

Assessment
and
Funding Feasibility

Prepared for:



G O T O P E K A

May 4, 2007

**RESOURCE DEVELOPMENT GROUP
WWW.RDGUSA.NET**

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I. ASSIGNMENT

Resource Development Group (RDG) was retained by Go Topeka for the following:

Conduct a series of interviews with private sector leaders to determine the following:

- 1 Depth of understanding and support for Go Topeka's economic development programs and strategies;
- 2 Test funding potential from the private sector for a new five-year cycle commencing 2008;
- 3 Identify principal sources of potential funding and a funding goal;
- 4 Determine/Identify potential leadership for a funding campaign;
- 5 Identify potential challenges and impediments in launching and successfully completing a major funding initiative.

Define the elements of a possible funding campaign including strategy, timing and approach.

The results of this assessment are summarized herein.

II. METHODOLOGY

Resource Development Group experience:

Participation in formulation and budgetary funding for more than 85 economic and community development organizations throughout the country. Collectively, these total more than \$400 million in operating capital and include both Chambers of Commerce and stand alone economic development corporations;

Familiarity with numerous economic and community development programs throughout the United States.

Background information for the study was provided by Chamber staff

Individual interviews with 52 strategically identified private sector leaders. See Appendix C: - Leadership Interviews

The Assessment focused on:

- 1 Leadership perceptions of the Go Topeka program, its successes, shortcomings and future potential.
- 2 Testing the viability of a private sector funding campaign to raise sufficient funds for a multi-year budget.
- 3 Identifying potential challenges impacting the success of a fundraising campaign for Go Topeka.
- 4 Identification of leadership or a funding effort.

III. KEY FINDINGS

QUESTION #1

How familiar/involved have you been with Go Topeka over the past 4 years?

51 of the 52 interviewees were familiar with Go Topeka and have had previous involvement with Go Topeka and/or the Chamber. 48 of the 53 are current Go Topeka investors. The five non- investors are current Chamber members. The interview pool in total represented 63% of the \$2 million private sector investment pool raised from the 2003 Go Topeka Funding Campaign

“We are not active but are strong supporters of the program.”

“I’m a Past Chairman of the Chamber but I’m not significantly involved now. I am very confident in the leadership today.”

“I’ve been involved, and I encourage my employees to get involved with the Chamber and the economic development program.”

“My involvement is directly tied to my financial investment.”

QUESTION #2

How would you rate Go Topeka's effectiveness during the past 4 years?

40 of the 52 interviewed rated Go Topeka as "effective" or "very effective" in their role as the economic development organization for Topeka/Sedgwick County. 11 felt they were "somewhat effective" with the remaining individual answering "not effective".

"I think Doug and his staff has done a great job as our community's economic development leader"

"This isn't the easiest place to sell so I'm pleased with the work they've done"

Reasons cited for "very effective" and "effective" response:

Activity Levels appear to be high

Communications are excellent

Must remain focused on recruitment, retention, workforce, marketing

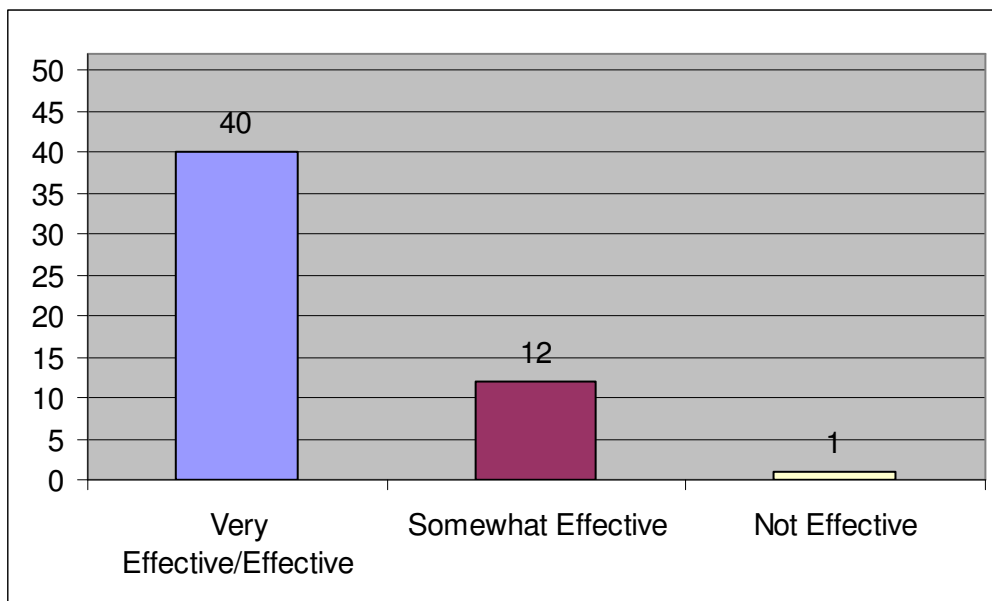
Reasons cited for "somewhat effective" response:

Would like to see more big and marquee projects locate in the region

Expectation that sales tax money would result in more projects for region

Reason cited for "not effective":

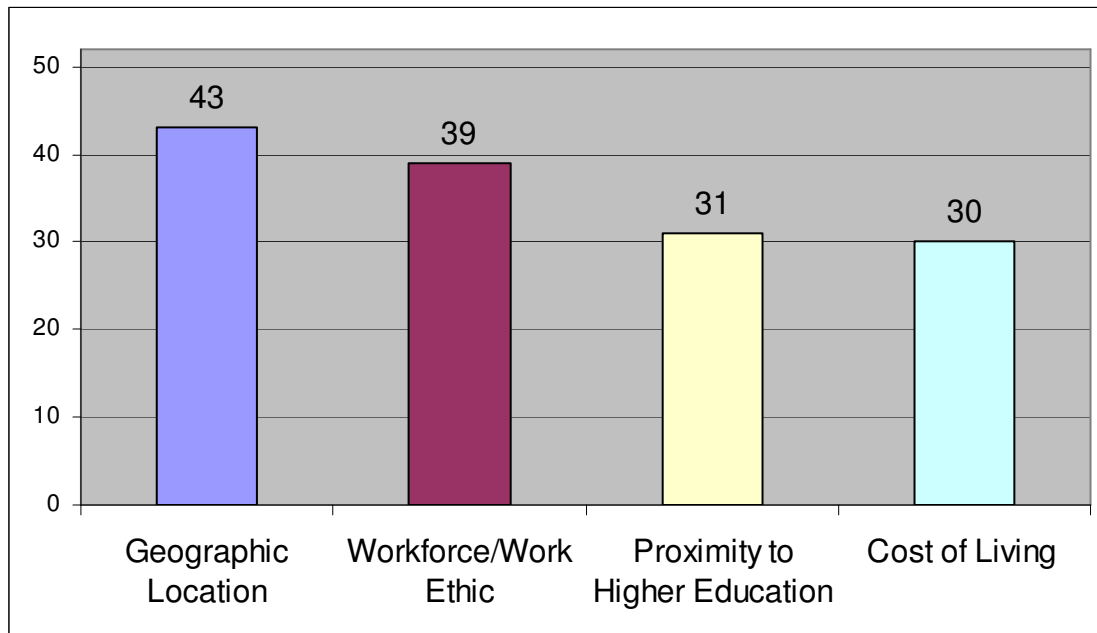
Was not helpful with specific company tax situation



QUESTION #3

What do you consider to be the Topeka's region's greatest strengths and greatest weaknesses from a business development perspective?

Greatest Strengths:



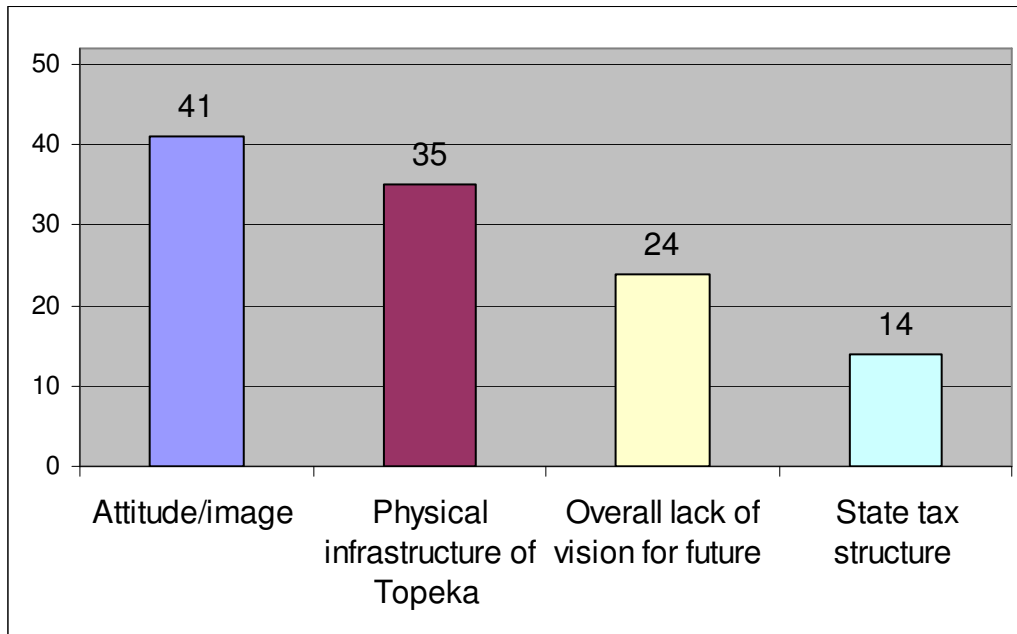
"Our location, with our interstate access and central location within the U.S. is a great strength."

"A key reason our business is successful is due to the great work ethic of our employees."

"The 'hassle free' nature of Topeka is extremely attractive."

"We need to continue to promote all of the institutions of higher education that are in our backyard."

Greatest Weaknesses:



“The attitude of our people needs to change; we still seem to have an inferiority complex.”

“When I first moved here, I was getting a haircut and the stylist asked me why I would want to live here?”

“Our downtown could use some work. I'm all for riverfront development but maybe we should look at the physical infrastructure, the sidewalks and streets. It's not very inviting or attractive.”

“Both the public and private sector need to have a vision for progress and all buy into it.”

“I'm not sure our public sector is focused on progress and I think Go Topeka needs to continue to play the role of educating them on the importance of a strong partnership.”

“The unitary taxes are horrible”

QUESTION #4

Do the program priorities outlined in the pre-case make sense?

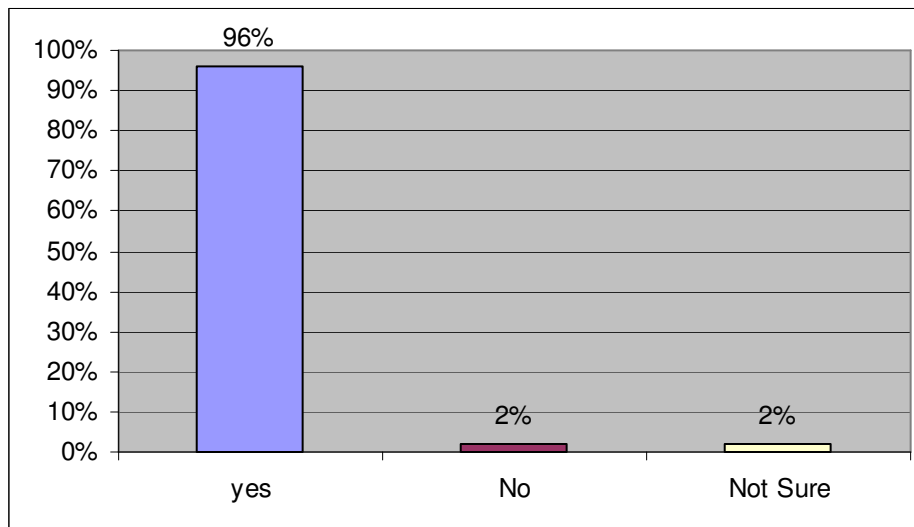
The priorities as presented in the pre-case document received 96% support. 40 interviewees were familiar with the comprehensive economic analysis and felt very comfortable with the four program components (Global Business Development, Employer Solutions, Workforce Development and Flexibility Fund) as listed in the pre-case document. Most felt the implementation of the enhanced programs will allow Go Topeka to play a more expanded and aggressive role in regional marketing, prospect coordination, project management, company retention, and talent recruitment and retention for companies within the region as well as those who are considering an expansion or new location within the region. In addition, the Flexibility Fund was supported as a means to continue to improve the product well into the future.

"Yes, I think they definitely make sense."

"I like all the areas mentioned and think we should step up our efforts."

"We can make a good case that everything mentioned here is a top priority."

Support for Program of Work



Results Based on 52 Interviews

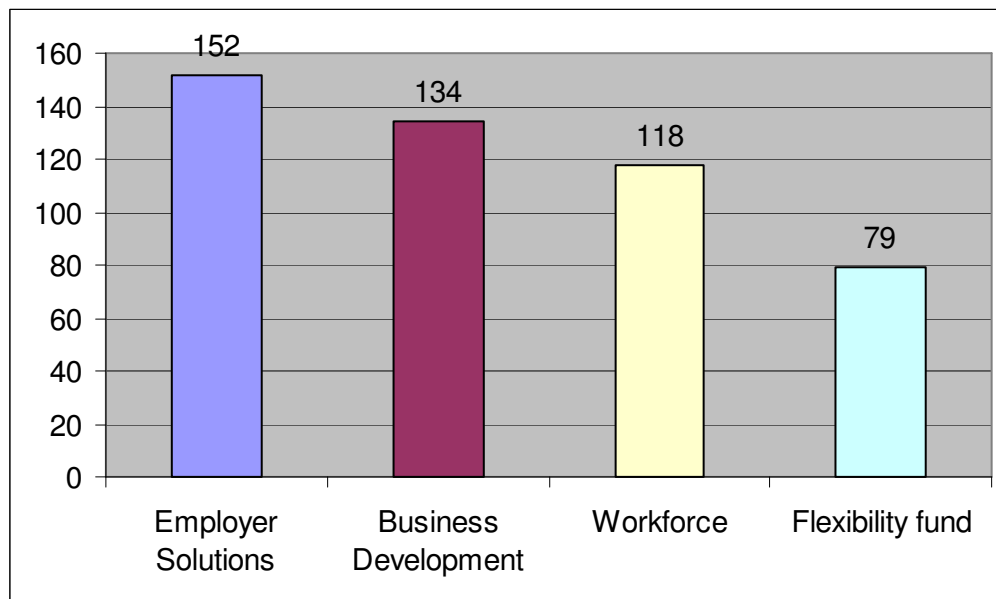
Question #5

Can you prioritize program components from most important to least important?

96% of those interviewed supported the general program of work as presented in the pre-case. However, when asked to prioritize each component from most important to least, the retention and expansion of existing businesses and recruitment of new companies clearly received the most support. The breakdown was as follows:

<u>PROGRAM COMPONENT</u>	<u>PRIORITY</u>			
	1st	2nd	3rd	4th
Employer Solutions	22	16	8	0
Business Development	14	21	5	5
Workforce Development	8	12	23	4
Flexibility Fund	7	7	6	18

(Graph reflects a 1-4 point scale with 4 points given to the top priority and 1 point given to the last priority)



*numbers reflect actual responses and in some case interviewee only mentioned 1 or 2 program areas

"It's like the chicken and the egg; they're all important and critical to a strong economic development program."

"Keeping our companies from moving should be at the top of our list."

"If we are to grow and attract more employees, we must attract new businesses."

"It just makes sense that it's easier to keep what's already here as opposed to convincing an outside company to relocate."

"Workforce issues are clearly important to our business community's growth but the community and our school systems should be the primary agencies addressing those needs."

"I think we need to improve the attractiveness of Topeka so that young professionals want to live here. The flexibility fund will allow us to address those things that will make Topeka a place where young people want to live and work."

"If young executives are going to see Topeka as a 'weigh station' on their resume, then we need to make it more attractive and more vibrant."

"We are lacking a common vision, where the business community, the public officials and the public are all working together on a common vision."

QUESTION #6

We have estimated the total cost of implementation to be a minimum of \$2.5 million over the next 5 years beginning in 2008 – or about \$500,000 per year. In your opinion, is \$500,000 per year a reasonable target from businesses throughout the region?

86% of those interviewed felt an increase from \$400,000 annually to \$500,000 annually from the private sector was reasonable AND attainable.

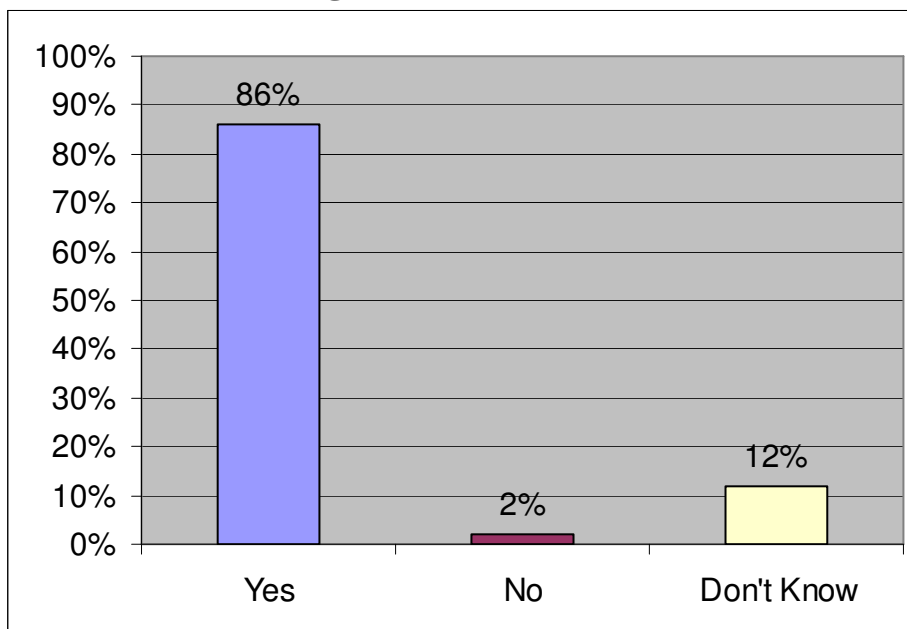
“I think that a small increase is possible but you need to be able to show the value related to the additional dollars.”

“On its face it doesn't seem like much but you have to be careful because everyone is looking for money.”

“We should be able to raise twice that amount!?”

“That is a lot of money. I'm not sure Go Topeka is the organization in the community that needs the money the most.”

Is Target Goal Reasonable?



QUESTION #7

How do you feel about your investment? Would you consider increasing your investment level?

100% of those interviewed that are currently investing in Go Topeka indicated that they would be willing to consider another 5-year investment commitment, with 42% willing to consider an increase. In addition, of the 5 non-investors, 3 stated their desire to participate in a new campaign.

"I feel private sector funding is a critical element to the partnership and I will consider an increase based on the goal."

"I am very bullish on Topeka and we will definitely participate this time."

"I really think there are other organizations that could use an increase more so than Go Topeka. We will continue at our current level."

Reasons cited for an increase:

- 1) Go Topeka's track record
- 2) Confidence in staff and good stewardship of past funding
- 3) The importance of remaining competitive with other regions with which we compete
- 4) The recently completed economic analysis

Reasons for maintaining or reducing their current investment level:

- 1) Other organizations requests
- 2) The feeling that adequate funding is available through the sales tax
- 3) Desire for further base broadening

QUESTION #8

**How important is direct involvement in program activities and decision making?
Is the ability to serve on a board, task force etc. attractive/important?**

While it was almost evenly split on the question of involvement (53% said it was important) those with interest in being involved were quite passionate.

“It’s very important. If I’m going to contribute \$25,000 I want to be involved.”

“I’ve always believed that you get out of something what you put in.”

“Yes it is attractive to be involved and the construction industry needs to be involved in this.”

For those who said that it is not important to be involved, several said:

“I trust the chamber to manage the process.”

“If I trust the people involved, I don’t have to be involved.”

QUESTION #9

Are there any other concerns related to a future private sector funding campaign for Go Topeka?

12 interviewees cited the need to increase the level of communication to both investors and the general public. There was a general feeling that the public does not understand Go Topeka's mission, activities and successes. Many felt we should attempt to utilize our local media to help inform the general public.

There were 9 individuals that mentioned the need to continue to improve the working relationship between the public and private sectors. The feeling is that while it has certainly improved over the past four years, it will take complete cooperation and partnering in order for the community to reach its potential, and to grow and prosper.

“Economic development needs to be a partnership; economic development is something we can’t afford not to do.”

“The sales tax has really helped provide the tools to be successful.”

“We need to do a better job of letting people know what we are doing and how we are having a positive impact on the community”

IV. RECOMMENDATIONS

FUNDING

When establishing the goal for an organization that has been through a funding cycle, a key component is the assessment of the top investors past track record to determine the historic rate of support from the previous campaign. In the case of Go Topeka, the top 13 investors in the first campaign accounted for 48% of the total dollars raised. The top investors typically track very consistently from one campaign to the next. Coupled with the one-on-one interviews, we are able to establish a goal that is both aggressive and attainable. The top 13 investors from the 2003 Go Topeka campaign revealed the following data:

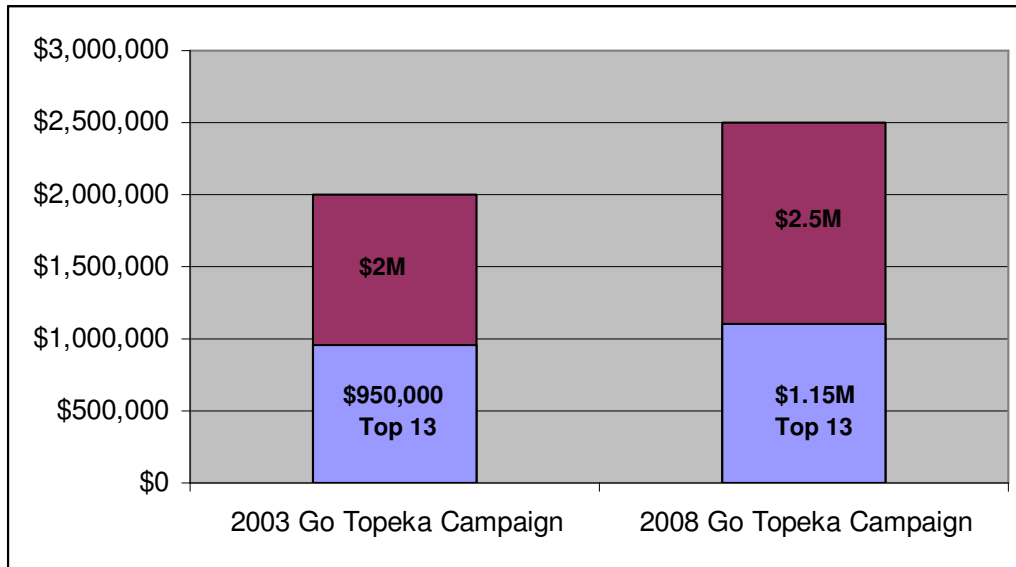
FUNDING TREND ANALYSIS

	<u>2003</u>	<u>Projected 2008</u>
Amount Raised	\$2,000,000	\$2,500,000
Number of Investors	124	150
Top 13 Investors	\$950,000	\$1,150,000
Percent of Total	48%	45%
52 Assessed Investors	\$1,265,000	\$1,660,000
Percent of Total	63%	66%

- 42% of assessed investors will consider an increased investment level.
- Only 3 current investors interviewed indicated they might reduce their current funding.
- Three of the 5 non investors interviewed indicated they would invest in a future campaign and the other two will consider an investment.

1. We recommend developing a very specific programmatic budget for the next five years that approximates \$500,000 per year from the private sector. We have projected the Top 13 for the second cycle at \$230,000 annually which represents 45% of our recommended goal of \$500,000 per year. We believe the remainder can be generated through aggressive base broadening and appropriate increases from Go Topeka mid and lower level investors.

GO TOPEKA CAMPAIGNS



We recommend commencement of a funding campaign May 7, 2007. With proper leadership response and an expanded base, we believe there are resources available within the community to create a resource pool at this level. Our campaign timeline is included as *Appendix C—Campaign Timeline*.

2. We recommend that specific goals with corresponding benchmarks be adopted for the campaign.
3. We recommend a five-year (2008-2012) initiative to ensure stability in funding and a timetable that allows for successful implementation. Conversely, it also mandates a sunset to ensure appropriate consideration of continuation.
4. We recommend an enhanced and more targeted approach to communicating with Go Topeka investor base. The chamber has built a strong foundation of effective communications; however, as the program expands, new investors will be introduced and a more targeted communication approach will prove valuable. Possible components of an overall investor relations strategy are included in *Appendix D—Investor Relations Program*.

V. NEXT STEPS

Convene Kitchen Cabinet to:

- 1 Identify and Recruit Campaign Leadership
- 2 Establish measurable benchmarks for the campaign
- 3 Oversee campaign process.

*Specific recommendations regarding campaign leadership will be made separate from this report.

VI. APPENDICIES

Appendix A: Pre-Case Document



Tell The World!

MARCH 2007

A Five-Year Economic Acceleration Program to Market the Topeka/ Shawnee County Region

MISSION STATEMENT/ PROGRAM OBJECTIVE

Tell The World! will create an environment that grows jobs and investment through expansion of existing industry, entrepreneurial activity, and recruitment of new businesses to the area.

TAKING OUR ECONOMIC DEVELOPMENT EFFORTS TO THE NEXT LEVEL

Competition is fierce in the world of economic development. Topeka/Shawnee County competes with 18,000 other communities in its quest to create and retain jobs and capital investment. Sometimes that competition is limited to other communities in Kansas. More often than not, that competition is nationwide...and worldwide.

Tell the World! sets a course for the future that is relevant to Topeka/Shawnee County's needs, targets measurable goals, and is accountable to its investors. Tell the World's efforts will be driven by our five-year Strategic Plan for 2008 through 2012, a plan that will help Topeka compete with 18,000 other communities.

Driving our Strategic Plan is a comprehensive economic analysis of the Topeka MSA conducted by Competitive Strategies Group (CSG), an international economic development consulting firm. CSG's research determined that Topeka has the potential to be an entrepreneurial community, being in the epicenter of a highly educated population. But, more is needed, including investing in quality-of-life infrastructure and in venture capital.

CSG commended local leaders for their excellence "in creating a source of funds for economic development and the creation of GO Topeka." As you know, area business leaders took that public source of funds—the \$5 million a year generated from the Economic

Development Sales Tax—even further. You committed an additional \$2 million these past five years—another \$400,000 a year—by investing in the "Building a Brighter Future" campaign.



Looking toward 2008 through 2012, CSG's researchers determined that GO Topeka must take its economic development efforts to the next level, both in policy making and in resource allocation, to reach long-term goals. In addition to providing incentives and site development, GO Topeka must expand its mission to:

- Be **global** in scope and provide more staff resources to target prospects.
- Find **solutions for employers** to retain and expand existing businesses.
- Enhance **workforce development** activities to better meet employers' workforce needs.
- Have enough **flexibility** to proactively respond to community initiatives and supplement limited governmental incentives.

To accomplish this expanded mission, we are again asking for funds from the private sector—this time \$2.5 million over the next five years—to supplement economic development sales tax funds.

TELL THE WORLD!

GLOBAL BUSINESS DEVELOPMENT

Projected five-year cost: \$5 million

The Chamber will establish a Global Business Development team staffed by economic development, business development, research, small business development, and communications professionals to promote Topeka worldwide to attract new business to the region. Activities will include, but not be limited to:

- Increase Economic Development staff resources to designate a Senior Vice President whose focus will be on overall strategy and vision—proactive in targeting prospects.
- Solicit capital investment and job growth opportunities both nationally and internationally, implementing the target market analysis recommendations and strategies.
- Conduct approximately 16 high-profile national and international business development missions over a five-year period.
- Develop a state-of-the-art community marketing campaign and materials to promote Topeka's strengths and assets.
- Produce promotional prospectuses for the targeted industry sectors.
- Enhance the Chamber web site to include relevant statistical and demographic information, as well as a regional inventory of available sites and buildings, using GIS technology.
- Develop a Business Information Center with a Chamber research staff professional to serve as the premier repository of business-related community data of the Topeka MSA.

Total Projected Five-Year Cost of Tell The World! Program: \$7.25 Million

- \$4.75 million from the public sector (Economic Development Sales Tax funds)
- \$2.5 million from the private sector (Tell The World! investors)

EMPLOYER SOLUTIONS

Projected five-year cost: \$500,000

The Chamber will designate a business development professional from the staff to work exclusively on implementing existing business retention and expansion strategies:

- Conduct approximately 1,000 existing business site visits over a five-year period.
- Conduct visits to home offices of local branch operations whenever strategically appropriate.
- Actively search for synergistic relocation and expansion opportunities that will help existing businesses grow, focusing particularly on supplier linkages with existing businesses.
- Assist and support the small business incubators in creating and nurturing viable new entrepreneurships.
- Create a "Rapid Response" Team providing liaison ombudsman services between existing businesses and appropriate city, county, and state programs and officials.

FLEXIBILITY FUND

Projected five-year cost: \$1,250,000

Create a fund that will enable timely, proactive responsiveness to investor-identified product ("product" meaning Topeka) enhancement initiatives. The fund will be used to:

- Supplement limited existing governmental incentives.
- Pay for initiatives such as those currently under consideration, including a Vision Plan for Topeka/Shawnee County, riverfront redevelopment, and downtown enhancement.

WORKFORCE DEVELOPMENT

Projected five-year cost: \$500,000

The Chamber will establish a Workforce Development program to focus exclusively on developing and implementing strategies designed to meet employers' workforce needs. Efforts will span three sources of potential workers:

- Students emerging from the local educational system. Efforts will include implementing a Career Pathways program to educate students about local career opportunities, and expanding the Partners in Education program to ensure that the content and delivery of local educational systems reflect the interests of the business the community.
- Adults already in the local workforce. Coordinate with other existing workforce development programs operating throughout the Topeka area.
- Out-of-town-recruits. Recruit talent from outside the region, as necessary, to meet short-term employer needs.

TELL THE WORLD!

INCENTIVES AND SITE DEVELOPMENT

Cost: \$20.25 million

A total of \$20.25 million will be designated for incentives to create or retain primary jobs, and to acquire or improve facilities or sites. Incentives are performance based and require each company to meet its commitments of job creation or retention, and capital investment.



ACCOUNTABILITY TO OUR MISSION

Counting the \$2.5 million in funds received from private investments, a total of \$27.5 million is expected to be used for GO Topeka's economic development efforts from 2008 through 2012. As before (2003-2007), most of the Economic Development Sales Tax funds, which total \$5 million a year (\$25 million total for the five-year period), will be used for incentives and site development.

Just as each company we help is held accountable to meet its commitments in order to receive incentives, GO Topeka, too, will be measured by these stated goals:

- Grow 5,000 new jobs over the next five-year period (2008-2012).
- Facilitate the attraction of 2,500 recruited jobs to the Topeka region over the next five-year period.

Progress will be reported regularly to investors over the course of the program, along with other measurable indexes, such as capital investment and average wage.

These goals are ambitious—tripling the number of new jobs this five-year period over the previous five-year period. As we take GO Topeka's economic development efforts to the next level, you can be assured that your investment will pay big dividends for your business and for your community.



KEY ACCOMPLISHMENTS: BUILDING A BRIGHTER FUTURE

Five years ago, 124 Topeka business leaders answered the call to "Build a Brighter Future" and pledged \$2 million to help the community's economic development efforts, building on goals set in 2002 to carry us through 2007.

The goals set for 2002 through 2007 pale in comparison to actual accomplishments:

- The goal for new capital investment totals \$122 million through 2007. From 2002 through 2006, new capital investment actually has totaled more than \$392 million, or an average of \$78.45 million each year. The \$5 million each year from the Economic Development Sales Tax, supplemented by the \$400,000 each year from private investors (\$5.4 million total) means a return of close to **\$15 for each investment dollar spent**. This return on investment does not even count the positive impact of new jobs.
- The goal for new jobs was set at 1,775 from 2002 through 2007. So far (2002-2006), **2,485 new jobs** have been created—an average of 497 new jobs each year. According to Paul F. Byrne, Ph.D., Washburn University School of Business, for each 100 new jobs paying \$37,640 a year, \$17.8 million is generated in economic activity—or \$88.5 million each year in economic activity for 497 new jobs. This added economic activity brings another **\$16 for each GO Topeka dollar invested**.

TELL THE WORLD!

DONORS TO 2002-2007 BUILDING A BRIGHTER FUTURE CAMPAIGN

DIAMOND LEVEL—\$15,000/year & above

AT&T, Inc.
 Capitol Federal
 Commerce Bank & Trust
 Hill's Pet Nutrition, Inc.
 Metropolitan Topeka Airport Authority
 Payless ShoeSource
 Security Benefit
 Stormont-Vail, Inc.
 Topeka Area Association of REALTORS, Inc.

EMERALD LEVEL—\$10,000 - \$14,999/year

Capital City Bank
 Harrah's Prairie Band Casino
 McElroy's, Inc./McElroy's Electric, Inc./SAMCO, Inc.
 Prairie Band Potawatomi Nation
 St. Francis Health Center
 Topeka Home Builders Association

GOLD LEVEL—\$5,000 - \$9,999/year

Bank of America
 Bartlett & West Engineers, Inc.
 Blue Cross and Blue Shield of Kansas
 Coffman DeFries & Nothorn, P.A.
 Concrete Supply of Topeka, Inc.
 Ed Bozarth Chevrolet
 FHLBank Topeka
 Ferrell Construction of Topeka, Inc.
 Jostens Printing & Publishing
 Radiology & Nuclear Medicine
 Strathman Sales Company, Inc.
 UMB Bank
 US Bank
 Washburn University
 Westar Energy

SILVER LEVEL—\$1,000 - \$4,999/year

Alliance Bank
 BRB Contractors
 Berberich Trahan & Co.
 CAS Construction
 CJS Industries, Inc.
 Callahan Creek
 Capital City Oil
 Carpenters District Council
 Columbian Bank
 Columbian Title of Topeka, Inc.
 Community National Bank
 Cook, Flatt & Strobel Engineers, P.A.
 Countrywide Home Loans
 Richard Darnall, DDS
 J.E. Dunn Construction Co.
 e.architects
 Express Personnel
 The Fidelity Banks
 FryeAllen, Inc.
 Goodyear Tire & Rubber Co.
 Gray & Company
 Griffith & Blair American Home
 Services/Griffith & Blair Commercial
 HDB Construction
 Heartland Park Topeka
 John Hoffer Chrysler Jeep, Inc.
 ILC of TOPEKA & LAWRENCE, LLC
 IMA of Kansas, Inc.
 INTRUST Bank
 Jayhawk Beverage
 Jayhawk File Express
 Kansas Building Systems
 Kaw Valley Electric Cooperative
 Kaw Valley State Bank & Trust
 Kennedy & Coe LLC
 Lower Heating & Air Conditioning
 M-C Industries
 MRV, Inc., /Equity Ventures, Inc.
 McPherson Contractors, Inc.
 Mize Houser & Co.
 Dr. Anita Murray-Clary
 Nichols & Wolfe Chartered
 D.F. Osborne Construction, Inc.
 Parrish Hotel Corp.
 Peoples Benefit Group, LLC/
 Peoples Commercial Insurance
 Service, LLC
 Personalized Brokerage Services, Inc.
 Pratt Enterprises
 Professional Engineering Consultants
 Residence Inn—Marriott
 Restoration and Waterproofing
 The Robb Company
 Dale Sharp Honda, Inc.
 Silver Lake Bank
 Sports Car Club of America
 Topeka Blue Print
 The Topeka Capital-Journal
 Robert Wood, DDS
 Young's, Inc.

BRONZE LEVEL—Up to \$999/year

Ansaer Topeka
 BA Designs, LLC
 Blue Dot
 Capital Title Insurance
 Carney Construction, Inc.
 Cassidy Orthodontics
 Central Mechanical Construction Co.
 Countryside Bank/Denison State Bank
 Crest Realty
 Russell Forrest, DDS
 Richard Forester
 Dr. David Gilthorn
 Drs. Hamilton & Wilson, DDS
 Bill Haag, ReMax
 Hein Law Firm
 Heritage Bank
 Horst, Terril, Karst Architects
 Humes Appraisal Services, Inc.
 KS Commercial Real Estate Services, Inc.
 Kansas Development & Investment Co., Inc.
 Kelly Construction Company
 John Love, ReMax
 Lawyer's Title of Topeka
 Midway Sales and Distribution
 Modern Air of Topeka
 NAI nVision Commercial Real Estate
 New York Life Insurance, Rick Friedstrom
 Plumbing by Carlson, Inc.
 Prudential First REALTORS
 Salisbury Supply Company
 Senne Company, Inc.
 Six Auto Sales & Service
 Taggart & Associates
 Valley, Inc.
 Mike VanDyke Chartered
 Financial Consultant
 G.W. Walker Construction
 Wildwoods, Inc.

Pie chart—
 figures to come

Showing how all dollars have been utilized 2002-2006.

Greater Topeka
 Chamber of Commerce/
 GO Topeka

120 SE 6th Avenue, Suite 110
 Topeka, KS 66603-3515

Phone 785.234.2644

Fax 785.234.8656

Email topekainfo@topekachamber.org

Appendix B: Questionnaire

GO TOPEKA

Feasibility Questions/Issues March/April 2007

The following is a general guideline for use by the interviewer for the funding feasibility. It is not designed to be a survey instrument but rather a tool to help format the interview and to ensure all subject areas are covered.

General

1. General information about company/firm.
2. How involved have you been with Go Topeka and the Greater Topeka Chamber over the past 4 years?
3. How would you rate Go Topeka's effectiveness (very effective, effective, somewhat effective, and not effective).
4. From your perspective, what are Topeka's greatest assets and greatest weaknesses from a business development perspective?
5. Briefly review priorities / goals / programming / target budget then take a look at this summary list of targeted program priorities and give me your reaction.
 - a. Do these make sense?
 - b. How would you prioritize the 4 components of the overall plan? Exclude?
 - c.
 - d. Generally speaking, are you supportive of the approach and major priorities as outlined?
6. How important is direct involvement in program activities and decision making to you? Is the ability to serve on the board, task forces, etc. attractive / important?

Funding

We have estimated the total cost of implementation to be a minimum of \$2.5 million from the private sector over the next five years beginning in 2008—or about \$500,000 per year.

7. In your opinion, is \$500,000 per year a reasonable target from corporations throughout the region? If not, what is a reasonable goal?

8. In order to attain the \$500,000 annual target, we think that _____ will be required from your sector.
 - a. What do you think of that target?
 - b. If that is not a reasonable goal, what is?
 - c. How would you tackle your particular sector?
 - d. Who are your sectors key leaders?
 - e. What will be most attractive to people in your industry?
 - f. Would a formula approach to funding work?
9. We have already discussed the total corporate need and your sectors piece of that. If we are to achieve those targets we think something in the range of _____ will be required from a firm such as yours.
 - a. This is not a request and I am not asking for any kind of commitment but give me your reaction to that.
 - b. What would it take to get you to that kind of number?
10. Are you comfortable with a multi-year pledge as long as it is subject to your annual review and approval?

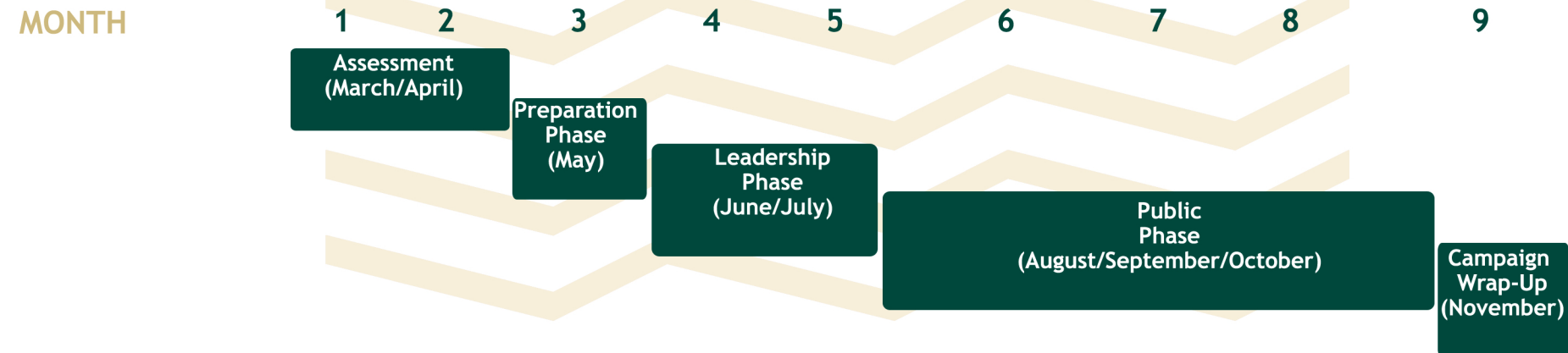
Leadership

11. Discuss for a minute corporate leadership. If you had a major project and could pick 5 corporate leaders to help you accomplish your mission, who would they be?

An Overview of RDG's Campaign Process

	ASSESSMENT	PREPARATION PHASE	LEADERSHIP PHASE	PUBLIC PHASE	CAMPAIGN WRAP-UP
The WHAT	1. Pre-Case Document	1. Finalize Program of Work, metrics and budget based on Regional Assessment Feedback	1. Board of Directors	1. Public Information and Public Relation	1. Pledge redemption/ Accounting System
The HOW	2. 40 to 50 confidential interviews.	2. Finalize Case Statement	2. First-Tier Investors/ Prospects	2. Plan is Implemented	2. Campaign Celebration Event
		3. Recruit Campaign Leadership	3. Community, State, and National Foundations	3. Second-Tier Prospects	3. Investor Recognition/ Relations
		4. Develop Correspondence and Demonstration Packet	4. Other trade groups	4. Third-Tier Prospects	
		5. Develop Master Prospect List		5. Broad-based general phase	
		6. Complete Prospect Research			
		7. Implement Administrative Systems			

Campaign Timetable



Appendix D: Investor Relations Program

History

Once a funding goal for an economic development effort has been achieved, **investors**, including the public sector, hear from the organization only once a year when they receive their invoice to renew their investment. The goal of a good investor relations program is to communicate with your investors not just at invoicing time but throughout the year. By communicating regularly with investors and prospects, it fosters a greater sense of ownership, ensures continued pledge payments and provides a solid base of support for future economic development campaigns.

Goal

The goal of a strong Investor Relations Program is to make every investor and potential investor be an integral part of the program by a systematic and structured:

- 1 Communication
- 2 Recognition
- 3 Opportunities for input and feedback
- 4 Participation in program implementation

1. COMMUNICATION

Communication is the single most important ingredient for a successful investor relations program and should be geared toward reinforcing the **“Return on Investment”** philosophy. Forms of contact include but are not limited to:

- 1 Semi-annual Investor Only Meetings – One of the requirements for good investor relations is to inform investors of activities and successes. In addition, targeted short and long-term goals should be a part of the discussion.
- 2 Investor Only Newsletter – A semi-annual bulletin style newsletter should be utilized focusing on the economic development activities of Northwest Louisiana Economic Development Foundation as well as other programs of interest around the country that have been. The newsletter should include information on targeted industries, number of jobs created and retained and the economic impact of those jobs on the community.
- 3 Annual Report – An annual report should be provided to all investors and prospective investors outlining specifics of the program over the last 12 months.
- 4 Regular updates on the website should be developed and

- implemented.
- 5 Personalized Direct Mail (Bi-Monthly) – The theme and the sender should be varied. Topics could include copies of articles on program activities in the area, success stories, and interviews with companies helped, etc.
 - 6 Telephone contact between key staff and investor companies quarterly.

2. RECOGNITION

An extremely important component of any successful fund-raising effort is recognizing investors in a positive and thoughtful way for the investment they have made in your program. Many of these items are already being completed or finalized. Components should include:

- 1 Investor only annual reception
- 2 Tangible memento that is creative and unique and should be accompanied by a letter, “Without you we never would have reached our goal...”
- 3 Publicity in newsletters, articles and other printed materials and special mailings.
- 4 Company expansions in addition to new company recruitments should be highlighted at annual investor only reception.

3. ACTUAL PARTICIPATION IN THE IMPLEMENTATION PROCESS

- Lead generation – People from the Topeka area travel around the world. Utilizing these people is a wonderful way to generate leads and further integrate your leadership and community into the program.
- Local image campaign
- Ambassadors
- Host receptions and tours for site consultants and prospects.
- Utilizing Elected Government Officials

Appendix E: Leadership Interviews

1	Bank of America	Rudy Wrenick
2	Bartlett & West Engineers	Michael Dunaway
3	Berberich Trahan & Co.	Ginger Power
4	Blue Cross Blue Shield	Michael Mattox
5	BRB Contractors	Michael Welch
6	Capital City Bank	Mathew Sabatini
7	Capital City Oil	Marvin Spees
8	Capital Federal Savings	Rick Jackson
9	Capital Federal Savings	John Dicus
10	CAS Construction	Robert Hall
11	Columbian Title of Topeka	Thomas Schuetz
12	Commerce Bank	Duane Fager
13	Community National Bank	Carl Koupal
14	Cook, Flatt & Strobel Engineers	Melvin Chapman
15	Federal Home Loan Bank	Andrew Jetter
16	Ferrell Construction	Dean Ferrell
17	Fidelity Bank	Allen Towle
18	Fidelity Bank.	Anderson Chandler
19	Frye Allen Inc.	Vincent Frye
20	Goodell, Stratton, Edmonds & Palmer	H. Philip Elwood
21	Griffith & Blair	Brian Schlosser
22	Hill's Pet Nutrition	Robert Wheeler
23	Hill's Pet Nutrition	Richard Wienckowski
24	INTRUST Bank	Scott Griffith
25	Jayhawk File Express	Charles Karlan
26	Kaw Valley Bank	Gerald Lauber
27	Kaw Valley Electric Cooperative	Daniel O'Brien
28	Kennedy & Coe	Robert Schuster
29	Martin Tractor	H. Craig Jr.
30	Mize, Houser & Co.	Brad Owen
31	MTAA	Michael Humbred
32	Payless	Jay Lentz
33	Prairie Band Potawatoni Nation	Sheryl Blue
34	Professional Engineering Consultants	Michael Berry
35	Prudential Realtors	Debbie Davis
36	Radiology & Nuclear Medicine	David Smith
37	Security Benefits Group	Kristopher Robbins
38	Security Benefits Group	Tom Swank
39	Sports Club Car of America	James Lulow
40	St. Francis Hospital	Michael Schrader
41	Stormont Vail	Maynard Oliverius
42	Tallgrass Oral Surgery	Dr. Richard Darnall
43	Target Distribution Center	Paul Forgy
44	Target Distribution Center	Lee Davis

45	Topeka Area Association of Realtors	Brian Schlosser
46	Topeka Homebuilders	Dawn Wright
47	UMB Bank	Pat Michaelis
48	US Bank	Michael Orozco
49	US Bank	Terry Neher
50	Washburn University	Dr. Farley
51	Westar Energy	James Haines
52	WIBW	James Ogle