



11333 N. Cedarburg Road
Mequon, WI 53092
Phone: 262-236-2902
Fax: 262-242-9655

www.ci.mequon.wi.us

Department of Community Development

ECONOMIC DEVELOPMENT BOARD

Tuesday, March 27, 2018

7:30 AM

North Conference Room

Agenda

1. Call to Order

2. Business Outreach Update

Request: Discuss & Action

3. Telsmith Visit on April 25th at 2:00 pm

Request: Discuss

4. Staff Updates

5. Announcements

The next meeting is May 18, 2018 at 7:30 a.m.

6. Adjourn

Dated: March 23, 2018

/s/ Timothy Carr, Chairman

Notice is hereby given that a quorum of other governmental bodies may be present at this meeting to present, discuss and/or gather information about a subject over which they have decision-making responsibility, although they will not take formal action thereto at this meeting.

Persons with disabilities requiring accommodations for attendance at this meeting should contact the City Clerk's Office at 262-236-2914, twenty-four (24) hours in advance of the meeting.

Any questions regarding this agenda may be directed to the Department of Community Development's Office at 262-236-2903, Monday through Friday, 8:00 AM – 4:30 PM



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Office of Community Development

TO: Economic Development Board
FROM: Kim Tollefson, Director of Community Development
DATE: March 27, 2018
SUBJECT: Business Outreach Update

Staff is prepared to initiate the priority outreach business visits with selected companies within the industrial sector. Six companies, all of which are located within Alderman Wirth's district, are targeted for our first round of outreach. Alderman Wirth will join the Board members at these meetings. The Board agreed to the following process:

1. Issue a Letter to the Company as an introduction to our request to meet. The release of this letter is scheduled for early April (see attached).
2. Follow-up the letter with a personal phone call by staff to coordinate and schedule the meeting. Meetings will be schedule for May. Two teams will conduct the meetings.
3. After the business visit, a thank you letter will be issued by Tim and Kim.
4. Within one month of meeting, staff will notify officials of any immediate business needs or findings. If there is an urgent business need, staff will respond with solutions or opportunities.
5. Within three months of all of the meetings, an executive summary of the Board's findings will be shared and a status update or progress report of any City actions will be issued to the businesses.

Also attached is a draft bio sheet of the members of the Board and City that will be provided to the companies in advance of our visits as well as a sample of business questions (reduced from previous content) to use at the visit if needed.

Attachments:

Packet (PDF)

Packet (PDF)

2018 Priority Outreach Visits

Business	Industry	Aldermanic District	Contact	Team	Visit Date
Per EDB Direction					
Rockwell Automation (follow up)	Relay and Industrial Control Manufacturing	Wirth		A	
Gen Met	Industrial Fabricating and Manufacturing	Wirth	Mary & Eric Isbister	B	
Telesmith	Construction Machinery Manufacturing	Wirth	Cheryl Milbauer	A	
HB Performance Systems Inc.	Motor Vehicle Brake System Manufacturing	Wirth	Several	B	
Gateway Plastics	Manufacturing	Wirth	Bill Vogel	B	
SPI Lighting	Industrial Commercial Lighting	Wirth	Lee Doerr Jr.	B	

Team A: Kim, Tim + Mayor or City Administrator

Team B: Kim, Tim + 1 EDB Ambassador + Ald. Wirth

EDB Ambassadors: Jim Baka - Insitutional
Bruce Sipiora - Industrial
Jon Safran - Commerical

Attachment: Packet (3079 : Business Outreach Update)



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DEPARTMENT OF COMMUNITY DEVELOPMENT

April 9, 2018

Gateway Plastics
 Mr. Bill Vogel
 5650 W. County Line Road
 Mequon, WI 53092

Re: Business Retention and Expansion

The City of Mequon Economic Development Board is conducting business visitations with various companies located in the City's industrial sector as part of their 2018 work program. The Board would like to advance tools and programs that are designed for business retention and expansion. A business visit will allow the Board members, and the Community Development Director Kim Tollefson, to learn what issues and opportunities are facing your company and its operations.

The City will be reaching out to gauge your interest in a business visit and establish a time to meet. Please consider your willingness to participate and how the City of Mequon may be able to assist. Most importantly, the Board and Director Tollefson, want to provide you with a resource and direct contact information should the company be faced with a pressing or urgent matter in the future.

We hope to visit your facility and learn more about your operations in the near future. Thank you in advance for your time and consideration.

Kim Tollefson
 City of Mequon
 Director of Community Development

Tim Carr
 City of Mequon
 Economic Development Board Chairman

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DEPARTMENT OF COMMUNITY DEVELOPMENT

April 9, 2018

GenMet Superior Metal Fabrication
 Mary and Eric Isbister
 10245 N. Enterprise Drive
 Mequon, WI 53092

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 Director of Community Development

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DEPARTMENT OF COMMUNITY DEVELOPMENT

April 9, 2018

Hb Performance Systems
 5800 W. Donges Bay Road
 Mequon, WI 53092

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April 9, 2018

SPI Lighting
 Mr. Lee Doerr Jr.
 10400 N. Enterprise Drive
 Mequon, WI 53092

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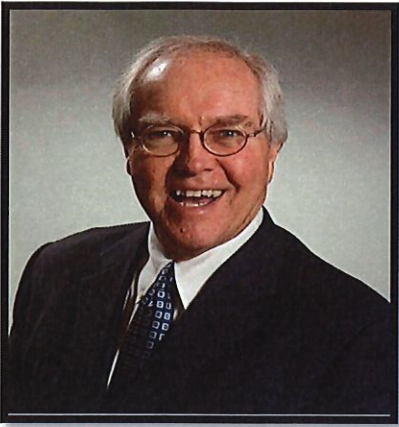
Kim Tollefson
 City of Mequon
 Director of Community Development

Tim Carr
 City of Mequon
 Economic Development Board Chairman

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City of Mequon

Economic Development Board Members

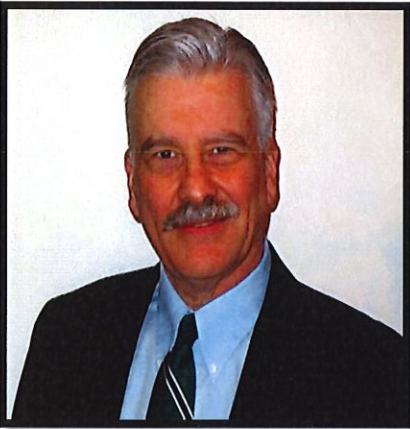


Tim Carr
Senior Portfolio Manager
Senior Vice President
Wealth Advisor

Tim is co-founder of The Carr Butler Group, and has been a part of Morgan Stanley since 1980. In addition to being a Senior Vice President and Wealth Advisor, he is a Senior Portfolio Manager in Morgan Stanley's Portfolio Management group.

After graduating Marquette University with a Bachelor of Arts degree in Political Science and Government, Tim went on to complete additional studies at University of Pennsylvania-The Wharton School, and Stanford University.

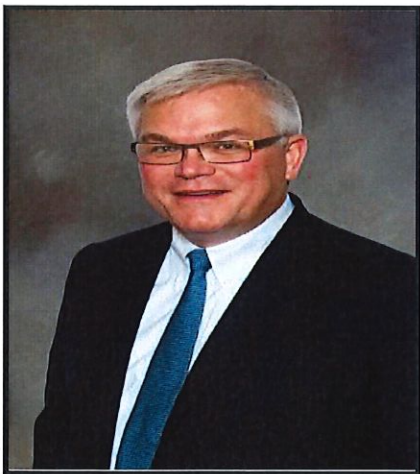
Tim is the Chair of the Economic Development Board and had been a member of the Board since 2012.



Bruce Sipiora

Bruce has 35 years private sector experience at E.I. DuPont deNemours & Co (Inc), Wilmington, DE (Currently DowDuPont). During this time, Bruce held positions in Global and North American (NA) Corporate and National Accounts; NS Business Development; Produce & Sales Management; and Industry Relations.

Bruce has been a member of the Economic Development Board for 3 years.



John Wirth
District 4 Alderman
Term Date: 2016 to 2019

John Wirth was elected to represent District 4 in April of 2016. He previously represented District 4 from April of 2001 through April of 2013. John currently serves on the Public Welfare Committee and the Planning Commission. John has called Mequon home since 1978.

John, a shareholder of the Milwaukee law firm of Mallery & Zimmerman, S.C., has spent almost 30 years practicing creditors' rights, real estate and business transactions law. John has a varied practice, dividing his time between operating businesses as a court-appointed receiver and advising and representing his varied entrepreneurial clients. John attended the University of Wisconsin - Madison where he earned a Bachelor of Arts Degree and his Juris Doctorate.

City of Mequon Staff



Will Jones
City Administrator

Will Jones was appointed Mequon City Administrator in 2015. As City Administrator, Mr. Jones is responsible for managing, coordinating and expediting activities across all City departments, serves as the City's spokesperson and representative to other units of government, outside organizations and the local business community, and oversees the City's annual budget development process. Prior to joining Mequon, he was employed with the Village of Glencoe, Illinois for four years as an Assistant Village Manager and the City of Highland Park, Illinois for fifteen years in a variety of positions, including Assistant City Manager and Deputy Finance Director.

Will has earned designation as a Credentialed Manager through the International City/County Management Association and presently serves as Chair of the Government Finance Officers Association's Advisory Committee on Economic Development & Capital Planning. He holds a Bachelor of Arts Degree in History and Political Science from Boston College and earned a master's degree in Public Administration from Indiana University School of Public and Environmental Affairs.



Dan Abendroth
Mayor

Dan Abendroth is a long-term leader for the City of Mequon. Dan was elected to his part-time mayoral position in 2013. In Mequon, the Mayor is the Chief Executive Officer and a Member of the Common Council. Dan is the chair of the Planning Commission and Finance Personnel Committee. Additionally, Dan previously served the City as an Alderman of District 1 for 27 years from 1986 – 2013.

Dan attended Carroll College and earned a Bachelor of Science Degree in Geography and Land Use Planning. Dan worked for Milwaukee Transportation Services, Inc. for 26 years, in which he worked as the Manager of Planning and Manager of Operations. Dan has extensive experience in coordinating resources, overseeing staff, project management, research, and budgeting.



Kim Tollefson
Director of Community Development

Director of Community Development oversees the operations of the Planning Division and Inspections Division. The Department staffs 11 regular and contracted employees. Kim is responsible for directing the City's development through the City's Comprehensive Plan, Municipal Codes and various and diverse planning programs and procedures including four, current Tax Increment Financing Districts. She is also responsible for public policy analysis related to urban planning and economic development as well as the development and implementation of special projects. Kim holds a Master's Degree in Urban Planning with an emphasis in Urban Design and a minor in Environmental Studies and has a diverse background in planning for governmental agencies in Wisconsin, Minnesota, Oregon and the State of Washington.

Business Visitation Talking Points

Retention is the foundation for a healthy local economy, we want to have an open dialogue about how the EDB can help strengthen and grow your business.

What are the opportunities for growth and are any anticipated in the next 3 – 5 years?

Does your company need assistance to stay and grow in Mequon?

Are there additional industries or other support services that you feel are needed in the area that would enhance your operations?

What factors are barriers to your business operations?

What are the greatest disadvantages of operating your business in Mequon?

What are the greatest advantages of operating your business in Mequon?

2018 Priority Outreach Visits

2 Weeks			4 Weeks		3 Months	
Thank You Letter	Review Visit & Comments Received	Data Entry Summarizing Visit	Notify Alderperson, Mayor, City Administrator of Business's Needs	City Response & Follow Up to any Specific Need with Business	Executive Summary of Visits	Send Progress Report of any Action By City

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TO: Economic Development Board
FROM: Kim Tollefson, Director of Community Development
DATE: March 27, 2018
SUBJECT: Telsmith Visit on April 25th

Staff has secured a visit and facility tour with Telsmith Inc. as part of the Board's outreach program. The visit is scheduled for Wednesday, April 25th at 2:00 p.m. and will likely last approximately two hours. Staff's goal is to follow a similar format that was conducted at the Rockwell tour in 2017. Staff is working with a representative of Telsmith Inc. and requesting the assistance of the Chamber of Commerce for a successful event.

In coordinating the event, staff is seeking input from the Board on desired objectives and outcomes. Staff recommends concluding the session with a targeted meeting between Telsmith Inc. executives and the Board. Included with this memo is a summary of Telsmith Inc. and as part of our meeting, staff and the Board will watch a video regarding their operations.

Attachments:

Telsmith History (DOCX)



History

TELSMITH HISTORY

Telsmith, Inc. was founded over one hundred years ago to manufacture a new type of rock crusher for the aggregate industry. Today, Telsmith is still connected with its heritage, delivering new crushing and screening solutions to help meet the growing demand for mineral processing equipment around the world. In 1987, Telsmith was acquired by Astec Industries, a leader in asphalt plant technology. Telsmith formed the cornerstone of what would grow to become the Astec Aggregate and Mining Group. Today, Astec is the largest supplier of aggregate processing equipment in North America.

Telsmith, Inc. serves the global mining and aggregate industries with crushing and vibrating equipment, modular stations, and portable plants through integrated solutions designed to improve efficiency, profitability, and safety. A global network of dealers and factory representatives are available to provide the right solution for aggregate, mining, industrial, or recycling needs, as well as the parts and service to keep Telsmith products running for decades.



OUR CORE VALUES

- Continuous devotion to meeting the needs of our customers.
- Honesty and integrity in all aspects of business.
- Respect for all individuals.
- Preserving entrepreneurial spirit, innovation and focus through decentralization.
- Safety, profit and growth as means to ensure success of the company.

OUR MISSION STATEMENT:

"To grow and prosper by designing, manufacturing and selling the most innovative, productive, reliable and safe equipment for the industries we serve, coupled with unparalleled customer service."