Mid-America Economic Development Council
The Bullet Report
Tuesday, December 6, 2016

STRATEGY MATTERS

Janet Ady
President and CEO
The Ady Advantage Ecosystem

Understand what makes business competitive

Economic Development Organizations

Understand a region’s and community’s economic assets

Businesses
Our Sweet Spot
Ady Advantage Services for EDOs: Making It Practical

Consulting

Research

Branding

Marketing Communications

Ady Advantage Services for EDOs
Ady Advantage Services for EDOs: Making It Practical

**Consulting**
- What is the market potential for a large industrial park in our area?
- How do we market an industrial property that will be vacated?
- How can we zero in on the prospects that will be the best fit for our area?

**Research**
- How can we improve RFI success?
- How can we ensure that we will have the talent we need for economic growth?
- How can we improve the odds of achieving our growth goals?

**Branding**
- How can we communicate our competitive advantages through a compelling brand?
- How can we best differentiate our area from all the others competing for investment and jobs?
- How can we ensure our messaging will resonate with site selectors and others?

**Marketing Communications**
- What do we have to do to create a great economic development website?
- How do we market ourselves to site selectors and others?
- What would be the best use of our marketing resources?
Ady Advantage Services for EDOs: Making It Practical

**Consulting**
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- What do we have to do to create a great ED website?
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- What would be the best use of our marketing resources?
ANNUAL SITE SELECTOR SURVEY
BACKGROUND
Survey Background

SURVEY BACKGROUND

This study is now the fifth annual site selector survey conducted by Ady Advantage for Mid-America Economic Council and its members. This year, we:

• Continued to send a parallel survey to Mid-America EDC members to allow us to compare and contrast responses
• Increased the sample size of site selectors
• Modified the questions to better reflect members’ interests
• Offered the option for Mid-America EDC member states to ask individual questions with private reporting back to them

2016 SURVEY OVERVIEW

<table>
<thead>
<tr>
<th></th>
<th>TOTAL SAMPLE SIZE</th>
<th>RESPONSES</th>
<th>RESPONSE RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>253</td>
<td>80</td>
<td>32%</td>
</tr>
<tr>
<td>Site Selectors</td>
<td>1,523</td>
<td>84</td>
<td>6%</td>
</tr>
</tbody>
</table>
Survey Background

STEERING COMMITTEE

Barb LaMue, Current Mid-America EDC President
Vice President, Economic and Community Development
Wisconsin Economic Development Corporation

Ashley Scray, Project Manager
Senior Research Analyst
Ady Advantage

Susan Reed, Past Mid-America EDC President
Director of Disclosure Strategies
H.J. Umbaugh & Associates

Mark Lofthus, Regional/Local EDO Representative
Economic Development Director
Dakota Electric Association

Brandon Marshall, State EDO Representative
Manager, Business Recruitment and Development
Wyoming Business Council
2016 SURVEY RESULTS
In which industries have you worked in the past three years? Please check all that apply.

Target industries indicated by a majority of respondents (over 50%) included Business Services, Food & Beverage, and Automotive.
In which one industry have you worked the MOST the past three years?

Over the past three years, nearly one-third (29%) of respondents have worked most in Business Services followed by Food & Beverage at 17%.

N=79
In which industry sectors have you worked MOST in the past three years?

Over the past three years, a majority of respondents have worked MOST in manufacturing and office.

- **Manufacturing**: 73%
- **Office**: 55%
- **Logistics-Distribution-Warehouse**: 41%
- **R&D-High tech**: 22%

N=78
How long ago did your LAST site selection project occur?

About 96% of respondents indicated that their last site selection project was within the past two years.

N=78
In which industry sector was your LAST project? Please check all that apply.

A majority of respondents (57%) indicated that their last project was within the manufacturing sector.

N=77
In which industry* was your LAST project? Please check all that apply.

Business Services and Food & Beverage were cited the most. A few respondents indicated “other,” which mostly included building products manufacturing, consumer goods, e-commerce, and retail.

N=67

*Industries listed alphabetically
In which industry was your LAST project? Please check all that apply.

Business Services and Food & Beverage are also the industries where participating site selectors worked the most in the past three years.

N=67
What level of contact person did you work with MOST during your LAST site selection project?

A strong correspondence was evident between what members think is the most typical level of contact, and site selectors reported level of contact.

Compared with the past two survey efforts, these data are largely consistent with “state level” being most frequently mentioned.

N=77
What level of contact person did you work with FIRST during your LAST site selection project?

Likewise, site selectors worked first with the state about half of the time.

N=76
What influences the level at which you engage?

“It’s situational. Generally, we reach out to the state first. If, however, I’m familiar with local, county or regional representatives, I may reach out to them.”

“The site and what incentives are offered for that site on the state or local level. At some point, I always work with both state and local on every project.”

“The magnitude of the project with the number of new jobs created and the amount of capital expenditures for the project.”

“The convention in that particular state. Which level of organization controls most of the incentives.”
What was the MAIN driver for the relocation or expansion of your LAST project?

Access to markets was the main driver for about one-third of the last projects completed by site selectors.

Other driver:
- Available real estate/facilities

N=76
Please rank only your TOP THREE MOST important factors for the choice of location for your LAST project. Rank 1=most important, 2=next-most important.

<table>
<thead>
<tr>
<th>Factor</th>
<th>RANK 1</th>
<th>RANK 2</th>
<th>RANK 3</th>
<th>RANKED 1, 2, 3</th>
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<tbody>
<tr>
<td>Workforce training programs</td>
<td>21</td>
<td>13</td>
<td>6</td>
<td>40</td>
</tr>
<tr>
<td>Incentives</td>
<td>11</td>
<td>11</td>
<td>7</td>
<td>29</td>
</tr>
<tr>
<td>Availability of labor</td>
<td>10</td>
<td>8</td>
<td>13</td>
<td>31</td>
</tr>
<tr>
<td>Available buildings</td>
<td>10</td>
<td>8</td>
<td>11</td>
<td>29</td>
</tr>
<tr>
<td>Culture/values of the region matched client’s</td>
<td>10</td>
<td>4</td>
<td>4</td>
<td>18</td>
</tr>
<tr>
<td>Ease of working with EDOs</td>
<td>5</td>
<td>6</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>Ease of working with elected officials</td>
<td>4</td>
<td>14</td>
<td>11</td>
<td>29</td>
</tr>
<tr>
<td>Good transportation infrastructure</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Level of innovation in the region</td>
<td>4</td>
<td>0</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>Low taxes</td>
<td>1</td>
<td>7</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>Low-competitive labor costs</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>Past business attraction success</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Positive growth rate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of life</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality-productivity of labor force</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Right-to-work status</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State legislative climate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supply chain opportunities</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Workforce training programs was easily the number one factor for the choice of location of participating site selectors’ last project. No statistically significant variation was found for ranked choice of location relative to industries MOST worked in over the past three years.

N=70
Please rank only your TOP THREE MOST important factors for the choice of location for your LAST project. Rank 1=most important, 2=next-most important.

FACTORS FOR CHOOSING A LOCATION

Ranked choice of location did vary significantly (statistically) by industry sector (Office, Manufacturing, Logistics-Distribution-Warehouse, R&D-High Tech)

Manufacturing
- Manufacturing was related to low-competitive labor costs
- Manufacturing was related to quality-productivity of labor force

Logistics-Distribution-Warehouse
- Logistics-distribution-warehouse was related to good transportation infrastructure
Please rank only your TOP THREE MOST important factors for the choice of location for your LAST project. Rank 1=most important, 2=next-most important.

**FACTORS FOR CHOOSING A LOCATION (CONT'D)**

**R&D-High Tech**
- R&D-high tech was related to low competitive labor costs
- R&D-high tech was related to quality-productivity of labor force

**Office**
- No relationships were found for the Office sector

**Note:** An exploratory approach was taken for this particular analysis allowing p values of <=.10; 10% chance the results are due to chance alone.
When considering your LAST project, were there any fatal flaws that eliminated one or more locations?

Nearly two-thirds (65%) of locations under consideration exhibited a “fatal flaw” that precluded selection.

- Yes: 66%
- No: 19%
- Unsure: 15%

N=72
Please describe briefly the "fatal flaw."

**FATAL FLAWS**

The most frequently mentioned fatal flaws included:

- **Lack of available property/building**
  - Infrastructure issues
  - Timing to get the site “ready”
  - Site contamination
- **Workforce issues**
  - Availability – especially for certain required occupations
  - Quality
  - Work ethic
  - Substance abuse
  - Turnover
  - Union presence

“Significant union presence, lack of available workforce, physical limitations to site development.”

“Lack of an available building.”

“Non right to work (union) state, state income taxes, over regulation”

“Shortcomings in community conditions discovered in on-site due diligence. Concerns with human resources (quality, work ethic, cost for specific positions, substance abuse, etc.) Technical problems with sites or buildings. Failure by public agencies, utilities, or others to cooperate.”

“Site and infrastructure issues.”
FATAL FLAWS (CONT’D)

• Costs
  • Taxes
  • Labor
  • Utility
  • Real estate
  • Capital/Borrowing

“Poor property availability, labor situation, higher costs.”
What are the most effective EDOs doing to win your business at the state level?

“Providing up-to-date information on incentives and workforce programs.”

“Regular touch points – whether it’s a dinner, a phone call, an email newsletter.”

“Easy to contact and quick to respond. Willing to coordinate responses from multiple markets.”

“A good mix of cash and tax incentives.”
What are the most effective EDOs doing to win your business at the *regional* level?

“Sharing recent wins and the reasons for the wins.”

“Developing your value proposition.”

“Providing one-stop prospect service for the region.”

“Invitations to attend Familiarization Tours. I only attend approximately 1 per quarter, but nothing beats seeing opportunities in person and building new relationships.”

“Good knowledge of the market and communities. Coordinating responses from multiple communities. Good response time and easy to reach.”
What are the most effective EDOs doing to win your business at the local level?

“Excellent understanding of local infrastructure, workforce and speed of project execution.”

“Connecting us with other employers in the area.”

“Flexible incentives programs.”

“Willingness to work in a flexible, speedy manner.”

“Partnering with regional and state officials.”

“Follow up, follow up, follow up.”
Please identify or describe the most effective talent programs you have seen.

**GENERAL CONCEPTS THAT LEAD TO EFFECTIVE TALENT PROGRAMS**

- Keeping up with technology in schools
- Good public schools
- Customized training programs for companies
- Job creation incentives and workforce training grants
- Specific training facilities for an industry (e.g., biotech, mechatronics, etc.)
- Providing access to companies for interviews and tours
- Strong integration between businesses and technical schools that lead to collaborative curriculum design and well-trained workers
- Working with high schools and community colleges to create trade internships
What are the best ways for an economic development organization to communicate with site selectors about their region? Please rank* all seven items, where 1=“most effective” and 7=“least effective.”

### SITE SELECTORS

<table>
<thead>
<tr>
<th>WAYS TO COMMUNICATE</th>
<th>RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting with you at your office</td>
<td>2.1</td>
</tr>
<tr>
<td>Familiarization tour</td>
<td>2.3</td>
</tr>
<tr>
<td>Email marketing</td>
<td>3.4</td>
</tr>
<tr>
<td>Printed communications</td>
<td>4.4</td>
</tr>
<tr>
<td>Gifts</td>
<td>4.8</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>5.2</td>
</tr>
<tr>
<td>Advertising</td>
<td>5.8</td>
</tr>
</tbody>
</table>

The personal touch proved to be the preferred way to communicate with site selectors with the two top ranks going to (i) in-office meeting and (ii) a familiarization tour.

Similar to the findings for members, paid-communications such as gifts and advertising ranked among the lowest.

Compared with the last two survey efforts, these data are largely consistent with “advertising” being lowest ranked and “meeting at the office” being highest ranked.

### MEMBERS

<table>
<thead>
<tr>
<th>WAYS TO COMMUNICATE</th>
<th>RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting with you at your office</td>
<td>1.9</td>
</tr>
<tr>
<td>Familiarization tour</td>
<td>2</td>
</tr>
<tr>
<td>Email marketing</td>
<td>3.5</td>
</tr>
<tr>
<td>Printed communications</td>
<td>4.3</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>4.6</td>
</tr>
<tr>
<td>Gifts</td>
<td>5.6</td>
</tr>
<tr>
<td>Advertising</td>
<td>6</td>
</tr>
</tbody>
</table>

*Ranks were statistically significant. Note: When reading data, keep in mind that lower rankings = more effective.
How important are each of the following characteristics of an ED website?

**SITE SELECTORS**

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Not at all</th>
<th>Midland</th>
<th>Extremely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target industries</td>
<td>4%</td>
<td>2%</td>
<td>96%</td>
</tr>
<tr>
<td>Amount-recency of data on Properties</td>
<td>7%</td>
<td>15%</td>
<td>80%</td>
</tr>
<tr>
<td>Contact Info for ED contact</td>
<td>21%</td>
<td>28%</td>
<td>51%</td>
</tr>
<tr>
<td>Ease of finding the website</td>
<td>29%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Current press release-announcements</td>
<td>29%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Amount-recency of data on Incentives</td>
<td>28%</td>
<td>42%</td>
<td>30%</td>
</tr>
<tr>
<td>Amount-recency of data on Workforce</td>
<td>33%</td>
<td>47%</td>
<td>20%</td>
</tr>
<tr>
<td>Amount-recency of data on Infrastructure</td>
<td>67%</td>
<td>58%</td>
<td>7%</td>
</tr>
<tr>
<td>Amount-recency of data for local employers</td>
<td>65%</td>
<td>57%</td>
<td>8%</td>
</tr>
<tr>
<td>Amount-recency of data on Demographics</td>
<td>63%</td>
<td>51%</td>
<td>6%</td>
</tr>
<tr>
<td>Cost of doing business</td>
<td>58%</td>
<td>47%</td>
<td>7%</td>
</tr>
<tr>
<td>Quality-of-life info</td>
<td>29%</td>
<td>62%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Only quality of life information failed to be affirmed by a majority (>50%) of site selectors.*

*Compared with the last 2 survey efforts, these data are largely consistent although a slight upward shift is apparent for data on properties with 2016.*
Please rate how important you think each of the following characteristics are for an ED website.

**MEMBERS**

Website characteristics to the left of the vertical line above were rated by a majority (>50%) as “extremely important”.

N=75
If there were one piece of advice you would give to communities/regions/states trying to market to site selectors, what would that be?

- “Arm us to overcome our clients’ preconceived ideas about your area.”
- “Be prepared for quick turn around on RFP’s. Try to make personal contact at conferences, and visits to site selectors.”
- “Communicate what is most unique about your location. Compare yourself to competing locations using objective data and cost indicators.”
- “Build relationships and target your message. Make sure you are sending us relevant information like recent announcements, new legislation, etc. but not invitations to your annual fundraising golf tournament or business expo especially if we are several hours from your community or out of state.”
- “Find me, contact me, stay in touch but only periodically (quarterly / semi-annually), and have something interesting to say.”
- “Attend Site Selectors Guild events.”
- “Focus. Be clear on who you are and what types of projects would be good fits. Don’t try to be all things to all people.”
- “Good state-level coordination on available sites with local communities. You would be surprised at how little coordination we see on this very important topic.”
KEY TAKEAWAYS
Key Takeaways

1. If you are marketing to site selectors, you should be aware of how they make decisions, what their current perceptions are of the state in which you operate, and how they prefer to be communicated with, as well as trends and changes over time.

2. Consider the information presented today in light of your area’s own unique assets, target industries and strategies.

3. For State ED groups, focus on getting on the radar so that communities within your state are considered.

4. For local and regional EDOs, your #1 job with site selection is being ready, aligned, and able to articulate your points of difference.

5. For local and regional EDOs, treat your State ED group and Utilities as customers: they bring you leads!

6. Talent issues take many forms; most are important and persistent. Developing and implementing a talent strategy can be your area’s greatest competitive advantage.
## Bob Ady Scholarship Winners - 2016

### 2016 WINNERS

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NAME</th>
<th>TITLE</th>
<th>ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>Abby Attoun</td>
<td>Director of Community Development</td>
<td>City of Middleton, Wisconsin</td>
</tr>
<tr>
<td>2016</td>
<td>Chris Castle</td>
<td>Economic Development Assistant</td>
<td>Norwalk Economic Development Corporation</td>
</tr>
<tr>
<td>2016</td>
<td>Mark Dobson</td>
<td>President &amp; CEO</td>
<td>The Economic Development Corp. of Elkhart County</td>
</tr>
<tr>
<td>2016</td>
<td>Katie Eaton</td>
<td>Economic Development Manager</td>
<td>Economic Development Corporation Michigan City</td>
</tr>
<tr>
<td>2016</td>
<td>Morgan Franklin</td>
<td>Business Development Officer</td>
<td>Economic Development Corporation of Kansas City</td>
</tr>
<tr>
<td>2016</td>
<td>Matthew Godinez</td>
<td>Executive Director</td>
<td>Chanute Regional Development Authority</td>
</tr>
<tr>
<td>2016</td>
<td>Megan McGown</td>
<td>VP of ED and Marketing</td>
<td>North Platte Area Chamber &amp; Development Corporation</td>
</tr>
<tr>
<td>2016</td>
<td>Sean Overeynder</td>
<td>Community Development Director</td>
<td>Twin Cities Development</td>
</tr>
<tr>
<td>2016</td>
<td>Erin Ruth</td>
<td>Director of Planning &amp; Development</td>
<td>Village of Cottage Grove, Wisconsin</td>
</tr>
<tr>
<td>2016</td>
<td>Lauren Sheridan-Simonsen</td>
<td>Assistant Director of ED</td>
<td>City of Neligh</td>
</tr>
<tr>
<td>2016</td>
<td>Christina Stephenson</td>
<td>Economic Development Coordinator</td>
<td>KBJ Economic Development</td>
</tr>
<tr>
<td>2016</td>
<td>Michael Stewart</td>
<td>Managing Director</td>
<td>Grayslake Business Partnership, LLC</td>
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<table>
<thead>
<tr>
<th>YEAR</th>
<th>NAME</th>
<th>TITLE</th>
<th>ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>Blake Benson</td>
<td>Economic Development Director</td>
<td>City of Pittsburg</td>
</tr>
<tr>
<td>2015</td>
<td>Sam Blahnik</td>
<td>Community Development Director</td>
<td>Village of DeForest</td>
</tr>
<tr>
<td>2015</td>
<td>Bryce Davis</td>
<td>Director</td>
<td>Wright County Economic Development</td>
</tr>
<tr>
<td>2015</td>
<td>Nick Fosheim</td>
<td>Executive Director LCEDA/MCEDA</td>
<td>Lincoln County EDA / Minnehaha EDA</td>
</tr>
<tr>
<td>2015</td>
<td>Heather Smith</td>
<td>Director of Economic Development</td>
<td>City of Fort Scott, Kansas</td>
</tr>
<tr>
<td>2015</td>
<td>Thomas Harrigan</td>
<td>Economic Development Specialist</td>
<td>Whitewater Community Development Authority</td>
</tr>
<tr>
<td>2015</td>
<td>Heather Horowitz</td>
<td>Director</td>
<td>Norwalk Economic Development Corporation</td>
</tr>
<tr>
<td>2015</td>
<td>Rachael Parker</td>
<td>Director of Economic Development</td>
<td>City of Chillicothe</td>
</tr>
<tr>
<td>2014</td>
<td>Regina Emberton</td>
<td>President</td>
<td>Michiana Partnership</td>
</tr>
<tr>
<td>2014</td>
<td>Patricia Perry</td>
<td>interim Main Street Manager</td>
<td>Portland Main Street</td>
</tr>
<tr>
<td>2014</td>
<td>Travis Haggard</td>
<td>Executive Director</td>
<td>Keith County Area Development</td>
</tr>
<tr>
<td>2014</td>
<td>Charles Hilmes</td>
<td>Mayor - Economic Development</td>
<td>City of Breese</td>
</tr>
<tr>
<td>2014</td>
<td>Christine Kish</td>
<td>Project Manager, Attraction</td>
<td>Team Lorain County</td>
</tr>
<tr>
<td>2014</td>
<td>Ken Maule</td>
<td>Executive Director</td>
<td>Lincoln County Economic Development Corp</td>
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<tr>
<td>2014</td>
<td>Mary Rajek</td>
<td>Economic Development Associate</td>
<td>Redevelopment Resources, LLC</td>
</tr>
<tr>
<td>2014</td>
<td>Glennis McClure</td>
<td>Executive Director</td>
<td>Gage Area Growth Enterprise - NGage</td>
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<tr>
<td>2014</td>
<td>Brittany Abrams</td>
<td>Economic Development Coordinator</td>
<td>Village of Justice</td>
</tr>
<tr>
<td>2014</td>
<td>Luke Virgil</td>
<td>Economic Development Coordinator</td>
<td>City of Laurel, Nebraska</td>
</tr>
</tbody>
</table>
### Past Winners – 2012-2013

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NAME</th>
<th>TITLE</th>
<th>ORGANIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Celie Koth</td>
<td>Marketing Coordinator</td>
<td>Watertown Economic Development Organization</td>
</tr>
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<td>2013</td>
<td>Terrance Hall</td>
<td>Business Development Specialist</td>
<td>Rockford Area Economic Development Council</td>
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<td>2013</td>
<td>Joe Sobieralski</td>
<td>Executive Director</td>
<td>Southwestern Michigan Economic Growth Alliance</td>
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<td>2013</td>
<td>Monica Lueking-Crowe</td>
<td>Executive Director</td>
<td>Furnas-Harlan Partnership</td>
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<td>2013</td>
<td>Wilson Bowling</td>
<td>Economic Development Director</td>
<td>City of Kimball</td>
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<td>2013</td>
<td>David Connolly</td>
<td>Executive Director</td>
<td>Crawford County EDC</td>
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<td>2013</td>
<td>Kelly Flynn</td>
<td>Director of Economic Development</td>
<td>City of South Sioux City</td>
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<td>2012</td>
<td>Nicole Sedalcek</td>
<td>Executive Director</td>
<td>Holt County Economic Development Agency</td>
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<td>2012</td>
<td>Kim Uhlig</td>
<td>Business Development Director</td>
<td>Morton Economic Development Council</td>
</tr>
</tbody>
</table>
Thank You

608.663.9218
jady@adyadvantage.com
www.linkedin.com/in/janetady/

Talent Toolbox for Economic Developers
Published February 2016

Rural Economic Development Toolbox
Published September 2014

Blog and newsletter at www.adyadvantage.com