

# INVESTOR HANDBOOK



Building a New Economy



## BOARD OF DIRECTORS

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WWW.IVEDC.COM

Dear Investor,

There is something remarkable happening in Imperial Valley and IVEDC would like you to be a part of it. After many years of planning, we have positioned ourselves to take advantage of the fast growing southwestern market. Southern California's "best kept secret," is now Southern California's "most promising opportunity." Different economic sectors are finding what we here at IVEDC have always known—Imperial Valley is a great place to live, work and play.

The economic outlook for the Imperial Valley continues to move in a positive direction. Housing and retail continue to tap into the demand for choices in the marketplace and industrial development is growing at a phenomenal rate. We have developed industry clusters which are helping to attract a new workforce, and diversify and stabilize our economy. Our retail sector has particularly enjoyed the healthy and growing economy. New housing developments are keeping up with the growing workforce and future families are being attracted to the Imperial Valley due to the continued employment opportunities and affordable living standard.

Please review the following page for a summary of our economic development strategy. The implementation of this strategy is dependant on the stakeholders of the community coming together to meet a common goal. IVEDC plays an important part of this plan and we are prepared to take on this task. You can download the full version of the Imperial County Economic Development Strategy from our website at [www.ivedc.com](http://www.ivedc.com).

To be a part of this success, please review the following materials and contact IVEDC so we may demonstrate how you can help Imperial Valley build a new economy.

Sincerely,

A handwritten signature in black ink that reads "Tim Kelley".

Timothy E. Kelley  
President/CEO  
IVEDC

## ECONOMIC DEVELOPMENT STRATEGY

Development Management Group, Inc. and Thomas Topuzes and Associates, LLC were retained by the County of Imperial, with support from the Imperial Irrigation District, to produce a comprehensive economic development strategic plan to guide the region in its efforts to build the economy.

The Economic Development Strategy applies to the entire County of Imperial. It consists of specific activities, projects, and programs that, when implemented by local business, community, and political leaders, will have a favorable impact on the Imperial County economy.

The strategy is divided into two major sections: economic analysis and recommendations to attract additional economic investment/development. The economic analysis section provides specific demographic and economic growth information for the region and provides a comparison to other regions with similar demographics, proximity to the international border or is located along the same transportation corridors. After significant research regarding the greatest economic potential, the following are the region's growth industry opportunities:

- Food Processing
- Energy Generation
- Distribution/Warehousing/Transportation
- Inbound Call Centers
- Construction Materials
- Specialized Manufacturing/Assembly
- Tourism
- Applied Biotechnology

Local governments seek opportunities to expand their sales tax base to fund government operations. Below is a list of the greatest retail opportunities:

- Consumer Electronics
- Specialty Book/Music
- Full-Service Restaurants
- Home Furnishings
- Automotive Sales (New)
- Sporting Goods

The region must focus its regional efforts on projects that increase the overall quality of life for residents. The following quality of life initiatives are recommended:

- Executive/Upscale Housing Opportunities

- Performing Arts Facilities
- Medical Facilities
- Entertainment Opportunities
- Formal/Fine Dining
- Local/Regional Parks
- Golf Courses
- Activities/Facilities for Active Adults

To successfully take advantage of the opportunities identified above, the region must take a series of steps to unite the region and work as a team. The following recommendations will allow Imperial County to achieve economic development success:

- Engage regional stakeholders and secure commitments to participate
- Define roles and responsibilities for stakeholders
- Create a brand for region
- Market internally to shape attitudes regarding the region's potential
- Market externally to introduce region to those making economic investments
- Evaluate effectiveness (cost benefit approach) of these efforts

The report provides a significantly more detailed explanation of each of the items listed above. The bottom line is that if Imperial Valley commits to the implementation of this plan over a three to five year period, significant economic benefits will be realized which will increase the overall quality of life for those concerned.

The Imperial Valley Economic Development Corporation plays an important role in the implementation of this plan, but equally important is the role of the partnering organizations, local government and the stakeholders who are working together to raise the level of the economy of Imperial Valley.

Source: Thomas Topuzes & Associates, LLC



## \$1000 BRONZE

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- Incoming Leads
- Listing with Link and Bio on IVEDC.com
- Listing in Annual Publication
- Announcements in Quarterly Newsletter
- Demographic Information
- Recognition at Annual Dinner
- Committee Participation
- Investment in the Imperial Valley
- Participation in Corporate Events
- Opportunities to attend Tradeshows

## \$2500 SILVER

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- Existing Bronze Benefits
- Free Advertising Opportunities on IVEDC's Weekly Newsletter

## \$5000 GOLD

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- Existing Silver & Bronze Benefits
- Distinctive Recognition on special list published for IVEDC events
- Identification Badges at IVEDC events

## \$10,000 PLATINUM

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- Existing Gold, Silver, & Bronze Benefits
- Seat on Executive Committee
- Seat on IVEDC Board of Directors

## \$25,000 DIAMOND

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- Existing Platinum, Gold, Silver, & Bronze Benefits
- Special Recognition at all IVEDC Events
- Business Logo advertized on IVEDC website

## \$1000 BRONZE

### Incoming Leads

#### Listing with Link on IVEDC.com

Our website is a marketing tool tailored to fit the needs of businesses outside the region that are looking to expand or relocate to Imperial Valley. Your listing on the IVEDC website is only the start of how IVEDC can assist your business gain exposure outside our region.

#### Listing in Annual Publication

IVEDC's *Annual Report and Investor Directory* is the go to source for social, economic and demographic information pertaining to Imperial Valley, making it the perfect marketing tool to present to existing and prospective clients. The annual report provides investors with a comprehensive overview of IVEDC's financials and activities for each fiscal year. And the directory not only lists our valued investors, but it also provides them with the opportunity to highlight their business through various advertising options.

#### Quarterly Email Newsletter

Receive our newsletter and stay informed about IVEDC activities, leads, new investors, events and business reports. Advertising opportunities are available. The following is a list of reports you will receive as part of our email newsletter:

##### Business License Report

Quarterly listing of businesses that have received a new business license or renewed an existing business license within one of Imperial Valley's incorporated cities.

##### Economic Indicators

We compile the most relevant indicators, including current labor force and industry employment figures, from the California Center for Border and Regional Economic Studies (CCBRES) bimonthly bulletin and republish them in our newsletter.

#### Demographic Information

Data includes county and city populations, major employers, labor force, housing market and education information. Specific data is available upon request.

## \$2500 SILVER

### Existing Bronze Benefits

#### Free Advertising Opportunities on IVEDC Weekly Newsletter

List your announcements for your business on the IVEDC Weekly Newsletter

#### Property Listing

List your industrial and commercial properties in the Available Properties section

- Utilities
- Healthcare
- Mexico
- Recreation
- Shopping/
- Transportation
- Education
- Golf
- Festivals
- Entertainment

## \$5000 GOLD

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### **Existing Silver & Bronze Benefits**

#### IVEDC Events

Distinctive recognition on special list published for IVEDC events

#### Recognition

Identification badges at IVEDC events

## \$10,000 PLATINUM

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### **Existing Gold, Silver, & Bronze Benefits**

#### Seat on the Executive Committee

You will have the privilege of serving as an officer on IVEDC's governing body, the Executive Committee

#### Board of Directors

You will have the privilege of serving as a member on IVEDC's Board of Directors

## \$25,000 DIAMOND

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### **Existing Platinum, Gold, Silver, & Bronze Benefits**

#### Advertising Credit

You will receive special recognition at all IVEDC hosted events

#### Other Benefits

You will receive opportunities for negotiated benefits and contracted activities

#### Business logo on IVEDC.com

Opportunity to display your logo on the IVEDC.com homepage. Investor provides completed artwork for logo

## INVESTOR INFORMATION

Please complete the following form and return to IVEDC.

**1**

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DATE \_\_\_\_\_ CATEGORY (REFER TO LIST BELOW) \_\_\_\_\_

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ORGANIZATION \_\_\_\_\_ YEAR ESTABLISHED \_\_\_\_\_ NO. OF EMPLOYEES \_\_\_\_\_

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MAIN CONTACT \_\_\_\_\_ TITLE \_\_\_\_\_

---

STREET ADDRESS \_\_\_\_\_ CITY/STATE/ZIP \_\_\_\_\_

---

OFFICE PHONE/EXT \_\_\_\_\_ FAX \_\_\_\_\_ MOBILE PHONE \_\_\_\_\_

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EMAIL ADDRESS \_\_\_\_\_ WEBSITE \_\_\_\_\_

Accounting	Printing	Employment	Financial Services	Law	Title Company
Advertising	Construction	Services	Government	Professional	Utility
Banking	Consulting	Energy/Bio	Industrial Park	Services	Other
Business Dev.	Design Firm	Renewables	Insurance	Public Relations	Please specify
Commercial	Education	Engineering	Land Development	Real Estate	Other

**2**

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ADDITIONAL CONTACT (REQUIRED) \_\_\_\_\_ TITLE \_\_\_\_\_

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STREET ADDRESS \_\_\_\_\_ CITY/STATE/ZIP \_\_\_\_\_

---

OFFICE PHONE/EXT \_\_\_\_\_ FAX \_\_\_\_\_ MOBILE PHONE \_\_\_\_\_

---

EMAIL ADDRESS \_\_\_\_\_

**3**

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ADDITIONAL CONTACT (REQUIRED) \_\_\_\_\_ TITLE \_\_\_\_\_

---

STREET ADDRESS \_\_\_\_\_ CITY/STATE/ZIP \_\_\_\_\_

---

OFFICE PHONE/EXT \_\_\_\_\_ FAX \_\_\_\_\_ MOBILE PHONE \_\_\_\_\_

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EMAIL ADDRESS \_\_\_\_\_

## INVESTMENT

<input type="checkbox"/> Diamond \$25,000	<input type="checkbox"/> Gold \$5,000	<input type="checkbox"/> Bronze \$1,000
<input type="checkbox"/> Platinum \$10,000	<input type="checkbox"/> Silver \$2,500	

FOR OFFICE USE ONLY:

INVESTMENT RENEWAL \_\_\_\_\_ FISCAL QUARTER: \_\_\_\_\_

## ROLES & RESPONSIBILITIES PLEDGE

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I have read and understand the “Roles & Responsibilities” (on page 11 of the Investor Handbook) of becoming an IVEDC investor, and enter into this pledge on this \_\_\_\_\_ day of \_\_\_\_\_, 2\_\_\_\_\_.

\_\_\_\_\_  
Investor Signature

\_\_\_\_\_  
Chairman Signature

\_\_\_\_\_  
President/CEO Signature

Please complete the following form and return to IVEDC.

Please complete the following form and return to IVEDC.

Please complete the following form and return to IVEDC.

As an IVEDC Investor, you have become part of a private/public partnership to grow the economy of Imperial Valley. Over the next five to ten years, the region will experience a renaissance of growth in the residential, retail and industrial sectors. In an effort to foster this growth and insure that all Imperial Valley entities (both public and private) have the opportunity to directly benefit from new investments, IVEDC has worked to create the following “Roles and Responsibilities” memorandum.

## INVESTORS PLEDGE TO DO THE FOLLOWING:

- 1] We will stay engaged in the organization, attend quarterly investor meetings to receive information about our economy, and learn more about business growth while interacting with other IVEDC investors in the effort to foster cooperation within the region.
- 2] Contribute, as agreed upon, our annual investment in a timely manner so those funds may be leveraged with those of other investors to promote our region as a business destination.
- 3] Respond to lead information requests of IVEDC staff. Many times an IVEDC lead will require both information on specific sites that will meet location needs and business referrals that allow them to utilize local goods and services, thus benefiting both the incoming business and the currently located business.

## IVEDC PLEDGES TO DO THE FOLLOWING:

- 1] As a trusted partner in your business or organization, IVEDC shall provide an ongoing accounting of all funding provided. This shall include, but is not limited to, an annual budget and work plan, a monthly income and expense report of the organization, access to any contracts signed (including both personnel and professional services) and personal travel/expense reports of IVEDC employee(s).
- 2] Holding of not less than three (3) quarterly meetings and one (1) annual meeting of all IVEDC investors to present items of discussion regarding the organization and programs of interest to IVEDC investors regarding the region’s economy.
- 3] Publishing on not less than a quarterly basis a report of economic indicators that may include, but is not limited to, Sales and Use Tax Reports, Employment/Unemployment Data and New/Used Car Sales Reports.
- 4] Publish on not less than a quarterly basis a listing of businesses that have either applied for (and received) a new business license or renewed a business license within one of the I incorporated cities within the Imperial County.
- 5] Furnish to investors within 24 hours after receipt, information regarding bonafide leads (companies/individuals) qualified by IVEDC as those interested in moving to the Imperial Valley. Said leads shall be distributed in accordance with the IVEDC lead protocol and shall be distributed to all investors simultaneously.

## PURPOSE

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It shall be the purpose of the IVEDC Communication Plan to provide policy guidance for IVEDC Staff and Board regarding communication with investors, clients and communication with media/public.

## PREMISE

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The premise of IVEDC is the corporation is made of a group of investors with a common purpose in expanding the local economy of the Imperial Valley. As investors, they should be aware of policy, administrative and financial functions of the company (or agency).

## COMMUNICATION WITH INVESTORS

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### A] Administrative Items

1. Meeting Dates/Times
2. Special Event Dates/Times
3. Financial Information
  - a. Monthly
  - b. Budget
4. Work plan/Marketing Plan for Organization
5. Leads (at origination)
6. Leads (on-going status)
7. Successes
8. Monthly/Quarterly/Annual Economic Information for the Region
9. Pending/New Legislative Information

### B] Forms of Communication to be Utilized by IVEDC

1. Email
2. Website ([www.ivedc.com](http://www.ivedc.com))
3. Committee/Personal Meetings
4. Phone Conversation
5. Events Bulletin
6. Written Information
7. Facsimile
  - a. Email shall be utilized to communicate with investors for the following information:
    - i. LEAD
 

When the IVEDC staff produces a lead, it will be communicated amongst staff in accordance with the Lead Protocol.
    - ii. MEETING ANNOUNCEMENTS
 

IVEDC investors, as a whole or parts as appropriate, shall receive email communication regarding upcoming meetings with appropriate agenda, financial and back-up information not less than 72 hours before a meeting. A meeting notice of upcoming meetings (both special and regularly scheduled) shall be made with a minimum of one week's notice.

### iii. GENERAL COMMUNICATION

IVEDC staff shall endeavor on at least a once monthly bases to send out an informational email that shall contain some (or all) of the following information:

- List of Upcoming Meetings
- Available Economic Information
- Action Taken at Previous Board/Committee Meetings
- Lead Status Report

#### C] The IVEDC Website Shall be Utilized in the Following Ways:

1. Provide general demographic information
2. Provide general information about the Imperial Valley Region
3. Provide the contact information for investors (by discipline)
4. Provide links to key information contacts (including local, state and federal governments, Imperial Irrigation District) and other entities, which provide specific public services
5. Contact information for IVEDC administrative offices

#### D] Committee/Personal Meetings

1. IVEDC staff shall utilize a combination of Executive, Board and Investor meetings to bring persons together to discuss policy, work plan and implementation decisions. Staff may choose (with Board direction and approval) to engage specific committees or groups of persons on an ad-hoc basis to discuss items of interest.
2. Pursuant to the Roles and Responsibilities memorandum, IVEDC staff shall call a meeting of the Investors not less than three (3) times per year for meetings to be known as the Investor Quarterly Meetings and once (1) annually as an Annual Meeting, where an annual budget and work plan will be presented to the Investors.
3. IVEDC staff shall endeavor to meet with each individual investor on an annual basis to discuss such items as the economy in general, items of specific interest to said investor and to provide a personal update regarding the status of the organization along with the opportunity to receive feedback from the investor.

#### E] Phone Conversations

1. IVEDC staff shall utilize ongoing phone conversations with investors to discuss specific items of interest, including but not limited to requesting specific information for a client, follow up on investments and to seek advice/input regarding policy implementation issues.

#### F] Event Bulletins

1. IVEDC staff may choose to utilize a voice mail system, whereas a calendar of upcoming events and items of interest are left in a weekly (or monthly) voicemail. Each IVEDC investor shall have the access phone number or code to access said message at their convenience.

#### G] Written Information

1. IVEDC staff shall give consideration to the issuance of a monthly or quarterly economic letter that provides the following information to investors:
  - a. Sales Tax Information
  - b. Unemployment Rates
  - c. New/Used Car Sales Reports

## COMMUNICATION WITH MEDIA

- d. Lead Status
- e. Legislative Updates
- f. New/Renewal Investor Information
- g. Lists of New/Renewing Business License Holders

As IVEDC is a regional public/private partnership, it is important that the Agency (staff, investors, board and executive committee) keep strong relations with local and regional media.

In understanding that a typical small market media is constantly searching for valid news items, IVEDC can play a positive role in helping the media do its job while increasing the credibility of the organization.

## STEPS INCLUDE:

- 1] Local Media Relations: Annual Meeting between Agency Director, Chairman, Vice-Chairman and Executive Management of local newspaper and television outlets (hosted).
- 2] Regional Media Relations: Annual Meeting between Agency Director, Chairman, Vice Chairman and Editor Level (hosted or visiting) of regional media (San Diego based print and television).
- 3] Furnishing of Quarterly Economic Data from IVEDC to the media regarding certain market indicators. These shall include:
  - Unemployment Rates
  - Taxable Sales
  - New Business Licenses
  - New Car Sales
- 4] Furnishing on not less than a monthly basis of media advisory regarding upcoming economic related events.
- 5] Furnishing on an as needed basis of major announcements regarding business expansions (important that press releases be written in such a way that if a print media choose to print direct, that they have that option).
- 6] Overall relations with media to where IVEDC is first point of contact for economic related issues, and IVEDC shall then strive to both be helpful to media and refer media to IVEDC investors where such referral will be advantageous to that investor. i.e., media calls to discuss boom in commercial development, IVEDC staff may choose to comment regarding activity they have seen, then refer media to a local business park developer and a local commercial builder (both IVEDC investors).

## PROLOGUE

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The Imperial Valley Economic Development Corporation Lead Protocol shall serve as the policy document for which all leads processed by IVEDC generates are handled. This policy shall be in effect from the first day of October 2005 until amended or revised by the Board of Directors.

## PURPOSE OF LEAD PROTOCOL

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IVEDC is composed of a group of investors with a common purpose in expanding the local economy of Imperial Valley. As investors, they should be aware of policy, administrative and financial functions of the company (or agency).

## DEFINITIONS

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### STAFF

Any member of the IVEDC Staff.

### INVESTOR

Any current investor (member) of IVEDC (public or private).

### EXECUTIVE COMMITTEE

The management committee or officers of the IVEDC Board of Directors.

### PROSPECT

A business or representative of a business that has contacted IVEDC with general questions regarding the region or has requested information regarding the region.

### LEAD

A business or representative of a business that has contacted IVEDC with express interest in relocating or expanding a business within the Imperial Valley. Said Lead is one that provides site location criteria which may include land or building needs.

### PUBLIC PARTNER

Investor or entity representing public organization (including cities, county, governmental utility).

### PRIVATE PARTNER

Investor or entity representing private company.

### REAL ESTATE PARTNER

Investor or entity representing broker, developer, principal landowner or real estate investor.

### PROTOCOL

The process in which staff and investors of IVEDC handle a lead.

### IVEDC MARKET AREA

Defined as the service area under which IVEDC covers, generally described as the jurisdictional

boundaries of the County of Imperial.

#### LEAD TYPES

Leads will generally fall within two categories: Location Need and Information Need. Some leads will fall into both categories.

#### LOCATION NEED LEAD

Company or entity that contacts IVEDC or an IVEDC Investor with a specific need for a location to expand, move or relocate within the IVEDC market area. The following shall be the process under which a Location Need Lead is conducted:

- 1] At the time the potential client contacts IVEDC, staff will utilize the Client Information Sheet for which to garner information regarding the site requirements of said lead.
- 2] IVEDC Staff will then fax or present (if in person) a Lead Registration and Confidentiality Statement for their review and signature. It shall be the policy of IVEDC to not begin work on behalf of a lead until said statement is completed and returned. The purpose of the statement is to explain the role of IVEDC and provide written assurance of confidentiality to the client. Concurrent with this step, IVEDC Staff will determine when the client will be visiting the area to tour and explore their business opportunity. The balance of the protocol must take into account the timeline of the client.
- 3] At such time as the Lead Registration and Confidentiality Statement is completed, IVEDC shall then present the site requirements and a company briefing to ALL IVEDC INVESTORS in the form of an email and/or fax. Information required in said communication shall contain the following:
  - a. Date of first contact
  - b. General industry lead is involved in
  - c. Process lead is involved in (retail, manufacturing, service, distribution, office)
  - d. Site requirements and additional information needed to make a business decision
  - e. Timeline for expansion/relocation
  - f. Due date for materials to be included in lead response
- 4] IVEDC Investors shall be responsible for responding to the client through IVEDC by submitting information that may be of benefit in their expansion/relocation decision. Information may, but is not limited to, the following:
  - a. Real estate site information (land)
  - b. Real estate building information (available building)
  - c. Utility, infrastructure and zoning information
  - d. Professional services information
    - i. Banking
    - ii. Business to business related services

It shall be requested that information that is made available to clients be in standard 8 ½ x 11 format so that it may be easily included in binder or bound package.

- 5] After a sufficient amount of time has passed for IVEDC to be provided with appropriate information based on client request (usually between 3 and 5 business days), IVEDC Staff shall package the region's proposal for the client.
- 6] If the client is not visiting the region to receive their proposal and tour/discussion of business opportunities, IVEDC Staff shall determine the best method of delivery. Often times a "Client" that is not visiting is being represented by a site selection consultant or the State of California. Staff will take appropriate steps to determine who the decision maker is among clients and contact them to encourage a regional visit/tour.

- 7] If the client is visiting the region to receive their proposal and tour/discussion of business opportunities, IVEDC Staff shall make the following preparations:
  - a. Confirm date and time of arrival.
  - b. Determine amount of time available for their visit/tour.
  - c. Schedule site visits with appropriate real estate professionals (for qualified sites included in proposal).
  - d. Invite municipal representatives to meet client during their visit (preferable on the site located within their community).
  - e. Determine other major items of interest that must be accommodated (examples include topics specific to utilities, specialized permitting, financing). During entire visit, IVEDC staff shall document additional items requested of IVEDC investors.\*
  - f. As time allows, schedule short meet and greet meetings between client and professional service providers.
  - g. Allow for time at end of visit for general reactions and questions that may need follow-up.
- 8] IVEDC Staff shall then prepare certain items as part of follow-up
  - a. Provide name and contact information of client to each of the responding/participating IVEDC investors (persons that met the client during their visit)
  - b. Provide listing of items to appropriate IVEDC investors for their own follow-up
  - c. Send thank you letter to client within 48 hours of their visit
- 9] On-Going Follow-Up
  - a. Often times, once a client has made their official business visit to the region, they have now met the appropriate persons to help them expand/relocate. Since the IVEDC investors have a specific individual profit motive, they will complete specific follow-up.
  - b. IVEDC staff shall follow-up with clients on the following schedule to insure that IVEDC investors are continuing to work with them. This will also allow for additional communication between the client and IVEDC if there is additional information they need.
    - i. Thank you letter (48 hours)
    - ii. Follow-up call (1 week)
    - iii. Follow-up call (30 days)
    - iv. Follow-up call (60 days)
    - v. Follow-up call (90 days)
    - vi. Letter follow-up (180 days)
    - vii. Demographic follow-up (180 days)

NOTE: This follow-up schedule is meant to be a guide to assist IVEDC staff with ongoing communication with client. Often times, if the client is in an active relocation/expansion mode, contact is made on a frequent basis.

#### INFORMATION NEED LEAD

Company or entity seeking market specific information regarding the region for which to make expansion/relocation decision. In general, IVEDC shall respond to information need leads through the utilization of information that has been collected by IVEDC. At times, the information requested will require additional research. The types of information that persons may request include:

- 1] Basic demographic information on entire region
- 2] Basic demographic information on specific community/city
- 3] Map of region or of a community/city
- 4] Listing of business engaged in certain enterprise
- 5] As referral
- 6] As market opportunity
- 7] Listing of educational resources
- 8] Listing of governmental resources



[WWW.IVEDC.COM](http://WWW.IVEDC.COM)

October 1, 2015