Baltimore. Client - James Rouse (1996)

Penn Center, South Carolina - Public Market development and master/business plan for revitalization of Afro-American sea island community commercial center. Penn Center was the first school (established 1862) for freed slaves. (1995)

La Marqueta, New York - Assisted in redevelopment planning for historic Hispanic New York City Public Market. Assisted in RFQ and RFP development. Client was New York City Department of Economic Development. (1993)

Chattanooga, Tennessee - Conceived and developed plan and feasibility study for Public Market in downtown Chattanooga. Client - River City Corporation. (1993)

Fort Worth, Texas - Conceived and developed plan for Public Market in downtown Fort Worth. Client - Sundance Square Management Corporation (Bass Family). (1993)

Greenville, South Carolina - Assisted City of Greenville Economic Development Division in developing a new Public Market in the West End neighborhood of downtown Greenville. Client – City of Greenville (1993)

Public Web Market - Lead Public Market consultant on the development of this virtual Public Market web site - one of the earliest commercial e-commerce sites. Project was funded by USDA. (1992)

Baltimore, Maryland - Developed plan, which was implemented, to transform Baltimore's 8 neighborhood markets from City to nonprofit management. Client - Baltimore's Goldsecker and Able Foundation. (1991)

Granville Island Public Market, Vancouver, Canada - while a Director at Seattle's Pike Place Market, advised the Federal development team that transformed Granville Island from a decaying industrial site and brownfield into North America's pre- eminent Public Market. (late 1970's)

OTHER EARLIER WORK EXPERIENCE:

EXECUTIVE DIRECTOR - MILITARY LAW OFFICE

San Francisco, California. Directed a legal program sponsored by a national bar association, providing civilian legal defense for American military personnel. Responsible for management, publicity, legal coordination, and fund-raising. (1973-1977)

PRINTER, R.P.M., INC.

Madison, Wisconsin. Assisted in running a print shop. (1971 - 1972)

ACTING DIRECTOR, YOUTH PROJECT COORDINATOR, DAYTON HOUSE

Madison, Wisconsin. Assisted in organizing and managing one of the first court-sponsored shelters for runaway street youth. Responsibilities included administration, youth and family counseling, public speaking and fund-raising. (1969-1971)

DEVELOPER, BLUE BUS MEDICAL CLINIC

Madison, Wisconsin. Assisted in organizing and managing one of the first nonprofit "community health clinics" in the country. Received paraprofessional medical training, assisted in health education, planning, and fund-raising. Helped to develop suicide prevention and drug abuse counseling program. (1969-1971)

ORGANIZER, MIFFLIN STREET COOP

One of many organizers of an early college grocery coop. (1968-1969)

VOLUNTEER ORGANIZER, FUND-RAISER, STUDENT NON-VIOLENT COORDINATING COMMITTEE - SNCC

New York, New York. Participant in numerous civil rights support activities. (1963-1967)

HONORS AND AWARDS:

ORGANIZER: Intergovernmental task force with leadership from E.D.A., U.S.D.A., S.B.A. and the National Trust for Historic Preservation, along with private sector and foundation representatives, to create a national agenda using Public Markets as a proven tool for community economic development and historic preservation in center-city communities. (1994-95)

FEATURED PRESENTER: White House Conference on Successful Models of Community Economic Development: One of 4 guest presenters. (1991)

FIRST PLACE: Bruner Foundation Award for Excellence in the Urban Environment: The Market Foundation was chosen as the best urban project in the United States from 81 competitors. \$20,000 award. (1987) Served on the Awards Jury for the next awards cycle. (1989)

FIRST PLACE: Management Excellence Award for Outstanding Administrative and Fiscal Management, Medina Foundation, Washington: Statewide \$5,000 award - for Market Foundation management. (May 1988)

FIRST PLACE: Outstanding Organization, Municipal League of King County: Market Foundation. (June 1987)

FIRST PLACE: Best Civic Idea - Fratelli's Corporation: To create "Rachel", a half-ton bronze piggybank which collects \$20,000/year for the Market Foundation. \$14,000 award. (June 1986)

FEATURE COVERAGE: CBS, "Sunday Morning with Charles Kurault": Feature on the work of the Market Foundation

PUBLICATIONS:

"Are you Ready to Take the Next Step" – A Primer for transforming an existing Farmers Market into a year-round, indoor/outdoor, Farmers Market/Public Market – Farmers Market Today (National trade publication for Farmers Markets). (2012)

"Funding Guide for the Development of Public Markets" - Ford Foundation sponsored. (2006)

"Ford Foundation Report" (2005) Public Market Article

"Public Markets and Community Revitalization" - Contributing writer. Book published by U. L. I. (1995)

"Urban Genius" - Contributor to this Neil Pierce book, commissioned by the Bruner Foundation. (1991)

"Urban Excellence" - Contributor to this Philip Langdon study of the Pike Place Market. Von Nostrand Reinhold. (1990)

"Sustaining a Vital Downtown Community" - Conceived and obtained Ford Foundation sponsorship of this book which details the nationally significant work of the Market Foundation. (1987)

"Lifelines" - Founder and regular contributor to Pike Place Market Foundation Newsletter. (1988-1991)

"Down the Pike" - Founder and regular contributor to the Pike Place Market Farmer Newsletter. (1978-1984)

Numerous articles published in newspapers and other publications. Quoted in the NY Times, Washington Post, AP, UPI, Cleveland Plain Dealer, Charlotte Observer, Atlanta Constitution, Seattle Times, etc.

EDUCATION:

B.A. University of Wisconsin - Anthropology. Vilas Scholar. Significant graduate level course work. (1966 - 1971)

Extensive Professional Continuing Education - including seminars in non profit management, business planning, direct mail, corporate and foundation funding, board management, special events funding, program planning and proposal writing, nonprofit business ventures, deferred giving, charitable estate planning, web site development, and team building.

Leadership Seattle

Leadership Asheville

PROFESSIONAL AFFILIATIONS:

American Society of Association Executives (ASAE)*

National Development Officers Association (NDOA)*

National Society of Fund-raising Executive (NSFRE)*

BOARD AFFILIATIONS:

North Buncombe Association of Concerned Citizens - President

Grove Arcade Preservation Inc - President*

Grove Arcade Restoration Inc - President*

Citizens Alliance to Keep the Market Public - Founding member.*

King County Low Income Housing Development Consortium*

King County Committee to Save Our Local Farmlands - appointed by County Executive to organization which wrote and campaigned for successful \$50,000,000 initiative for purchase of farmland development rights.*

Washington State Farmers Market Association - Founding member.*

Tolt Community Club - Founding member, officer.*

King County Rural Development Committee*

Sno-Valley Multi-Age Center - Officer.*

Pike Market Medical Clinic - Founding member, officer, incorporator.*

Pike Market Childcare Center - Founding member, officer, incorporator.*

Pike Market Senior Center - Founding member, officer, incorporator.*

Downtown Food Bank*

Blue Bus Medical Clinic - Founding member, officer.*

* = Past Affiliation

PUBLIC SPEAKING - INVITED GUEST PRESENTER AT MANY NATIONAL CONFERENCES INCLUDING:

National Main Street Conference – Naples, Florida, 2005; Punta Gorda, Florida 2010; Vilano Beach, Florida, 2013

International Public Market Conference, Biannual 1995-2007

National Main Street Conference –

Organizer, National Public Market Conference, Philadelphia, Pennsylvania, 1995; Seattle, Washington, 1998

International Planners Association National Conference, Myrtle Beach, South Carolina. 1994

Environmental Forum, Chattanooga, Tennessee. 1993

White House Conference on Successful Models of Community Economic Development. 1991

Neighborhoods, U.S.A. 1989

International Downtown Association. 1989

Direct Marketing Conference and Farm Conference, Oakland, California. 1989

Public Markets - Tradition and Promise - Assisted in organizing national conference, Seattle. 1987

Institute for Urban Design, Denver, Colorado. 1987

National Conference of State Legislators, Seattle, Washington, 1986

Annual Local Presentations include scores of presentations to social, political, religious, and business organizations such as: Leadership Tomorrow, Rotary, Kiwanis, Lions, City Council, County Commission, City Club, Junior League, Downtown Association, Chamber of Commerce, Downtown League of Women Voters, Municipal League, American Institute of Architects, Association of TV and Radio Broadcasters, etc.

PERSONAL:

Date of Birth: 7/6/49

Extensive travel in western and eastern Europe; north, central and east Africa; Latin America, Caribbean, Canadian arctic. Wilderness hiking and canoeing, birding. Visits to about 350 international Public Markets.

Speak (rusty) French, Spanish, Swahili, German, and Dr. Kashianian.

Substantial personal involvement as a general contractor and carpenter in building 3 personal residences.

Alpaca farmer.

REFERENCES:

Please see “references” tab at professional website: www.publicmarketdevelopment.com

Dr. Russ Kashian, PhD



Dr. Russ Kashian, Director of the FERC and a Professor of Economics at the University of Wisconsin Whitewater, has seen his work in applied economics published in both practitioner format and in peer reviewed academic journals. In consideration of this success, the request for an Economic Analysis of the proposed Madison Public Market in Madison, Wisconsin brings together much of this research into one report. Beginning with the “Value of a Clean Lake”, the FERC has focused on the positive economic impact of managing the environment for positive economic contributions with consideration to the environment. In its research into Tax Incremental Finance, serious effort was made to see the relationship between one economic activity and a neighboring activity. In its recent work on the specialty crops of Wisconsin, supply chain analysis has been integrated with input/output analysis in economic impact calculations. This proposed work will bring together this wealth of experience and talent to an analysis of the proposed Madison Public Market. Dr. Kashian earned a BA from the University of Wisconsin-Madison, a MS in Urban Studies from Cleveland State University, and PhD from the University of Wisconsin-Milwaukee.

UW-Whitewater Fiscal and Economic Research Center (FERC)

The Fiscal and Economic Research Center prepares both reports and peer reviewed academic articles on topics of interest to regional economists and businesses.

Agricultural economic impact analysis: The Principal Investigator has extensive experience in conducting agricultural economic impact analyses. The following list is a brief overview of services provided to a variety of constituents focused on agricultural economic impact analysis; all services/agreements/contracts resulted in final reports and/or presentations (and are available upon request). Recent agricultural research conducted by the Principal Investigator and the UW-Whitewater FERC can be found at the following locations:

- [http://www.uww.edu/Documents/colleges/cobe/ferc/KashianCVMay2013\[1\].pdf](http://www.uww.edu/Documents/colleges/cobe/ferc/KashianCVMay2013[1].pdf)
- <http://www.uww.edu/ferc/completed>

IMPLAN methodologies and tools: The Principal Investigator has published two peer-reviewed publications that utilized IMPLAN methodologies and tools:

- “The Economic Impact of Organized Camps” (with Renee Pfeifer-Luckett). *Tourism Economics*, Vol 17, 2011 pp. 905-916.

- “Exporting Knowledge” Spaces and Flows: An International Journal of Urban and Extra Urban Studies. Forthcoming.

These publications are in addition to numerous projects that utilized IMPLAN as a major component of the methodology during the project.

Regional or public economic impact analysis: The Principal Investigator has extensive experience in conducting regional and/or public economic impact analyses. The following list is a brief overview of services provided to a variety of constituents focused on regional or public economic impact analysis; all services/agreements/contracts resulted in final reports and/or presentations (and are available upon request):

- Economic Development Partners, LLC, Verona, Wisconsin. *The Economic Impact of the Ice Age Trail*. Summer 2012.
- Economic Development Partners, LLC, Verona, Wisconsin. *The Economic Impact of the Fox Wisconsin Heritage Parkway*. Summer 2012.
- University of Wisconsin-Whitewater Small Business Development Center, Whitewater, Wisconsin. *A Gap Analysis of the Leading Industries in Wisconsin Counties*. Winter 2012.
- Standard Process, Palmyra, Wisconsin. *The Economic Impact of Standard Process on the State of Wisconsin*. Summer 2012.
- Standard Process, Palmyra, Wisconsin. *Cranberries of Wisconsin*. Summer 2012.
- Standard Process, Palmyra, Wisconsin. *Wisconsin Ginseng: Impacts and Implications*. Summer 2012.
- Standard Process, Palmyra, Wisconsin. *Dietary Supplements: Analyzing the Economic Impact in Wisconsin*. Summer 2012.
- Student Undergraduate Research Fellowship, Wisconsin. *Food Deserts of Rural Wisconsin*. Summer 2012.
- Standard Process, Palmyra, Wisconsin. *Processed Sweet Corn: Analyzing the Economic Impact in Wisconsin*. Spring 2013.

The Fiscal and Economic Research Center utilizes a number of undergraduate students affiliated with the Economics major at the University of Wisconsin-Whitewater. Through this degree program, students develop skills in analytical and critical thinking; problem solving, quantitative and statistical methodologies; communication; and economic literacy.

Russell D. Kashian - CV

Department of Economics
University of Wisconsin-Whitewater
4404 Hyland Hall
Whitewater WI 53190 Phone:
(262) 472-5584 [Email:
kashianr@mail.uww.edu](mailto:kashianr@mail.uww.edu)

Positions Held

Professor, University of Wisconsin-Whitewater
Fall 2010 - Present

Director: Fiscal and Economic Research Center
University of Wisconsin-Whitewater
Fall 2009 - Present

Economic Development Specialist
University of Wisconsin-Extension
Fall 2004 - Present

Associate Professor, University of Wisconsin-Whitewater
Fall 2006 - 2010

Co-Founder: Fiscal and Economic Research Center
University of Wisconsin-Whitewater
Fall 2004

Assistant Professor, University of Wisconsin-Whitewater
Fall 2002 - 2006

Lecturer, Marquette University Fall 2000 - Spring 2002

Lecturer, University of Wisconsin - Whitewater
Fall 1999 - Spring 2000; Summer 2001; Spring 2002

Education

Ph.D., Economics, University of Wisconsin-Milwaukee,
August 1999

M.A., Economics, University of Wisconsin-Milwaukee,
December 1994

M.S., Urban Studies, Levin College of Urban Affairs: Cleveland

State University, May 1992

Dissertation

B.A., University of Wisconsin-Madison, May 1983
Two Studies in Regional Economics: IPO Location, Regional Effects & Fairness in Initial Public Offerings & A Willingness to Pay: The Amenity Value of Farmland. Advisor: Robert Drago

Fields of Interest

Regional & Urban Economics, Microeconomics, Macroeconomics, Money and Banking, and Labor Economics

Publications

“Town and Gown: The Negative Externality of a University on Housing Prices” (with Steven Rockwell). *Journal of Real Estate Practice and Education*, forthcoming.

“Cranberries of Wisconsin: Analyzing the Economic Impact” (with Jeremy Peterson). *Journal of Business Case Studies*, Vol 9, 2013 pp 185-192.

“A Duration Analysis of the Life Spans of Tax Increment Finance Districts” (with Mark Skidmore and Eric Cramer). *State Tax Notes*, Vol 63, 2012 pp 465-469.

“An Estimation of the Elasticity Demand for Tap Water” (with Jeff Heinrich, et al). *Journal of Strategic Innovation and Sustainability*, Vol 7, 2012 pp 100-112.

“The X-Efficiency and Profitability of Hispanic Banking in the United States” (with Juan Gómez Casillas). *The Journal of Applied Financial Research*, Vol 1, 2011 pp 38-50.

“Condominium Sub-Market: Effect of Sheriff Sales on Sub-Market Property Values” (with Joseph Carroll). *Journal of Regional Analysis and Policy*, Vol 41, 2011 pp 71-81..

“Estimating and Analyzing the Cost Efficiency of Subchapter S Banks” (with Richard Cummings and Yannan Wang). *Journal of Business and Economics Research*, Vol 9, 2011 pp 43-52.

“On the Relationship between Tax Increment Finance and Property Taxation” (with Mark Skidmore). *Regional Science and Urban Economics*, Vol 40, 2010 pp 407-414.

“Do Tax Increment Finance Districts Stimulate Growth in Real Estate Values?” (with David Merriman and Mark Skidmore). *Real Estate Economics*, Vol 31, 2011.

“The Economic Impact of Organized Camps” (with Renee Pfeifer-Luckett). *Tourism Economics*, Vol 17, 2011 pp 905-916.

“Pricing the Homebuyer’s Proximity to Open Land” (with Jeff Heinrich). *Journal of Applied Business and Economics*, Vol 11, 2010 pp 17-25.

“Does Ownership Form in Community Banking Impact Profitability?” (with Richard Cummings and Peter Westort). *Managerial Finance*, Vol 36 2010 pp 122-133.

“Does Tax Increment Finance Stimulate Municipal Annexations?” (with David Merriman and Mark Skidmore). *Land Economics*, Vol 85 pp 2009 pp 598-613.

“Modeling the Time to an Initial Public Offering: When does the Fruit Ripen?” (with Yamin Ahmad). *Journal of Economics and Finance*, Vol 34, 2010 pp 391-414.

“The Economic Considerations of Subchapter S Corporations” for Taxation, Tax Policies and Income Taxes, Warren J. Berube and Camron N. Pinto, eds. Co-authors Richard Cummings and Peter Westort. 2009.

“Committee Size and Smart Growth: An Optimal Solution” (with Heather Kohls). *Journal of Applied Business and Economics*, Vol 9, 2009 pp 11-20.

“Lake Drawdown: The Value of 2 Inches of Water”, *Journal of Business and Economics Research*, Vol. 6, 2008 pp 1-22.

“Do Tax Increment Finance Districts Increase Real Estate Values” (with David Merriman and Mark Skidmore). *State Tax Notes*. Vol 47 2008 pp 105-112.

“Examining angler behavior using contingent behavior modeling: a case study of water quality change at a Wisconsin lake” (with Mark Eiswerth and Mark Skidmore). *Water Resources Research*. Vol 44, 2008.

“Credit Union to Mutual Conversion: Do Rates Diverge?” with Jeff Heinrich, *Contemporary Economic Policy*. Vol 26, 2008 pp 107-121.

“Lake Rehabilitation the Value of Shoreline Real Estate: Evidence from Delavan, Wisconsin” (with Mark Eiswerth and Mark Skidmore). *Review of Regional Studies*. Vol 36, 2006 pp 231-238.

“The Publishing Patterns of Seasoned PH.D. Recipients”, with Jeffery Heinrich, *Journal of Business and Economics Research*, Vol. 3, 2005 pp 1-22.

“State Farmland Preferential Assessment: A Comparative Study”. *Journal of Regional Analysis and Policy*. Vol 34, 2004 pp 1-12.

“Comprehensive Planning: Is There a Relationship between Committee Design and Subsequent Outcome: A Baseline Survey”, with Heather Kohls. Proceeding on the Conference on the Small City and Regional Community. 2004.

Regional Differences and Underwriter Location in Initial Public Offerings”, with Taggart Brooks. *The Industrial Geographer*. Vol 2, 2004 pp 94-110.

“The Pricing of Thrift Conversions”, with Kristen Monaco. *Journal of Applied Business Research*. Vol 19, 2003 pp 25-31.

“Mapping the Terrain of Work/Family Journals” with Robert Drago. *Journal of Family Issues*. Vol 24, 2003 pp 488-512.

“Preserving Agricultural Land Via Property Assessment Policy and the Willingness to Pay for Land Preservation”, with Mark Skidmore. *Economic Development Quarterly*. Vol 16, 2002 pp 75-87.

"The Willingness-to-pay for Work/Family Policies: A Study of Teachers". Co-authors Robert Drago, et al. *Industrial and Labor Relations Review*, Vol. 55, 2001 pp 22-42.

"The Longest Day: Working Time for Teachers," for Working Time: International Trends, Theory and Policy Perspectives, Deborah Figart and Lonnie Golden, eds. Routledge, Co-authors Robert Drago, et al, 2000.

"New Estimates of Working Time for Teachers". Co-authors Robert Drago, et al, *Monthly Labor Review*, Vol. 122, 1999 pp. 31-41.

"Banking Employment in the 1990's: Regional Effects of Consolidation." with Kristen Monaco, *Growth and Change*, Vol. 29, 1998 pp. 146-156.

Instructor Manual for Unlevel Playing Fields, with Corey Wanek The McGraw-Hill Companies, Inc., 1997.

Presentations

“The Effect of Concentrated Sheriff Sales of Condominiums on Adjacent Condominium Property Values” with Joseph D Carroll, Jr. Midcontinent Regional Science Association Meetings, June 2010.

“The Neighborhood Effect of Concentrated Sheriff Sales on Adjacent Property Values” with Matt Kures and Taggart Brooks. North American Regional Science Association Meeting, November 2009.

“A Regional Examination of Foreclosures in Wisconsin”, Mid-Continental Regional Science Association Meeting, May 2009.

“The Value of Two Inches of Water”, Mid-Continental Regional Science Association Meeting, May 2007.

“Demutualization: A Hazard Analysis of the Conversion of Former Credit Unions to Publically Traded Financial Institutions”, with Yamin Ahmad. Midwest Economics Association Meeting, March 2007.

“The Effect of ATM Networks on Community Banks”, with Heather Kohls. Midwest Economics Association Meeting, March 2006.

“Estimating the Value of Lake Quality in the Demand for Housing”, with Mark Eiswerth and Mark Skidmore. Presented by Mark Eiswerth. Southern Regional Science Association Meeting, April 2005.

“Contingent Behavior Analysis Applied to Changes in Lake Quality” with Mark Eiswerth and Mark Skidmore. Presented by Mark Eiswerth. Southern Regional Science Association Meeting, April 2005.

“The Economics Value of Lake Water Quality Changes: An Input/Output Approach” with Mark Eiswerth and Mark Skidmore. Presented by Mark Eiswerth. Southern Regional Science Association Meeting, April 2005.

“Property Taxes: Forests, Recapture and Efficiency”, with David Moeller. Midwest Economics Association Meeting, March 2005.

“Comprehensive Planning: Is There a Relationship between Committee Design and Subsequent Outcome—A Baseline Survey” with Heather Kohls, 15th Conference on the Small City and Regional Community, September 2004.

“Banking Concentration and Disequilibrium: Why Can’t I Get a Loan in Mexico?” with Sarah Szczepaniec, Mid-Continental Regional Science Association Meeting, June 2004.

“The Publishing Patterns of Seasoned PH.D. Recipients”, with Jeffery Heinrich, Midwest Economics Association Meeting, March 2004.

“Credit Union Employment in the 1990's: Regional Effects of Consolidation.” Midwest Economics Association, March 2003.

“State Farmland Preferential Assessment: A Comparative Study”, Mid-Continental Regional Science Association Meeting, May 2003.

“IPO Location, Regional Effects & Fairness in Initial Public Offerings” with Taggart Brooks, Mid-Continental Regional Science Association Meeting, June 2, 2001.

“Life and Death in the IPO Premarket”, with Taggart Brooks., Midwest Economics Association Meeting, March 31, 2001.

“The Pricing of Thrift Conversions”, with Kristen Monaco, Midwest Economics Association Meeting, March 31, 2001.

“Preserving Agricultural Land Via Property Assessment Policy and the Willingness to Pay for Land Preservation”, with Mark Skidmore, Mid-Continental Regional Science Association Meeting, June 2000.

Research Experience A Gap Analysis of the Leading Industries in Wisconsin Counties.

Winter 2012. External Grant—Small Business Development Center

State of Ingenuity Impact Analysis. Winter 2012. External Grant—

Economic Development Agency Subgrant

The Spillover Costs of Housing of the University on Whitewater Wisconsin. Fall, 2011. External Grant—City of Whitewater

The Demand for Housing by “Newcomers” to Whitewater Wisconsin. Fall 2011. External Grant—City of Whitewater.

Principal Investigator. The Feasibility of a Silent Sports Facility in Gays Mills Wisconsin. Winter 2011. External Grant—Economic Development Partners.

Implan Investigator: The Economic Impact of a Taconite Mine in Northeastern Wisconsin. Winter 2011. In Cooperation with Northstar Economics.

Implan Investigator: The Economic Impact of a Paper Mill in Easter-Central Wisconsin. Winter 2011. In Cooperation with Northstar Economics.

Principal Investigator: Foreclosures: The New Relationship

Between Foreclosures and Unemployment. Winter 2011.
External Grant— University of Wisconsin Extension.

Principal Investigator: The Feasibility of a Privately Owned
Fitness Center in a Small Town in Rural Wisconsin. Fall 2010.
External Grant—Western Wisconsin Investment Group

Principal Investigator: A Duration Analysis of Wisconsin's Tax
Increment Finance Districts. Fall 2010. External Grant—Lincoln
Land Institute.

Principal Investigator: The Economic Impact of The Waukesha
County Fair. Summer 2010. External Grant—Waukesha County
Fair.

Principal Investigator: The Increase in Evictions in Wisconsin—
2000 through 2010. Summer 2010. External Grant—University
of Wisconsin-Extension.

Co-Principal Investigator: The Social and Economic Impacts of
Evictions in Wisconsin—2000 through 2010. Summer 2010.
Internal Grant. University of Wisconsin-Whitewater.

Co-Principal Investigator: An Alternative Use of a Historic
Standard Oil Gas Station—A Case Study in Janesville,
Wisconsin. Summer 2010. External Grant—Forward Janesville.

Principal Investigator: The Economic Impact of the Tainter Lake
Watershed. Fall 2010. External Grant—Tainter Lake
Association, Menomonee, Wisconsin.

Principal Investigator: The Economic Impact of An
Entrepreneurial Network 2007-2010. Spring 2010. External
Grant—Wisconsin Entrepreneurial Network.

Principal Investigator: The Economic Value of a Graduate
Degree from the University of Wisconsin-Whitewater. Summer
2010. Internal Grant—University of Wisconsin-Whitewater.

Principal Investigator: The Impact of the Housing Crisis on Tax
Increment Finance Districts. Spring 2010. External Grant—
Lincoln Land Institute.

Principal Investigator: The Relationship between PILOT and
Default in Tax Increment Financing. Spring 2010. Internal

Grant— University of Wisconsin—Whitewater.

Implan Investigator: The Economic Impact of a Bike Trail in Ozaukee County Wisconsin. Spring 2010. In Cooperation with University of Wisconsin Extension

Principal Investigator: A Census Tract Examination of Foreclosures in Wisconsin 2000-2009. Spring 2010. External Grant—Department of Commerce, State of Wisconsin

Principal Investigator: Sheriff's Sales: Is There a Relationship Between Foreclosures, Sheriff's Sales and Property Values. Fall 2009. External Grant—University of Wisconsin Extension.

Principal Investigator: Determinants of Entrepreneurial Activity in Wisconsin: Spring 2009. External Grant—Wisconsin

Entrepreneurial Network.

Principal Investigator: The Economic Value of the University of Wisconsin-Whitewater. Spring 2009. Internal Grant—University of Wisconsin-Whitewater.

Principal Investigator: The Economic Impact of An Entrepreneurial Network 2007. Spring 2008. External Grant—Wisconsin Entrepreneurial Network.

Principal Investigator: A Census Tract Examination of Foreclosures in Wisconsin. Spring 2009. External Grant—Department of Commerce, State of Wisconsin

Principal Investigator: Determinants of Entrepreneurial Activity in Wisconsin: Spring 2009. External Grant—Wisconsin

Entrepreneurial Network.

Principal Investigator: A Study of Off-Campus Housing in Whitewater Wisconsin. Spring 2009. External Grant—City of Whitewater

Principal Investigator: A Best Practices Review of Snow Plowing in Wisconsin. Spring 2009. Internal Grant—University of WisconsinWhitewater.

Principal Investigator: The Economic Impact of the Eagle Lake Watershed. Winter 2008. External Grant—Town of Dover Wisconsin

Principal Investigator: The Economic Impact of An Entrepreneurial Network 2007. Spring 2008. External Grant—Wisconsin Entrepreneurial Network.

Principal Investigator: Foreclosure Patterns: Is There a Relationship Between Demography and the Spike in Foreclosures. Fall 2007. External Grant—University of Wisconsin Extension.

Principal Investigator: The Economic Impact of the Young Theatre on Walworth County. Fall 2007. External Grant—University of Wisconsin Extension.

Implan Investigator: Feasibility Analysis: Creation of a Wood Technology Program at North Central Wisconsin Technical College. Fall 2007. In Cooperation with University of Wisconsin Extension

Co-Principal Investigator: Public Support for and Understand of Tax Increment Financing. Spring 2007. External Grant—The Lincoln Land Institute.

Principal Investigator: Town of Richmond Comprehensive Plan Survey. Winter 2007.
External Grant—Town of Richmond.

Co-Principal Investigator: Demutualization: A Hazard Analysis of the Conversion of Former Credit Unions to Publicly Traded Financial Institutions. Winter 2006. External Grant—Credit Union National Association.

Principal Investigator: City of Appleton Comprehensive Plan Survey. Winter 2006. External Grant—City of Appleton.

Principal Investigator: Village of Menomonee Falls Comprehensive Plan Survey. Summer 2006. External Grant—Village of Menomonee Falls.

Co-Principal Investigator: The Economic Impact of Development on the Geneva Lake Watershed Survey. Summer 2006. External Grant—Geneva Lakes Conservancy.

Co-Principal Investigator: The History of TIF in Wisconsin. Spring 2006. External Grant—The Lincoln Land Institute.

Principal Investigator, Lake Drawdown: A Debate on the Value of 2 Inches of Water. Spring 2006. External Grant—Rock Koshkonong Lake District.

Principal Investigator. 2006 Survey of Current and Future Manufacturing Jobs In Walworth County Wisconsin. Spring 2006. External Grant—Walworth County Workforce Development Board.

Co-Principal Investigator. Preliminary Cost of Community Services Study: Town of Delavan. Spring 2006. External Grant—Sho-Deen Incorporated.

Co-Principal Investigator: Department of Administration Comprehensive Plan Survey. Fall 2005. External Grant—State of Wisconsin Department of Administration.

Principal Investigator: Is there a Profit Incentive to an ATM Network for Community Banks. Fall 2005. Internal Grant—University of Wisconsin Whitewater.

Co-Principal Investigator: Examination of Interest Rate Differentials between Credit Unions and Commercial Banks. Summer 2005. External Grant—Credit Union National Association.

Co-Principal Investigator: Delavan Lake Economic Impact Study. Summer 2004. External Grant—University of Wisconsin Extension.

Co-Principal Investigator: Economic Impact of Fort Atkinson Memorial Health Services

Study. July 2003. External Grant—Fort Atkinson Memorial Hospital

Principal Investigator: City of Muskego —Big Muskego Lake/Bass Bay Lake District Survey. November 2002. External Grant—City of Muskego.

Principal Investigator: City of Muskego Census of Households— Proposed Community Recreation Center. June 2002. External Grant—City of Muskego.

Research Assistant: City of Muskego Comprehensive Plan Survey. Spring 1998.

Research Assistant: Time, Work & Family Life: A Study of School Teachers, University of Wisconsin-Milwaukee, 1998 - 1999.

Student Research: Joseph Carroll. A Coincident Economic Index for Wisconsin's

Counties. Summer Undergraduate Research Fellowship. 2010.

Joseph Carroll. Factor Analysis and Principal Component Analysis. NCUR. 2010.

Jon Schellin. The Economic Value of a UW-Whitewater Education to the State of Wisconsin: A Subset Analysis of Varsity Athletes at UW-Whitewater. NCUR. 2010.

Kevin J. Selch. An Evaluation of the Contemporaneous Response to the Publication of John Maynard Keynes' The General Theory of Employment, Interest, and Money. Proceedings of The National Conference on Undergraduate Research (NCUR) 2003

Teaching Experience MBA Introductory Economics (Fall 2001)

MBA Managerial Economics (Spring 2007, Fall 2007, Spring 2008,

Spring 2009, Summer 2010, Spring 2011)

Intermediate Microeconomics (Summer 2001, Fall 2001, Spring 2002, Fall 2008, Fall 2009, Fall 2010)

MBA Business Conditions Analysis (Summer 2001, Spring 2004, Fall 2004, Spring 2005, Fall 2005, Spring 2006)

Introduction to Microeconomics (Fall 2000, Fall 2002, Spring 2003, Fall 2003, Fall 2004, Fall 2005, Fall 2006, Fall 2007, Spring 2008, Fall 2008, Spring 2009, Spring 2011)

Global Perspectives (Fall 1999, Spring 2000)

Money and Banking (Spring 1996, Summer 1996, Fall 1996, Spring 1997, Spring 2002, Fall 2002, Spring 2003, Fall 2003, Spring 2004, Spring 2008, Fall 2009, Fall 2010)

Urban, Regional, and Transportation Economics (Fall 2003, Fall 2004, Fall 2005, Fall 2006, Fall 2007, Fall 2008, Fall 2009, Fall 2010)
Labor Problem Analysis (Spring 1999)
Economics of Discrimination (Spring 1997, Summer 1997, Fall 1997, Summer 1998, Fall 1998)
Introduction to Macroeconomics (Spring 1998, Fall 1999, Spring 2000, Spring 2003, Spring 2004, Spring 2005, Spring 2006)
Comparative Economic Systems (Fall 2007)

Honors/Awards/Membership

Wisconsin Idea Fellow 2004
Adjunct Faculty: University of Wisconsin Extension 2005-Present
American Economic Association 2000-Present
Midcontinent Regional Science Association (MCRSA)
2002-Present
Secretary: Midcontinent Regional Science Association (MCRSA).
2007-2009
Vice President: Midcontinent Regional Science Association
(MCRSA). 2009
President Elect: Midcontinent Regional Science Association
(MCRSA). 2010
Program Chair: MCRSA Meetings June 2010, St Louis, Missouri
Program Chair: MCRSA Meetings May 2009, Milwaukee,
Wisconsin
Program Chair: MCRSA Meetings June 2008, Colorado Springs,
Colorado
Program Chair: MCRSA Meetings June 2007, Kansas City
Missouri
Program Chair: MCRSA Meetings June 2006, Indianapolis Indiana
Program Chair: MCRSA Meetings June 2004, Madison Wisconsin

Associate Editor

Journal of Regional Analysis and Policy 2009-Present

References

Contemporary Economic Policy
Economic Development Quarterly
The Industrial Geographer

Employment

All Employee's Credit Union
Chief Operating Officer
COO of \$13,000,000 Industrial Credit Union in Euclid Ohio
1990 to 1994

Warner & Swasey Credit Union
Loan/Collections Manager
Supervised Lending Operations for \$7,000,000 Credit Union in
Cleveland Ohio 1988 to 1990

Transamerica Financial Services

Branch Manger
Supervised Operations of Finance Company in Janesville
Wisconsin 1986 to 1988

University Service

Seminar: 27th Annual UW System Faculty College May 2005

Seminar: AACSB Strategic Management Seminar,
Madison June 2003

Department of Economics

Assessment Committee, 2002- present

Advisory Committee, 2002-present

Advisor, Whitewater Economics Society,

2002- 2007 Advisor, Omicron Delta Epsilon,
2002-2007

Internship Committee, 2002-present

College of Business and Economics

Irvin L. Young Professor of Entrepreneurship

Selection Committee, Fall 2002

Strategic Planning Committee, 2003-present

University of Wisconsin-Whitewater

University Writing Award Committee,

2004-present General Education Review
Committee, 2003-2005

Public Policy and Administrative Review
Committee, 2003- present

Advisor Undergraduate Research Grant Recipient 2002-

2003 Graduate Economics Forum, Lecture Series Chair,

1996-1999 Economics Department Graduate Recruiting
Committee, 1998-1999

Community Service

Comprehensive Planning Commission: Muskego, Wisconsin, 1997-
2000

Michael Vartanian College Scholarship Committee, 1994-

Present Conservation Planning Committee: Muskego,

Wisconsin, 2000-2001 St John the Baptist Armenian

Church, Chairman 1994-1998, 1999-2005

St John the Baptist Armenian Church, Diocesan Council

Delegate 2005-Present

Diocese of the Armenian Church of America, Audit

Committee, 2010-Present

Zoning Board of Appeals: Muskego Wisconsin, 2002-

Present Whitewater Community Development Authority,

ad-hoc member 2002-2004

Sandra Beccue



Sandra Beccue, Market Research Manager for the Wisconsin Innovation Service Center, develops market research studies that are designed to provide companies with strategic insight to make more profitable market and new product development decisions. Her experience working with Wisconsin agri-businesses brings targeted insight into the opportunities and challenges that would be encountered by the Madison Public Market and their producer/vendor partners. Recent market feasibility studies on behalf of clients seeking information about customer requirements for innovative products and services, customer packaging and product feature requirements; market expansion opportunities for hydroponics and aquaponics operations; and the feasibility of establishing a hops growers cooperative provide a basis for in-depth research and analysis focusing on the specific needs of the proposed Madison Public Market and its participants. Beccue earned a B.S. in Agricultural Economics from the University of Illinois – Urbana Champaign, and an MBA from the University of Illinois – Springfield.

Wisconsin Innovation Service Center (WISC)

The Whitewater SBDC specialty center, the Wisconsin Innovation Service Center, is an internationally recognized leader in market research. As part of the University of Wisconsin-Whitewater Business Outreach Services, WISC provides market research that enables clients to achieve a competitive advantage. WISC specializes in assessing new product and invention feasibility and market expansion opportunities for innovative manufacturers and agri-businesses, technology businesses, B2B companies and independent inventors. Since 1980, WISC has completed more than 8,500 projects. Technical experts and researchers use an extensive array of resources to analyze information on market size, competitive intensity, demand trends, and other areas. WISC's research products cover market and product feasibility, competitive intelligence, diversification opportunities, distributor assessment, customer satisfaction, and licensing partnerships. In recent years, Customer Diversification Assessments conducted by WISC have helped more than 80 manufacturers weather the troubled economy by identifying new markets and new customers. Recent client success stories can be found at:

<http://www.uww.edu/wisc>.

The Wisconsin Innovation Service Center utilizes a number of undergraduate and graduate students affiliated with the College of Business and Economics, one of the largest business schools in the country with over 13 specialized business degrees. Student researchers build on their skills in problem solving, analysis, critical thinking skills and business communications.

Sandra Beccue - Resume
707 Wildwood Court
Jefferson, WI 53549
Home: 920-675-0054
Email: dsbeccue@charter.net

CAREER SUMMARY

Market Research and project oversight specialist with extensive experience in market research, press release creation, employee training, project direction, and operations analysis.

Demonstrated performance in:

Market Research	Project Management
Research Analysis and Recommendations	Leadership and Team Building
Operations Analysis	Employee Training
Business Feasibility	Entrepreneurship

PROFESSIONAL EXPERIENCE

WISCONSIN INNOVATION SERVICE CENTER, Whitewater, WI
Present

December 2004 to

The Wisconsin Innovation Service Center (WISC) a nationally recognized business outreach program that conducts over 200 research projects per year. WISC specializes in new product and invention assessments and market expansion opportunities for innovative manufacturers, businesses, technology transfer organizations, and independent inventors. WISC generates about 75% of its budget through client fees.

Market Research Manager

Provide direction for the Wisconsin Innovation Service Center. Recent studies include analysis of supplier of choice requirements for companies looking to diversify into new markets, assessments of customer packaging and product feature requirements; market expansion opportunities for hydroponics and aquaponics operations; and the feasibility of establishing a hops growers' cooperative.

- Negotiate project scopes and fees and develop research proposals in collaboration with business clients, intermediaries and agencies.
- Propose and implement projects with state policy implications for state Small Business Development Centers and other state agencies.
- Provide oversight for research process from evaluation of customer request to design of research process, collection of data, and development of final report-out resulting in 95% client satisfaction.
- Manage student research activities associated with new product appraisals, competitive intelligence evaluations, licensing partner searches, customer assessments, market diversification assessments, and distribution channel assessments.
- Provide direct technical assistance to small business clients in the research and development of business plans, marketing plans, loan proposals and related topics.
- Guide clients in the collection of data and other information to prepare business and marketing plans.
- Implement market scanning procedures to recognize emerging or future markets, analyze potential target market for changes and look for commercial opportunities that could benefit WISC clients.

Beccue Consulting, Jefferson, WI & Morrison, IL **1999 to 2003**

Beccue Consulting offered technical assistance to help small business owners focus strategically on business development problems resulting in higher profits, better cash flow, and better efficiencies.

Sandra Beccue, Consultant

- Provided direct technical assistance to small business clients in the research and development of business plans, marketing plans, operational organization and related topics.

UIUC Extension Whiteside County, Morrison, IL **1999 to 2001**

The UIUC Extension Office in Whiteside County is the link to the University of Illinois research-based information to improve lives and communities for the residents and communities of Whiteside County.

Community and Economic Outreach Academic

- Refocused the economic development process from the traditional industrial recruitment to the creation of a culture of support for small businesses, particularly in terms of developing resource networks in Whiteside County.

Crop Growers Insurance, Springfield, IL **1995 to 1997**

Crop Re-insurance Underwriter

Ralston Purina Company, Davenport, IA **1983 to 1984**

Commodity Buyer

EDUCATION

Masters of Business Administration **University of Illinois – Springfield**
Area of Focus: Marketing and Entrepreneurship **1989-2004**

B.S. of Agriculture Economics **University of Illinois – Urbana Champaign**
Major: Agriculture Economics, Minor: Marketing **1979-1983**

CONTINUING EDUCATION

PROBE - Accredited Facilitator **2012**

PRoMoting Business Excellence is a best practice benchmarking and assessment tool in the field of organizational diagnosis and improvement.

GrowthWheel - Accredited Facilitator **2013**

GrowthWheel is a tool for decision-making in start-up and growth companies to help entrepreneurs and advisors get focus, set agenda, and take the next step

Driving Value Innovation **2013**

Value Innovation is a targeted approach for increasing business value through innovation targeted to the Most Influential Customer.

UWEX Leadership Academy

2007-2008

A leadership toolbox focused on the challenges of a constantly changing environment that enables graduates to think strategically and act collaboratively to serve the needs of Wisconsin residents.

Cuhaci & Peterson

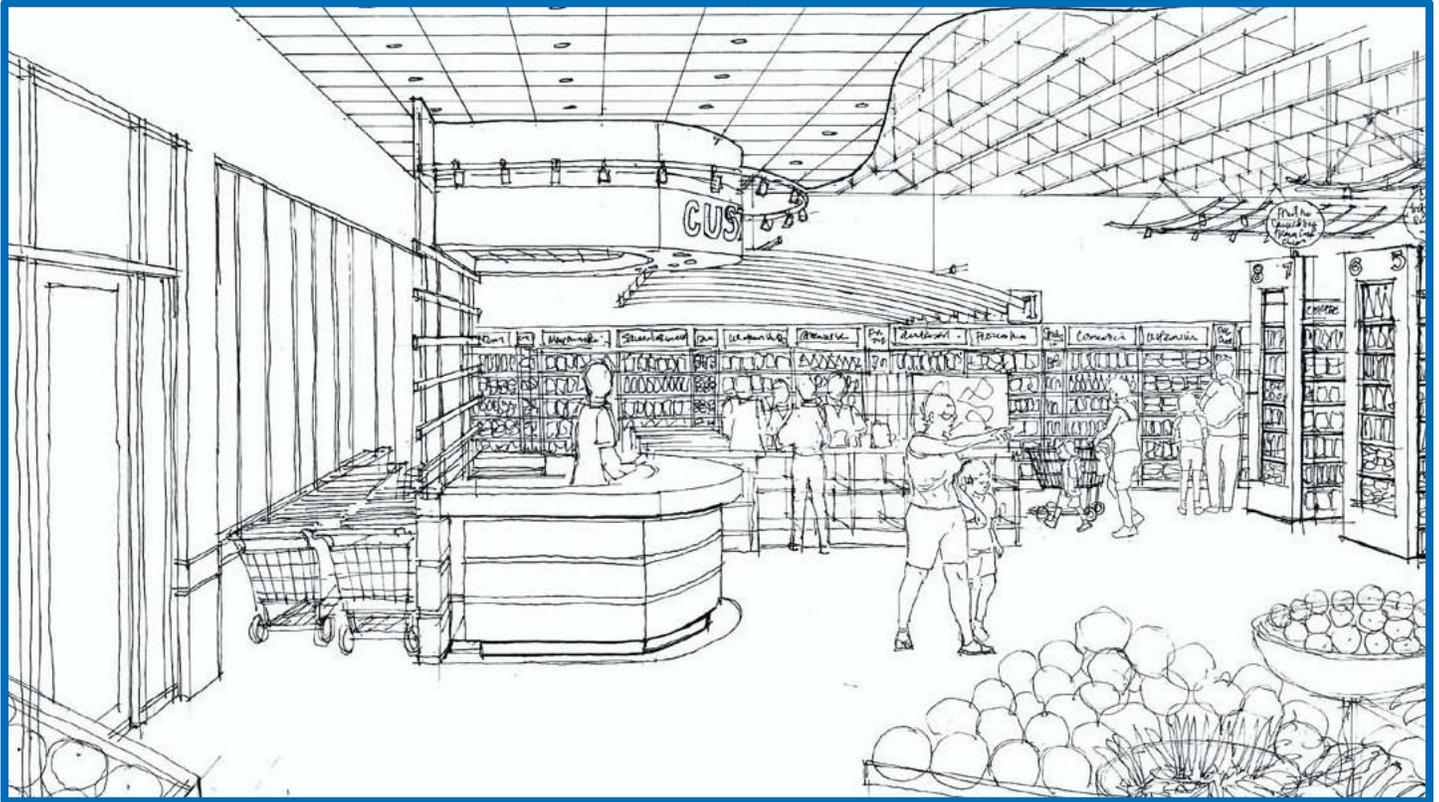
Architects, Engineers & Planners

Farm Market / Grocery Portfolio



Cuhaci & Peterson
Architects Engineers Planners
ORLANDO • PHILADELPHIA

ADA'S FOOD MARKET CONCEPT | Fort Meyers, FL



FOUR CORNERS PUBLIC MARKET | Polk County, FL



This project was specifically designed to blend aesthetically with the neighboring 'The Falls' Mall, a uniquely designed open air shopping/dining center.

THE FRESH MARKET @ THE FALLS | Miami, FL



This is the first prototype Publix grocery store to be certified LEED Gold. Major sustainable adaptations to the 28,000 square foot prototype were required.

PUBLIX @ BEE RIDGE | Sarasota, FL



C&P has an on-going 30 year relationship with Winn-Dixie. The transformational remodels and new prototype stores include this new "open market" entry that C&P helped to develop using the REVIT modeling platform.

WINN-DIXIE @ ERROL PLAZA | Longwood, FL





“Architecture creates a space for human interaction, it surrounds our lives like a frame to a painting,” Norberto says, “With every building we create, we try to find the best way to enhance lifestyles and meet the specific needs of the community.”

With more than three decades of international architectural instruction and experience, Norberto’s style, insights and ideas have created outstanding frameworks for the structures he has designed. As C&P’s Vice President of Design, Norberto and his team lead the design efforts from concept to final materials selection and have been responsible for everything from mixed use facilities to resorts to multi- family housing to churches.

Norberto joined the C&P team in 1989 as an Architectural Designer and now serves as both an Associate Partner and Vice President of Design. His years of varied professional experience coupled with his artistic talents are clearly reflected in the unique, elegant designs he produces, each of which creates a beautiful frame for the painting of life.

Norberto is a member of the Argentina Architects Association, the American Institute of Architects (AIA), and the International Council of Shopping Centers.

Norberto Campos

Vice President of Design

Education:

Master of Architecture - National University, Mar Del Plata Argentina
ENET Number One - Olavarria, Argentina

Professional Associations:

Argentina Architects Association
AIA (American Institute of Architects)
ICSC (International Council of Shopping Centers)

WHY C&P?

What we do:

- Land Planning
- Landscape Architecture
- Architectural Design
- Engineering
- Structural
- Mechanical
- Electrical
- Plumbing
- Concept Design
- Graphic Design / Presentation
- Site Due Diligence
- Quality Control/Assurance
- LEED Consulting
- Building Information Modeling (BIM)
- Prototype Development & Maintenance
- Permit Expediting

FIRM SIZE AND STRUCTURE

Our size and multiple disciplines allows us to share resources which in turn allows us to engage in multiple projects, minimize costs and main project schedules.

The Matrix structure allows for movement of staff between projects quickly, preventing disruption of teams or programs.

Benefits to owner are:

- Cross Training within disciplines and programs
- Bigger talent pool available
- Quicker startup and responsiveness
- Lower Costs

TEAM

Cuhaci & Peterson's team of **135** members includes **20** licensed professionals with **35** college graduate team leaders, **15** architects in training, **6** engineers in training and **30** support personnel.

STATISTICS

- Less than **1%** of change orders attributed to errors and omissions
- **98%** of projects completed on schedule
- Average response time to RFI is **1 day!**
- Average response time to emails: **3 hours**
- Completed over **1400** grocery store projects
- Average tenure of mid/upper management: **18 years**
- Average tenure of all staff: **7 years**

QUALIFICATIONS

- We have **35** years of experience
- **22** LEED® Accredited Professionals in-house
 - 18** LEED Architectural Staff
 - 4** LEED Engineering Staff
- 3** LEED Designed Buildings In for Certification
- **3** of the world's **90** architect CDP's (2011) (Certified Development Professional)
- Integrated Architecture, Structural, and MEP into BIM (REVIT) design process
- Four specialized architectural studios
- National tenant experience
- Dedicated Video conference room and individual computer to computer meeting capabilities

GEOGRAPHY

We are registered in **49 states** and glad to travel as necessary. We have a main office in Orlando, FL and a small recently acquired office near Philadelphia, PA.

QUALITY CONTROL

We focus our efforts on maintaining quality relationships and quality projects consistently. We have many standard processes in place to ensure all elements are accurate, complete and coordinated. **Benefits** to owner are:

- 4 Tier System (multiple sets of eyes)
- Detailed Checklist **Tailored** to the client
- Performed through the "LIFE OF THE PROJECT"
- Additive not repetitive review of documents

CUSTOMER SERVICE

We believe the key to successful projects and client relationships is maintaining the "golden thread" of at least one key professional contact involved in EACH project from beginning to end. **Benefits** are:

- Dedicated customer service
- Quicker and more accurate response
- Familiarity with client needs and program

COVERAGE

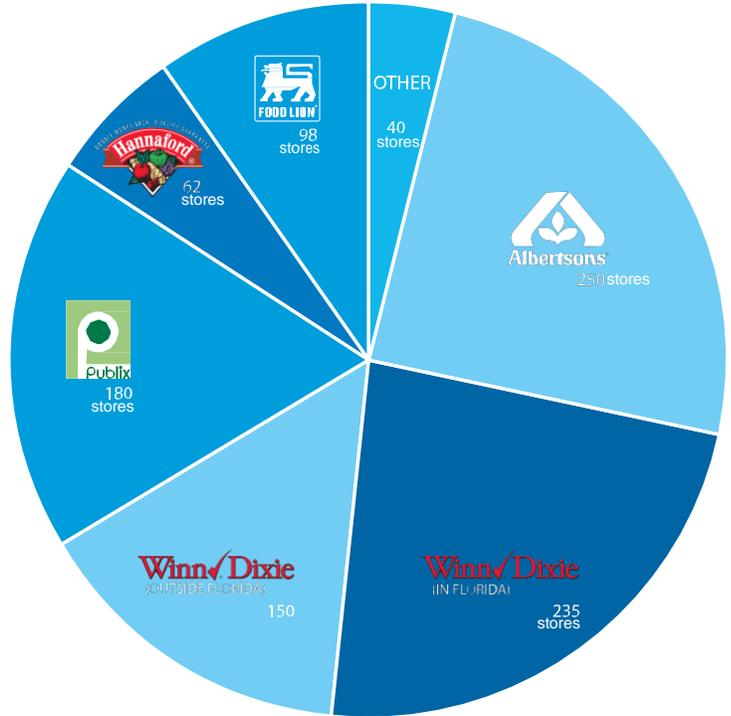
- Professional Liability Insurance
- Lexington Insurance Company
- General Liability Insurance
- Nationwide Insurance

HISTORICAL and RECENT GROCERY EXPERIENCE

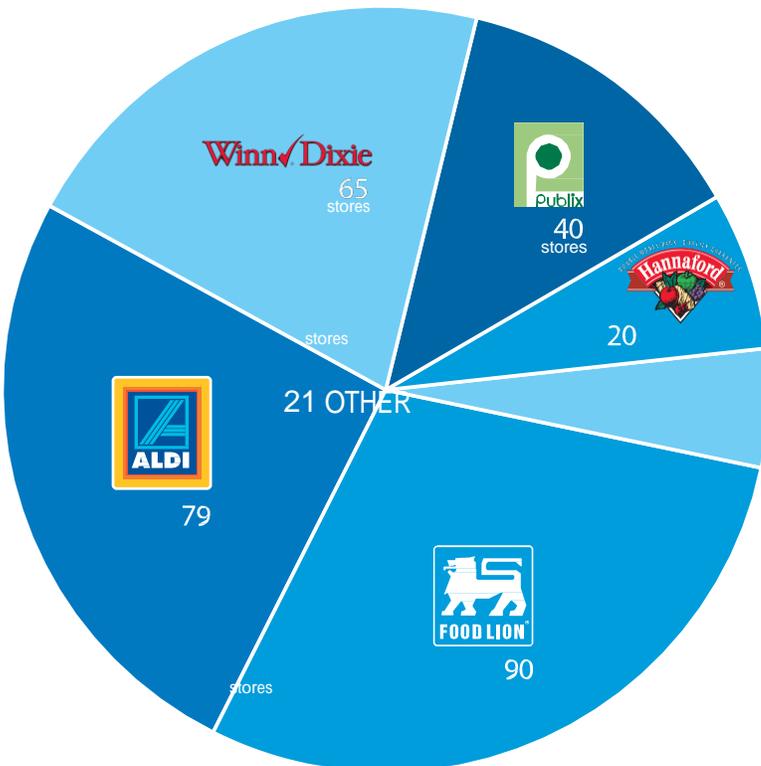
Since 1978, Cuhaci & Peterson has worked on nearly 1400 grocery store projects and many have been with four major chains; these numbers continue to grow.

A wide background of experience has been gained by working with additional grocery clients beyond those seen in the graphs including: Miller Enterprise, Harris Teeter, Sav-A-Lot, U-Save, Safeway, BJ's, Restaurant Depot, Freshfield Farms, Gordon Food Services and Kash'n Karry.

C&P GROCERY EXPERIENCE 1978 - 2006



C&P GROCERY EXPERIENCE 2007 - Present



Cuhaci & Peterson has identified some specific capabilities that we believe are both desirable for the architect/engineering team to possess and differentiate us from others who might perform this work.

- **Food Service Design:** Having worked hundreds of restaurants and grocery store delicatessen areas of all sizes and types, our teams are experienced in working with Food Service equipment. We offer the most flexible food service design and documentation options in the industry, having worked with consultant food service designers, food equipment vendor/designers and internal design and selection of equipment.
- **Refrigeration Design:** While most refrigeration for this type of product is self contained within each piece of equipment (i.e. cooler, ice machine, etc), we have the experience of working on much more sophisticated systems that require remote refrigeration and trenching. We have an extensive working knowledge of refrigeration systems, large and small, self contained and remote.
- **Lighting Design:** Working in small and regional retail center design, we routinely work with exterior lighting solutions, completing photometric analysis to meet regulatory requirements. We have the flexibility to work the brand's specific vendor or complete them independently inhouse, based upon the needs of the program. From an interior decorative perspective, our architects are experienced in the selection of decorative lighting packages for a variety of restaurant and retail clients.
- **Construction Phase Reporting:** As a part of our quality control program, we have developed a series of reporting tools that keep the brand informed regarding project status. Those forms include project specific forms like request for information and shop drawing logs as well as multi-project communication status reports, and individual project action item tools.

HISTORICAL and RECENT GROCERY EXPERIENCE



Tim Hanrahan

Darden Restaurants
1000 Darden Center Dr
Orlando, FL 32837

George Meerdo

Albertsons, Inc.
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Ste. 100
Lake Mary, FL 32746

Gary Yoko

HMS Host
6905 Rockledge Dr
Bethesda, MD 20817

John Kelly

Leslie's PoolMart
3925 E Broadway Rd
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Phoenix, AZ 85040

Steve Sless

Paragon Outlets
217 E. Redwood Street
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