



**MADISON REGION
ECONOMIC PARTNERSHIP**



Madison Region Economic Partnership, Inc Proposal for Services

In Partnership with AFF Research, LLC

Contract Proposal for BizReady Program Administration

Date: August 18, 2023

Proposal ID: RFP #12051-0-2023-BP

Prepared by: Madison Region Economic Partnership, Inc (MadREP)

8517 Excelsior Dr, Ste 107

Madison, WI, 53717

Ph: 608-571-0401

Email: jfields@madisonregion.org

Website: <https://madisonregion.org>

In Partnership with: AFF Research, LLC

Website: <https://www.affresearch.com>



Form A: Signature Affidavit

RFP #: 12051-0-2023-BP Business Ready "BizReady" Program

This form must be returned with your response.

In signing Proposals, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise take 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 Proposals, that Proposals have been independently arrived at, without collusion with any other Proposers, competitor or potential competitor; that Proposals have not been knowingly disclosed prior to the opening of Proposals to any other Proposers or competitor; that the above statement is accurate under penalty of perjury.

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

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

Madison Region Economic Partnership, Inc. (MadREP)

COMPANY NAME

Jason M. Fields

SIGNATURE

08/18/2023

DATE

Jason M. Fields

PRINT NAME OF PERSON SIGNING



Form B: Receipt of Forms and Submittal Checklist

RFP #: 12051-0-2023-BP Business Ready "BizReady" Program

This form must be returned with your response.

Proposers hereby acknowledge the receipt and/or submittal of the following forms:

Forms	Initial to Acknowledge SUBMITTAL	Initial to Acknowledge RECEIPT
Description of Services/Commodities	N/A	
Form A: Signature Affidavit	JF	JF
Form B: Receipt of Forms and Submittal Checklist	JF	JF
Form C: Vendor Profile	JF	JF
Form D: Cost Proposal	JF	JF
Form E: References	JF	JF
Appendix A: Standard Terms & Conditions	N/A	JF
Appendix B: Contract for Purchase of Services	N/A	JF
Addendum # 1	N/A	JF
Addendum # 2	N/A	JF
Addendum #	N/A	
Addendum #	N/A	

Jason M. Fields

VENDOR NAME

Madison Region Economic Partnership, Inc. (MadREP)

COMPANY NAME



Form C: Vendor Profile

RFP #: 12051-0-2023-BP Business Ready "BizReady" Program

This form must be returned with your response.

COMPANY INFORMATION

COMPANY NAME (Make sure to use your complete, legal company name.) Madison Region Economic Partnership, Inc.			
FEIN 71-1015136		(If FEIN is not applicable, SSN collected upon award)	
CONTACT NAME (Able to answer questions about proposal.) Jason M. Fields		TITLE President/ CEO	
TELEPHONE NUMBER 608-571-0401		EMAIL jfields@madisonregion.org	
ADDRESS 8517 Excelsior Dr Ste. 107		CITY Madison	STATE ZIP WI 53717

AFFIRMATIVE ACTION CONTACT

If the selected contractor employs 15 or more employees and does aggregate annual business with the City of \$50,000 or more, the contractor will be required to file an Affirmative Action Plan and comply with the City of Madison Affirmative Action Ordinance, Section 39.02(9)(e), within thirty (30) days contract signature. Vendors who believe they are exempt based on number of employees or annual aggregate business must file a request for exemption. Link to information and applicable forms: <https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/vendors-suppliers>

CONTACT NAME Jason M. Fields		TITLE President/ CEO	
TELEPHONE NUMBER 608-571-0401		EMAIL jfields@madisonregion.org	
ADDRESS 8517 Excelsior Dr Ste. 107		CITY Madison	STATE ZIP WI 53717

ORDERS/BILLING CONTACT

Address where City purchase orders/contracts are to be mailed and person the department contacts concerning orders and billing.

CONTACT NAME Jason M. Fields		TITLE President/ CEO	
TELEPHONE NUMBER 608-571-0401		EMAIL jfields@madisonregion.org	
ADDRESS 8517 Excelsior Dr Ste. 107		CITY Madison	STATE ZIP WI 53717

LOCAL VENDOR STATUS

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website. <https://www.cityofmadison.com/finance/purchasing/local-businesses>

CHECK ONLY ONE:

Yes, we are a local vendor *and* have registered on the City of Madison website under the following category: Business and Professional Services

No, we are not a local vendor or have not registered.



Form D: Cost Proposal

RFP #: 12051-0-2023-BP Business Ready "BizReady" Program

This form must be returned with your response.

Prepare the fee proposal as all inclusive, not-to-exceed, fixed fees:

- All Inclusive – Covers all direct and indirect necessary expenses including but not limited to; travel, telephone, copying and other out-of-pocket expenses.
- Not To Exceed – The actual fees shall not exceed the amount specified in fee proposal.
- Fixed Fee – All prices, rates, fees and conditions outlined in the proposal shall remain fixed and valid for the entire length of the contract and any/all renewals.

Any pricing increases or additions must be agreed upon in writing by both parties.

Part 1

The budget for the program is \$300,000. Describe how you would propose using these resources to create and administer the program. In particular, how much would be used for administration, programming, and direct micro-enterprise funding to participants. To maximize effectiveness, describe how you would propose structuring the direct micro-enterprise funding.

Though not required, the City is very interested in leveraging city funding with additional outside resources. If applicable, describe how your team would do this. Include a detailed table describing the budget for the project, delineated by task, and clearly identifying leveraged resources.

Part 2

Please attach a list of positions and the hourly billing rate of anyone anticipated to work on this project. Include staff names if they are known. Use the below as a guide as to how it should be organized.

Employee Classification	Employee Name	Hourly Rate

Please see attached document for cost proposal breakdown

Madison Region Economic Partnership, Inc. (MadREP)

COMPANY NAME

Form D: Cost Proposal for RFP #12051-0-2023-BP Business Ready "BizReady" Program

Part 1: The following tables display the breakdown of administrative overhead, fund administration, direct fund allocation and technical assistance/training program expense costs.

Budget Category	Amount	Description
Administrative Overhead Costs		
Administrative Overhead Expenses	\$30,000	The Admin Fee of \$30,000 covers office expenses, and overhead costs. These are vital for program coordination and management.
Fund Administration Costs		
Fund Administration Costs	\$15,000	Fund Administration costs of \$15,000 covers salaries for staff engaged in fund administration, grant processing expenses and other costs directly related to the administration of the Micro-Enterprise fund.
Direct Micro-Enterprise Funding to Participants		
Fund Allocation for Successful Business Owners	\$105,000	<p>This \$105,000 fund is reserved to reward successful program completers. Distribution will be based on established criteria to encourage and recognize their achievements.</p> <p>To maximize the effectiveness of the direct micro-enterprise funding MadREP will seek matching dollars via the Wisconsin Economic Development Corporation (WEDC) matching grant and dollar program, private donors, and Foundations. The goal is to ultimately have a fund that doubles in size to \$210,000.</p> <p>The program will look to allocate \$3,000 per business that completes the BizReady program.</p> <p>By structuring the direct micro-enterprise funding program in this way, we can ensure a fair and transparent process, maximize the impact of the funding, and support the growth and success of participating businesses.</p> <p>An outline of the Micro-Enterprise Fund allocation structure is provided in Table A .</p>
Direct Programming Expense Costs		
Total Direct Programming Expenses	\$150,000	<p>The total of \$150,000 is meticulously allocated across various program components to ensure a seamless and impactful learning experience.</p> <p>The breakdown is provided in Table B.</p>

Table A: Funding Structure for Micro-Enterprise Grants	
1. Eligibility Criteria:	Establish clear eligibility criteria for businesses to participate in the program. This could include factors such as being a small-scale enterprise, operating for a specific period (e.g., at least one year), demonstrating financial viability or potential, and being committed to completing the BizReady program.
2. Application and Selection Process:	Create a streamlined application process where businesses can apply for micro-enterprise funding after successfully enrolling in the BizReady program. Applications should require details about the business, its financials, and a brief proposal outlining how the funding will be utilized to enhance its operations.
3. Selection Committee:	Form a selection committee comprising industry experts, entrepreneurs, and representatives from relevant government agencies. This committee should review the applications, assess the business potential, and ensure fairness in the selection process.
4. Funding Allocation:	Allocate the \$105,000 /210,000 budget proportionately over the course of two years to provide 35/70 grants of \$3,000 each. This ensures a steady flow of funding without overwhelming the program with a large number of recipients at once. When accepting funding, grantees will sign agreements to ensure grant funds are used for eligible expenses as defined in section 2.6 of the City of Madison's RFP.
5. Monitoring and Evaluation	Implement a robust monitoring and evaluation system to track the progress and impact of funded businesses. This can include regular check-ins, financial reporting, and tracking key performance indicators. This information will help identify successful businesses and potential areas for improvement within the program. Grantee reporting will also guarantee and verify that all micro grant funds are spent on eligible costs as defined in section 2.6 of the City of Madison's RFP.
6. Business Support and Mentorship:	Provide additional support to the funded businesses to enhance their chances of success. This can include connecting them with mentors or business advisors, organizing workshops or training sessions specific to their needs, or facilitating networking opportunities within their respective industries.
7. Collaboration with Local Institutions:	Partner with local institutions such as banks or microfinance organizations to leverage their expertise and resources. This collaboration can help provide financial services, including access to credit or loan facilities, to further support businesses in scaling up their operations.
8. Gradual Expansion:	Based on the program's success, consider gradually increasing the funding and the number of businesses benefiting from it. This expansion can be done in subsequent years or cycles after evaluating the outcomes and ensuring the sustainability of the program.
9. Public Awareness and Outreach:	Conduct awareness campaigns to promote the direct micro-enterprise funding program and encourage eligible businesses to participate. Advertise the success stories of previously funded businesses to attract more candidates and create a positive perception of the program's impact.
10. Periodic Evaluation:	Conduct periodic evaluations of the program's effectiveness and impact to assess its ongoing relevance and make necessary improvements. This can involve seeking feedback from both the funded businesses and the selection committee, analyzing key performance indicators, and identifying any challenges or bottlenecks.

Form D: Cost Proposal for RFP #12051-0-2023-BP Business Ready "BizReady" Program

Table B: Direct Programming Expense Breakdown		
Training Materials and Resources	\$50,000	This allocation includes expenses for training manuals, online platforms, videos, software, and other resources that enhance participant learning.
Guest Speakers and Experts	\$30,000	Engaging experts and mentors is essential. This fund covers speaker fees, travel, accommodation, and honorariums for professionals who enhance the program content.
Infrastructure and Facilities	\$20,000	To provide a suitable environment, this allocation covers training space rent, equipment, renovation, setup, and maintenance to ensure a conducive learning environment.
Outreach and Program Promotion	\$15,000	Effective outreach and promotion is vital. This allocation supports website development, digital campaigns, print collateral creation, and advertising to maximize program visibility.
Staff and Trainer Salaries	\$25,000	A skilled team is key. This allocation covers salaries for program coordinators, trainers, facilitators, and administrative staff involved in program management.
Evaluation and Assessment	\$5,000	To measure impact, \$5,000 is allocated for surveys, evaluation tools, analysis software, and reporting to gather participant feedback and enhance future iterations.
Miscellaneous Expenses	\$5,000	For unforeseen needs, this fund covers contingencies, office supplies, and insurance/legal fees to ensure program operations remain secure and compliant.

Part 2:

Employee Classification	Employee Name & Role/Title	Hourly Rate
Full-Time, Exempt	Jason Fields, President/ CEO - MadREP	\$115/hour
Part-Time, Exempt	Tonnetta Darcel Carter, Chief Strategy Officer - MadREP	\$66/hour
Full-Time, Exempt	Everett Mulroe, Grants Manager- MadREP	\$34/hour
Full-Time, Exempt	Anna Steinfest, President/ CEO - AFF Research	\$175/hour
Full-Time, Exempt	Michael Toyer, PhD, Vice President- AFF Research	\$125/hour



Form E: References

RFP #: 12051-0-2023-BP Business Ready "BizReady" Program

This form must be returned with your response.

Please list three references that are **NOT** from the City of Madison. If you wish to highlight any additional work experience for the City of Madison, please list it on a separate page.

REFERENCE #1 – CLIENT INFORMATION			
COMPANY NAME Economic Development Administration (EDA)		CONTACT NAME Tom Baron	
ADDRESS Chicago Regional Office: 230 S. Dearborn St. Ste 3280		CITY Chicago	STATE ZIP IL 60604
TELEPHONE NUMBER (224)229-9154		FAX NUMBER	
EMAIL tbaron@eda.gov			
CONTRACT PERIOD May 2021 - January 2023		YEAR COMPLETED 2023	TOTAL COST \$160,000
DESCRIPTION OF THE PERFORMED WORK Development of a pandemic recovery sector strategy that once implemented will provide a clear vision for economic growth for the region based on the region's growing clusters and to provide an action plan that builds the region's resiliency.			

REFERENCE #2 – CLIENT INFORMATION			
COMPANY NAME Wisconsin Economic Development Corporation (WEDC)		CONTACT NAME Tim Weber	
ADDRESS 201 W Washington Ave		CITY Madison	STATE ZIP WI 53703
TELEPHONE NUMBER 608-210-6772		FAX NUMBER	
EMAIL tim.weber@wedc.org			
CONTRACT PERIOD August 2021 - February 2023		YEAR COMPLETED 2023	TOTAL COST 308,000
DESCRIPTION OF THE PERFORMED WORK Administered over \$12 Million in Main Street Bounceback Grants to local businesses across 6 counties served by MadREP. Administration of grants included marketing of the opportunity, communicating with potential applicants, processing and reviewing applications, communicating decisions to applicants, awarding grants, monitoring and reporting duties between grantees and WEDC.			


Madison Region Economic Partnership, Inc. (MadREP)

COMPANY NAME

REFERENCE #3 – CLIENT INFORMATION			
COMPANY NAME Dane County		CONTACT NAME Michelle Bozeman	
ADDRESS 210 Martin Luther King Jr Blvd RM 421		CITY Madison	STATE ZIP WI 53703
TELEPHONE NUMBER 608-225-3448		FAX NUMBER	
EMAIL michelle@countyofdane.com			
CONTRACT PERIOD December 2022 - December 2023		YEAR COMPLETED 2023	TOTAL COST \$79,734
DESCRIPTION OF THE PERFORMED WORK Provide economic development services to Dane County. Such services include: -Business attraction and retention services for the county -Marketing of the county on MadREP's website and through RFIs -Direct assistance to Dane County start-ups in the innovation and entrepreneurship space -Partner with Urban League of Greater Madison to host annual Diversity, Equity and Inclusion Summit -Represent Dane County at international economic development events and meetings -Work with Dane County on Sustainability Campus			

Madison Region Economic Partnership, Inc. (MadREP)

COMPANY NAME

	<h2 style="margin: 0;">Form E: References</h2> <h3 style="margin: 0;">RFP #: 12051-0-2023-BP Business Ready "BizReady" Program</h3>
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This form must be returned with your response.

Please list three references that are **NOT** from the City of Madison. If you wish to highlight any additional work experience for the City of Madison, please list it on a separate page.

REFERENCE #1 – CLIENT INFORMATION			
COMPANY NAME NEW North	CONTACT NAME Barb LaMue		
ADDRESS 2740 West Mason	CITY Green Bay	STATE WI	ZIP 54303
TELEPHONE NUMBER 920.336.3860	FAX NUMBER		
EMAIL barb.lamue@thenewnorth.com			
CONTRACT PERIOD June 2022-June 2023	YEAR COMPLETED 2023	TOTAL COST \$50,000	
DESCRIPTION OF THE PERFORMED WORK Administrator for their Diverse Small Business Training Program which was designed to increase the business acumen , capabilities and focus on small, women, minority, veteran-owned, LGBTQ and other businesses.			

REFERENCE #2 – CLIENT INFORMATION			
COMPANY NAME Green Bay Packers	CONTACT NAME Aaron Popkey		
ADDRESS 1265 Lombardi Ave	CITY Green Bay	STATE WI	ZIP 54304
TELEPHONE NUMBER 920.569.7500	FAX NUMBER		
EMAIL PopkeyA@packers.com			
CONTRACT PERIOD 2005-Present	YEAR COMPLETED Present	TOTAL COST Confidential	
DESCRIPTION OF THE PERFORMED WORK The Packers Mentor-Protégé Program pairs emerging Wisconsin businesses (protégés) with established, knowledgeable and committed companies (mentors) to help provide exposure, resources and guidance in order to reach the next level of business growth.			

1. Team - Describe your team. State organization(s) that will be part of providing the services, the number of years the organization has been operational, and experience with similar or related programs. If proposers are a team of several organizations, describe how each involved organization will contribute. [15%]

*MOU Attached

Our team is composed of a diverse group of professionals who are dedicated to the economic success of entrepreneurs and small business owners from diverse and historically underserved communities. We are a partnership of two organizations: Madison Region Economic Partnership, Inc (MadREP) and AFF Research. Each organization brings a unique set of skills and experiences to the table, allowing us to offer a comprehensive range of services necessary to best serve entrepreneurs, business owners and innovators as they start, grow and thrive in Madison.

MadREP has served the city of Madison and its surrounding 8-county region for over 16 years, specializing in regional economic development that understands and appreciates the importance of the region's communities and the local businesses that serve them. These local businesses, entrepreneurs and innovators are what make Madison one of the Nation's best places to live, work and play. For this reason, MadREP has dedicated significant time and resources over the past years to support entrepreneurs, small business owners and corporations who wish to expand and thrive in our region. MadREP has partnered with local organizations to administer grant and loan programming that provides small businesses with technical assistance and business development resources.

In the delivery of such programs, MadREP continues to focus on the inclusivity of business owners from historically underserved communities in efforts to ensure the affordability and accessibility of Madison's resources to all individuals and communities within the region.

In honoring the commitment of providing businesses with the best resources to support economic stability and scalability, MadREP has established a partnership with AFF Research. AFF Research brings to the partnership 18 years of experience in developing, implementing, and monitoring small business training and support programs that focus on increasing business acumen and capabilities for small businesses owned by women, people of color, members of the LGBTQ community, and other underserved communities. They have successfully administered Diverse Small Business Training programs across the state of Wisconsin and have a proven track record of supporting small businesses as they start and grow.

MadREP's initial partnership with AFF Research was realized through the opportunity to participate in AFF Research's Green Bay Packer Mentor Protege Program, which supports diverse small business owners by providing them with mentorship, training, and technical assistance. MadREP now seeks to further leverage our experience administering small business

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funding with AFF Research's extensive experience and expertise in business development training and technical assistance through collaboration in administering Madison's BizReady Program to provide comprehensive support for Madison's diverse small business owners.

MadREP will spearhead the overall program management for the BizReady program, acting as the main liaison and Project Manager. Our responsibilities will include fund administration for the BizReady Micro-enterprise Grant Fund and collaboration with AFF Research and the City of Madison to develop the program. MadREP will also be in charge of recruiting small businesses and supervising AFF Research's role in Training and Technical Assistance Programming. We will manage the BizReady Micro-enterprise Grants Fund and supervise AFF Research's individual assistance to participants. As specified in the attached Memorandum of Understanding (MOU), MadREP would be the main contractor with the City of Madison and would subcontract the project activities to AFF Research to capitalize on their specialized expertise and experience in the technical assistance and training space.

In their role, AFF Research will collaborate with MadREP and the City of Madison to develop the BizReady Program, leveraging their expertise in business training. Their role will encompass the creation and organization of the program's training and technical assistance, eligibility criteria, application and selection processes. They will also support the recruitment of businesses using both traditional and digital outreach methods. AFF Research will manage the program's training and technical assistance, providing individualized support to participants and conducting regular meetings to guide their progress. They will also collaborate with MadREP to set program evaluation standards and ensure timely reporting of all data.

Together, AFF Research and MadREP will combine their expertise and resources to ensure the successful implementation of the BizReady Program, contributing to the economic success of diverse small business owners in the City of Madison.

2. Team Members - Describe individual team members. Include names, titles, roles, and responsibilities for each team member. Identify the project manager and primary contact. Describe who will manage the training/technical assistance work and who will manage the fund. Include a resume for each proposed team member. [15%]

****Resumes attached at the end of Question Responses**

Our team is made up of a diverse group of experts. who are dedicated to the economic success of entrepreneurs and small business owners from diverse and historically underserved communities. We are a partnership of two organizations: Madison Region Economic Partnership (MadREP) and AFF Research. Each organization brings a unique set of skills and experiences to the table, allowing us to offer a comprehensive range of services necessary to best serve entrepreneurs, business owners, and innovators as they start, grow, and thrive in Madison.

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The project will be managed by Jason Fields, the President and CEO of MadREP. With his extensive experience in economic development and leadership, Jason will oversee the overall project implementation, ensuring that all activities align with our objectives and that we meet our targets in a timely manner.

Everett Mulroe, the Grants Manager at MadREP, will serve as the primary contact for the project. Bringing over a decade of experience working in education and community advocacy, she has a proven track record of facilitating communication and serving as a liaison between stakeholders and community members. This experience will be a significant asset to the role as she will be responsible for communication with all stakeholders, including City of Madison points of contact, program applicants, grantees, and partner organizations ensuring that all inquiries and concerns are addressed promptly and effectively.

Tonnetta Darcel Carter, the Chief Strategy Officer at MadREP will manage the BizReady Micro-Enterprise Grants Fund. She will oversee the financial aspects of the project, ensuring that funds are allocated and utilized efficiently and transparently and will be responsible for financial reporting and compliance. Darcel Carter's impressive background and achievements uniquely position her as an ideal candidate to manage a grant fund for small businesses. With extensive experience in directing multimillion-dollar capital raises, implementing investment strategies, and cultivating global investor networks, she brings a proven track record of financial leadership. Her strategic vision and collaborative approach, as demonstrated in leading transformative healthcare campaigns and strategic initiatives, showcase her ability to drive impactful projects. Tonnetta's adeptness in relationship management and expertise in major gifts further underline her potential to excel in this role, making her a valuable asset for empowering small businesses through effective grant fund management.

Anna Steinfest, President and CEO of AFF Research will manage The Diverse Business Training and Development aspect of the project. Steinfest brings 18 years of experience in developing, implementing, and monitoring small business training and support programs. To illustrate Steinfest's expertise for this role, she holds a Bachelor of Science in Planning, Forecasting and Economic Systems, a Masters of Science in Marketing Research and Consumer Behavior along with specialized certification as a "Diversity Practitioner" from Northwestern University's Workforce Diversity Institute. She will be responsible for designing and delivering training programs tailored to the needs of diverse small businesses.

Michael Toyer, PhD, VP of AFF Research will oversee the project's Training/Technical Assistance. With degrees in Economics from Duke University and Cornell College, and a distinguished academic career, including a tenure at the University of Wisconsin – Green Bay's Cofrin School of Business, Toyer brings extensive experience. His roles have ranged from professor to Senior Consultant for Inc. Magazine's Business Resource Unit, to owning a small business consulting firm. His leadership is demonstrated through his mentorship in the Green

Bay Packers' Mentor-Protégé Program and a 12-year stint on the Bay Area Workforce Development Board. Toyer's role will focus on providing beneficiaries with the technical assistance needed to realize their business plans and goals.

Together, our team combines decades of experience and a wide range of expertise. We are confident in our ability to successfully implement Madison's BizReady Program and make a significant impact on the communities we serve.

3. Project examples – Provide descriptions of related work. [20%]

The following are examples of related projects that our team has successfully implemented. These projects highlight MadREP's experience in administering small business grants and loans, as well as AFF Research's experience providing individualized, personal business technical support and training to small business owners and entrepreneurs, with a particular focus on supporting underserved business owners and entrepreneurs. The combined experience of each partner makes our team uniquely positioned to provide robust and comprehensive support to Madison's small businesses.

MadREP's Disaster Recovery Microloan Program:

Following severe floods across parts of the Madison Region, MadREP responded to local business needs by partnering with Wisconsin Economic Development Corporation (WEDC) to administer the Disaster Recovery Microloan program to businesses impacted by the floods. Between November 2018 and May 2019, MadREP staff administered \$750,000 in loans to 53 businesses. Local businesses received up to \$15,000 each in assistance through the Disaster Recovery Microloan Program. With local businesses' best interest in mind, loans were administered at 0% interest with opportunity for penalty-free deferred payments for the first 6 months of the loan followed by an 18-month loan term for payments.

The program provided short-term assistance to businesses affected by the flood by providing microloans to assist the business with necessary restoration and operation expenses until they were able to secure more long-term recovery funding.

In administering the loans, MadREP developed and implemented an application and background check system to identify and screen businesses for the program.

MadREP's Administration of the Main Street Bounceback Small Business Grant Program:

Over the past couple years, MadREP, once again, partnered with the State of Wisconsin through WEDC to support local businesses as they responded to unprecedented events. As local businesses reopened and returned to in-person operations following the COVID-19 pandemic and Safer at Home Orders, MadREP administered the Main Street Bounceback Grant Program.

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The program provided over \$12 million in funding to more than 1200 local businesses across the region. The post-pandemic support provided businesses with funding to move into commercial spaces allowing them to open their first brick and mortar location or expand into additional commercial space. The program has been instrumental in supporting the growth and development of small businesses in the Madison Region.

Throughout the program, MadREP was intentional in making a concentrated effort to ensure equitable and inclusive access to the program by working with local and regional partners in chambers of commerce and business development organizations. Across the region, the program administered a total of 1,235 grants to local businesses. 422 of these grants were awarded to businesses in Madison with 299 of those going to business owners who identified as either women-owned or “minority-owned” businesses.

Administration of the program included:

1. Program Design and Planning - Done in partnership with WEDC
 - a. Definition of clear objectives and eligibility criteria.
 - b. Allocation of a well-defined budget and grant amounts.
2. Application Development and Promotion - Done in partnership and collaboration with local chambers of commerce and municipalities
 - a. Creation of a user-friendly application process.
 - b. Implementation of effective promotion strategies for maximum engagement with a focus on inclusive and equitable program access
3. Application Review and Evaluation:
 - a. Thorough application reviews for completeness and eligibility
 - b. Objective scoring methods for fair evaluation
4. Selection and Communication:
 - a. Selection of recipients based on application completeness, accuracy and eligibility requirements.
 - b. Prompt notification and guidance for grant recipients
5. Due Diligence and Disbursement:
 - a. Verification of applicant information for accuracy
 - b. Compliant fund disbursement
6. Reporting and Management:
 - a. Establishment of ongoing reporting and accountability measures
 - b. Management of the program for optimal impact

MadREP Revolving Loan Fund

In 2021, MadREP announced the creation of a USDA revolving loan fund (RLF) focused on entrepreneurs and growing businesses in Columbia, Dane, Dodge, Iowa, Green, Jefferson, Rock, and Sauk Counties. In 2023, MadREP will operationalize the fund, increasing access to capital

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for regional businesses. The total fund amount is \$372,150. The program will provide gap financing that will supplement loans from traditional lending sources.

The RLF is funded by the USDA to assist local businesses in rural communities within the Madison Region. MadREP's responsibilities in administering the Revolving Loan Fund include:

- Program Leadership and Oversight:
 - Develop and Lead RLF Committee, set policies, review applications, and collaborate on financial management.
- Applicant Support and Guidance:
 - Provide information, assist with applications, and guide credit analysis.
- Meeting Coordination and Documentation:
 - Organize meetings, maintain accurate records, and ensure compliance.
- Financial Management:
 - Manage fund disbursement, adhere to USDA guidelines, and handle financial aspects.
- Monitoring and Reporting:
 - Monitor fund use, job creation, and compliance; provide regular reports to stakeholders.
- Default Management and Communication:
 - Enforce terms, address defaults, and maintain effective communication.
- Evaluation and Adjustment:
 - Assess effectiveness and recommend policy changes as needed.
- Reinvestment and Sustainability:
 - Reallocate repaid funds in alignment with program objectives

AFF Research's Diverse Small Business Training Program:

The Packers' Mentor Protege Small Business Training and Technical Assistance Program is a significant initiative that has been operational since 2010. The program is designed to foster business growth, economic development, and job creation in Wisconsin by pairing emerging businesses with established, knowledgeable companies. The primary focus of the program is to support businesses owned by minorities, women, veterans, service-disabled veterans, or disabled persons, although other regional small businesses are also encouraged to apply.

The program operates by creating mutually beneficial partnerships between mentor and protégé companies. These partnerships involve participation in various events and presentations, as well as monthly meetings between the paired businesses. The program's goal is to increase the business acumen and capabilities of these small businesses, helping them reach the next level of business growth.

The Packers' Mentor Protege Program has recently expanded its reach to businesses in southeastern, southwestern, and central Wisconsin. The program is actively seeking more mentors and protégés for its next session, and interested businesses are encouraged to apply.

The program has achieved notable successes since its inception. It has served 128 protégé businesses, 88% of which are owned by minorities, women, or veterans. These protégé businesses have created more than 407 new jobs and have generated a combined annual revenue of \$85.6 million, positively impacting 46 communities across the state of Wisconsin.

These projects demonstrate our team's extensive experience and commitment to supporting the growth and development of small businesses, particularly those owned by underserved individuals. We are confident that our team's experience and expertise will enable us to successfully implement Madison's BizReady Program and make a significant impact on the communities we serve.

Work Plan – The Scope of Work listed in Section 2.7 identifies seven tasks. Describe how your team would undertake and complete each task. Based on your expertise, feel free to vary, re-arrange, or alter the scope of work to better meet the overall goals of the program. The City is open to alternative approaches and different ideas.

BizReady Program: Empowering Madison's Diverse Business Community

The following work plan outlines MadREP's plan to partner with AFF Research in close collaboration with The City of Madison to deliver Madison's BizReady Program and empower Madison's diverse business community. We have broken the plan down to highlight how each task will be addressed.

Task #1: Creating the Details of the BizReady Program

Our proposal for the BizReady Program is a collaborative effort between MadREP and AFF Research. Together, we will co-create the program details to ensure a comprehensive and well-structured approach. AFF Research will leverage its expertise in business training programs to design the framework for training and technical assistance elements. MadREP will work closely with AFF Research and the City of Madison to develop and organize the training and technical assistance programming, eligibility requirements, application process, selection methods, and overall program development.

Our proposed plan for the BizReady Program is built upon a comprehensive understanding of Madison's diverse business landscape. To achieve this we will conduct in-depth interviews and focus groups with potential participants, community leaders, and stakeholders to identify unique challenges and opportunities. Collaborating closely with the City, we will refine eligibility

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criteria, application processes, and selection methods to ensure maximum impact and participation. Through this process, our partnership will guarantee that the program structure is tailored to Madison's unique landscape, ensuring maximum participation and impact.

Task #2: Recruiting Participation

MadREP and AFF Research will conduct a robust outreach effort. MadREP will take the lead in recruiting businesses, engaging local chambers of commerce, business development organizations, and other partners to foster inclusive and equitable recruitment methods. The partnership's extensive network will facilitate networking opportunities between local small business partners and potential participants. AFF Research will support the outreach effort by utilizing both traditional outreach and digital campaigns to identify and recruit potential participants. This combination of efforts ensures an extensive and targeted reach to Madison's diverse business community.

Task #3: Managing Application and Selection Process with Equity

MadREP will collaborate with AFF Research in soliciting applications and managing the application and selection process. AFF Research will take the lead in developing and implementing the pre-application phase, engaging potential applicants through information sessions, application support, and mentorship. Both entities will co-create an application review panel comprising a diverse group of industry experts and community leaders to ensure equitable evaluation. Together, they will co-create an application evaluation system and actively participate in the evaluation process, ultimately leading to a fair and transparent selection of participants.

Task #4: Administering Training and Technical Assistance Programming

Our team recognizes that the core of the BizReady Program lies in its training and technical assistance offerings. AFF Research will lead the administration of the BizReady Training and Technical Assistance Programming. They will design classes, seminars, and workshops, coordinate events, manage instructors, and ensure the successful implementation of the technical assistance and training components.

The core of AFF's specialized training and technical assistance approach lies in its dynamic curriculum that combines foundational entrepreneurial skills with industry-specific training. Workshops, boot camps, and mentorship sessions will be conducted by subject matter experts, using a mix of in-person and virtual formats for accessibility.

This focused leadership guarantees a dynamic and impactful curriculum that aligns with the needs of Madison's diverse businesses.

Task #5: Administering the BizReady Micro-enterprise Grants Fund

MadREP will take the lead in administering the BizReady Micro-Enterprise Grants Fund, building on the organization's extensive experience and proven track record in supporting local small businesses. Over the past 16 years, MadREP has successfully administered a variety of funding mechanisms, including grants, micro-loans, and revolving loan funds, to support the growth and sustainability of local businesses. This will involve setting up and establishing the fund, awarding grants to participants, processing payments, managing fund reporting requirements, and seeking additional funding for the program. In order to achieve this last step and create sustainability of the fund, MadREP will seek to leverage a portion of the funds from the BizReady Micro-Enterprise Grants Fund to secure additional funding commitments and grow the fund. This will increase the reach and depth of support the program is able to provide to Madison's diverse business community.

MadREP's approach to administering the fund will be comprehensive and strategic. Understanding that funding alone is not enough to ensure the success of a business, MadREP will pair the administration of the grant fund with technical assistance and business development resources provided by AFF Research. This approach ensures that the businesses we support not only receive the necessary funding but also the tools and resources they need to leverage that funding effectively for sustainable growth. AFF Research's experience working with small businesses provides them invaluable insight into the operations of the small businesses the program will serve. They will support grantee businesses with financial literacy workshops to equip participants with the skills needed for prudent fund management. Our team's expertise in financial consulting will ensure that fund utilization is strategic and sustainable.

MadREP's experience administering funding ensures the effective management of the Micro-Enterprise Grants Fund while partnership with AFF Research provides grantee businesses with tools, resources and technical assistance that promotes successful and sustainable business models for grantee businesses. This comprehensive approach ensures that businesses not only receive funding but also gain access to essential resources for sustainable growth.

Task #6: One-on-One Assistance to Participants

AFF Research will take the lead in providing personalized One-on-One Assistance to Participants. They will develop and implement personalized training plans, mentorship opportunities, and regular progress meetings. Their experience in community engagement and small business support ensures that participants receive tailored guidance throughout their journey.

Their approach will include assigning dedicated mentors to participants based on industry alignment and demographic compatibility. Mentors will provide ongoing guidance, conduct

regular progress reviews, and facilitate networking opportunities. To further enrich the experience, AFF Research will organize peer-to-peer learning sessions where participants can share insights and experiences. This approach fosters a supportive community and ensures that participants have a strong support system throughout their journey.

Task #7: Communication, Reporting, & Evaluation

MadREP and AFF Research will work in close collaboration to establish program evaluation criteria to use in monitoring program progress, challenges, and successes. The partnership will take a hybrid evaluation approach, combining quantitative metrics and qualitative assessments in order to help refine the program based on real-time insights. Examples of quantitative metrics will include data on business growth and revenue generation while qualitative assessments will be done through participant interviews and focus groups.

MadREP will work with AFF Research to collect and compile reporting information for the City of Madison and other stakeholders. AFF Research's proficiency in reporting and evaluation will be complemented by MadREP's assistance in preparing monthly reports for the Economic Development Committee and a final comprehensive report summarizing program results. The partnership will also be able to provide additional reporting as necessary and helpful to stakeholders upon request.

Overall, our partnership's approach to the Scope of Work is rooted in collaboration, innovation, and customization. By leveraging our expertise and adapting methodologies, we are poised to create a BizReady Program that not only meets the RFP requirements but also maximizes its impact on Madison's communities. We welcome the opportunity to further discuss our innovative ideas and tailor our approach to align seamlessly with the City's vision.

5. Budget (Form D) - As stated above, the budget for the program is \$300,000. Describe how you would propose using these resources to create and administer the program. In particular, how much would be used for administration, programming, and direct micro-enterprise funding to participants. To maximize effectiveness, describe how you would propose structuring the direct micro-enterprise funding. Though not required, the City is very interested in leveraging city funding with additional outside resources. If applicable, describe how your team would do this. Include a detailed table describing the budget for the project, delineated by task, and clearly identifying leveraged resources.

Please note, that the budget will be scored based on the logic/effectiveness of how the funding will be allocated. It will not be a point total in regards to the total dollar amount of the proposed budget. It is the intent that each proposer will use the complete \$300,000.

Provided in Form D: Cost Proposal Attachment. Please see attachment

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Question #1 Attachment: MOU for Partnership

The following is a Memorandum of Understanding between Madison Region Economic Partnership, Inc (MadREP) and AFF Research, LLC formally defining roles and responsibilities each will take in the partnership should MadREP be awarded the BizReady Program.

Memorandum of Understanding

This Memorandum of Understanding (the "Memorandum") is made on August 16, 2023, by and between Madison Region Economic Partnership, of 8517 Excelsior Dr Suite 107, Madison, Wisconsin 53711 (hereinafter referred to as "MadREP") and AFF Research, LLC, of 2701 Larsen Rd, Green Bay, Wisconsin 54303 for the purpose of achieving the various aims and objectives relating to the BizReady (the "Project").

WHEREAS MadREP and AFF Research, LLC desire to enter into an agreement in which MadREP and AFF Research, LLC will work together to complete the Project;

AND WHEREAS MadREP and AFF Research, LLC are desirous to enter into a Memorandum of Understanding between them, setting out the working arrangements that each of the partners agree are necessary to complete the Project;

Purpose

The purpose of this Memorandum is to provide the framework for any future binding contract regarding the BizReady between MadREP and AFF Research, LLC.

Obligations of the Partners

The Partners acknowledge that no contractual relationship is created between them by this Memorandum, but agree to work together in the true spirit of partnership to ensure that there is a united visible and responsive leadership of the Project and to demonstrate financial, administrative and managerial commitment to the Project by means of the following individual services.

Cooperation

The activities and services for the Project shall include, but not limited to:

a. Services to be rendered by MadREP include:

- Lead administration of the BizReady Program and BizReady Micro-enterprise Grants Fund
- Serve as primary contact for the program
- Act as Project Manager for the BizReady program
- Act as Fund Administrator for the BizReady Micro-enterprise Grant Fund
- Lead in the recruitment of small businesses for the program
- Lead partnership in soliciting applications from BizReady Program Participants
- Oversee AFF Research leadership of Training and Technical Assistance Programming
- Lead management of the BizReady Micro-enterprise Grants Fund
- Oversee AFF Research leadership in providing One-on-One Assistance to Participants
- Work with AFF Research to establish program evaluation criteria, outlined in Project Plan Scope of Work
- Work closely with AFF Research and participating businesses to monitor program

progress, challenges and success

Collect reporting information from AFF Research to report back to the City of Madison and other stakeholders

With assistance and input from AFF Research, complete and present a monthly report for the Economic Development Committee at monthly meetings

With assistance and input from AFF Research, complete a final report at the end of the program to summarize program results

b. Services to be rendered by AFF Research, LLC include:

Work with MadREP and the City of Madison to co-create the BizReady Program details -

Use expertise in business training programs to create the structure for the BizReady Program training and technical assistance elements

Work with MadREP and the City of Madison to develop and organize:

Training and technical assistance programming

Eligibility requirements for prospective participants

The application process for participants

The selection process

Working with partners on program development and implementation, and setting up the fund

Lead the administration of the Training and Technical Assistance Programming Managing, coordinating, and directing the technical assistance and training elements of the BizReady Program

Responsibilities include: Designing classes and seminars, coordination of events, lining-up instructors, coordinating site visits, and other responsibilities as needed for successful training and technical assistance implementation

Lead in providing One-on-One Assistance to Participants

Lead the individual assistance and support to BizReady participants through personalized training plans, mentorship opportunities, etc.

Conduct periodic meetings with each participant to help them plan their next steps, find resources, and make progress.

Report back all quantitative and qualitative data and reporting as defined in the Project Plan Scope of Work to MadREP in a timely manner

Provide complete and timely reporting on all formal and informal evaluation criteria outlined throughout the Project Plan Scope of Work as defined to analyze the challenges and successes of the program

Conduct a robust Pre/On-going/ Post participant surveying process to share back with MadREP to report to the City of Madison and other stakeholders.

Work closely with MadREP to complete and present a monthly report for the Economic Development Committee at monthly meetings

Work closely with MadREP to complete a final report at the end of the program to summarize program results

Resources

The Partners will endeavor to have final approval and secure any financing necessary to fulfill their individual financial contributions at the start of the planning for the development of the Project.

- a. MadREP agrees to provide the following financial, material and labor resources in respect of the Project:

MadREP will seek matching funds via state grant programs, private investors, and foundations to leverage the \$105K set aside for investments into the businesses that participate in the BizReady program
MadREP will contribute \$37,492 per year in in-kind contributions.

- b. AFF Research, LLC hereby agrees to provide the following financial, material and labor resources in respect of the Project:

Training and marketing material. Instructors and facilitators. Data management system and monitor and reporting systems.

Communication Strategy

Marketing of the vision and any media or other public relations contact should always be consistent with the aims of the Project and only undertaken with the express agreement of both parties. Where it does not breach any confidentiality protocols, a spirit of open and transparent communication should be adhered to. Coordinated communications should be made with external organizations to elicit their support and further the aims of the Project.

Liability

No liability will arise or be assumed between the Partners as a result of this Memorandum.

Dispute Resolution

In the event of a dispute between the Partners in the negotiation of the final binding contract relating to this Project, a dispute resolution group will convene consisting of the Chief Executives of each of the Partners together with one other person independent of the Partners appointed by the Chief Executives. The dispute resolution group may receive for consideration any information it thinks fit concerning the dispute. The Partners agree that a decision of the dispute resolution group will be final. In the event the dispute resolution group is unable to make a compromise and reach a final decision, it is understood that neither party is obligated to enter into any binding contract to complete the Project.

Term

The arrangements made by the Partners by this Memorandum shall remain in place from August 16, 2023 until August 16, 2026. The term can be extended only by agreement of all of the Partners.

Notice

Any notice or communication required or permitted under this Memorandum shall be sufficiently given if delivered in person or by certified mail, return receipt requested, to the address set forth in the opening paragraph or to such other address as one party may have furnished to the other in writing.

Governing Law

This Memorandum shall be construed in accordance with the laws of the State of Wisconsin.

Assignment

Neither party may assign or transfer the responsibilities or agreement made herein without the prior written consent of the non-assigning party, which approval shall not be unreasonably withheld.

Amendment

This Memorandum may be amended or supplemented in writing, if the writing is signed by the party obligated under this Memorandum.

Severability

If any provision of this Memorandum is found to be invalid or unenforceable for any reason, the remaining provisions will continue to be valid and enforceable. If a court finds that any provision of this Memorandum is invalid or unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision will be deemed to be written, construed, and enforced as so limited.

Prior Memorandum Superseded

This Memorandum constitutes the entire Memorandum between the parties relating to this subject matter and supersedes all prior or simultaneous representations, discussions, negotiations, and Memorandums, whether written or oral.

Understanding

It is mutually agreed upon and understood by and among the Partners of this Memorandum that:


- a. Each Partner will work together in a coordinated fashion for the fulfillment of the Project.
- b. In no way does this agreement restrict involved Partners from participating in similar agreements with other public or private agencies, organizations, and individuals.
- c. To the extent possible, each Partner will participate in the development of the Project.
- d. Nothing in this memorandum shall obligate any Partner to the transfer of funds. Any endeavor involving reimbursement or contribution of funds between the Partners of this Memorandum will be handled in accordance with applicable laws, regulations, and procedures. Such endeavors will be outlined in separate agreements that shall be made in writing by representatives of the Partners involved and shall be independently authorized by appropriate statutory authority. This Memorandum does not provide such authority.
- e. This Memorandum is not intended to and does not create any right, benefit, or trust responsibility.
- f. This Memorandum will be effective upon the signature of both Partners.

- g. Any Partner may terminate its participation in this Memorandum by providing written notice to other Partner.


The following Partners support the goals and objectives of the BizReady:

Signatories

This Agreement shall be signed on behalf of Madison Region Economic Partnership by Jason Fields, President and CEO, and on behalf of AFF Research, LLC by Anna Steinfest, its President & CEO. This Agreement shall be effective as of the date first written above.

By: 
Madison Region Economic Partnership
Jason Fields, its President and CEO

Date: 8/16/2023

By: 
AFF Research, LLC
Anna Steinfest, its President & CEO

Date: 8/16/2023

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Question #2 Attachments: Team Member Resumes

The following are the attached resumes of

For Madison Region Economic Partnership, Inc (MadREP):

Jason Fields: *President, CEO* - Madison Region Economic Partnership, Inc. (MadREP)

Everett Mulroe: *Grants Manager*- Madison Region Economic Partnership, Inc. (MadREP)

Tonnetta Darcel Carter: *Chief Strategy Officer*- Madison Region Economic Partnership, Inc (MadREP)

For AFF Research, LLC:


Anna Steinfest: *President/ CEO*, AFF Research, LLC

Michael Toyer, PhD: *Vice President*, AFF Research, LLC

Jason M. Fields, CEcD, CFEI, CCRS

Milwaukee, Wisconsin, United States

 jmfields1906@gmail.com

 414-810-7196

 [linkedin.com/in/jasonmfields](https://www.linkedin.com/in/jasonmfields)

Summary

Offering an award winning track record of leadership, economic development, financial acumen, diverse business strategies, and financial analytical expertise.

Goal: To provide key leadership qualities and access for business's to interact with governmental bodies throughout the US. To also be in a key management role for a major organization. Finally to bridge the gap between American business's and the International community.

ACCOLADES

2012-Wisconsin Financial Literacy Award

2012-Named as one of the Nations Top Pro-Growth Progressive Leaders

2012-Wisconsin League of Conservation Award, 2011-2012

2012-Brain Injury Association of WI Legislative Achievement Award

2012-Black Alliance for Educational Options (BAEO) Champion of Ed Reform Under 40 Award

2012-Hispanic Chamber of Commerce Award

2012-National Technology Adoption Advisory Council (NTAAC) Midwestern Regional Vice-President

2010- Meharry Medical College & State Farm Alliance:

Seat Belt Champion Award.

2009-Wisconsin Minority Supplier Dev. Council

Award of Excellence

2007- Milwaukee Business Journal: "40 under Forty"

2006- OnMilwaukee.com: "100 Milwaukeeans you need to know".

2003- Honorable Mention: Milwaukee Business Journal

"Future Leaders to Watch".

2003- Featured In Harvey Magazine: "25 People Changing 2003"

2002- Recipient of Community Brainstorming Award:

"Ordinary People Doing Extraordinary Things."

2002- Featured in Milwaukee Magazine, September Issue:

"35 Up and Coming Future Leaders"

2000- Outstanding Member Award:

National Association of Black Accountants. (NABA)

Specialties: KEY SKILLS

Conflict Resolution

Leadership & Management

Articulate

Advanced Communication Style

Team Collaboration

Financial Analysis

Analytical / Problem Solving Mind Set

- # Public Speaking
- # Media Interviews and Presentations
- # Previously Licensed Insurance Life and Health, Property and Casualty
- # Previously Licensed Securities Series 6, 7, 63, 65
- # Political Networking

Experience

President/Chief Executive Officer

Madison Region Economic Partnership

Jan 2021 - Present (2 years 8 months)

Mission: Through a comprehensive regional approach to economic development, the strategic pursuit of job creation and business growth in target clusters, and the development of a coordinated talent pipeline, MadREP will lead the development of a dynamic economy where people and businesses thrive.

Role & Services: MadREP fills an important role in Wisconsin's economic development landscape, serving as a partner and collaborator to the Wisconsin Economic Development Corporation and other state agencies, as well as economic development initiatives within counties, municipalities, chambers of commerce, and the private sector.

Managing Principle & Chairman

The Financial Promise Co. & The Financial Promise Foundation, Inc

Dec 2016 - Present (6 years 9 months)

Our Mission:

The Financial Promise is dedicated to working with communities to increase financial literacy so they can invest in themselves to build financial stability, careers, businesses and wealth.

Our Vision:

To be recognized as a trusted leader that helps community members improve their chances of success by making smarter financial decisions.

State Representative of the 11th District

Wisconsin Legislature

Nov 2016 - Dec 2020 (4 years 2 months)

Re-elected: Served as the State Representative for the 11th Assembly District of Milwaukee and Glendale, Wisconsin.

Regional Partner

FasterCapital

Jan 2018 - Jan 2020 (2 years 1 month)

FasterCapital is a virtual incubator based in Dubai Internet City. We help IT startups through our programs acceleration and incubation. FasterCapital was established in 2010 and our model was publicly available since 2016. Fastercapital has currently 20 incubated startups that graduated and are fully functional now, more than 234 startups in the acceleration program, more than 201 regional partners with 120 offices worldwide.

FasterCapital has multiple rounds of funding per year during each of which we will be selecting startups that can be accelerated or incubated by FasterCapital.

SDC Board Commissioner-Appointed by Office of The Governor Scott Walker

Social Development Commission

Dec 2012 - Dec 2018 (6 years 1 month)

The role of the SDC Board of Commissioners is to provide guidance and leadership to the Social Development Commission. For more than 50 years, the Social Development Commission (SDC) has served as a planner, coordinator, and provider of human service programs for low-income individuals and families in Milwaukee County. SDC was established in 1963 as an intergovernmental commission under Wisconsin State Statute 66.0125. In 1964, the SDC became the only Community Action Agency for Milwaukee County.

The Commission is comprised of 18 citizens residing in Milwaukee County, each of whom holds the title of Commissioner. One-third of the Commissioners are elected representatives of low-income residents of the county, one-third of the Commissioners are appointed as representatives of public officials, and one-third of the Commissioners are appointed as representatives of the private sector.

With its vision of ensuring that all Milwaukee County residents will have equal access to the resources needed to help them achieve economic self-sufficiency, the SDC believes that all individuals are to be treated and valued with compassion, dignity, & respect.

Chief Operating Officer

Gibraltar Industries

Mar 2015 - Mar 2016 (1 year 1 month)

Gibraltar Industries Inc, is a full service facility maintenance and management services provider.

Our staff brings a wealth of proven experience in the following fields:

Deconstruction, Asbestos & Lead Abatement, Salvage, Selective Slight Demolition.

Construction Clean-Up, Residential and Commercial Janitorial Cleaning Services, 24-7 Emergency Service.

Vice President of Business Development/Government Affairs

Mar 2013 - Mar 2016 (3 years 1 month)

Spring Water Asset Management was created out of a desire to invest in companies that are doing well and supporting communities, the environment and the people they serve.

Spring Water Asset Management is a Registered Investment Advisor (RIA) that provides financial consultation and portfolio management to individual clients who want to:

- Grow their net worth
- Invest in socially responsible and green companies, and
- Understand how their investments can work for them and for the good of others.

We specialize in socially responsible investing (SRI) that considers environmental, social and corporate governance criteria in addition to standard financial analysis.

<http://www.springwaterassetmanagement.com/>

Wisconsin State Representative

Wisconsin State Legislature

Jan 2005 - Jan 2013 (8 years 1 month)

Served as the State Representative for the 11th Assembly District of Milwaukee Wisconsin.

Served as the Chairman of the Wisconsin State Assembly Department of Financial Institutions Committee.

Served as Chairman of the 19 member Milwaukee Delegation.

State Representative

State of Wisconsin

2005 - 2013 (8 years)

Agency Dir

MetLife Financial Services Financial Rep

2005 - 2007 (2 years)

Sales Agent, and management goal was to recruit individuals to join MetLife Insurance Agency.

Branch Manager

Guardian Credit Union

2003 - 2005 (2 years)

Day to day management of approximately 10-15 people, worked at various locations. Opened close branches, and provided conflict resolution among team members as well as clients within branches.

Managed Loans, and Depository services.

Personal Banker

Wells Fargo Bank Personal Banker 2002

Jan 2001 - Sep 2003 (2 years 9 months)

Worked as Personal banker, Manage Loans, and Depository services as well as offer a number of Financial Products for clients of the Bank

Financial Representative

First Union Securities

Jun 1998 - Jan 2002 (3 years 8 months)

Helped to manage \$100 million dollars in Assets with Purnell Wealth management Group.

Created partnership " Walters-Fields Investment Group" Had \$22 million dollars in Assets under Management.

Senior Sales Rep

Blue Cross/ Blue Shield

Jan 1996 - Jan 1999 (3 years 1 month)

Education



Concordia University-Wisconsin

Master of Science - MS, Organizational Leadership

Sep 2022 - May 2024



Cardinal Stritch University

Bachelor of Science (BS), Business Management

2010 - 2014

Licenses & Certifications



AI For Everyone - Coursera

coursera.org/verify/EJWXWGQHZF8E



Technical Support Fundamentals - Google



Certified Financial Education Instructor - National Financial Educators Council



Trade Like a Professional - DailyFX - Market News & Analysis



The Bits and Bytes of Computer Networking - Google



Diversity and inclusion in the workplace - ESSEC Business School



Business Retention & Expansion - International Economic Development Council



Economic Development Marketing & Attraction - International Economic Development Council



Economic Development and Finance Programs - International Economic Development Council



Real Estate Development & Reuse - International Economic Development Council



New Mexico Economic Development Course - International Economic Development Council

 **Economic Development Credit Analysis** - International Economic Development Council

 **Certified Economic Developer (CEcD)** - International Economic Development Council

 **Lean Six Sigma Yellow Belt** - Six Sigma Global Institute

 **Food & Beverage Management** - Università Commerciale Luigi Bocconi

 **Introduction to Data Analytics** - IBM

 **Black Venture Institute Fellow- Cohort 5** - BLCK VC

 **Prompt Engineering for ChatGPT** - Vanderbilt University

 **Certified Lean Six Sigma Green Belt** - The Council for Six Sigma Certification (CSSC)

Skills

Public Speaking • Public Relations • Strategic Planning • Leadership • Financial Analysis • Leadership Development • Politics • Conflict Resolution • Business Development • Analytical Skills

Everett Mulroe Address: 1212 Sweeney Dr. Apt 7, Middleton, WI 53562
Phone: (630) 802-8212
Email: everettmulroe@gmail.com

MISSION:

Visionary educator and community advocate dedicated to empowering individuals and communities with equitable resources, access, and opportunities.

SKILLS:

Relationship Building | Volunteer Management | Partnership Development
Donor Management | Grant Writing and Presenting | Data-driven Reporting
Program Development | Equitable Resource Allocation

PROFESSIONAL EXPERIENCE:

Grants Manager
Madison Region Economic Partnership, Madison, WI
Aug 2021 - Current

- Spearheads research for funders and grant opportunities, driving successful grant proposals for MadREP and partner organizations
- Directed fund management and distribution of more than \$12 million in Government Main Street Bounceback Grant Program local businesses grants
- Fosters robust relationships with grantees and grantors, ensuring program alignment with their needs.
- In charge of development, implementation and maintenance of Federal Grant Program Management Systems, enhancing program efficiency while ensuring compliance
- In charge of monitoring project/program development, maintaining strict adherence to grant and funder reporting requisites.

Grant Writer/Non-Profit Specialist
The Lonely Entrepreneur, Remote
May 2021 - July 2021 (Freelance/Contract)

- Researched, strategized, and executed grant proposals for entrepreneurial education programs catering to diverse business owners.

-
- Tracked and managed funders and proposals to optimize grant acquisition.
 - Assisted with marketing initiatives, aligning efforts with diversity-focused nonprofit objectives.

Program Director/Girls' Inc. Lead
Kennedy Heights Community Center, Madison, WI
July 2018 - July 2019 and June 2020 - March 2021

- Established program structure and culture for after-school programs, including Girls Inc.
- Offered academic and behavioral support through in-school and after-school tutoring.
- Developed and nurtured relationships with students, schools, parents, and community collaborators.
- Led and coordinated programming following Girls Inc. curriculum.
- Directed, supervised, and supported program staff and volunteers.

2nd Grade Teacher
Quitman County Elementary School, Lambert, MS
July 2016 - May 2018

- Introduced an in-room 'scholarship' program, encouraging interest-based learning opportunities.
- Built strong relationships with students, parents, and community members.
- Utilized PBIS behavior management to empower students.
- Developed engaging, academically rigorous lessons aligned with state standards.
- Implemented differentiated instruction and academic/behavioral interventions.

EDUCATION:

DePaul University, Chicago, IL
BA in Journalism Honors Program, Minor: Psychology/Sociology
Graduated Summa Cum Laude

CERTIFICATIONS AND LICENSES:

- Certified in CPR
- Certified in Trauma-Informed Care

BOARD MEMBERSHIP:

Board of Directors, Kennedy Heights Community Center, Madison, WI

TONNETTA DARCEL CARTER

4400N Wilson Drive, Suite 4 | Shorewood, WI | (414) 215.5087
tdcarter@carterwilsongroup.com

EXPERIENCE

MADISON REGION ECONOMIC PARTNERSHIP

(March 2023-Present)

Madison, WI

Chief Strategy Officer

- Responsible for the development and execution of the strategic vision of MadREP newest regional project, including identifying opportunities for growth and developing creative solutions to new challenges
- Responsible for driving the organization's innovation strategy and the development of plans, policies and partnerships to implement into the organization's Comprehensive Economic Development Strategy (CEDS)
- Responsible for maintaining key stakeholder relationships and establishing priorities across the eight (8) county region, inclusive of economic development, innovation and entrepreneurship, information technology, affordable housing, and early childhood education

CARTER WILSON GROUP, LLC

(January 2023-Present)

Milwaukee, WI

Founder & CEO

- A specialized alternative asset consulting firm that provides strategy and investor management for unique venture, real estate, and infrastructure investment opportunities

gener8tor

(May 2021- December 2022)

Milwaukee, WI

Director of Investment

- Led the multimillion-dollar capital raise for gener8tor Fund VIII and gener8tor Luxembourg Fund I across 18 markets, 100+ startups, and 50+ industries
- Implemented gener8tor's investment strategy across the company and developed investor communications as it relates to capital calls, fund performance, fund/portfolio reporting and relevant fund management and investment material
- Developed investor management policies and best practices to broaden gener8tor investor network globally and expose portfolio companies to an excess of follow-on financing opportunities
- Partnered with leadership to identify investment opportunities and expand gener8tor's footprint internationally

MEDICAL COLLEGE OF WISCONSIN*(June 2019-April 2021)***Milwaukee, WI***Assistant Director of Development*

- Co-led the institutions first \$300M healthcare campaign around innovative technologies, research and education, and transformative patient care to eradicate the health burden in the State of Wisconsin
- Co-managed the institutions largest strategic initiative in partnership with Greater Milwaukee Foundation, a \$100M initiative focusing on economic development, impact investing, and neighborhood-based investing in the City of Milwaukee
- Partnered with Executive Leadership and the Board of Trustees to develop long-term philanthropic strategies, optimize community investment, and align departmental research strengths with forward vision of the institution
- Increased the institutions funding capacity by cultivating and managing relationships of key stakeholders with a focus on major gifts

WISCONSIN ARMY NATIONAL GUARD*(May 2013- May 2019)***Milwaukee/State of Wisconsin***Chief of Staff/Executive to the Brigade Colonel Wisconsin*

- Direct representative to Colonel and served as thought partner and liaison to leadership
- Supervised and managed annual evaluations to provide counsel and develop statewide improvement strategies for over 2,000 personnel

South Korea, 2018

- Joint Mission under President Trump's leadership
- Performed real-time war analysis and US involvement in foreign conflict
- Developed real-time negotiation procedures and practices

Afghanistan, 2014

- Strategized the demobilization of 20,000 US troops in Jalalabad, Mazar-i-Sharif, and Bagram
- Established clear protocols and operating procedures to ensure daily mission completion

PUBLIC SERVICE**PROFESSIONAL DIMENSIONS** Member

Milwaukee, WI

*(December 2020-Present)***AMERICAN HEART ASSOCIATION** Executive Leadership Team, Go-Red for Women-Milwaukee

Milwaukee, WI

*(August 2020-May 2021)***WISCONSIN DEPARTMENT OF VETERAN AFFAIRS** Governor Appointed, Board of Veteran Affairs

State of Wisconsin

*(January 2019-Present)***NEW LEADERS COUNCIL-WISCONSIN** Board Member, Advisory Board Chair

State of Wisconsin

*(January 2019-January 2021)***WISCONSIN WOMEN'S NETWORK** Member, Public Policy Fellow

Madison, WI

*(November 2018-June 2019)***MILWAUKEE URBAN LEAGUE YOUNG PROFESSIONALS** Board Member, Fund Development Chair

Milwaukee, WI

(September 2018-January 2020)

EDUCATION

CAIA

Expected Spring 2023

Series 65

Expected Spring 2023

UNIVERSITY OF WISCONSIN-WHITEWATER

Whitewater, WI

Bachelor of Business Administration, Finance

PERSONAL

Since immigrating to the US in 1998, Anna Steinfest has spent over 15 years developing programs to empower women, minorities, and veterans. Anna is best known for developing the Green Bay Packers Mentor-Protégé Program (mentorship partnership).

With a Master's degree in Economics, Anna's focus is on developing sustainable programs that encourage community development through entrepreneurship and economic development. By providing women and minority communities with access to mentorship, training, and partnerships with established business leaders in their communities, Anna consistently generates a long and successful track record of job creation and long-term, positive growth. All this without the potentially unsustainable overreliance on government grants and taxpayer funding for dramatic, far reaching impact.

EXPERIENCE

AFF Research LLC ♦ Green Bay, Wisconsin, USA

President/CEO ♦ 2005 – present

Anna and her team offer consulting services to the Green Bay Packers¹ (GBP) and administer the GBP Mentor-Protégé Program². “With our focus on minority-, women-, and veteran-owned small business, we have developed a trusted process to create jobs and leaders that impacts the community.” We have helped the businesses involved in the program to create sustainable business practices.

Concordia ♦ Green Bay, Wisconsin, USA

Instructor – Managerial Economics 2012 – present

Managerial Economics provides a clear and balanced presentation of relevant economic theories and instruments. The course focus is on the application of these relevant theories and the analysis tools of decision-making science to examine how a firm makes optimal managerial decisions in the face of the constraints. Anna teaches students how to deal with the nature of the firm, and how and why it is organized the way it is, in order to make students better, more efficient and more highly rewarded executives. The course is applied economics, emphasizing topics which are of greatest interest and importance to managers.

U.S. Bank ♦ Green Bay, Wisconsin, USA

Vice President 1998 – 2016

Started as a teller, progressing through the increasing stages of responsibilities in the capacities of assistant manager and branch manager to become a vice president within the bank hierarchy. Has conducted numerous financial workshops for small business with a resolved focus on ensuring a strong financial foundation for ongoing sustainable growth.

- ❖ Functioned in a fast-paced environment with frequent setbacks and a variety of scenarios
- ❖ Developed and maintained customer relationships within all types of account structure
- ❖ Implemented an advisory approach to address the needs of private banking clients and establish long-term, trusted client relationships
- ❖ Created team atmosphere and strengthened partnerships so that, collectively, all areas of the bank can effectively improve service to customers

¹ American football major league team (Green Bay Packers, Green Bay, Wisconsin).

² Sponsored program that promotes mentorship of community based, targeted small business.

KEY SKILLS

- ❖ **Community Relations** - Excellent communication skills to communicate in a clear and concise manner with the media, community groups and leaders, public, referral sources, and administration. Agile in identifying community needs and strategic opportunities.
- ❖ **Marketing** – Ability to represent the program to a wide range of people and organizations in a positive manner. Ability to assist in the implementation of marketing programs and strategies.
- ❖ **Problem Solving** – Ability to resolve in-depth queries in a methodical manner, independently and with internal and external business partners, to find appropriate resolutions, efficiencies, and high levels of quality.
- ❖ **Planning and Organizing** - Refined planning and organizational skills that balance work, team support and ad-hoc responsibilities in a timely and professional manner.
- ❖ **Research** – Overseeing the analysis of reports for the Green Bay Packers targeted business programs.

EDUCATION

University of National and World Economy ♦ Sofia, Bulgaria
1994 – 1996 ♦ Masters Degree, Science Marketing Research in Consumer Behavior

University of National and World Economy ♦ Sofia, Bulgaria
1990 – 1994 ♦ Bachelor's Degree, Science - Planning and Forecasting the Economic Systems

English Language School
1985 – 1990 ♦ Equivalent to US High School

PROFESSIONAL EXPERIENCE & COURSEWORK

- ❖ Certification: “Diversity Practitioner” from Workforce Diversity Institute at Northwestern Illinois University; developed by Souder, Betances and Associates
- ❖ Common Ground Consulting training: Rethinking Diversity
- ❖ Tax School
- ❖ Internship, International Program – Ohio State University

AWARDS

- ❖ ECC's Community Award for work in organizing & conducting ECC programs
- ❖ ECC's Founder's Award for work on its first board of directors
- ❖ Girl Scouts of Lac-Baie Council's Woman for Diversity Award
- ❖ Honored by the Green Bay Chamber of Commerce as a one of “the most promising and business-savvy” 40 Under 40
- ❖ Brown County Dr. Martin Luther King JR. Leadership Awards for 2013

INTERNATIONAL ACTIVITIES AND PRESENTATIONS

- ❖ Financial educator for Israeli and Jordanian women in the Young Entrepreneur's Program, a project of UWGB, in cooperation with various Israeli and Jordanian business and entrepreneurial organizations, and funded by the US Department of State, Bureau of Educational and Cultural Affairs, Professional Exchanges Division. Personal mentor to Israeli entrepreneur. Included State Department authorized business exchange to Israel and Jordan.
- ❖ Invited speaker on entrepreneurial financing to WOKI (Women of Kenya Initiative), sponsored by the Women's Democracy Network of the IRI.

COMMUNITY ACTIVITIES AND PRESENTATIONS

- ❖ Member, Brown County Chamber of Commerce Diversity Board
- ❖ Member, The New North Diversity Committee [Chair, Awards Committee]
- ❖ Member, Village of Ashwaubenon Finance & Personnel Committee
- ❖ “Banking 101,” for the Hispanic community at the Multicultural Center
- ❖ “Unlock Your Financial Power,” member workshop, ECC
- ❖ “Small Business in the USA,” for Russian business delegation, Rotary Club
- ❖ “Banking 101 for Students” Chamber of Commerce (for 150 students)
- ❖ “Women Hold Up Half of the Sky” Management Women
- ❖ “Why Diversity/Inclusion is Important,” Rotary Club
- ❖ “Diversity,” Green Bay Area Chamber of Commerce
- ❖ “Social Justice,” St. Norbert College
- ❖ “Financing Small Business Enterprises in USA” – Young Entrepreneurs Program for Israeli and Jordanian participants through US Department of State and UWGB
- ❖ “Diversity and Inclusion” – training for CASA (Custody Appointment Special Advocates) Volunteers
- ❖ “Supplier Diversity and Why It Matters” Institute Supply Management
- ❖ “Overcoming Challenges and Creating New Opportunities in the Current Economy” Shoreline Chapter of APICS
- ❖ “Diversity and Inclusion” – training for CASA (Court Appointment Special Advocates) Volunteers
- ❖ Trainer – Leadership Green Bay through the Green Bay Chamber of Commerce
- ❖ Volunteer in VOCA and other organizations
- ❖ Developed a workshop for minority and women-owned businesses entitled “Unlock Your Financial Power”
- ❖ One-on-one mentorship for local international communities
- ❖ Facilitator, Brown County Diversity Circles
- ❖ Corporate Board CASA (Court Appointed Special Advocates)

LANGUAGES

- ❖ Multilingual skills: fluency in English, Bulgarian and Russian

SELECTED CREDENTIALS – MICHAEL TROYER PH.D
Vice President - Mentoring, Education and Strategic Development
AFF Research

Educator, Business owner, Entrepreneur

- Ph. D. and M.A. Degrees, Duke University (Economics), B.A. Cornell College – Economics, Philosophy and Political Science
- Associate Professor Emeritas (Management), Business Administration Program, now the Cofrin School of Business (serving as Chair from 1979 to 1985), The University of Wisconsin – Green Bay
- University Committee (Executive Committee) of the Faculty, University of Wisconsin-Green Bay
- Formed and hosted the Northeastern Wisconsin Family Business Forum, University of Wisconsin-Green Bay
- Served as professor/instructor – Masters in Business Administration, University of Wisconsin – Oshkosh; Program in Health Services and Hospital Administration, Duke University; Community Human Services Graduate Program (partner in formation), University of Wisconsin-Green Bay
- Senior Consultant, Inc. Magazine, Business Resource Unit
- Owner – A Private Mentor for the Small Business Owner consulting firm
- Mentor, Green Bay Packer's Mentor-Protégé Program (5 years); Most Valuable Mentor Award and two of his Protégés received Most Valuable Protégé Award
- Bay Area Workforce Development Board (12 years, 9 as Chair)
- Baylake Bank Regional Board of Directors
- St. Mary's Hospital Advisory Committee (Chair) and St. Mary's Hospital Business Strategy Task Force (Chair)
- Member of the Board of Directors for NEW Health Systems Agency (President); NEW Health Policy Council; NEW Emergency Medical Services, NEW Community Clinic
- Has spoken before or served as facilitator, consultant, or trainer for the Health Care Institute, the State Health Policy Council, The International Association of Municipal Clerks, Northeastern Wisconsin Quality Improvement Network, the Wisconsin Society of Professional Engineers, Leadership Green Bay, Leadership Oshkosh, Leadership Manitowoc, the Paradigm Group of Minneapolis, and the annual Executives Conference of the Wisconsin Chamber of Commerce
- Awarded the Daniel Whitney Award (Green Bay Area Chamber of Commerce); Distinguished Leadership Award (Leadership Green Bay), University of Green Bay's Founder's Association Award for Excellence in Community Service (1978 and 1995), Distinguished Leadership Award from the National Association of Community Leadership, and Company Flagship Award from the Entrepreneurs of Color Council of Green Bay