

# 2023

## WEDA FALL BEST PRACTICES CONFERENCE

# DRIVING INNOVATION FOR A THRIVING ECONOMY



SEPTEMBER 27 - 29, 2023 | JEFFERSON STREET INN, WAUSAU, WI

	THURSDAY, SEPT. 28, 2023
7:30 AM Jefferson Ballroom	Registration / Continental Breakfast / WEDA Networking Expo
8:30 AM	Welcome – Sheldon Johnson, Chair, Wisconsin Economic Development Association
0 10 11	Welcome to Wausau!
Grand Ballroom	Mayor Katie Rosenberg
8:40 AM	Building an Economy for All
	As the state's lead economic development organization, the Wisconsin Economic Development
<b>Grand Ballroom</b>	Corporation (WEDC) is working to create opportunities for everyone in Wisconsin to achieve
	economic well-being. Deputy Secretary Sam Rikkers will highlight the agency's recent
	successes in strengthening communities, attracting and retaining workers, and helping
	businesses thrive. Sponsored by:
	Guest Speaker: Sam Rikkers, Deputy Secretary and Chief Operating Officer,
	Wisconsin Economic Development Corporation
	BUILD BOLDLY
9:00 AM	CONFERENCE KEYNOTE ADDRESS
Grand Ballroom	Introduction by: Rachel Smith, US BANK
Granu Banroom	Creating the Future—How to Help Others Remember Our Best Future
	Leading is all about people, projects, organizations, and society. Our leadership is in fact, a bold act of
	creating the future. In this presentation, I will share my research about how to concretely engage others in understanding and imagining the best future. The stories you tell activate those around you to first
	rehearse and then remember and enact the future you've envisioned. We will discuss:
	The stories that visionary leaders tell to move people, projects, organizations and society.
	<ul> <li>How the brain remembers.</li> </ul> Sponsored by:
	How we can strengthen our leadership and influence
	Lyna Matesi, Coach, Educator, Facilitator, MBA Director, UW-Stevens Point
	Jennifer Hess, Associate Director of Continuing Education, UW-Stevens Point
9:45 AM	WEDA EXPO & NETWORKING BREAK
Jefferson Ballroom	/// Miron
	Sponsored by:
	Building Excellence
10:15 AM	Public Funding Opportunities
	In alignment with WEDA's core mission and vision to make Wisconsin a better place to live and work,
<b>Grand Ballroom</b>	attendees in this session will walk away with knowledge of Brownfields funding opportunities that may
	be available to assist businesses, communities, and individuals throughout Wisconsin.
	Moderator: Melissa Hunt, CEcD, EDFP
	Speakers: Carah Koch, Federal Program Officer, US Department of Commerce
	Thomas Coogan, Local Government Ombudsman & Brownfields Policy Coordinator, State of Wisconsin
	Thomas Coogan, Local Government Ombausman & Brownjielus Policy Coordinator, State of Wisconsin

#### 11:00 AM

#### **Grand Ballroom**

### Happening Under the Capitol Dome: How Policy Decisions Made in Madison can Advance or Hinder Economic Development

Hear about what's happening in the State Capitol that can impact your profession, your community, and economic growth in Wisconsin. From the 2023 State Budget bill to stand-alone legislation, this session will explore what issues lawmakers are tackling to boost economic development, including proposals to address the state's workforce shortage, build Wisconsin's affordable housing stock, and help meet the childcare challenges faced by Wisconsin employees and employers.

Moderator: Brad Elmer, Baker Tilly

Speaker: Michael Welsh, Vice President of Legislative

Affairs & Communications, Wisconsin Economic

**Development Association** 

Sponsored by:



### SPEEDY JAM SESSION #1 11:00 – 11:20 AM | Exhibit Hall

# You've Got It All Wrong! New Insight for Economic Development

The past couple of decades have introduced many new data sources, opening doors to new methodologies and insight for more effective planning and marketing. This session explores these emerging tools.

Moderator: Kathy Heady, WEDA Speaker: Michael Stumpf, President,

Place Dynamics, LLC

Sponsored by:



# 11:45 am Grand Ballroom

## **Community Economic Development Awards (CEDA) Luncheon**

Introduction By: Kristen Fish-Peterson, Principal & CEO,

Redevelopment Resources

**Guest Emcee: Representative Patrick Snyder** 





#### **CEDA AWARD SPONSORS**

#### **CEDA Partners:**

#### **CEDA Award Sponsors:**























#### 1:00 PM

#### HIGH IMPACT BREAKOUT SESSIONS (40 minutes)

#### **Lincoln Ballroom**

# 1. Real Estate Due Diligence & Regulatory Hot Buttons

Identifying potential costs and potential risk factors is key to managing development and redevelopment projects to maximize efficiency and minimize costs. What are current WDNR hot topics as they relate to real estate ownership and development? Learn what to look for and how to improve your risk management approach.

Moderator: Kathryn Berger, CG Schmidt Speaker: Joshua Neudorfer, Director of Business Development, The Sigma Group

Sponsored by:



# Washington Ballroom

# 2. Nonprofits Spend Less, Build More with Tax Exempt Financing Through WHEFA

Explore the options for not-for-profit entities to obtain access to tax-exempt financing to fund qualifying capital improvement projects. Learn how WHEFA can partner with your current financing sources to lower your cost of financing.

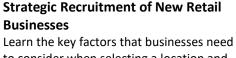
Moderator: Brad Elmer, Baker Tilly

Panelists:

Larry Wiemer, Executive Director, WI Health and Educational Facilities Authority
Tatiana Graver, Associate ED, WI Health and Educational Facilities Authority
Nathan Fronk, Partner, Quarles

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**Location, Location.** 

SPEEDY JAM SESSION #2 1:00 – 1:20 PM | Exhibit Hall

Learn the key factors that businesses need to consider when selecting a location and how to leverage a community's unique strengths and assets to attract and retain retailers. Gain insights into successful strategies used by other communities and have a better understanding of how to develop and implement a strategic retail recruitment plan that benefits both the community and its businesses.

Moderator: Melissa Meschke, UW-

Business

Speaker: Elliott Cook, Director of Real

Estate, Retail Strategies

Sponsored by:

Quarles



retail strategies

#### 1:45 PM **HIGH IMPACT BREAKOUT SESSIONS** (30 minutes) **Lincoln Ballroom** CEDA Award Best Practices Case Study: From Shuttered Shopko to Destination Distillery! The Tattersall project started out as a site search for expansion of Jon Kreidler's and Dan Oskey's craft cocktails distillery in Minnesota. Restrictions there prompted these grade-school friends to look to Wisconsin. Learn how the City of River Falls went into attraction mode and innovatively offered a shuttered Shopko building. Today Tattersall Distillery is the jewel of River Falls, composed of a destination distillery featuring solar power, ballroom space for up to 400, a private barrel room, outdoor amphitheater, tasting area and retail space, plus a full-service restaurant and bar with seating for 120 inside and 200 outdoors. Hear how the community development team used innovative financial structuring and visioning to drive this redevelopment over the finish line coupling the owners' cash with regional funds, state tax credits and TIF to make the deal financially feasible. Moderator: David Kircher, Phoenix Financial Advisors Speakers: Heather C. Smith, Senior Director, Business & Investment Attraction, Wisconsin Economic **Development Corporation** Keri Schreiner, Economic Development Manager, City of River Falls 2. Indigenous Entrepreneurship in the 21st Century: How to Utilize a NCDFI to Grow Washington **Your Business Ballroom** Native Americans are living in nearly all Wisconsin communities. Learn how to assist Native entrepreneurs in starting and growing a business. You will learn about resources available to Native entrepreneurs and Native-owned small businesses to help start, support and sustain a business. The panel will explain how to take an idea and turn it into a working business, with tips, tricks and guidance on the necessary steps from how to register an LLC, to applying for CDFI loans and grants. Attend this informative session and bring best practices back to your communities to start making Native entrepreneurial dreams come true! Moderator: Jennifer Peters, Wisconsin Indigenous Economic Development Corporation (WIEDC) Panelists: Sponsored by: Pam Boivin, Executive Director, Woodland Financial Partners David Gouwens, Chief Operating Officer, Wisconsin Native Loan Fund Becky Albert-Breed, Executive Director, First Nation Community Christopher Cote, Development Services Manager, First American Capital Corporation Sponsored by: 6 bakertilly 2:15 PM WEDA EXPO & NETWORKING BREAK **Jefferson Ballroom** 2:45 PM **HIGH IMPACT BREAKOUT SESSIONS** (30 minutes) **Lincoln Ballroom** 1. CEDA Award Best Practices Case Study: New North More YOU in NEW Campaign Learn the best practices New North used to create and execute its talent attraction & retention marketing campaign. Attendees will take away critical knowledge about compiling video stories and digital assets and engage local partners, stakeholders and community leaders to help share the messaging through social media, newsletters and email. Moderator: Melissa Meschke, UW Institute for Business & Entrepreneurship Speaker: Barbara LaMue, President and CEO of The New North Sponsored by: FIVE TO FLOW 2. Investing in Nonprofits Throughout Wisconsin Washington Capital is a critical resource that's often beyond the reach of **Ballroom** nonprofits serving communities with limited resources. At IFF, we work hard to change that. For more than 30 years, we've specialized in flexible and alternative solutions to lending products and

creative real estate solutions that help nonprofits achieve their growth goals and best serve their

communities. IFF provides loans, consulting, and development support to mission-driven nonprofits to help communities thrive. Key to our success has been a deep sense of purpose, a broad perspective, and a relentless focus on achieving positive results. Moderator: Joe Schuchardt, Director of North Central Operations, Findorff Strengthening Speaker: Darian Luckett, Director of Lending, IFF Milwaukee nonprofits and Sponsored by: the communities

#### 3:20 PM

#### **Grand Ballroom**

### **Unlocking the Power of Military Veterans: Best Practices for Recruitment, Development, and Retention**

This session aims to provide valuable insights and strategies to organizations seeking to effectively tap into the unique skills and experiences that military veterans bring to the civilian workforce. This session will explore various best practices that can be implemented to recruit, develop, and retain veteran talent, along with methods to uncover new talent pipelines and enhance veteran engagement within the organization. Moderator: Rebecca Deschane, The New North

Speaker: Zach Zabel, Vice President of Programs,

Wisconsin Veterans Chamber of Commerce

### SPEEDY JAM SESSION #3 3:20 - 3:40 PM | Exhibit Hall

they serve.

### Wisconsin's Economic Future: Retaining **Business & Talent Through Effective Succession Planning**

Wisconsin faces a staggering potential loss of businesses and associated talent over the next ten years due to lack of succession planning by Baby Boomer business owners. Explore illuminating data and effective strategies that support the joint interests of businesses, talent and communities.

Moderator: Carol Maria, FDIC **Speakers:** 

Jayne McQuillan, Owner/President, Journey Consulting, LLC Diane C. Lupke, President, Diane Lupke & **Associates** Sponsored by:

**JOURNEY** CONSULTING



#### 4:00 PM Attendees to walk to Whitewater Music Hall Brew Co., 130 1st Street, for final session. 4:30 - 6:00 pm Transplanted & Growing Roots -- Networking Reception to follow Whitewater Music What can we learn from the people who chose to leave their hometowns and put down roots in a new community? This roundtable will ask why people from all over the U.S. decided to relocate to Wausau. **Hall Brew Company** Hear straight from the people who moved and love their new community. Host/Leader: Liz Brodek, Development Director, City of Wausau 7:00 - 9:00 PM **DINE-Arounds in Downtown Wausau** Meet in Lobby at 6-7 downtown restaurants to choose from! (Make your Reservation by 3:00 pm) 6:30 pm Networking at MaLarkey's Pub & Townie's Grill, 408 N. 3rd Street 8:30 - 9:30 PM **OPEN TO ALL!** 8:30 - 11:00PM **Hospitality Suite at Jefferson Street Inn ROOM #325 OPEN TO ALL!** Sponsored by:

## FRIDAY, SEPTEMBER 29, 2023 **Mobile Career Lab** 7:15 AM F.I.R.E. Breakfast Buffet **Jefferson Street Inn Parking Lot** Jefferson Ballroom WEDA Networking Expo Open until 10 AM The Dept. of Workforce Development's Mobile Career Lab delivers workforce resources and services to individuals and Sponsored by businesses throughout Wisconsin. Open to conference attendees throughout the morning until 12:30 PM today! PLAN TO VISIT! 8:15 AM Friday Morning Welcome - Kathryn Berger, CG Schmidt Guest Speaker: Elmer Moore, Jr., Chief Executive Officer, WHEDA **Grand Ballroom** Using Human Centered Design as a Community Development Tool Using Human Centered Design as a way of partnering with communities can pave the way to develop unique pathways in addressing housing needs. WHEDA has used the Human Centered Design (HCD) process to lead them through two pilot initiatives. In this panel discussion, WHEDA, along with Greater Good Studios, will discuss how HCD is being used in community development and engagement, the benefits of HCD, lessons learned, and how communities can use HCD to work on solutions towards achieving their housing and economic development planning goals. Speakers: Rebecca Giroux, Community and Economic Development Officer, WHEDA Ana Simpson, Director – Community and Economic Development, WHEDA Sponsored by: **Sara Cantor,** Co-Founder and Executive Director, Greater Good Studio

# 9:15 AM

**Grand Ballroom** 

# **Keeping Good Jobs & Sustaining Local Economies: An Employee Ownership Case Study**

Over the next 5-7 years, it is estimated that over 49,500 Wisconsin businesses will be sold or closed because of the retirement of the aging business owners. Transfer of ownership via an ESOP or worker-cooperatives is an effective method for retaining businesses, jobs and wealth in local communities. This session features a panel of representatives from employee-owned companies who will share their experiences in transferring their business to their employees and how to retain jobs in their community.

Moderator: Melinda Osterberg, Wisconsin Economic Development Corporation

Speakers:

Steve Storkan, Executive Director, Employee Ownership Expansion Network

Kristin Forde, Cooperative Development Specialist, UW Center for Cooperatives

Eric Howlet, President, Cooperative Veterinary Care

Samantha Forehand, Marketing Communications Manager, Realityworks

Sponsored by:

# WICEO T

SPEEDY JAM SESSION #4

9:15 – 9:35 AM | Exhibit Hall

**Crisis Communication & Media Training** 

all aspects of a crisis? With a 24/7 news cycle,

it's more important than ever to be prepared

Moderator: Dawn Follendorf, Incredible Bank

Meagan Hardwick, Red Shoes, Inc.

Tracy Doering, Red Shoes, Inc.

Leadership within any organization is the

public facing figure in any crisis. Are you prepared? Do you have key people to handle

for a crisis.

Speakers:

Sponsored by:

### 10:00 AM Jefferson Ballroom

#### **CONFERENCE NETWORKING BREAK**

Sponsored by:



#### 10:15 AM

### HIGH IMPACT BREAKOUT SESSIONS (40 min)

#### Washington Ballroom

#### 1. Development Agreements: The Economic Developer Prospective

This session will feature development agreement lessons learned from economic development professionals. Best practices will be considered including a discussion on public involvement/transparency and what partners/parties you may want to have involved in the process. Community perspectives, including a discussion on lessons learned will be included.

Speakers: Sponsored by:

**Liz Brodek,** Development Director, City of Wausau **Randy Fifrick,** Economic Development Manager, City of Wausau **Charlie Walker,** President-CEO, Chippewa County Economic Development Corporation



#### **Lincoln Ballroom**

### 2. Sustainability: Many Perspectives – One Goal

Aligning a business strategy to sustainability can reap tremendous social and financial rewards. Environmental, social, and governance (ESG) issues are increasingly critical for any company.

This workshop will help you understand the planning process, technical assistance options, and

	perspectives from local leaders. You will walk away with persuasive reasons to consider ESG and tips to incorporate that generates value and longevity for Wisconsin's businesses and communities.  Facilitator: Carol Maria, Community Affairs Specialist, Federal Deposit Insurance Corporation Panelists:  Jessy Servi Ortiz, Managing Director, Wisconsin Sustainable Business Council Dani Taube, Marketing Coordinator, Roastar Lisa M. Ashenbrenner-Hunt, Environmental Assistance Coordinator, WI Department of Natural Resources Bryant Esch, Corporate Sustainability Manager, Waupaca Foundry, Inc.
	Sponsored by:
	<b>incredible</b> bank
11: 00 AM Grand Ballroom	Community Childcare Innovations Childcare is hindering Wisconsin's workforce and economic vitality. Along with advocacy for childcare reform, many communities have begun work in their own backyards to increase childcare capacity and affordability. These innovative childcare models support their local workforce and business community while also ensuring children and childcare workers are in high quality, well-resourced care environments. This session gives a brief overview of the childcare challenges and then highlights 3-4 communities' innovative childcare projects.  Moderator: Marie Barry, Rural Wisconsin Health Cooperative Speakers: Donna Jost, Early Learning Campus Director, Madison Area Technical College Erin Trondson, Early Care & Education Program Manager, Madison Area Technical College
	Olivia Otte, Executive Director, Green County Economic Development Corporation  Angle Close, Executive Director, Langlade County Economic Development Corporation
12 Noon Washinton Ballroom	CONFERENCE CLOSING

# **Conference Supporting Sponsors:**



