

IMPERIAL VALLEY ECONOMIC DEVELOPMENT CORPORATION

INVESTOR HANDBOOK

Over Twenty Years of Economic Development



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October 1, 2024

Dear Investor,

On behalf of the Imperial Valley Economic Development Corporation (IVEDC), I would like to welcome you to our organization and thank you for your support.

As a new investor, we would like to profile your company in an upcoming e-newsletter and quarterly report. Please send a logo and a short company description to carlos@ivedc.com.

The past few years have been very exciting for IVEDC. Because of the generous support of investors like you, we have been able to surpass our goals, expand the size of our organization and increase our marketing efforts regionally, nationally and internationally. Your support will help IVEDC attend more industry-related trade shows and conferences and provide more familiarization tours of Imperial Valley.

We look forward working with you in the joint effort to promote the Imperial Valley region for new business, industry, and most importantly, bring new jobs to the Imperial Valley.

Should you have any questions about the organization, please contact me directly at (760) 353-8332 or email tim@ivedc.com

Respectfully,

Timothy E. Kelley
President/CEO
Imperial Valley Economic Development Corporation

BOARD OF DIRECTORS

EXECUTIVE OFFICERS

Efrain Silva

Chair
Imperial Valley College

Thomas Topuzes

Secretary
Thomas Topuzes & Associates, LLC

Doug Dahm

Executive Committee
The Dahm Team Real Estate

Victor Nava

Vice Chair
Sun Community Federal Credit Union

Jason Jackson

Immediate Past Chair
The Dahm Team Real Estate

Tom DuBose

Executive Committee
DuBose Design Group

Nick Wells

Treasurer
City of Holtville

Timothy Kelley

President/CEO
IVEDC

Stephen Benson

Executive Committee
Benson Farms

Deborah McGarrey

Executive Committee
SoCalGas

MEMBERS

Mark Gran

Berkshire Hathaway Energy

Buz Schott

Con Edison

Karl Weir

ChemTreat

Carroll Buckley

KXO Radio

Mike Vogt

IRE Enterprises

Robby Herrera

Keystone HR

Mike Morris

El Centro Motors

Lauren Rose

Controlled Thermal Resources

Robert Rubio

Imperial Printers

Alissa Sanchez

ORMAT Technologies

Bryan Keegan

Ventura Transfer Company

Vince Signorotti

EnergySource Minerals

Tom Chang

SW Tech Corp.

William DeRevere

Management & Training
Corporation

Justin Huang

YK America

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CONTACT INFORMATION

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El Centro, CA 92243

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ABOUT US

Imperial Valley Economic Development Corporation is a partnership of private enterprise and local government that is united by the common vision to expand and diversify our economy. Our investors include a host of public and private organizations that benefit from the growth of our regional economy.

MISSION

IVEDC's mission is to help grow the regional economy by aggressively marketing the region to attract business.

CORE VALUES

- Commitment to enhance the quality of life experienced in Imperial Valley by engaging in initiatives that contribute to the diversification of the regional economy
- Dedication to a Regional Economic Development Approach
- Partnership between the private and public sectors, which will always be driven by private sector forces

ECONOMIC DEVELOPMENT STRATEGY

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

Imperial Valley Economic Development Corporation partnered with local government, the private sector and other nonprofit organizations to develop a Comprehensive Economic Development Strategy (CEDS) for Imperial County. The strategy includes a survey of local assets and opportunities, initiatives, industries, economic development goals and an action plan to meet those goals.

Imperial Valley Economic Development Corporation plays an important role in the implementation of this strategy, but equally important is the role of partnering organizations, local government and stakeholders who work together to achieve this vision of economic prosperity.

B.E.A.R.

IVEDC helps to grow the regional economy by focusing on three areas of impact for local industry and business:

- 1) Expansion
- 2) Attraction
- 3) Retention

This is also known as the B.E.A.R. method.

TRIPLE BOTTOM LINE

IVEDC is committed to the Triple Bottom Line, a shared approach to economic development in California. This approach has three pillars of measuring impact:

- 1) Economy
- 2) Environment
- 3) Equity

INVESTOR LEVELS AND BENEFITS

At Imperial Valley Economic Development Corporation, we are committed to ensuring our investors see a return on investment. We understand that every business has unique needs and priorities. The investment benefits listed below are a foundation of the services we provide and we welcome other opportunities to serve the needs of our investors.

BENEFITS	BRONZE \$1,000	SILVER \$2,500	GOLD \$5,000	PLATINUM \$10,000	DIAMOND \$25,000
Investment in the Imperial Valley	✓	✓	✓	✓	✓
Listing on IVEDC website	✓	✓	✓	✓	✓
Announcement in e-newsletter	✓	✓	✓	✓	✓
B2B & marketing opportunities	✓	✓	✓	✓	✓
Access to tradeshows, grand openings & groundbreakings	✓	✓	✓	✓	✓
Invitation to IVEDC hosted events	✓	✓	✓	✓	✓
Access to workforce development services	✓	✓	✓	✓	✓
Opportunity to serve on Board of Directors & committees	✓	✓	✓	✓	✓
Invitation to IVEDC retirement program, MEAP	✓	✓	✓	✓	✓
Registration to Imperial Valley Business Resource Center	✓	✓	✓	✓	✓
Access to incoming leads, contracting & bid opportunities	✓	✓	✓	✓	✓
Annual business assessment*		✓	✓	✓	✓
Workforce needs assessments*		✓	✓	✓	✓
Advertising of employment opportunities by IVEDC*		✓	✓	✓	✓
Opportunity to market events on IVEDC website*		✓	✓	✓	✓
Complimentary advertising on IVEDC e-newsletter*		✓	✓	✓	✓
Use of IVEDC facilities for private meetings*		✓	✓	✓	✓
Early access to procurement opportunities & leads			✓	✓	✓
Identification badges at IVEDC events			✓	✓	✓
Distinctive recognition at IVEDC events			✓	✓	✓
Recognition at IVEDC Annual Dinner			✓	✓	✓
Logo listing on IVEDC website			✓	✓	✓
Opportunity to present at Roundtable meetings			✓	✓	✓
Opportunity to serve on Roundtable steering committee				✓	✓
Access to IVEDC data resources & reports				✓	✓
Dedicated email blast by IVEDC*				✓	✓
Complimentary exhibitor table at IVEDC events				✓	✓
Complimentary dinner table at IVEDC Annual Dinner					✓
Recognition at all IVEDC Events					✓
Special listing on IVEDC website					✓
Opportunity for negotiated benefits*					✓

*Upon Request

INVESTOR INFORMATION

1. _____
DATE INDUSTRY (REFER TO LIST BELOW)

ORGANIZATION NAME YEAR ESTABLISHED # OF EMPLOYEES

MAIN CONTACT TITLE

STREET ADDRESS CITY/STATE/ZIP

OFFICE PHONE/EXT. EMAIL ADDRESS WEBSITE

Accounting	Commercial	Education	Financial Service	Land Dev.	Real Estate
Advertising	Construction	Employment	Government	Legal Service	Title Company
Banking	Consulting	Energy/Bio	Industrial	Professional Service	Utility
Business Dev.	Design	Engineering	Insurance	Public Relations	Other (Please specify)

2. _____
ADDITIONAL CONTACT (REQUIRED) TITLE

STREET ADDRESS CITY/STATE/ZIP

OFFICE PHONE/EXT. EMAIL ADDRESS

3. _____
ADDITIONAL CONTACT (REQUIRED) TITLE

STREET ADDRESS CITY/STATE/ZIP

OFFICE PHONE/EXT. EMAIL ADDRESS

INVESTMENT

DIAMOND \$25,000

PLATINUM \$10,000

GOLD \$5,000

SILVER \$2,500

BRONZE \$1,000

FOR IVEDC USE ONLY:

INVESTMENT RENEWAL MONTH: _____ FISCAL QUARTER: _____

Please complete the following form and return to IVEDC.

ROLES AND RESPONSIBILITIES

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 ensure 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.

The Board of Directors has embraced the following motto regarding our region’s cooperative partnership: “Recruit Regionally, Compete Locally.” Essentially, this is the understanding that we must work together to grow the market size while fairly competing to increase our personal market share.

JOINT PLEDGE

IVEDC pledges the following:

- IVEDC will provide the benefits associated with the agreed upon investment level to each investor. As agreed upon, investors will contribute our annual investment in a timely manner so those funds may be leveraged to promote our region as a business destination.
- As a trusted partner, IVEDC shall provide an ongoing accounting of all funding provided.
- IVEDC will hold quarterly meetings and one annual meeting of all IVEDC investors to present items of discussion regarding the organization and the region's economy. Investors shall stay engaged and attend meetings to receive information about our economy and interact with other investors to foster cooperation within the region. Each investor shall be given equal opportunity to serve on one or more IVEDC committees and (in accordance with our bylaws) as a member of the IVEDC Executive Committee.
- Qualified leads shall be distributed in accordance with IVEDC's lead protocol and shall be distributed to all investors within 24 hours of receipt. Investors shall respond to lead information requests of IVEDC staff. Many times, leads can benefit local businesses and public agencies.

COMMUNICATION PLAN

IVEDC's Communication Plan provides policy guidance for IVEDC staff, Board and investors regarding communication with investors, clients, media and public. Forms of communication include email, website, social media, phone conversations, personal/committee meetings and media outlets. We will communicate lead opportunities, meeting announcements and general communications via various methods of these forms of communication. The Communication Plan will be made available upon request.

LEAD PROTOCOL

IVEDC's Lead Protocol serves as the policy document for which all leads processed by IVEDC are handled. This policy includes the process for client intake, confidentiality, investor communications, and site visits. IVEDC leads include businesses with location and information needs. It is the responsibility of investors to respond to leads. Many times, leads will require information on specific sites and business referrals that allow for use of local goods and services, thus benefiting local businesses and public agencies. The Lead Protocol will be made available upon request.

ROLES AND RESPONSIBILITIES PLEDGE

I have read and understand the “Roles & Responsibilities” (on page 8 of the Investor Handbook) of becoming an IVEDC investor, and enter into this pledge on this _____ day of _____, 20 _____.

INVESTOR SIGNATURE

IVEDC CHAIR SIGNATURE

IVEDC PRESIDENT/CEO SIGNATURE

Please complete the following form and return to IVEDC.