

**EXHIBIT "E"**

Lexington/Fayette Urban County Government  
Addendum for Services  
Commerce Lexington

**COMMERCE LEXINGTON  
RFP #35-2024 RESPONSE  
WORK PLAN**

4939-1249-7984, v. 1



# REQUEST FOR PROPOSAL: ECONOMIC DEVELOPMENT PARTNERSHIP SERVICES

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May 31, 2024



# A

## Letter of Intent / Statement of Services

### A.1 Description of your knowledge and understanding of Lexington-Fayette County & the Lexington-Fayette County economy.

Dear Ms. Stone,

On behalf of Commerce Lexington Inc.'s Economic Development division, thank you for considering our team for RFP #35-2024 Economic Development Partnership Services. We appreciate the opportunity to respond and demonstrate why we are best suited to execute the services for the Lexington-Fayette Urban County Government.

Commerce Lexington's Economic Development team has partnered with the Lexington-Fayette Urban County Government (LFUCG) for over 30 years, creating thousands of jobs and generating significant revenue for the City of Lexington. Our comprehensive approach addresses business needs, workforce talent, and minority business support, making us a national leader in economic development. We have a combined team with over 100 years of economic development experience dedicated to improving economic prosperity for Lexington-Fayette County.

Our extensive knowledge of Lexington and long-tenured relationships allow us to understand the city's unique character. In 2022, on behalf of the city, we worked diligently with Economic Leadership, a economic development consultancy, to reassess the city's strategic targets and create a balanced strategy for job creation. The Economic Leadership team studied current market trends, strengths, weaknesses, opportunities, key assets, and more to formulate a plan that pursues investment opportunities and jobs within AgBio and AgTech, Biopharma and Life Sciences, Business Services and Financial Services, Medical Devices, and Marketing and Design. These industry sectors align with Lexington's unique assets and will lead to an increased number of higher-wage jobs and improved quality of life.

Our commitment to Lexington-Fayette County's economic growth is unwavering. Every day, we strive to implement the key job creation goals and tactics identified in the strategic targeted industry analysis conducted by experts at Economic Leadership. This dedication to turning analysis into action is at the core of our mission to drive economic prosperity in the region.

Commerce Lexington's Community & Minority Business Development (CMBD) program is dedicated to fostering and sustaining the economic growth, development, and self-sufficiency of ethnic minority business owners and entrepreneurs. This program began 25 years ago and has evolved over time to address changes in community needs.

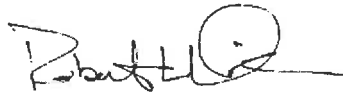
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**A.1**  
Description of your knowledge and understanding of Lexington-Fayette County & the Lexington-Fayette County economy.

Additionally, we have managed a robust existing business program for over 20 years. Recently, the Lexington Economic Partnership (LEP) established connections with industry professionals within the city's business ecosystem to learn about business trends and ways the LEP can help with successes, including job growth. Long-standing relationships have been formed with companies who trust us to help meet their needs.

Sincerely,



Robert L. Quick, CCE  
President & CEO



Gina Hampton Greathouse  
Executive Vice President for  
Economic Development

*Please accept this as our intent to respond to Sections*  
*2.1 New Business Development*  
*2.2 Existing Business Retention and Expansion*  
*2.3 Small Business Owner Connections and Networking*  
*2.5 Minority Owned Business Development*  
*2.6 Women Owned Business Development*  
*2.7 Veteran Owned Business Development*  
*2.8 Available Economic Development Property Register*  
*2.11 Ag-Tech and Agri Business Development*

## A

## Letter of Intent / Statement of Services

**A.2 – A.3**

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Identification of criteria to measure the success of your proposal.

**Kathy Mussio, Partner,**  
**Atlas Insights**

"We walk through a lot of community colleges and technical schools on these types of (community) visits which is great, but you all took it up a notch by taking us to see the equine hospital."

**A. BUSINESS DEVELOPMENT****(2.1) New Business Development**

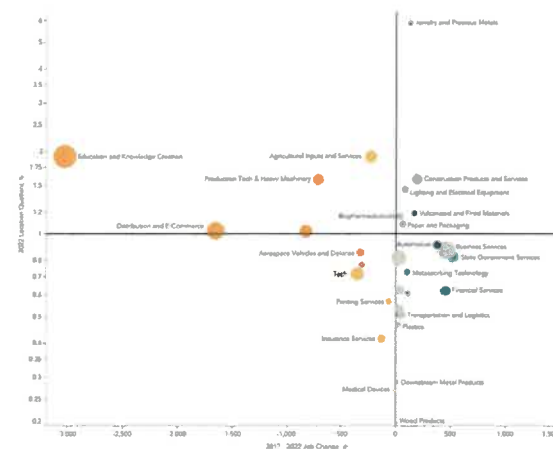
On behalf of the Lexington-Fayette Urban County Government, Commerce Lexington contracted with Ted Abernathy, Economic Leadership, LLC, to assess current strategic targets and identify new strategic target industry sectors for the city of Lexington. The comprehensive study reviewed existing industry clusters to determine which are especially strong in terms of concentrated employment and wage levels, whether they are growing or declining in employment, and identified emerging sectors that deserve more attention. The analysis report noted and emphasized that target industries need to be realistic and achievable and should mesh with existing strengths and assets, such as the University of Kentucky, which employs 25,000 people and has strong research capabilities.

Completed in the summer of 2023, the resulting findings determined new industry targets that should be potentially transformational by raising the level of opportunity with investments and jobs that improve opportunities for area residents, particularly by increasing the number of higher-wage jobs.

The following five strategic target industries were identified for Lexington – Fayette County to best serve the city's and region's current and future needs while also maximizing ROI.

- Biopharma and Life Sciences
- Business Services and Financial Services
- Medical Devices
- Marketing and Design Services
- AgBio (agricultural biology) and AgTech (agricultural technology)

Fayette County Cluster Map



Source: Lightcast 2023.1

A variety of marketing recommendations were offered for varying levels of available budget dollars. With limited funding, Ohio Valley and east coast opportunities should be prioritized. With more robust funding, west coast and international trade shows as well as consultant events in those areas should be explored.



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**Allen Waugerman, President & CEO, Lexmark**

"I enjoyed attending Commerce Lexington's consultant event at Fasig-Tipton. It was a very unique event mixing area CEOs, government officials, and visiting site selection consultants."

### (2.1) New Business Development (CONT.)

Commerce Lexington has developed an annual work plan designed to organize activities and ensure completion of necessary tasks to implement the business recruitment plan. (See attached sample spreadsheet.)

If awarded the contract, Commerce Lexington will coordinate with the Chief Development Officer and the Director of Agriculture Development *to develop a marketing plan, tasks, promotional materials, and timetable* that will be incorporated into the existing annual work plan.

With new strategic target industries identified, Commerce Lexington has focused on building and executing a marketing program to attract investments in Life Sciences, Biopharma, Biotech and Advanced Manufacturing. Within the past year we have attended trade shows and conferences where site selection consultants working within these fields attend to create awareness of Lexington, KY and form relationships with the consultants. With additional funding, we will expand the marketing plan to target additional identified strategic targets.

### Examples of select trade shows and consultant events:

- Bio International Tradeshow
- SelectUSA Investment Tradeshow – aimed at recruiting foreign direct investment to the United States.
- Consultant Connect – Destination Showcase and Economix conference
- Site Selectors Guild
- International Economic Development Council (IEDC)
- Association of Chamber of Commerce Executives (ACCE)
- Area Development Consultant Forums
- KYUnited and Kentucky Association for Economic Development efforts
- Southern Economic Development Council
- World Agri-Tech innovation Summit (listed in Ted's recommendations)



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**Tyler Burke, Manager, Large Customer Relations & Economic Development, Columbia Gas**

"When assembling the sales team for prospect visits, Commerce Lexington has the RIGHT people at the table. They keep us engaged in the process of RFPs. They know when to ask for assistance."

### (2.1) New Business Development (CONT.)

#### We will:

- On behalf of the LEP, organize and represent Lexington on consultant trips to cities where site selectors are clustered (Dallas, Chicago, Atlanta, Greenville, Indianapolis).
- Make recommendations to the Chief Development Officer on industry specific trade shows and events with a focus on key strategic industry targets.
- Attend trade shows to showcase Lexington as an ideal city for relocation or expansion to corporate decision-makers and site selection consultants.
- Represent Lexington at the Kentucky Association for Economic Development's consultant trips as they are organized.
- Utilize a market research consulting firm to identify and set appointments with real estate executives and site selection consultants in major cities.
- We will work with local partners and a market research firm to identify and set appointments with companies within the Ohio Valley who may be interested in expanding, relocating, or a potential research partnership with area universities.
- Meet with 100-125 site selection consultants annually.



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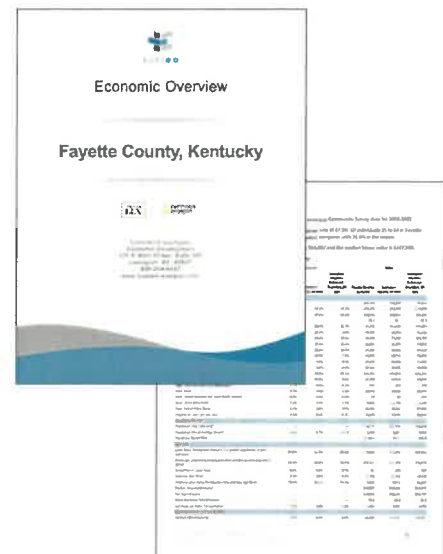
**(2.1) New Business Development (CONT.)**

Once RFIs are received, our team will coordinate all new business project activity and site visits from companies outside of Lexington with Lexington Economic Development Partners. We will serve as the primary contact and sales team, coordinating with the LEP for assistance needed prior to and during the visit. We will provide detailed follow-up and coordinate resulting necessary action items with the LEP. (Sample RFIs to the right.)



Based on recommendations from Economic Leadership, LLC, we are currently working to refresh and strengthen the LocateinLexington website to incorporate the LEP goals and objectives. The refreshed website will include a section that focuses on the LEP. Part of the new website design will include intentional efforts to ensure information is easily viewed on mobile devices in addition to traditional desktops.

We will build out new marketing materials for the identified target industries focusing on data and information that showcases why Lexington is an exceptional location for those industries. We utilize data from the latest Census, American Community Study, Bureau of Labor Statistics, Bureau of Economic Analysis, and other sources. To enhance these efforts, we recently purchased JobsEQ, a labor market research platform. This tool not only helps us maintain up-to-date for the website but will also be used to support existing business research requests and to create supporting documents for RFIs. This data is critically important to marketing Lexington and the Bluegrass region, allowing us to showcase diversity, education attainment, and size of our labor force.





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**(2.1) New Business Development (CONT.)**

Traditional white papers and other marketing materials will include print and digital versions. These materials will populate dedicated pages on the LocateinLexington website focused on the strategic target industries. In conjunction, we will produce new promotional video content with Lexington thought leaders working within the targeted industries. These videos will be disseminated on various platforms to enhance overall awareness and drive messaging.

Commerce Lexington will also purchase annual directory listings in Site Selection Magazine, Area Development Magazine and others as determined. We will continue to co-brand advertisements in Keeneland Magazine, Land Rover Three Day Event Program Guide, Bluegrass Airport, and Kentucky's Guide to Economic Development.

We will promote the LEP throughout our existing social media platforms—LinkedIn, Facebook—which are followed by companies and consultants alike. Our team will post important LEP new announcements, available real estate, rankings, and other newsworthy events about Lexington on a regular basis.

As a new method, we will annually renew access to the Location Advisors Database to target site selectors more effectively. We will send quarterly email blasts to site selection consultants working within the identified strategic targeted industries to create awareness and encourage ongoing dialogue for development opportunities in Lexington-Fayette County. We will continuously monitor and adjust email marketing efforts based on real time data captured by the email marketing delivery system.



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**(2.1) New Business Development (CONT.)**

With additional funding, we will meet with the LEP Chief Development Officer and Director of Agriculture Development to incorporate AgBio and AgTech into an expanded marketing strategy.

We will also work with the LEP to investigate digital marketing opportunities that utilize geofencing and other new technologies to further raise awareness and promote Lexington as an ideal location for business attraction.

Consultant Marketing Event and Tradeshows		
Event	Purpose	Cost
Area Development Workshop Forum	Educational conference for economic development professionals with many opportunities to network and engage with site selectors.	8,500
Consultant Connect Destination Summit	Hosting 10 site selectors of our choice in Lexington for two immersive days	38,000
KAED Spring Collaboration Conference	Conference for KAED ED professionals and site selection consultants	2,650
Out of Market Lexington Consultant Event	host a gathering in a target city for site consultants.	10,600
BIO International Convention	Represent Lexington and KY on a global stage highlighting the competitive advantages of KY for biotech, life science, and medical device companies.	7,500
Select USA	Investment summit for US and International investors and companies	2,500
Women in Economic Development	Educational conference for women in economic development.	3,000
Southern Economic Development Council	Annual Conference with educational and networking opportunities	2,200
Economix	Conference for ED professionals and site selection consultants	7,000
Out of Market Lexington Consultant Event	host a gathering in a target city for site consultants	15,000
	<b>Total</b>	<b>96,950</b>
Advertising		
Publication or Space	Digital/Print?	Cost
Bluegrass Airport Display	Print	15,000
Business Facilities - Life Science Feature	Digital/Print	3,500
Site Selection Magazine - Annual Directory	Digital/Print	4,100
Business Facilities - Annual Directory	Digital/Print	4,000
Kentucky Economic Development - Annual Guide	Digital/Print	4,900
Area Development - Annual Directory	Digital/Print	4,900
Lane Report - Central Kentucky Review	Digital/Print	3,500
Keeneland Magazine - Spring & Fall	Print	4,500
Equestrian Spring 2024 Issue - USEF 3-Day	Digital/Print	1,800
	<b>Total</b>	<b>46,200</b>

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**Amy Bowman, Department for Business & Community Development, Kentucky Cabinet for Economic Development**

"The Kentucky Cabinet for Economic Development is very appreciative for the opportunity to collaborate with the Lexington Economic Partnership Team. This team exemplifies the power of collaboration, uniting businesses, organizations, and community partners to help maintain and create sustainable economic growth."

### (2.2) Existing Business Retention and Expansion Program

Through our dedication to the existing business community and our partnership with the city, Commerce Lexington contacts over 200 companies annually to request an exclusive meeting with the company and Lexington Economic Partnership (LEP) team. Accepted meetings allow our team to identify potential strengths and opportunities, including but not limited to real estate and/or workforce expansions, capital investment projects, trainings, salary and wage benefits (Jobs EQ), network connections to near-source supplies, imports/exports, future conventions for Visitor Industries with VisitLEX; and challenges or threats, including but not limited to downsizing workforce, talent pipeline, supply chain, traffic and pedestrian safety and more. We will continue to coordinate LEP meetings, which include representation from the Kentucky Cabinet for Economic Development, LFUCG Office of the Chief Development Officer, University of Kentucky, Bluegrass Community & Technical College (BCTC), Bluegrass Workforce Innovation Board, Kentucky Career Center, and other community and utility partners as needed. These meetings provide our team with

insight into the business community's unique needs. Following each meeting, we will continue to coordinate appropriate LEP partner responses to address the issues and/or opportunities identified. We will conduct monthly "Deal Day" project briefing updates with the Chief Development Officer to provide a comprehensive overview on prospect activity for the previous month including project activity, breakdown of leads by industry, potential flight risks, and other topics will be discussed.



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#### Erin Tipton, VP of Workforce and Economic Development, Bluegrass Community and Technical College

"Commerce Lexington has been a key leader in promoting work-based learning opportunities such as apprenticeships and internships for BCTC students as a mechanism for connecting talent to employers."

### (2.2) Existing Business Retention and Expansion Program (CONT.)

We will give an overview of the current inventory of sites and buildings and update the Chief Development Officer on significant challenges identified via LEP meetings. We will continue to organize Councilmember Economic Development Days, which strategically unite the business eco-system and officials with a goal for councilmembers to better understand businesses in the community, demonstrate the LEPs role, and connect businesses with elected officials to encourage community relations.

#### We will expand upon our network group support by organizing:

- Manufacturer's Network Events
- Bluegrass Bio Events- BioPharma, Life Sciences, Medical Devices with an invitation to AgBio.
- AgTech (agricultural technology) and AgBio (agricultural biology) Specific Events
- Tech Networking Group – Includes an invitation to AgTech.
- Equine Network Events National Horse Center, Equine associations, and educational institutions
- Business & Professional, and Marketing & Design Services will be invited accordingly to each network event to ensure a cohesive approach to supporting and encouraging industry sectors.



#### Biotech Network Group Agenda December 6, 2023 Commerce Lexington 330 E. Main Street First Floor Conference Room

10:00 am	Introduction and Industry Overview
	• Gina Greathouse, EVP, Economic Development - Commerce Lexington
10:05 am	Introduction – Attendees
	• Name, Title, Company/Organization
10:10 am	Industry Stakeholders & Resources to Support Biotech:
	• Amy Glascock, Director of Business Engagement - Office of the Mayor, UFUG
	• Lexington Jobs Fund
	• Erica Rogers, Director of Agriculture Development – Office of the Mayor, UFUG
	• Bluegrass AgTech Development Corp. grant
	• George Ward, Executive Director, Goldstream Research Campus & Real Estate – UK
	• Landon Borders, Executive Director of UK Innovation Connect, UK Innovate, UK
	• Eric Hartman, Sr. Associate Director, Office of Technology and Commercialization – UK
10:30 am	Greater Lexington Region's Life Sciences Ecosystem:
	• Strengths
	• Weaknesses
	• Opportunities
	• Threats
11:15 am	Growth Opportunities and Action Items:
	• CBA
12:00 pm	Networking Lunch
1:00 pm	Event Concludes



CEO Round Table



Biotech Meeting



Manufacturing Network



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**Marilyn Clark, Economic Inclusion Manager, University of Kentucky**

"You could feel the pride and the goodwill in the room last night. The work that we are doing together is really changing lives. Let's keep it going! Thank so much to Commerce Lex for being an important part of this growing business ecosystem."

### (2.3) Small Business Owner Connections and Networking

Commerce Lexington's Community & Minority Business Development (CMBD) program hosts the biannual Opportunity Exchange, a key networking event typically occurring in the spring and fall. These gatherings provide forums where pressing topics directly affecting small and minority businesses are discussed. Attendees have the invaluable opportunity to network with procurement professionals from esteemed organizations such as the University of Kentucky, Toyota Kentucky, Messer Construction, Fayette County Public Schools, and the Lexington-Fayette Urban County Government, among others. During these sessions, minority business owners can personally introduce themselves and their enterprises to decision-makers overseeing various projects, fostering potential collaborations.

To expand collaboration and networking efforts within Lexington-Fayette County, we're enhancing our marketing initiatives to attract a broader industry base. This involves forging additional partnerships with key community organizations like Bluegrass Community and Technical College (BCTC), Urban League of Lexington-Fayette County, Lexington-Fayette County Housing Authority, College of Technical Education, Hispanic Connections of Lexington, and the Building Industry Association of Central Kentucky. These entities harbor burgeoning entrepreneurs who stand to benefit from engagement with our program. Through these expanded efforts, we anticipate facilitating significant opportunities for the growth of small businesses. Following the outcomes of these initiatives, we plan to engage the small business community in consultations to identify further collaborative networking opportunities tailored to their needs and preferences.



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**Edward Holmes, President,  
EHI Consultants**

"[Tyrone's] strategic insights and innovative approach have been instrumental in driving meaningful change towards business development and advancing the cause of Minority and Community Economic Development."

### (2.5) Minority Owned Business Development

Commerce Lexington's Community & Minority Business Development (CMBD) program is dedicated to fostering and sustaining the economic growth, development, and self-sufficiency of ethnic minority business owners and entrepreneurs. The program focuses on several key areas:

1. **Promoting Economic Growth and Development:** CMBD works to support the economic advancement of minority-owned businesses, ensuring they have the resources and opportunities needed to thrive.
2. **Recruitment:** The program actively recruits aspiring and burgeoning minority owned businesses in Lexington-Fayette County and Commerce Lexington.
3. **Business Referral Services:** CMBD provides referrals to the appropriate minority business assistance agencies, ensuring that business owners receive the support and resources they need for success.
4. **Financial Literacy:** CMBD provides small business and minority-owned businesses with financial literacy classes to enhance their financial business acumen.
5. **Partnerships:** The program promotes increased business partnerships between public and private majority corporations, business and industry, local and state governments, and minority business owners.
6. **Research:** The program provides research assistance to minority business entrepreneurship in the areas of business startup resources, financial business assistance, market data and other specific business support areas.
7. **Business Certification:** Assist entrepreneurs and small business owners in identification of the appropriate business certifications.

Through these efforts, CMBD aims to create a robust and inclusive economic environment that benefits all members of the community.



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### (2.5) Minority Owned Business Development (CONT.)

Commerce Lexington's staff is knowledgeable and experienced in access to capital, and this experience has been utilized on the Mayor's Economic Development Investment Board. The innovative, nationally benchmarked Access Loan program is a cornerstone of Commerce Lexington's support for minority entrepreneurs and business owners in Lexington-Fayette County. This program has facilitated over \$25 million in approved loans, aiding small businesses, start-ups, and expansions. The Access Loan Program meets prospective business owners where they are by offering:

- **Comprehensive support:** providing technical assistance that guides business owners through all facets of business plans and financial development.
- **Application Review Process:** Involves a Subcommittee that reviews completed applications and a Full Committee that finalizes approvals, with a high approval rate of 97% once applications reach the full committee.
- **Diverse Lending Partners:** Collaborates with local non-profits, a credit union, and both local and national banks to offer commercial loans ranging from \$5,000 to several million dollars.



In addition to the Access Loan Program, we will also introduce the Kentucky Small Business Credit Initiative (KSBCI) 2.0, which will strengthen and grow loan support capabilities, which are directly managed by the Cabinet, while also providing a significant funding infusion for early-stage venture capital. It is our goal to host at least one session per year in which state employees present the program. Together, these programs and initiatives underscore Commerce Lexington's commitment to fostering a vibrant and inclusive economic environment for minority entrepreneurs and business owners in Lexington-Fayette County.

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**(2.5) Minority Owned Business Development (CONT.)**

Commerce Lexington is committed to fostering business connections and growth opportunities within the community by continuing to host and sponsor various events. Major sponsorship roles include:

1. **Lexington Bluegrass Area Minority Business Expo**, an annual event that attracts hundreds of entrepreneurs and offers quality programming, business collaborations and educational forums. This event is held annually and offers sessions like "Growing Your Business" and "Government Market to Growing Your Business." Unique features include speed dating sessions with large companies and a luncheon featuring a nationally recognized speaker who shares best practices and encouragement to emerging and seasoned minority businesses. Attendees leave with valuable business resources to help grow their brands.
2. **Turner-UK Construction Diversity Accelerator Program**. In this community partnership, Commerce Lexington supports minority-owned, women-owned, and other underrepresented construction-related businesses. This program provides access to tools, resources, and opportunities to be competitive in the construction industry. Over the past two years, this program has graduated twenty-eight participants.

Commerce Lexington's Minority Business Accelerator, which was designed to accelerate the development of sizable minority business enterprises (MBEs), has been instrumental in helping local minority-owned businesses gain the knowledge and tools to be successful. In just over ten years, the program member businesses have secured over \$50 million in procurement contracts and opportunities. The Minority Business Accelerator currently includes six member businesses, all headquartered in Lexington-Fayette County, with some having contracts extending to California and Florida. Along with our consultant, Commerce Lexington offers two networking events per year for Accelerator members. With financial growth, the program aims to expand its reach, with continued focus on businesses with annual revenues of \$250,000 or higher.



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Elaine Allen provides comprehensive construction management services that provide the best results for your specific project needs and requirements. Elaine Allen offers the following construction services: Project Management, Cost Estimating, Scheduling, Contract Administration and Change Order Management.

**ELAINE ALLEN LLC.**  
Elaine Allen Construction LLC, Inc.  
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**EQUITY SOLUTIONS GROUP**  
A certified MBE with headquarters in Lexington, Kentucky, Equity Solutions Group, LLC (ESG) is a strategic sourcing firm with an emphasis on expense reduction while ensuring competitive participation.

**Raymond Dennis, Co-Founder, President and CEO**  
info@equitygroup.com  
Phone: (502) 375-3173  
www.equitygroup.com

**FACILITY MAINTENANCE & SERVICES GROUP, LLC**  
Facility Maintenance & Services Group, LLC provides top quality maintenance, janitorial and cleaning services to clients who appreciate professionalism and quality work. They provide employment opportunities to individuals who enjoy working in the field. The company specializes in Commercial Cleaning, Pressure Washing, Construction Cleanup, High Drying, Residential Cleaning, and Grounds Keeping.

**Frank Bell, Owner**  
info@facilitiesgroup.com  
2115 Walburn St., Lexington, KY 40503  
Phone: (606) 255-3357 | www.facilitiesgroup.com

**HELPING HAND, LLC.**  
Helping Hand, LLC, provides an array of apartment services that yields comfort for college students and assistance to college housing managers across the country. The upgraded living services provided include: Valet Waste Services, Moving Services, Cleaning services, and Apartment Turn Services.

**Chase Minkoff, Owner**  
info@helpinghand.com  
2035 Palumbo Drive, Lexington, KY 40505  
Phone: (606) 276-3877 | www.helpinghand.com

**PATRIOT GROUP, LLC**  
Leveraging over seventy-five years of industry experience, Patriot Group, LLC is Kentucky's premier minority-owned, independent insurance agency. Patriot Group focuses on providing insurance products and risk management solutions for businesses. Highly skilled in Commercial Insurance and Risk Management, they represent clients that operate locally, nationally and internationally. Patriot Group provides their clients with the tools needed to make informed decisions that mitigate risk.

**Lorraine Murray, President & President**  
lurray@patriotgroup.com  
1831 Walburn St., Lexington, KY 40505  
Phone: (606) 276-5100 | www.patriotgroup.com

**PRINTCORE, INC.**  
Printcore Inc. is committed to providing top-quality printing and packaging products. With over 20 years of experience in the printing and packaging arena, we are a one stop shop for our customers.

**Ray Woods, Owner**  
ray@printcore.com  
www.printcore.com  
Phone: (502) 381-1336  
http://www.printcore.com



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**(2.5) Minority Owned Business Development (CONT.)**

As previously denoted in 2.3, Commerce Lexington's ongoing and future initiatives include the Opportunity Exchange, hosted twice a year, providing connections to other businesses in the community and providing opportunity for growth in their operations. In addition, continued partnerships throughout the year with LFUCG (Lexington Fayette Urban County Government), the University of Kentucky, Fayette County Public Schools, and other large entities on outreach events underscore Commerce Lexington's dedication to supporting minority-owned businesses, providing them with crucial networking opportunities, resources, and avenues for growth.

Commerce Lexington recognizes the immense value in memberships that equip us with the necessary tools and information to support our Lexington-Fayette minority-owned businesses. By joining the National Minority Supplier Development Council (NMSDC), we aim to promote minority business certifications and provide these businesses with access to crucial wealth-building opportunities. This strategic move will enable us to foster upward mobility in their business operations, further contributing to the economic growth and diversity of our community.

Commerce Lexington, a newly minted Federal Deposit Insurance Corporation (FDIC) Money Smart Alliance member, biannually offers the Money Smart for Small Business classes which cover financial literacy topics such as Managing Cash Flows, Organizational Types, and Financial Management. Over the past three years, these sessions have seen tremendous growth and impact

with the largest class averaging twenty-seven participants weekly, consisting of both aspiring and existing business owners. Twenty-three participants earned a certificate of completion by attending four or more classes. In addition to the Money Smart Curriculum, participants were also introduced to several of Commerce Lexington's community partner organizations including Fayette County Public Schools, University of Kentucky Economic Inclusion, Kentucky's Small Business Development Center, local banking representatives, and the LFUCG Minority Business Enterprise Liaison who has been a consistent guest over the duration of classes. We were also joined by Councilmember Denise Gray, who joined the last class of the Winter 2024 session to congratulate the participants on their hard work and dedication in attending the classes. Commerce Lexington's future



## A

## Letter of Intent / Statement of Services

### A.2 – A.3

Provide a work program that includes the proposed method of accomplishing goals and task outlined in the Request for Proposal including work plan, framework for plan implementation, project deliverables and proposed budget broken out by category.

**Identification of criteria to measure the success of your proposal.**

## (2.5) Minority Owned Business Development (CONT.)

plans include the continuation of the biannual classes. In addition, we would like to offer certain ad-hoc sessions, such as how to write a business plan, which is crucial for gaining access to capital.

Commerce Lexington along with other Lexington Leaders and business community leaders will continue to identify ways to reduce barriers to minority business ownerships through the Black Faith Leaders Collaborative, established in 2020. Participants include Commerce Lexington, University of Kentucky, Lexington-Fayette Urban County Government, Fayette County Public Schools, Transylvania University, several small business owners, and the Lexington-Fayette Urban League, along with pastors from many area churches. Several accomplishments have been made since the introduction of this collaborative group. Significant changes include contract payment updates from Net30 to Net15 and bid process modifications which strengthen the accountability process of large entities. These initiatives illustrate the collaborative effort and commitment of Commerce Lexington and its partners to create a more inclusive and supportive environment for minority business owners in the community. Through continued collaboration and proactive measures, the group aims to further dismantle barriers to minority business ownership and foster a thriving entrepreneurial ecosystem.

Commerce Lexington will continue to involve the LFUCG Minority Business Enterprise Liaison in outreach activities, similar to past engagements with the Opportunity Exchange and Money Smart for Small Business classes. Each quarter, Commerce Lexington will provide the Liaison with a list of minority-, women-, and veteran-owned businesses. The LFUCG Minority Business Enterprise Liaison will continue to receive a free advertisement and write up in our Minority Business Resource Guide, which is published several times throughout the year.



# A

## Letter of Intent / Statement of Services

### A.2 – A.3

Provide a work program that includes the proposed method of accomplishing goals and task outlined in the Request for Proposal including work plan, framework for plan implementation, project deliverables and proposed budget broken out by category.

Identification of criteria to measure the success of your proposal.

**Nicki Stewart, Workforce Development Manager, KY VALOR**

"Their knowledge of local industries has served as a helpful resource while we assist military families making Lexington their post-service home."

### (2.6) Women Owned Business Development

Commerce Lexington has a proven track record of providing networking, classroom, and one-on-one technical assistance to any small businesses in Lexington-Fayette County. Historically, about 60% of all small business contacts have been with women owned businesses. In addition to our community & minority owned business programming and initiatives described in 2.3 and 2.5, we will build on our existing framework and introduce targeted initiatives for women-owned business. Through enhanced relationship building, we will strengthen our ties with the Women's Business Enterprise National Council (WBENC), Women's Business Center, and the Women Leading Kentucky organization to further support female entrepreneurs. In addition, we will host a dedicated event for women business owners, to foster networking, share resources, and provide targeted support.

### (2.7) Veteran Owned Business Development

Commerce Lexington has a strong history of providing networking, classroom, and one-on-one technical assistance to any small businesses in Lexington-Fayette County. In addition to our community & minority owned business programming and initiatives described in 2.3 and 2.5, we will intentionally target and market to veteran owned businesses. Strengthening our partnership with the Small Business Administration's Office of Veteran Business Development, our goal is to enhance collaboration with this office to offer more tailored resources and support for veteran-owned businesses. We will also leverage our existing partnerships to identify and reach out to veteran business contacts, ensuring a comprehensive support network. In addition, we will host an event for veteran -owned business owners.



## A

## Letter of Intent / Statement of Services

**A.2 – A.3**

Provide a work program that includes the proposed method of accomplishing goals and task outlined in the Request for Proposal including work plan, framework for plan implementation, project deliverables and proposed budget broken out by category.

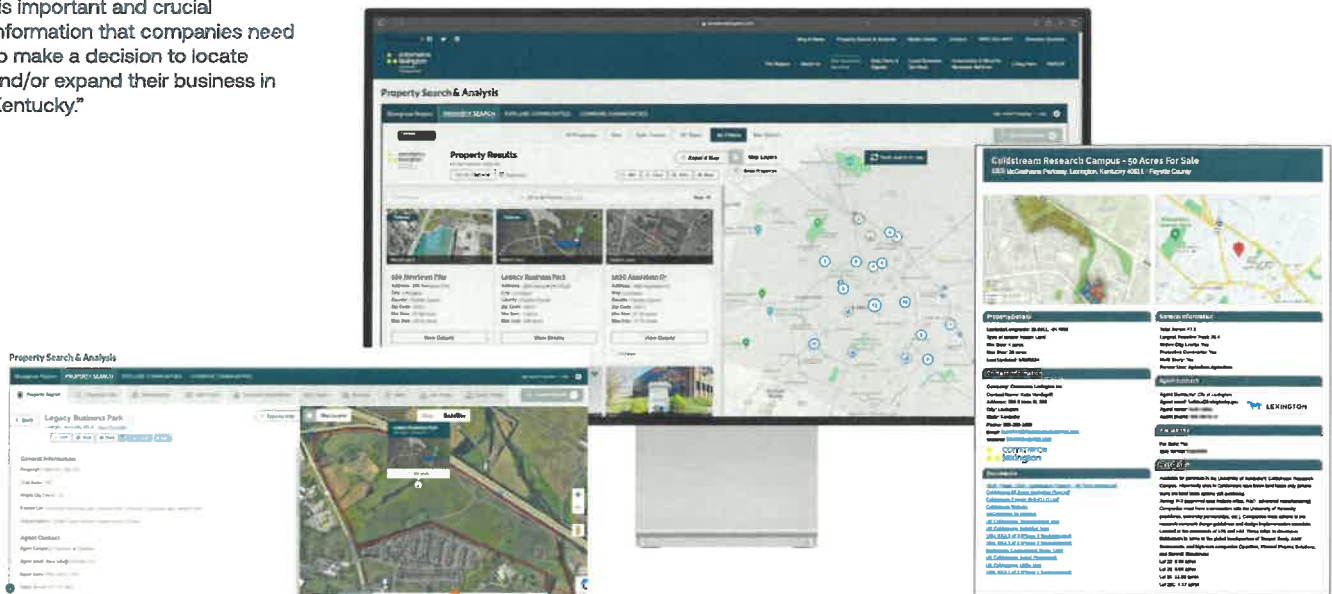
Identification of criteria to measure the success of your proposal.

**Amy Mills, Sites and Buildings Specialist, Kentucky Cabinet for Economic Development**

"Commerce Lexington partners with the [cabinet] to collaborate on marketing new and existing buildings and sites using the ZoomProspector database. The up-to-date property information ... is important and crucial information that companies need to make a decision to locate and/or expand their business in Kentucky."

**(2.8) Available Economic Development Property Register**

Commerce Lexington will continue to maintain and update its property database for Lexington and the region. Our database automatically syncs with the Cabinet for Economic Development and Kentucky Utilities property tools, ensuring up-to-date information across multiple websites. Lexington's property listings will have prominent placement on the Lexington Economic Partnership website, and properties will be featured in consultant email outreach as well as periodic social media updates. Our team ensures the register is continually updated as new listings are received from commercial real estate brokers, Kentucky Commercial Real Estate (KCREA) and Loopnet. Our team performs community tours for access to "pocket listing" property information that otherwise may not be available online. Our team places high priority on making sure the register is available to LFUGG and the community at large in real time with accurate and up-to-date information. We participate in Commercial Property Association of Lexington (CPAL) and Certified Commercial Investment Member (CCIM) meetings to network with real estate brokers, learn about new properties, and educate the real estate community about our database/website to market our services. Additionally, we will engage these events to continue supporting existing businesses with expansion projects and promote Lexington for new business prospects. We will continue to prioritize our efforts to seek and incorporate innovative solutions for higher visibility to encourage marketing efforts.





# A

## Letter of Intent / Statement of Services

### A.2 – A.3

Provide a work program that includes the proposed method of accomplishing goals and task outlined in the Request for Proposal including work plan, framework for plan implementation, project deliverables and proposed budget broken out by category.

Identification of criteria to measure the success of your proposal.

**George Ward, AVP for Economic Development and Real Estate, University of Kentucky**

"UK and Commerce Lexington have been working together for many years... There are many examples of the good work these entities do together. One of the biggest is a major economic development agreement between UK and the City of Lexington to create a 200-acre industrial park. This agreement originated in a land task force meeting where Commerce Lexington brought together representatives from government, business, UK and other landowners."

In Appendix A, is a detailed outline of our action plan and future endeavors contingent upon adequate funding

### (2.1f) Ag-Tech and Agri Business Development

If awarded the contract, Commerce Lexington will research opportunities within the AgTech and AgBio industry segments to develop a plan aiming to attract new business to the area. Commerce Lexington will coordinate with the Chief Development Officer and the Director of Agriculture Development to solidify a marketing plan and timetable, create marketing materials and attend select tradeshow and consultant events. The AgTech and AgBio industry segments will also be incorporated into the existing annual work plan.

Below are examples of the top Ag-Tech shows that could be researched and evaluated for inclusion into a work plan for this industry segment.

1. Fort Wayne Farm Show
2. National Cattlemen's Beef Association - NCBA
3. Grain Elevator & Processing Society
4. Hawkeye Farm Show
5. Commodity Classic Show
6. Mid-South Farm & Gin Show
7. International Association of Operative Millers - IAOM
8. Midwest Poultry Federation Convention
9. The Loggers Expo
10. Ag Progress Days
11. The Landscape Show - FNGLA
12. Farwest Show
13. Citrus Expo
14. Husker Harvest Days
15. Farm Science Review
16. World Beef Expo
17. American Society for Horticultural Science - ASHS
18. Sunbelt Agriculture Exposition
19. Angus Convention
20. Irrigation Show & Education Conference

## A

## Letter of Intent / Statement of Services

**A.4 – A.5**

Source(s) of private or non-LFUCG funding that will be used as part of the proposal to go along with LFUCG funding. State the percentage and amount of private or non-LFUCG funding and LFUCG requested funding as proposed in your submission.

List any funding from LFUCG sources the respondent has received in the previous two years and if your program succeeded and fulfilled their agreement with the LFUCG as described and agreed to within the agreement your organization signed with LFUCG.

**A.4 Private Funding Source & LFUCG/Non-LFUCG Funding Percentage**

Current funding sources	Amount	Purpose
Community/Minority Business Development	\$174,800.00	Full Stride Capital Campaign
	\$55,000.00	Commerce Lexington Sponsorships
	\$60,000.00	LFUCG Execution RFP
	<b>\$289,800.00</b>	
Economic Development	\$570,400.00	Full Stride Capital Campaign
	\$240,000.00	LFUCG Execution RFP
	<b>\$810,400.00</b>	
<b>Percentages</b>		
LFUCG funding total	\$300,000.00	29%
Full Stride and Sponsorships	\$745,000.00	71%
<b>Total funding for all</b>	<b>\$1,045,000.00</b>	<b>100%</b>

**A.5 LFUCG Funding Received in Last 2 Years**

Department	Amount	Purpose
Community/Minority Business Development	\$60,000.00	1st Execution of the PSA RFP #26-2022
	\$60,000.00	2nd Execution of the PSA RFP #26-2022
Economic Development	\$240,000.00	1st Execution of the PSA RFP #26-2022
	\$240,000.00	2nd Execution of PSA RFP #26-2022
	\$30,000.00	LFUCG Pass Through for Targeted Industry Study
	\$18,500.00	LFUCG Add'l support for "Consultant Connect Event"
<b>Total funding for all 2022 -2024</b>	<b>\$648,500.00</b>	

## B

## History of Organization and Statement of Qualifications

B.  
History of  
organization.

## OUR HISTORY

Commerce Lexington Inc., established in 2004 through the merger of several organizations, is a vital private, non-profit entity fostering economic development in the Greater Lexington Region. Collaborating with local government and various institutions, Commerce Lexington aims to boost economic growth, job opportunities, and business development. The organization has forged strategic partnerships with key entities such as Lexington-Fayette Urban County Government (LFUGG), University of Kentucky (UK), VisitLEX, Bluegrass Community and Technical College (BCTC), the Kentucky Career Center, Kentucky Cabinet for Economic Development, Bluegrass Alliance, Small Business Development Center of Kentucky (SBDC), World Trade Center Kentucky, WORK-Lexington, and US Commercial Services.

Since its inception, Commerce Lexington has been a steadfast partner with LFUGG in driving economic development initiatives tailored to benefit Lexington. Through a strategic collaboration with LFUGG, Commerce Lexington actively promotes Lexington's economic potential in all endeavors, serving as the go-to source for economic development locally, regionally, statewide, and nationally. By leveraging this partnership, Commerce Lexington positions itself as a trusted entity dedicated to advancing Lexington's economic prosperity and reputation on a broad scale.

## A TIMELINE OF HIGHLIGHTS

**Access Loan Program** surpassed the \$7,000,000 mark in loan facilitation



**Fresh Bourbon (dba Edwards Spirit Company)** announces plans to build first Black-owned bourbon distillery in Lexington creating 25 new jobs with a \$5.4 million investment



**Summit Biosciences, Inc.** a pharmaceutical manufacturer, expands creating 78 new jobs with a \$20.4 million investment



**Launch Blue** an early stage accelerator program for Kentucky tech startups, launches

2020



**Mac Conway Award for Excellence in Economic Development** was awarded to Commerce Lexington Inc. by *Site Selection Magazine*



**NX Development Corp.** expands life science company creating 20 new jobs with an investment of more than \$1.2 million

# B

## History of Organization and Statement of Qualifications

### B. History of organization.

#### A TIMELINE OF HIGHLIGHTS

**Coldstream Research Campus**  
community leaders break ground at The Core, a home for early stage, high-tech companies



**Longship**  
celebrates opening of new 29,000 SF building in Hamburg area



**Thoroughbred Aviation Maintenance**  
opens new headquarters in Lexington creating 47 new jobs

**Access Loan program**  
facilitates over \$24M in loans for small businesses since 2001

2021



**Coastal Cloud Partnership**  
celebrates UK Salesforce Consultancy Incubator Program grand opening

**LFUCG Small Business Economic Stimulus & Recovery Grant Programs**  
administers over \$6.9 million to over 500 businesses

**Commerce Lexington Inc.**  
named to *Site Selection Magazine's* list of Top Economic Development Agencies for 2nd year in a row



**Total Quality Logistics**  
expands, creating 300 new jobs in Lexington

**Canadian-owned Vector Corrosion Technologies**  
locates first US manufacturing facility in Lexington



**Galls**  
expands Lexington headquarters with \$2.7M investment, adding 80 new jobs



**2022 Unity Award**  
presented to Commerce Lexington by Alpha Beta Lambda Chapter Education Foundation



**Space Tango** expansion of microgravity R&D facility adding 16 jobs and investing \$2.1M

**Lexington Manufacturing Company**  
celebrates grand opening of new, more efficient facility

2022



**Lexmark International**  
breaks ground on a \$4 million solar panel array project at Lexington headquarters



**Valvoline**  
expands by opening heavy-duty fleet service center

**Commerce Lexington**  
facilitates the launch of Bluegrass Tech Task Force

**Kinetic by Windstream**  
breaks ground on regional HQ building

**Lexair**  
announces \$8.5 M expansion investment

**ElectraMet**  
marks expansion with ribbon cutting and open house



**Commerce Lexington**  
recognized for Money Smart for Small Business Classes



## B

## History of Organization and Statement of Qualifications

B.  
History of  
organization.

## A TIMELINE OF HIGHLIGHTS

**Legacy Business Park**  
receives \$2M in KPDI  
funding

**Neogen**  
expands Mercer Road  
Location with \$6M  
investment, adding 72  
new jobs



**Webasto**  
announces \$25.6M  
investment, adding 120  
new jobs



**Opportunity Exchange**  
Celebrates 10 Years of  
Accelerator Program



**Commerce Lexington**  
facilitates inaugural  
Global HQ CEO  
Roundtable

**RD1 Spirits**  
locates in Lexington  
with \$4.8M investment

**Commerce Lexington &  
Mayor Linda Gorton**  
host CEO networking  
event at VisitLEX

2023



**Funai**  
Microfluidic Solutions  
Relocates Business  
Unit Headquarters to  
Lexington



**God's Pantry Food Bank**  
breaks ground on  
expansion and new  
building

**Bespoken Spirits**  
a San Francisco start-up,  
relocates to Lexington  
adding 16 high-wage  
positions

**Infineon Technologies**  
expands with \$5.5M  
investment, adding 54  
new high paying jobs

**Accelerator Program**  
hits \$50 million in new  
contracts and revenue  
since 2013

**Commerce Lexington**  
hosts BioTech Network,  
bringing together 40  
industry leaders

**SRC of Lexington**  
announces \$15.3 M  
expansion, adding 60  
new jobs



**Destination Showcase**  
features Lexington, KY



**Tru-Tone Finishing**  
expands with \$13.6 M  
investment



**Commerce Lexington**  
presents Leadership  
& Management in  
Economic Development  
Workshop

2024

**Commerce Lexington  
Partners with Turner-UK  
Construction Diversity  
Accelerator**  
for 3rd consecutive year,  
graduating 28 to date  
open house

**Tech Association of the  
Bluegrass re-launches**



**Access Loan Program**  
facilitates over \$25M  
in loans for small  
businesses since 2001



**Money Smart**  
graduates 80  
participants since  
classes began in 2020

**Commerce Lexington  
hosts Marketing  
Luncheon for  
Indianapolis site  
selection consultants**

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

A list of individuals that would be actively engaged and involved in the project along with the percentage of their time that will be committed to the Lexington-Fayette County efforts related to the project.

Individual information should include: Resume(s); Job Description(s); and percentage of their time that will be committed to the project for each/all individual(s) who will be a part of the program team as proposed by the RFP response.

Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

### OUR TEAM



**Bob Quick, IOM CCE**  
President and CEO

*Function: 2.1, 2.2, 2.3, 2.5, 2.6, 2.7, 2.8, 2.11*

*Over 25% of time committed to the project*

Bob is the President and Chief Executive Officer for Commerce Lexington, a 1,900-member investor-driven chamber of commerce and economic development organization. He is extremely involved in the Central Kentucky region in matters of public policy; and community, economic, and leadership development. He represents Lexington in the Bluegrass Alliance, a nine-county consortium of regional economic development entities and was a founding partner in the Central Kentucky "Regional Public Policy Group."

Both entities have proven to be 'region builders' by unifying cities, towns, and counties across Central Kentucky. Under his leadership, Commerce Lexington has received numerous industry accolades, including 2020 Top 20 Mac Conway Economic Development Agency by Site Selection Magazine, and 2016 Chamber of the Year by the Association of Chamber of Commerce Executives (ACCE). Throughout his career, Bob has served, and continues to represent Lexington on local, national and international business, educational and industry boards of directors and advisory councils, including his current appointment with the prestigious U.S. Chamber's Chamber of Commerce Committee of 100.

During his 34 years in the chamber profession, he has also served as the President and CEO of the Metropolitan Evansville (IN) Chamber of Commerce and as the Executive Vice President of the Iowa City Area Chamber of Commerce.

Bob is a 1985 graduate of the University of Illinois at Champaign-Urbana.

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

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### OUR TEAM (cont.)



#### Gina Hampton Greathouse

Vice President for Economic Development

*Function: 2.1, 2.2, 2.3, 2.5, 2.6, 2.7, 2.8, 2.11*

*75% of time committed to the project*

Gina is a highly experienced and respected community and economic development professional with over 30 years of expertise, 25 of which have been dedicated to Lexington and the Bluegrass Region. Currently serving as the Executive Vice President for Economic Development at Commerce Lexington, Gina is known for her dedication, creativity, and proven leadership skills. She oversees the strategy and implementation of Commerce Lexington's economic development mission, including managing the goals of the Lexington Economic Partnership.

In her role, Gina has expanded Commerce Lexington's focus to include supporting existing businesses, fostering industry ecosystems, engaging with minority businesses, marketing Lexington's assets, and building relationships with senior business leaders. She excels in managing the economic development process, attracting major companies to Lexington, and facilitating business relocations.

Gina's efforts have led to the creation of over 12,000 jobs, \$5 billion in capital investment, and \$20 million in payroll tax revenue for Lexington in the last decade. She was instrumental in establishing the Bluegrass Business Development Park, which is home to 7 companies including Big Ass Fans, Webasto Roof Systems, and Tiffany and Co.

Through strategic partnerships with the City of Lexington, the University of Kentucky, Bluegrass Community and Technical College, and key business partners, Gina and her team have secured over \$1 million annually from the private sector to support job creation in Lexington and the Greater Lex region. A graduate of the University of Kentucky's College of Business and Economics, Gina is a long-time resident of Lexington and a passionate advocate for the region's economic development.

# B

## History of Organization and Statement of Qualifications

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### OUR TEAM (cont.)



#### **Tyrone Tyra**

Senior Vice President - Community & Minority Business Development

*Function: 2.3, 2.5, 2.6, 2.7*

*100% of time committed to the project*

Tyrone Tyra, Senior Vice President of Community & Minority Business Development at Commerce Lexington, is a dedicated professional committed to fostering economic opportunities for entrepreneurs in Central Kentucky, particularly within minority communities. With a focus on business development, Tyrone has dedicated his career to providing crucial support to small businesses, offering lending opportunities, technical assistance, and training programs aimed at promoting growth and sustainability.

In his role at Commerce Lexington, Tyrone manages a wide range of responsibilities, including public and private sector purchasing assistance, minority business recruitment, advocacy, and community outreach. Notably, he spearheaded two LFUGG grant projects that administered \$6.9 million in small business stability grants, highlighting his proactive approach to securing funding for local businesses.

Tyrone's leadership extends beyond his role at Commerce Lexington, as he actively participates in various boards and committees focused on diversity, equity, and inclusion within economic development. His involvement with organizations such as the Lexington-Bluegrass Minority Business Expo Board of Directors and the Kentucky Association of Economic Development's Diversity, Equity & Inclusion Committee underscores his commitment to promoting inclusive economic growth. With a background in LaSalle University and roots in Detroit, Michigan, Tyrone brings a wealth of knowledge and experience to his role, further enhancing his ability to drive positive change and empower entrepreneurs in Central Kentucky.



# B

## History of Organization and Statement of Qualifications

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### OUR TEAM (cont.)



#### **Niki Goldey**

Director of New Business Development, Economic Development

*Function: 2.1, 2.11*

*75% of time committed to the project*

Niki Goldey joined the Commerce Lexington team in the fall of 2022 as Director of New Business Development and works alongside her team to demonstrate Lexington's best attributes for companies considering locating or expanding to Lexington. Niki's primary focus is on new business attraction, with focus on the recently identified Strategic Target Industries. She regularly attends trade shows, conferences, and economic development events to establish and maintain relationships with site selection consultants, business leaders, state and local government officials, utility, and transportation representatives. Prior to joining Commerce Lexington, Niki was on staff at VisitLEX for 22 years and most recently served as the Director of Communications where she worked to raise awareness of Lexington as a premier travel, conference, and meeting location. Her primary focus was to establish and maintain vital working relationships with journalists and influencers to encourage positive regional, national, and international stories about Lexington's Bluegrass Region. Niki is a graduate of Transylvania University where she earned a bachelor's degree in business administration with an emphasis in marketing.

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

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### OUR TEAM (cont.)



#### Cheryl Klever

Director of Business Retention & Expansion, Economic Development

*Function: 2.2, 2.11*

*100% of time committed to the project*

As Director of Business Retention & Expansion on the economic development team at Commerce Lexington, Cheryl works alongside her team to demonstrate Lexington's best attributes for companies considering location or expansion to Lexington. Cheryl's primary focus is business retention and expansion. She regularly meets with existing businesses and various industries within Fayette County to learn about their operations, challenges, and successes. She provides companies with a wealth of resources, programs, and services to support and encourage expansion opportunities. Cheryl nurtures healthy relationships with existing businesses to promote a prosperous ecosystem of economic success in Fayette County. Prior to joining Commerce Lexington's team, Cheryl was the Development Manager for one of Central Kentucky's largest nonprofit organizations, Community Action Council. Her primary focus there was to foster relationships between business and community leaders within the non-profit sector. Cheryl has a bachelor's degree in communications from the University of Kentucky.



#### Katie Vandegrift

Director of Marketing & Research, Economic Development

*Function: 2.1, 2.2, 2.8, 2.11*

*75% of time committed to the project*

Katie Vandegrift is a dynamic professional serving as the Director of Marketing & Research for Commerce Lexington's Economic Development team. She plays a pivotal role in maintaining comprehensive data across various sectors including demographics, economy, labor, taxes, real estate, cost of living, and education. Katie is instrumental in managing marketing materials, advertisements, and updating social media and website content to position Lexington as a prime business destination. Katie's academic journey began at Midway University, where she earned a bachelor's degree in Equine Health and Rehabilitation in 2012. After developing an allergy to horses, she returned to her alma mater and obtained a master's degree in business administration in 2021. Her professional career is diverse, with experience in hospitality, the thoroughbred industry, and banking. Katie is deeply rooted in her community in Midway where she is actively involved, serving in leadership positions on various non-profits and boards including the Woodford County Economic Development Authority. Katie's dedication to economic development and community service makes her a vital asset to her team and her community.

# B

## History of Organization and Statement of Qualifications

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### OUR TEAM (cont.)



#### **Falon McFarland**

Project Manager, Economic Development

*Function: 2.3, 2.5, 2.6, 2.7, 2.8*

*75% of time committed to the project*

Since 2021, Falon McFarland has leveraged her diverse skill set to enhance the Economic Development team. In her role as Project Manager, Falon provides comprehensive administrative support, oversees the Full Stride Capital Campaign, which is over the \$1 million mark, coordinates events for community and minority business development programs, offers technical assistance to both aspiring and established small business owners, and contributes creatively to the marketing efforts of the Community and Minority Business Development programs across our social media platforms and website. Before joining Commerce Lexington, Falon accumulated over 11 years of professional experience in the telecommunications industry, specializing in marketing research, product management, and systems analysis. She is deeply committed to fostering relationships within the local small business community, aiming to ensure that every entrepreneur has the requisite knowledge and access to capital for success in their endeavors. Outside of her professional responsibilities, Falon actively engages with her community in various capacities. She holds memberships in the Beta Gamma Omega Chapter of Alpha Kappa Alpha Sorority, Incorporated®, the Central Kentucky Chapter of Jack and Jill of America, Inc., and serves as the Children and Youth Ministry Leader at First Baptist Church Bracktown. Falon holds dual bachelor's degrees in Computer Information Systems and Marketing from Grambling State University, along with an MBA from the University of Texas at Tyler, specializing in Marketing.

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

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### RESUMES

#### ROBERT L. QUICK, IOM, CCE

Phone: 859-226-1616 | E-Mail: bquick@commercelexington.com

#### CURRENT POSITION

##### Commerce Lexington Inc., President, and Chief Executive Officer, 2001–Current

- 1,900-plus member chamber of commerce & economic development group
- 5+ million-dollar operating budget
- Commerce Lexington Inc. formed on January 11, 2004, when the Greater Lexington Chamber of Commerce, Lexington United (Economic Development Group), and the Lexington Partnership for Workforce Development merged.
- Commerce Lexington Inc. is the lead business organization in Central Kentucky for advancing economic development (entrepreneurial start-ups, expansion, retention, and recruitment), public policy, leadership development, domestic and international benchmarking, minority and small business development.
- In 2016, the organization achieved the highest industry distinction being named the Association of Chamber of Commerce Executives, 2016 Chamber of the Year.
- 2018, 2020, & 2021 TOP Economic Entity.

#### PAST PROFESSIONAL EXPERIENCES

- Metropolitan Evansville (IN) Chamber of Commerce, President and Chief Executive Officer, 1994- 2001
- Iowa City Area Chamber of Commerce, Executive Vice President, 1989 – 1994
- Iowa City Area Chamber of Commerce, Vice President Membership Development, 1988 - 1989
- World Agricultural Expo, Assistant Manager, 1987-1988 (Top 10 World Agricultural event – 1988)
- Ralston-Purina, Inc., Sales Representative, 1985-1987
- United States Department of Agriculture (U.S.D.A.) Economics Division, Economist Assistant, Washington D.C. 20250. May – August 1983
- United States Department of Agriculture (U.S.D.A.), Office of the Secretary – John R. Block, Public Liaison Office, Administrative Assistant, Washington, D.C. 20250. May – August 1982
- National Secretary, National FFA Organization, Alexandria, Virginia 1980-1981
- State President, Illinois FFA Organization, Roanoke, Illinois 1979–1980



# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

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Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

### RESUMES | ROBERT L. QUICK (CONT.)

#### PROFESSIONAL ACTIVITIES

- Commerce Lexington Inc., Board Secretary, 2001 – Current
- Lexington Strides Ahead Foundation, Inc., Board of Directors, 2014 – Current
- Business & Education Network (B.E.N.), Board of Directors, 2004 – Current
- Lexington Industrial Foundation, Board Secretary, 2001 – Current
- Federal Reserve Bank of Cleveland - Cincinnati Branch, Lexington Business Advisory Council, 2009 - Current
- Chamber of Commerce of the United States, Chamber of Commerce Committee of 100, 2004 - Current
- Association of Chamber of Commerce Executives (A.C.C.E.)
  - *Benefit Trust Board, Six-Year Term, 2015 – 2020; Board Chair – 2019, 2020*
  - *Past-Chair, Certified Chamber Executive (C.C.E.) Commission Board*
  - *Past ACCE Board Member*
- Central Kentucky Regional Public Policy Group, Group Co-Founder
- Downtown Lexington Partnership, Advisory Board

#### COMMUNITY INVOLVEMENT

- YMCA of Central Kentucky, Past Board Member, 2010 - 2014

#### PROFESSIONAL AFFILIATIONS

- Association Chamber of Commerce Executives (A.C.C.E.)
- Chamber of Commerce of the United States

#### PERSONAL INFORMATION

- Hometown: Bement, Illinois
- Family: Julie A. Quick – Wife, 3 Adult Children
- Church: St. John's Lutheran Church; Church Leader
- Interests: Sports-Softball, Snow Skiing, Basketball; Reading-Business and Political Leadership Books

**Education:** University of Illinois, Bachelor of Science, Agricultural Economics, 1985

**Professional Certification:** Certified Chamber Executive (C.C.E.), 1999–Current

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

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Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

### RESUMES (CONT.)

#### GINA HAMPTON GREATHOUSE

Phone: 859-226-1623 | E-Mail: ggreathouse@commercelexington.com

A dedicated and respected community and economic development professional. Over 30 years of experience in the economic development field, with over 25 of those being focused on improving and promoting the Great Lexington Region. Team leader, creative, energetic, outspoken, outgoing, willing to go the extra mile.

### EXPERIENCE

#### Commerce Lexington Inc. Executive Vice President, Economic Development 2018 - Current

- Manage the economic development team in initiating, developing, and maintaining programs that attract and grow jobs and capital investment to Lexington and the Bluegrass region.
- Manage business attraction efforts focusing on recommended strategic focus areas including, but not limited to Biopharma, Business and Professional Services, AgBio/Agtech, Marketing/Design, Medical Devices, and others.
- Interact with leading national & global site selection consultants, leaders, and real estate brokers.
- Implement economic development goals and objectives for the Lexington and the Bluegrass area and interface and coordinate with clients and various community and regional partners.
- Manage implementation of a \$1,000,000 budget including RFP/ grant writing, fundraising, and building sponsorships.
- Responsible for over 25 years of fundraising for the economic development team via the Full Stride Capital Campaign and City funding. Raised over \$30,000,000.
- Maintain strong relationships with local CEOs to connect to learn trends, needs, and partnerships.
- Direct the Commerce Lexington project management team to achieve the goals for the Lexington Economic Partnership initiatives such as Business Retention and Expansion outreach, new and expanding business project activity, minority business opportunities, and site visits.
- Coordinate the efforts of the regional Bluegrass Alliance (BGA). Organize marketing trips to major cities with site selection consultants for Lexington and the BGA regional partners.
- Represent and share Commerce Lexington's economic development mission at regional, national, and global events. Biotechnology Industry Organization (BIO), Select USA, Area Development Forums, Consultant Connect.

# B

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### RESUMES | GINA HAMPTON GREATHOUSE (CONT.)

- Represented the Lexington and the Bluegrass on trade missions to Japan, China, Germany, Dubai, and the United Kingdom. Interfaced with existing businesses with operations in those countries.
- Interact with state, local and federal officials. Governor's Office, Kentucky Cabinet for Economic Development various Kentucky State Agencies, Congressional Offices, and others.

#### **Commerce Lexington Inc., Lexington, KY Senior Vice President, Vice President—Economic Development (2004–2018) Senior Project Manager, Project Manager(1995-2004)**

- Worked with economic development team charged with promoting Lexington and Central Kentucky as a profitable place for companies to locate and expand.
- Managed business attraction efforts with focus on strategic targets in technology including data centers, manufacturing, business and professional services, life sciences, and distribution.
- Assisted new and existing clients in the site selection process by providing necessary information, such as financing, taxes, state/local incentives, workforce data and training, real estate, utilities, and local business connections.
- Managed a six-person project management team focused on the core economic development practices.
- Maintained and cultivated relationships with investors, board of directors, elected officials, site selection consultants, and economic development professionals.
- Coordinated regional strategic plan for economic development.
- Managed marketing initiatives in collaboration with team and marketing agency to promote Lexington and Central Kentucky as a place for business.

#### **Kentucky Cabinet for Economic Development Project Manager (1993–1995)**

- Responsible for promoting economic development in Kentucky by marketing and recruiting new companies to locate or expand into all areas of Kentucky.
- Responsible for preparing financial proposals used to recruit manufacturing and service companies.
- Assist clients with site selection process through all phases of project.
- Liaison between various state governmental agencies with clients.
- Located over 30 new companies across Kentucky which lead to the creation of over 3,800 jobs.

# B

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### RESUMES | GINA HAMPTON GREATHOUSE (CONT.)

#### **Kentucky Cabinet for Economic Development Assistant State Enterprise Zone Coordinator (1990–1993)**

- Responsible for promoting economic development in Kentucky by marketing and recruiting new companies to locate or expand into Kentucky's 10 Enterprise Zones.
- Coordinated and presided over monthly meetings of the Kentucky Enterprise Zone Authority.
- Responsible for managing and coordinating various activities of the ten local zone administrators.

#### **Kentucky Governor's Office for Policy and Management Policy Budget Analyst Senior (1990), Policy Analyst (1988–1990)**

- Responsible for analysis of Policy and Budgets of Kentucky's Educational System which involved the preparation of biennial budget, reports, briefing documents and other materials for presentation to the State Budget Director, the Governor, Executive Branch Officials and others.
- Instrumental in the preparation of the 1990 Kentucky Education Reform Act.

### EDUCATION

#### **University of Kentucky, Lexington, KY**

- Bachelor of Business Administration, Graduated May 1988 with Honors

### COMMUNITY AND INDUSTRY INVOLVEMENT

- International Economic Development Council, Member
- Industrial Asset Management Council, Member
- Kentucky Association for Economic Development (KAED), Board Member
- Japan America Society of Kentucky
- American Chamber of Commerce Executives
- LexArts, Board of Directors
- Opportunities for Work and Learning (OWL), Board Member
- 2016 KAED Economic Development Professional of the Year
- Member of the 2016 American Chamber of Commerce Executives Chamber of the Year team
- President of Opera House Square Neighborhood Association



# B

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### RESUMES (CONT.)

#### TYRONE TYRA

Phone: 859-223-6233 | E-Mail: ttyra@commercelexington.com

Extensive experience as a senior level administrator in an economic development agency; direct sales for national corporations; business trainer and consultant; entrepreneur; Key manager of Chamber named 2016 American Chamber of Commerce Executives Chamber of the Year; and business manager for the company designated as the 2002, 2001, 2000 Small Business Association's Micro-lender of the Year.

### EXPERIENCE

**Senior Vice President Community & Minority Business Development, Commerce Lexington, 2016-Present**

**Vice President Community & Minority Business Development, Commerce Lexington, 2005- 2016**

**Vice President for Business Development, Community Ventures Corporation (CVC), 1995-2005**

### ACCOMPLISHMENTS

- Key Contributor to Commerce Lexington's 2016 American Chamber of Commerce Executives National "Chamber of the Year Award"
- Responsible for 57% increase in Ethnic Minority membership in first 15 months with Commerce Lexington
- Created Minority Business Accelerator in 2013
- Coordinated over \$13.5 million in procurement opportunities for Minority Business Enterprises
- Grew Access Loan Program for \$4.2 to \$23 million
- Expanded lending partners from 12-26
- Expanded CVC's client list from 65 to 320 in 6 years
- Managed over \$1 million SBA loan portfolio
- Instrumental in developing networks to supply CVC with expanding markets
- Increased service area from 17 to 31 counties including three satellite offices
- CVC's Business Division named 2002, 2001, & 2000 U.S. Small Business Administration's Micro-lender of the Year

# B

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### RESUMES | TYRONE TYRA (CONT.)

#### RESPONSIBILITIES

##### Marketing

- Growth of Minority Business Accelerator
- Promotion of Access Loan Program
- One-on-One technical assistance to perspective business owners & entrepreneurs
- Coordinating with other regional supplier diversity firms to grow participation
- Increased client base by building a network via participation in diverse organizations and events
- Support Commerce Lexington with membership in national and regional organizations
- Working with national for-profit corporations to connect local minority business enterprises
- Provide support to small chambers in the region in assisting businesses with access to capital
- Support Commerce Lexington with membership on several community board
- Presented to several community organizations no less than 15 times yearly on CVC's programs and services
- Coordinated and supervised the business division's comprehensive recruitment efforts

##### Management

- Manage 5-8 Minority Business Accelerator members
- Coordinating consultant activities to assist MBE's
- Management of Minority Business Development Advisory Committee
- Synchronize activities of Access Loan Sub- & Full committees
- Timely reporting to Commerce Lexington Board of Directors
- Technical assistance to start-up & existing small businesses
- Supervised 6-7 Business Development Specialists
- Managed department budget of over \$750,000
- Responsible for training and development of a nationally recognized staff.
- Determined credit potential and liability of clients

# B

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### RESUMES | TYRONE TYRA (CONT.)

- Project director for several CDBG and loan funds including partnership grants with Kentucky State University, Small Business Administration Loan Fund and School-to Work grant
- Recruited and serviced 13 in-house incubator clients

#### Strategic Planning

- Created a business plan and mission statement for CVC's business development division including research, data analysis, and action plans to meet increasing demands for clients
- Executed plan using a multi-tiered continuum of services
- Developed methods and procedures for recovery on defaulted loans

#### Collections

- Responsible for recovery of defaulted and delinquent loans
- Served as collections' liaison for staff on defaulting clients
- Operated as Legal contact to report to CFO

### Business Development Specialist Community Ventures Corporation (CVC), 1995-2002

#### ACCOMPLISHMENTS

- Successfully managed client portfolios of \$250,000
- Decreased delinquency rate by 12%
- Increased client base by 5%
- Developed training curriculum for Business, Planning and Feasibility program

#### RESPONSIBILITIES

- Supported entrepreneurial recruitment in 17 Bluegrass counties
- Provided classroom training and technical assistance to new business developers focusing on budget development, market research, basic accounting and inventory management
- Provided ongoing assistance throughout the development of clients' businesses
- Assisted in securing funding for clients
- Determined credit potential and liability of applicants
- Coordinated loan application process from application through disbursement
- Provided post-loan technical assistance

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### RESUMES | TYRONE TYRA (CONT.)

#### PROFESSIONAL AFFILIATIONS

Kentucky Chamber of Commerce Small Business Council-2012-Present

American Chamber of Commerce Executives' Diversity Equity & Inclusion Division  
Member, Kentucky Supplier Diversity Collaborative

Vice Chair of Mayor's Economic Development Committee Kentucky SBA Lenders  
Conference Committee

Member, former Co-Chair Bluegrass Minority Business Expo Committee  
Commerce Lexington Access Loan Committee- 2001 to Present Lexington Transit  
Authority-2007-2013

Member United Way of the Bluegrass Board of Directors- 2007- 2017



# B

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### RESUMES (CONT.)

#### NIKI GOLDEY

Phone: 859-226-1622 | E-Mail: NGOLDEY@commercelexington.com

#### EXPERIENCE

##### **Commerce Lexington, Inc. Director of New Business Development, Economic Development, 9/2022 - current**

- Assist the Executive Vice President for Economic Development and team in strategic planning of marketing initiatives to recruit new primary business to the central Kentucky region.
- Attend national forums, conferences, and trade shows to demonstrate central Kentucky's quality of life and opportunities for business development.
- Initiate and manage new business prospect activity and coordinate site visits with state, local, and industry partners as necessary.
- Work alongside internal team to support existing business retention, expansion, and entrepreneurial development.
- Collaborate with regional economic development partners to coordinate meetings, special events, programs, and project updates.
- Demonstrate ability to analyze and communicate data relevant to workforce, wages, tax revenues, capital investment, real estate development and other primary economic development factors as appropriate.
- Coordinate economic development packages with Kentucky Cabinet for Economic Development & Lexington-Fayette Urban County Government to demonstrate central Kentucky's primary assets.
- Assist clients and site selection consultants in obtaining information on environmental regulations, transportation, utilities, real estate options, available incentives, and funding sources, etc.
- Remain current about federal, state, or local legislation/regulation changes, which affect economic development.

##### **Director of Communications, VisitLEX, August 2008-July 2022**

- Responsible for attracting media professionals to facilitate travel articles.
- Developed and maintained relationships with editors and freelance journalists.
- Facilitated internal and external communication plans on behalf of leisure, meeting sales and organizational marketing efforts.
- Managed relationship with national PR firm and local agency.
- Planned and executed media events in feeder cities.

# B

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### RESUMES | NIKI GOLDEY (CONT.)

- Prepared itineraries and hosted domestic and international journalists.
- Created, prepared, scheduled and distributed e-marketing messages to key leisure travel markets, industry partners, convention sales markets and community leaders.
- Wrote and distributed press releases.
- Maintained media relations and film sections of VisitLEX.com.
- Managed photo/video libraries and delivered assets for internal and external projects.
- Contracted with photographers and collaborated with agency of record to ensure photo/video library contained necessary assets for VisitLEX projects.
- Wrote and edited articles for incoming groups to increase meeting attendance.
- Maintained working knowledge of new developments in Lexington and the region.
- Coordinated with broadcast media, film crews and the KY Film Office/Commission.
- Worked with marketing team on social media outreach and managed influencer relationships.
- Maintained CRM, tracked coverage and sent reports to staff and industry partners.

### Media/Communications Manager, Lexington Convention and Visitors Bureau, July 2002-July 2008

- Proactively facilitated editorial opportunities by attending media showcases and developing relationships with editors and freelance journalists.
- Planned all itineraries and entertained all incoming domestic and international media.
- Responded to requests from all media.
- Tracked editorial coverage and maintained communications CRM.
- Managed photography and video assets.
- Produced and maintained marketing/promotional materials.

B

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RESUMES | NIKI GOLDEY (CONT.)

Marketing/Information Services Assistant, Lexington Convention and Visitors Bureau, August 2000-June 2002

- Responded to requests from media for information on Lexington.
- Tracked editorial coverage and maintained communications CRM.
- Assisted sales team in the development and execution of familiarization programs.
- Updated and maintained internal systems and materials.
- Assisted in development of collateral materials.

EDUCATION

Bachelor of Arts, Business Administration with Marketing Emphasis, 2000, Transylvania University

PROFESSIONAL AND COMMUNITY INVOLVEMENT

2000-2022	Public Relations Society of America, member
2000-2022	Kentucky Tourism Industry Association, member
2020-2022	Kentucky Film and Digital Entertainment Association, Inc., board member
2022-present	Kentucky Association for Economic Development, member
2023-present	International Economic Development Council, member
2024-present	Southern Economic Development Council, member

# B

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### RESUMES (CONT.)

#### CHERYL L. KLEVER

Phone: 859-227-0911 | E-Mail: cklever@commercelexington.com

#### EXPERIENCE

##### Director of Retention & Expansion, Commerce Lexington Economic Development 10/2019–CURRENT

- Collaborates meetings between various organizations and existing business community to support workforce development, provide knowledge on training grants, tax incentives and current business climate in Fayette County and region.
- Connects employers and employees to encourage workforce development.
- Monitors, manages compliance reports and projects pertaining to workforce development in central Kentucky region.
- Develops and initiates industry specific network events to provide best practices, and monitors performance.
- Identifies and reviews funding contracts to ensure compliance.
- Maintains open communication by presenting regular updates on project status to employers, economic development, and executive team members.
- Fosters relationships with existing business community and stakeholders to promote positive working relationships.
- Identifies plans and resources required to meet project goals and objectives.
- Heads team projects specializing in design and launch activities.

##### Development Manager, Community Action Council 9/2011–9/2019

- Partnered with board of directors, senior management, and department to align project goals with business strategy and define project milestones.
- Managed and coordinated solicitation of private, corporate and foundation gifts to secure unrestricted revenue.
- Identified funding opportunities and lead the planning and implementation of all fundraising opportunities and events to meet annual development goals, including annual giving and planned giving initiatives.
- Recruited and managed tasks, time sheets and coordination of volunteers
- Created and managed annual signature fundraiser event to secure stakeholder commitments and created public awareness for organization.
- Drove departmental performance and achievement of service levels through focused team operational reviews, structured coaching and managing to enterprise targets.



# B

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### **RESUMES | CHERYL L. KLEVER (CONT.)**

#### **EDUCATION & CERTIFICATIONS**

August 2011, Bachelor of Science, Communication, University of Kentucky

June 2004, Associate of Science, Liberal Arts and General Studies, Harrisburg Area Community College

#### **SKILLS**

- Professional Leadership skills
- Sensitive to diversity
- Passionate about community
- Tenacious spirit to achieve goals
- Distinguished written and verbal communication
- Dedicated to enhancing quality of life

#### **ACTIVITIES**

I've been invested in community engagement since 2009 when I volunteered to be a Troop Leader for Girl Scouts of America. Since then, I've discovered ways to stay involved with various committees, organizations, and community driven conversations. During my career at Community Action Council, I joined the Employee Engagement Committee, registered as an Emerging Leader at Commerce Lexington, facilitated, and hosted annual On the Table discussions, joined Lexington Forum as a member, and accepted the nomination as Board member for LFUCG Neighborhood Action Match Board which I am still involved. In 2017, I became a Certified Community Action Professional. Between 2019 and 2021, I was the President for Parent Teacher Student Association and Track & Field Booster Club. To date, my children and I volunteer at the Salvation Army.

# B

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### RESUMES (CONT.)

#### KATIE VANDEGRIFT

Phone: 859-226-1621 | E-Mail: kvandegrift@commercelexington.com

#### EXPERIENCE

##### Director of Marketing & Research, Commerce Lexington Economic Development, 2020–Current

- Collaborate with the economic development team to drive recruitment, support existing businesses, and foster entrepreneurial growth.
- Maintain comprehensive logs and databases of business interactions, tracking employment trends, wages, and regional company challenges
- Monitor news outlets to stay abreast of client activities and pertinent economic developments.
- Assist in crafting proposals detailing Lexington's corporate climate, encompassing taxes, financing, incentives, labor, and workforce data.
- Provide clients and consultants with crucial information on regulations, transportation, utilities, real estate, and funding sources.
- Manage marketing initiatives and social media promotion to position Lexington as an attractive business destination.
- Write articles for various publications and manage content for the Locate in Lexington website and associated social media.
- Monitor legislative and regulatory changes impacting economic development.
- Participate in recruitment trips, trade shows, and special events as needed to meet prospects and partners.
- Maintain relationships with regional leaders, economic developers, chamber executives, consultants, and staff at the Kentucky Cabinet for Economic Development
- Assist the Executive VP with business briefings, board reports, and preparing metric reports for local government officials
- Respond to RFPs, manage prospect inquiries, and coordinate press releases and business profiles.
- Regularly update and maintain statistical data for chamber publications and the Greater Lexington Business Prospectus
- Conduct quarterly real estate tours, and maintain a comprehensive commercial real estate database for Lexington and the region
- Develop methodologies for analyzing business location trends and supporting recruitment efforts, including arranging community visitations, and preparing local economy overviews.

# B

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### RESUMES | KATIE VANDEGRIFT (CONT.)

#### Marketing & Administrative Manager, Commerce Lexington Economic Development, 2019–2020

- Supported the process for business expansion/relocation in Lexington and the region
- Managed overall office operations for Economic Development Division, including inventory management, telephone inquiries, correspondence assistance, and equipment maintenance.
- Provided administrative support to economic development team and CEO by coordinating meeting set-up, ordering lunches, and maintaining a professional office environment
- Assisted with updates to websites, e-newsletters, and commercial property databases
- Supported Economic Development Department with administrative tasks, event preparation, editing press releases, and delivering department materials.
- Coordinated program logistics, including distribution lists, meeting notices, reservations, billing, and event set-up; updated program website regularly.

#### Personal Banker, WesBanco/United Bank & Capital Trust Company (merged in 2018), 2018–2019

- Proactive member of the banking center team by being an initial contact for new and existing clients.
- Identified and resolved complex customer service opportunities and issues.
- Supported the retention and growth of profitable client relationships through sale of basic deposit and consumer loan products.
- Analyzed required financial and personal data to cross sell products and services to the customer.

#### BSA Compliance Analyst, WesBanco/United Bank & Capital Trust Company, 2017–2018

- Provided strategic and comprehensive review of OFAC and 314a cases to ensure compliance with regulatory standards and internal requirements.
- Oversaw the generation of CIP and MOI reporting.
- Held accountable for Subpoena log management.
- Aided in CRA reporting and the performance of SAR research.
- Conducted monthly monitoring of high-risk consumers.
- Performed in various capacities as a BSA Specialist II, Deposit Compliance Specialist and Title Insurance Specialist as needed.

# B

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### RESUMES | KATIE VANDEGRIFT (CONT.)

- Served as the Compliance Committee Secretary

#### **Risk Support Specialist, WesBanco/United Bank & Capital Trust Company, 2017**

- Served in a role providing support to the Enterprise Management Department, aligning performance with organizational objectives.
- Prepared materials utilized in various meetings.
- Purchased and administered supplies and maintained supply storage.
- Analyzed and updated vendor management documents.
- Held accountable for records management specific to Attorney liability insurance, subpoena log, fraud files, after-hours call list, and calendars.
- Approval authority for liability insurance.
- Performed tasks as the Title Insurance Specialist in their absence.

#### **Bank Teller, WesBanco/United Bank & Capital Trust Company, 2015–2017**

- Engaged with customers to assess needs, present solutions, and answer banking inquiries.
- Processed monetary transactions including deposits, withdrawals, and payments.
- Presented new and additions solutions to clients.
- Balanced the vault and ATM transactions daily.
- Performed onboarding activities in support of new customers

#### **Office Manager, Lantern Hill Farm 2012–2017**

- Managed administrative functions through the oversight and performance of various duties.
- Processed monthly client billing.
- Organized logistics of thoroughbred sale consignments.
- Oversaw records management of farm data.



B

History of Organization and Statement of Qualifications

B.1 – B.3

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Individual information should include: Resume(s); Job Description(s); and percentage of their time that will be committed to the project for each/all individual(s) who will be a part of the program team as proposed by the RFP response.

Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

RESUMES | KATIE VANDEGRIFT (CONT.)

EDUCATION AND CERTIFICATIONS

Master of Business Administration, 2021, Midway University  
Bachelor of Science, Equine Health & Rehabilitation, 2012, Midway University  
Kentucky Institute for Economic Development, 2020  
Leadership Lexington, 2023

PROFESSIONAL AND COMMUNITY INVOLVEMENT

President - Midway Woman’s Club, 2020 – present  
Treasurer - Midway Woman’s Club, 2012 – 2020  
Board Member - Woodford County Economic Development Authority 2017–2019  
Chair & Founder - Midway Childcare Task Force, 2017–2019  
Campaign Manager / Treasurer - Grayson Vandegrift for Mayor 2014 & 2018  
Co-coordinator - Midway Fall Festival, 201

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

A list of individuals that would be actively engaged and involved in the project along with the percentage of their time that will be committed to the Lexington-Fayette County efforts related to the project.

Individual information should include: Resume(s); Job Description(s); and percentage of their time that will be committed to the project for each/all individual(s) who will be a part of the program team as proposed by the RFP response.

Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

### RESUMES (CONT.)

#### FALON MOORE MCFARLAND

Phone: 859-226-1621 | E-Mail: fmcfarland@commercelexington.com

### EXPERIENCE

#### Project Manager, Commerce Lexington Economic Development, 10/2023 – Present

- Manages the Full Stride Capital Campaign approaching \$1 million in investments.
- Manage the facilitation of financial literacy classes sponsored by minority business development from planning to execution.
- Coordinates networking events such as the Opportunity Exchange
- Provides technical support to aspiring and existing small business owners.
- Assists in the marketing management of the Economic Development and Community & Minority Business Development social media platforms.
- Provides editing and production of articles for the Economic Development and Community & Minority Business department in our business publication, press releases, board reports, and newsletters.
- Creates presentations, detailing the program elements of Community & Minority business platform to aspiring and existing business owners.
- Represents Commerce Lexington at networking events and community partnership programs.
- Manages the marketing of Community & Minority Business programs including content creation for financial literacy classes via social media and advertisements; creation of marketing materials used in magazine publications, sponsorship materials, and news journals; co-coordinated, co-wrote and reviewed video content for 10th Anniversary of the Minority Business Accelerator program.
- Assist with Ribbon Cuttings and other Full Stride/Top Investor events.
- Oversees administrative support to the team.
- Assist in the maintenance of commercial real estate databases and community and minority business development website.

#### Administrative Project Coordinator, Commerce Lexington Economic Development, 7/2021–10/2023

- Coordinate and assist with the activities and special projects of Community & Minority Business Development, such as the Opportunity Exchange, FDIC backed Money Smart for Small Business classes, and the LFUCG Small Business Economic Recovery Grant.

# B

## History of Organization and Statement of Qualifications

### B.1 – B.3

A list of individuals that would be actively engaged and involved in the project along with the percentage of their time that will be committed to the Lexington-Fayette County efforts related to the project.

Individual information should include: Resume(s); Job Description(s); and percentage of their time that will be committed to the project for each/all individual(s) who will be a part of the program team as proposed by the RFP response.

Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

### RESUMES | FALON MOORE MCFARLAND (CONT.)

- Manage new prospect projects for the Economic Development team through assisting clients and site selection consultants in obtaining information on environmental regulations, transportation, utilities, real estate options, available incentives, and funding sources, etc.
- Oversees administrative functions, assist with event preparation and coordination, and supplies for special events including Geeks Night Out, Networking Groups, Ribbon Cuttings, etc. Assist Department with editing and production of press releases, board reports, newsletters, project/client materials, etc.
- Assist in the management of social media platforms and commercial real estate databases.

### **Lumen Technologies (formerly CenturyLink, Incorporated) – Monroe, LA, 7/2005–11/2016 | Product Manager, Senior/Lead Analyst, Business Systems, Product Integration - Marketing**

- SME Analyst for L-Qwest CRIS/ACSR billing systems for HSI Promotions and Prism Product and Promotion set up.
- Cross-functioned with IT, Billing, Process, and Segment partners daily to ensure accurate pricing, front-end rep and Online visibility, accurate scenario availability, and accurate bill formatting.
- Developed specific requirements and delivered to IT, based on the needs of the Product Segment team.
- Assumed Responsibility for L-CTL Ensemble billing system for HOA and MDU Product and Promotions.

### **Analyst I, Coordinator – Product Support - Marketing**

- Consistently achieved high standard of billing code quality for setup in billing, tables, sales, ordering, provisioning and reporting.
- Led, guided, and instructed new hires in daily processes for accurate billing code set up, conversion related tasks such as data querying, early termination fees, quality assurance, and system integration.
- Implemented matrix for HOAs during early phases of price plan setup to assist in quality billing code setup, provisioning documentation. These matrices now serve as a reference for future HOA/MDU setup as well as reference for Customer Service account set up and training documentation.

### **Market Research Analyst - Marketing**

- Researched industry competitors via cold calling techniques, website analysis.
- Created content for small focus groups.

# B

## History of Organization and Statement of Qualifications

**B.1 – B.3**

A list of individuals that would be actively engaged and involved in the project along with the percentage of their time that will be committed to the Lexington-Fayette County efforts related to the project.

Individual information should include: Resume(s); Job Description(s); and percentage of their time that will be committed to the project for each/all individual(s) who will be a part of the program team as proposed by the RFP response.

Describe the qualification(s) of key staff to achieve the outcomes required under the RFP.

**RESUMES | FALON MOORE MCFARLAND (CONT.)**

- Wrote surveys targeting consumers and potential consumers in various service markets.

**EDUCATION AND CERTIFICATIONS**

- 2020 Master of Business Administration, University of Texas at Tyler
- 2005 Bachelor of Science, Computer Information Systems, Grambling State University
- 2005 Bachelor of Science, Marketing, Grambling State University
- 2021 Kentucky Institute for Economic Development – Coursework Completion

**PROFESSIONAL AND COMMUNITY INVOLVEMENT**

- 2022–Present Central Kentucky Chapter of Jack and Jill of America, Inc.
- 2021–Present Kentucky Association for Economic Development 2021–Present Beta Gamma Omega Chapter of Alpha Kappa Alpha Sorority, Incorporated
- 2021–Present Children & Youth Ministry Leader, First Baptist Church Bracktown
- 2012–2015 Longview (TX) Habitat for Humanity



# B

## History of Organization and Statement of Qualifications

### B.4

Describe why your organization is best suited for selection of the project on behalf of LFUCG.



**AREA**DEVELOPMENT



### HERE'S OUR PROOF

The Lexington-Fayette Urban County Government (LFUCG) has partnered with Commerce Lexington for many years to provide continuity and enhanced focus in the areas of business, economic development, minority business development, and workforce development. This partnership and its funding from the LFUCG have leveraged additional funding from the private sector resulting in a greater than 3 to 1 ratio. The business relationships that come with it are invaluable. We have grown from a small recruiting and marketing organization once known as Lexington United, to a very strong organization that is deeply committed to Lexington and the Bluegrass Region. Here's our proof:

### COMMERCE LEXINGTON AWARDS AND RECOGNITIONS

Large Metro Economic Development Organization, *Business Facilities* (2024)  
 First-Rate Economic Development Agency, *Southern Business & Development* (2020)  
 Unity Award, Alpha Beta Lambda Chapter Education Foundation (2022)  
 Mac Conway Award for Excellence in Economic Development, *Site Selection Magazine* (2018, 2020 & 2021)  
 #1 Chamber of the Year, *Association of Chamber of Commerce Executives* (2016)  
 Economic Professional of the Year, Gina Greathouse, *KAED* (2016)  
 ACCE's Grand Award – Communications & Marketing – "Here's our Proof" (2015)  
 Marketing Campaign Marketing Slogan of the Year Winner, *fDi Intelligence* (2017)  
 Perfect Score, Existing Business Support, *Financial Time-Nikkei* (2022 – 2023)

### LEXINGTON AWARDS

#10 Top Metro by Number of Economic Development Projects, *Site Selection Magazine* (2023)  
 #7 Top Metro by Number of Economic Development Project per Capita, *Site Selection Magazine* (2023)  
 #7 Mid-sized Metro with Best Business Climate, *Business Facilities* (2023)  
 Leading Metro Location for Economic Growth, *Area Development* (2023)  
 #8 Best Cities for Food Manufacturing, *Global Location Strategies* (2023)  
 #3 Friendliest City in the US, *Readers' Choice Awards* (2023)  
 #2 Best Run City in America, *WalletHub* (2023)  
 Top 100 Best Places to Live in the U.S., *Livability* (2023)  
 13th Most Educated City in Advanced Degrees, *U.S. Census* (2023)

### STATE AWARDS

Top Five State by Number of Economic Development Projects Per Capita (Kentucky), *Site Selection Magazine* (2019 - 2023)  
 Top Ten State by Number of Economic Development Projects (Kentucky), *Site Selection Magazine* (2019 -2020 & 2022)  
 Gold Shovel Award (Kentucky), *Area Development* (2022 & 2023)  
 Silver Shovel Award (Kentucky), *Area Development* (2019 & 2020)

## B

## History of Organization and Statement of Qualifications

**B.5**

Provide references for completed projects similar to the project you have responded to in your proposal.

**ENDORSEMENTS**

"I wanted to write a brief note describing the very positive experience we had hosting one of our Destination Summits in Lexington in partnership with the Commerce Lexington team. We do these events all over the Country and it doesn't happen often where we work with a team that is as detail oriented as us! In hosting 9 site consultants and 7 economic developers, the Commerce Lexington left no stone unturned as they rolled out the red carpet for the guests. They really provided a unique experience to those on the ground and the site consultants left Lexington with a very positive updated perception of the region. They also have a very engaged group of partners and stakeholders that really helped to tell the Lexington story. The region has a lot to offer and consultants truly believe it is a region that has a high opportunity for growth!"

–Nick Riashi, Sr. Director, Consultant Connect

"I am just arriving back in Tryon, NC after a wonderful few days in your beautiful city. From my experience it's rare that a city the size of Lexington is able to retain the charm that I discovered during my visit. Thank you as our hosts for making the visit experiential, informative and entertaining. That's a winning combination."

–James Blair, Managing Director, Navigator Consulting

"Thanks again for hosting lunch yesterday. I was really impressed by that three-county collaboration on the development of that new site. I can't say I've even seen that kind of skin-in-the-game collaboration. Let me know if I can ever help you all out. If I get down that way, I'll be sure to let you know."

–Jacon Everett, CECd, Founder, Corsa Strategies

"Thanks so much for hosting lunch yesterday. It was very well done and informative. I hope we have the opportunity to work together in the future."

–Chad Sweeney, Sr. Principal, Ginovus

"I know I'm biased as I do own horses and love the equine industry, but I can say that this is one of the more interesting community visits I've made. We walk through a lot of community colleges and technical schools on these types of visits which is great, but you all took it up a notch by taking us to see the equine hospital. I learned a lot about your community and was glad to participate."

–Kathy Mussio, Partner, Atlas Insights *(phone conversation)*

"I enjoyed attending Commerce Lexington's consultant event at Fasig-Tipton. It was a very unique event mixing area CEOs, government officials, and visiting site selection consultants. Witnessing first-hand how Commerce Lexington works to attract new business to the area was impressive and I look forward to future collaboration."

–Allen Waugerman, President & CEO, Lexmark

# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

"After almost 40 years as an Economic Developer, I have never been more excited to participate with our partners in Madison, Fayette and Scott Counties to implement a true benchmark regional Business Park. From the time we (the partners) met together with SSG on our site visit and developed our "plan" on how to structure a collaborative and cooperative venture, the process is working. I have always been proud of our teamwork with Fayette County and Commerce Lexington and now truly bringing together the essence of regionalism and it "can and will work."

—**Jack Conner, Executive Director, Scott County United**

"When assembling the sales team for prospect visits, Commerce Lexington has the RIGHT people at the table. They keep us engaged in the process of RFPs. They know when to ask for assistance. Commerce Lexington's economic development team takes a comprehensive approach to fostering economic growth, staying attuned to trends and emerging technologies, and leveraging industry expertise to position Lexington and the surrounding region for continued success. Columbia Gas proudly supports its dedication to fostering growth and creating opportunities in Lexington and the entire region."

—**Tyler Burke, Manager, Large Customer Relations & Economic Development, Columbia Gas**

"CLARK, a top 10 global forklift manufacturer with its North America headquarters and manufacturing in Lexington, KY, made a commitment to the region over 40 years ago and continues to enjoy its business relationship with the community, especially in Fayette County. Commerce Lexington provided vital support early on with everything from land development contacts and local land availability to personnel seeking employment. They have always had the pulse of the county, and knew where to turn when we needed local support. Their organization's contact support and credibility have introduced CLARK to the community through various programs, most notably the annual Train the Trainer program during National Forklift Safety Day. CLARK's participation in the Regional Leadership Council has become a critical part of their long-range business planning, providing unparalleled cohesive reporting and dialogue. As a Full Stride Investor, CLARK believes in the power of a strong local Commerce and looks forward to many more years of collaboration with Commerce Lexington."

—**Dennis Lawrence, President and C.E.O.**

# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

"Commerce Lexington has been instrumental in the following areas and events: Hosting incentive forum for existing BGS businesses. Cultivating growth through incentives for potential businesses at BGS. Providing step by step growth path for KD Analytical, an existing BGS business. Invited and assisted with tours and business plans for potential business, MEOS."

–General Steve Collins, Director, Bluegrass Station, Department of Military Affairs

"I am writing this letter of recommendation on the programs and partnerships that have been created through Commerce Lexington and the Community and Minority Business Development Program. I have had the pleasure of working closely with Tyrone over a number of years. His leadership, dedication, expertise and commitment to fostering community minority business development has significantly enriched the efforts within this Community and region. While altering the landscape of business development and leveling the playing field. It has been nothing short of exceptional. His strategic insights and innovative approach have been instrumental in driving meaningful change towards business development and advancing the cause of Minority and Community Economic Development."

–Edward Holmes, AICP, President, EHI Consultants

Commerce Lexington has been a long-time supporter and partner with the University of Kentucky on many economic development programs and initiatives. While UK has been a general sponsor of many Commerce Lex programs, in recent years, that growth has focused on minority business development. There are a number of innovative programs offered by the Minority Business Development office, such as: Access Loan, Money Smart for Small Business classes, Minority Business Accelerator, Opportunity Exchange, and Black Faith Leaders Collaborative. In 2022, Commerce Lexington became one of the first supporters for the Turner-UK Construction Diversity Accelerator, a 10-week construction development program to upskill minority contractors to be more competitive in the construction industry. That support continues today. The program has graduated nearly 50 contractors who are capable of bidding on projects and winning contracts. Commerce Lexington also participates in other UK events such as: certification events, construction outreach events, veteran-owned business events, and events that support students on campus through diversity and hiring fairs.

–Marilyn Clark, Economic Inclusion Manager, University of Kentucky

# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

"VisitLex deeply appreciates the collaborative efforts and strategic partnership with CLX in promoting Lexington as a premier destination for business meetings and events. Our ongoing business outreach initiatives, supported by CLX, have been instrumental in attracting a diverse range of companies to host their meetings in Lexington. This partnership not only enhances our city's visibility as a top-tier meeting location but also drives economic growth and fosters a vibrant business community. Together, we continue to set new benchmarks in service excellence and create memorable experiences for all our corporate visitors."

—**Mary Quinn Ramer, President, VisitLEX**

"Commerce Lexington is a key partner to our economic development efforts at Kentucky Utilities. Their strength for collaboration makes it easy for our team to quickly respond to prospective and importantly existing customers. Commerce Lexington has strong relationships with many of our same stakeholders which make us more effective. They help us stay united to accomplish the same goals of seeing Lexington, the bluegrass region and the Commonwealth, grow and prosper. We at KU are proud to partner with Commerce Lexington."

—**Roxann Fry, CECD, Manager, Business & Economic Development, LG&E and KU Energy LLC**

"The University of Kentucky (UK) and Commerce Lexington have been working together for many years on economic development projects and marketing the central Kentucky region. It is a strong, mutually beneficial relationship. There are many examples of the good work these entities do together. One of the biggest is a major economic development agreement between UK and the City of Lexington government to create a 200-acre industrial park. This agreement originated in a land task force meeting where Commerce Lexington brought together representatives from government, business, UK, and other landowners. Other examples include:

- Assistance on a Product Development Initiative grant applications where UK received \$500,000 from the state to build laboratory space at the Coldstream Research Campus.
- Marketing UK's Coldstream Research Campus to prospective tenant and site selection consultants.
- Presentations on economic development and site development for visiting chambers of commerce looking at what Lexington has done well.
- Working together to sell the Bluegrass Region by assembling appropriate UK personnel to meet with business prospects.



# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

- Revitalizing the Biotech industry affinity group and having a presence at the Biotech Industry Organization's (BIO) International Convention to enhanced research and development efforts at the university.
- We are proud of the work we have done together and appreciate the willingness of the Commerce Lexington Economic Development team to work with UK on mutually beneficial projects."

–**George Ward, AVP for Economic Development & Real Estate, University of Kentucky**

"Commerce Lexington has been a valuable partner to Belcan for nearly two decades. They have helped us in so many ways. Some examples are, navigating the complexities of government initiatives, real estate deals, event organization, and much more. They are a true partner and a valuable asset for businesses in central Kentucky."

–**Ben Marsico, VP, Resource Alignment and Program Manager, Belcan**

"University of Kentucky Innovation Connect has been pleased to partner with Commerce Lexington to foster a thriving ecosystem for innovation and economic growth in our region. Our collaboration on place-based federal grant programs such as NSF Engines and EDA Tech Hubs has laid the foundation for establishing robust technology hubs that drive progress and prosperity. The joint effort to create a Kentucky-themed footprint at the BIO International Conference in 2023 and 2024 has significantly elevated our profile in the BIO industry, to aid in attracting investments and spurring growth in life sciences investments and technologies in our region. Additionally, our continued coordination in attracting and nurturing businesses to the Bluegrass Region underscores our commitment to catalyzing sustainable development. Through strategic planning, roundtable discussions, and facilitating access to research and regulatory resources, we are collectively building a dynamic life sciences industry that promises enduring benefits for our region and beyond."

–**Landon Borders, Innovation Connect Executive Director, University of Kentucky | Chelsea Ex-Lubeskie, Innovation Connect Manager, University of Kentucky**

"The Kentucky Career Center – Bluegrass and Commerce Lexington has had an ever-growing partnership over the last several years. Commerce Lexington's work with the Lexington Economic Partnership has become a testament to their leadership and ability to bring organizations together for the common good and create a

## B

## History of Organization and Statement of Qualifications

**B.5**

Provide references for completed projects similar to the project you have responded to in your proposal.

**ENDORSEMENTS (CONT.)**

positive lasting effect. The connections forged through their work on LEP has assisted workforce in the Bluegrass to create lasting connections with businesses and community partners in Fayette County. In addition, their skills and expertise regarding the Lexington-Fayette County economy have proved invaluable to planning workforce efforts for the county's citizens."

–**Rolando Thacker, Business Services Manager, Bluegrass Area Dev District | Staci May, Planning and Information Manager, Bluegrass Area Development District**

"The strong partnership between Bluegrass Community and Technical College (BCTC) and Commerce Lexington is invaluable as we advance workforce and economic development in Central Kentucky. Commerce Lexington's leadership in this space has greatly assisted BCTC's ability in providing high-quality, responsive workforce training across multiple industry sectors. Through Commerce Lexington's leadership and the LEP Program, BCTC has connected with many businesses and organizations to upskill their current workforce with new and emerging technologies as well as provide needed supports to assist new businesses in securing needed talent. In addition, Commerce Lexington has been a key leader in promoting work-based learning opportunities such as apprenticeships and internships for BCTC students as a mechanism for connecting talent to employers."

–**Erin Tipton, Ed.D., VP of Workforce and Economic Development, Bluegrass Community and Technical College**

"Kentucky American Water is proud to partner with Commerce Lexington and their team of economic development experts to drive growth and prosperity in the Central Kentucky region. Commerce Lexington fosters a thriving business environment that attracts new businesses, creates jobs and enhances the overall economic vitality of our region. Together we can build a strong foundation for a sustainable future that benefits us all."

–**Kathryn Nash, President, Kentucky American Water**

"Commerce Lexington has proven to be a valued partner of KY VALOR over the past few years. From inviting our team to networking opportunities with local businesses, to providing introductions to likeminded programs— we have greatly appreciated their support and ability to connect organizations together. Their knowledge of local industries has served as a helpful resource while we assist military families making Lexington their post-service home."

–**Nicki Stewart, Workforce Development Manager, KY VALOR**

# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

"Kinetic appreciates the partnership and collaboration that we have with Commerce Lexington. Community success requires leadership from government and the business community working together. Commerce Lexington provides communication and the ability for businesses to make a difference in our community. Lexington is a wonderful place to live and work and we all have the responsibility to work together to make it a world class community!"

–**Stephanie Bell, VP Government Affairs, Kinetic by Windstream**

"Commerce Lexington is vital to the vibrancy and economic growth of the Central Kentucky region. By combining their vast experience and leadership skills with a steadfast commitment to the advancement of the region, Commerce Lexington skillfully navigates the complexities of prospective projects. They unite key stakeholders with a careful assessment of their client's needs to craft a winning package for both their clients and the region. R. J. Corman Railroad Company is proud to partner with Commerce Lexington and support the shared goal of fostering economic growth, attracting investment and creating prosperity that sustains our local communities for years to come."

–**April Colyer, Commercial Development Manager, R.J. Corman**

"The Office of Employer and Apprenticeship Services, in conjunction with the Kentucky Career Center, is proud to support the efforts of Commerce Lexington. Our inclusion in this vibrant group of community leaders allows us to highlight the services we can provide at the state level in order to support businesses and organizations with resources that are often overlooked. The collaboration with the Lexington Economic Partnership team allows us to collectively work together for the singular purpose of strengthening businesses within the community and following up to ensure the actions achieve the desired results. When organizations work together to achieve a common purpose great things can happen."

–**Ben Richardson, Apprenticeship Workforce Consultant, Kentucky Education and Labor Cabinet**

# B

## History of Organization and Statement of Qualifications

### B.5

Provide references for completed projects similar to the project you have responded to in your proposal.

#### ENDORSEMENTS (CONT.)

"Since the early 1990s Lexington United, now folded into Commerce Lexington, has been providing economic development services to Lexington-Fayette County. During those three-plus decades Commerce Lexington has contributed to the team effort of all the notable economic development achievements in Lexington. In doing so, it has developed skills and expertise that make it inextricably linked with economic development in our community."

—Steve Byars, VP and Chief Investment Officer, Moneywatch Advisors / Board Chair, Commerce Lexington

"Commerce Lexington partners with the Kentucky Cabinet for Economic Development to collaborate on marketing new and existing buildings and sites using the ZoomProspector database. The up-to-date property information that Commerce Lexington and other local economic development partners across the state provide is important and crucial information that companies need to make a decision to locate and/or expand their business in Kentucky."

— Amy Mills, Sites & Buildings Specialist, Kentucky Cabinet for Economic Development

# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

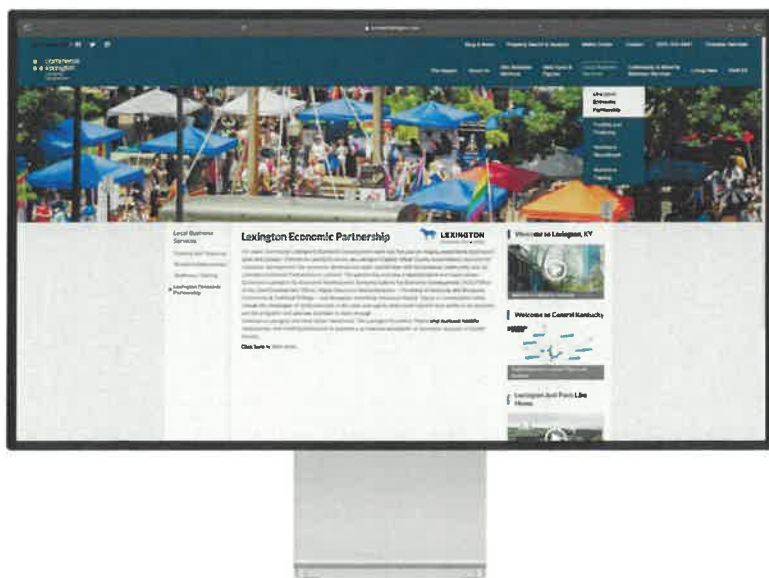
Presentation(s).

Other work products, etc.

### (2.1) NEW BUSINESS DEVELOPMENT

#### MARKETING EXAMPLES WITH LEXINGTON ECONOMIC PARTNERSHIP BRANDING

In addition to existing business initiatives, Commerce Lexington leverages the strength and commitment of the partnership to help promote Lexington.





# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.1) NEW BUSINESS DEVELOPMENT KENTUCKY PRODUCT DEVELOPMENT INITIATIVE THE CORE & LEGACY BUSINESS PARK

In 2019, the Commerce Lexington Economic Development team partnered with University of Kentucky officials to help secure a product development initiative (PDI) grant created by the state and the Kentucky Association for Economic Development. This grant enabled the Coldstream Research Campus to receive a \$500,000 matching grant to develop lab space in their new building.

In 2022, Commerce Lexington assisted the Lexington Fayette Urban County Government to help secure a product development initiative (PDI) grant created by the state and the Kentucky Association for Economic Development. This grant provided \$2 million to complete infrastructure build-out for the 200 acre industrial park.



September 7, 2022

Josh Bays  
Partner  
Site Selection Group, LLC  
8215 Douglas Ave., Suite 500  
Dallas, TX 75225  
Via email to: [jfbay@KSASOnline.org](mailto:jfbay@KSASOnline.org)

Dear Josh:

On behalf of Commerce Lexington Inc.'s economic development division, I am writing in support of the Lexington-Fayette Urban County Government's grant request for the Kentucky Product Development Initiative (PDI) for Legacy Business Park. Commerce Lexington recognizes the need for more shovel-ready product in Lexington and the Commonwealth. We work regularly with clients and site location consultants to find locations for all types of new businesses. Our team's greatest challenge has been and continues to be finding contiguous industrial land for business recruitment efforts.

Following Lexington's previous comprehensive plan process in 2018, a group of business leaders, city officials, representatives from the University of Kentucky and the Agricultural Industry came together to find a solution to our lack of contiguous land. As a result, the City and University of Kentucky agreed to a historic solution - swapping land to form a new business park, Legacy Business Park, owned and operated by the city.

The Lexington-Fayette Urban County Government is submitting a grant application to supplement the \$9.5 million awarded from the Lexington-Fayette Urban County Council's distribution of American Rescue Plan Act (ARPA) dollars to begin infrastructure buildout of Legacy Business Park. Investing in infrastructure will give Lexington a competitive opportunity to create jobs, advance economic growth and enhance the quality of life for the region.

Our economic development team urges you to strongly consider LFUCG's request for grant funding to assist in the build out of infrastructure at Legacy Business Park. If you have any questions for our team, please don't hesitate to contact me. Thank you for your consideration.

Sincerely,

Gina Greathouse  
Executive Vice President, Economic Development  
Commerce Lexington Inc.

330 East Main St., Lexington, KY 40507  
Ph: (502) 254-4447  
[LexiconLexington.com](http://LexiconLexington.com)



## C

## Evidence of Ability to Perform the Requested Tasks

**C.1 – C.3**

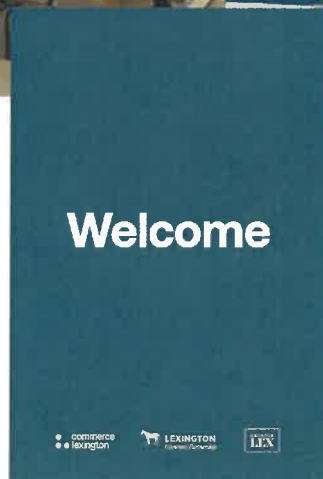
Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.1) NEW BUSINESS DEVELOPMENT CONSULTANT CONNECT

In April of 2024, Commerce Lexington and the Lexington Economic Partnership hosted a group of site selection consultants for a Destination Showcases with Consultant Connect. Site consultants experienced an eye-opening tour at Rood & Riddle Equine Hospital followed by a community update at the American Board of Family Medicine within Coldstream Research Campus. After the update, the consultants attended a reception and mock horse sale at Fasig-Tipton which was also attended by business executives, community leaders, and Bluegrass Alliance economic development officials. The next day featured quality of life experiences including a day at the races with Kinetic by Windstream and a historic walking tour of the Lexington Distillery District. The final morning featured one-on-one meetings with consultants. Guests were enthusiastic about the visit and shared positive feedback about having a deeper knowledge of Greater Lexington's economic development priorities.



Other work products, etc.

Created by Commerce Lexington's Economic Development team, Lexington's Business Prospectus is designed to provide prospective companies and existing businesses with the basic information needed to evaluate the Lexington area as a business location.





## C

## Evidence of Ability to Perform the Requested Tasks

**C.1 – C.3**

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

**(2.1) NEW BUSINESS DEVELOPMENT  
TRADE SHOWS / CONSULTANT EVENTS**

Commerce Lexington actively participates in a variety of tradeshows and consultant events throughout the year to promote Lexington as an attractive location for business expansion and relocation.



Select USA	
Hotel cost (1)	\$608.88
F&B	\$227.47
Travel	\$788.04
Registration (1)	\$995.00
	<b>\$2,619.39</b>

Chicago Site Selector Event	
United Center Rental	\$12,060.00
Car Rental + Gas + UBER	\$534.90
F&B	\$793.74
Hotel (2)	\$1,038.42
	<b>\$14,427.06</b>

Women in ED/KY United (Chicago)	
Hotel Cost (1)	\$561.18
Registration	\$1,795.00
PPlane Cost + UBER	\$681.70
F&B	\$128.65
KY United Fee	\$1,200.00
	<b>\$4,366.53</b>

International BIO	
Hotel cost (1)	\$1,299.60
F&B	\$238.32
Travel	\$564.28
Registration (2)	\$5,000.00
	<b>\$7,102.20</b>

EconomiX	
Registration (2)	\$3,565.50
Car Rental + UBER	\$475.74
Hotel (2)	\$2,174.38
F&B	\$183.06
	<b>\$6,398.68</b>

Bluegrass Alliance Out of Market Event - ATL	
Hotel cost (1)	\$565.26
Event Cost	\$5,086.07
Gifts	\$1,123.33
Car Rental + gas	\$406.90
Applied Marketing Event Planning	\$5,000.00
	<b>\$12,181.56</b>

IEDC Annual Conference & KY United Event	
Hotel cost (1)	\$635.07
Registration	\$975.00
PPlane Travel + UBER	\$711.06
F&B	\$141.59
KY United Fee	\$1,200.00
	<b>\$3,662.74</b>

Annual Total	
Select USA	\$2,619.39
International BIO	\$7,102.20
BG Alliance Marketing Event	\$12,181.56
Chicago Site Selector Event	\$14,427.06
EconomiX	\$6,398.68
IEDC Conference + KY United	\$3,662.74
Women in E.D. + KY United	\$4,366.53
	<b>\$50,758.16</b>

## C

## Evidence of Ability to Perform the Requested Tasks

## C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.



Presentation(s).

Other work products, etc.

## (2.2) EXISTING BUSINESS RETENTION AND EXPANSION

### EXISTING BUSINESS MEETINGS

Commerce Lexington serves as Lexington-Fayette Urban County Government's resource for economic development. Our economic development team connects the business community to the Lexington Economic Partnership. The partnership includes a representatives from Commerce Lexington, Kentucky Cabinet for Economic Development, LFUCG Office of the Chief Development Officer, University of Kentucky, Bluegrass Community & Technical College, and the Bluegrass Workforce Innovation Board.

**LEXINGTON**  
Economic Partnership

Retention Survey

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### RETENTION

<p>Interview date*</p> <p>Interviewer 1*</p> <p>Interviewer 2</p> <p>Company contact*</p> <p>Survey information notes</p> <p>Type of business</p> <p><input type="checkbox"/> AgBio &amp; AgTech</p> <p><input type="checkbox"/> Automotive/EV</p> <p><input type="checkbox"/> BioPharma &amp; Life Sciences</p> <p><input type="checkbox"/> Business &amp; Financial Services</p> <p><input type="checkbox"/> Food &amp; Beverage Processing</p> <p><input type="checkbox"/> HQ</p> <p><input type="checkbox"/> Healthcare</p> <p><input type="checkbox"/> Marketing &amp; Design Services</p> <p><input type="checkbox"/> Medical Devices &amp; MedTech</p> <p><input type="checkbox"/> Tech</p> <p><input type="checkbox"/> Warehouse &amp; Logistics</p> <p><input type="checkbox"/> Other</p> <p>If Other please specify</p> <p>How long in Lexington?</p> <p>Ownership</p> <p><input type="checkbox"/> LLC</p> <p><input type="checkbox"/> Sole</p> <p><input type="checkbox"/> Minority</p> <p><input type="checkbox"/> Other</p> <p>If Other please specify</p> <p>Sales/Revenue</p> <p>Current business trends</p> <p>Location of customer base/clients</p> <p>Suppliers location</p> <p>Any needs?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Please specify</p> <p>Lexington only employee count</p> <p>Full-time</p> <p>Remote FTE</p> <p>Part-time</p> <p>Temporary</p>	<p>Wage rates Low</p> <p>High</p> <p>Capital investment</p> <p><input type="checkbox"/> Recent <input type="checkbox"/> Future</p> <p>How large is the operation?</p> <p>Own or Lease?</p> <p><input type="checkbox"/> Own <input type="checkbox"/> Lease</p> <p>Need additional or different space?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Growth opportunities</p> <p><input type="checkbox"/> Expansion - real estate <input type="checkbox"/> Expansion - number of employees <input type="checkbox"/> Modernization <input type="checkbox"/> R&amp;D</p> <p>Need a prospect survey?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Utilities</p> <p>Needs</p> <p><input type="checkbox"/> Electric <input type="checkbox"/> Water <input type="checkbox"/> Gas</p> <p>Challenges/Needs</p> <p><input type="checkbox"/> Financing</p> <p><input type="checkbox"/> Legislative</p> <p><input type="checkbox"/> Training</p> <p><input type="checkbox"/> Workforce</p> <p><input type="checkbox"/> Other</p> <p>If Other specify</p> <p>LEP needs/opportunities</p> <p><input type="checkbox"/> Bluegrass Area Development District</p> <p><input type="checkbox"/> Bluegrass Community Technical College</p> <p><input type="checkbox"/> Catalyst for Economic Development</p> <p><input type="checkbox"/> KY Innovations</p> <p><input type="checkbox"/> KY Career Center</p> <p><input type="checkbox"/> LFUCG</p> <p><input type="checkbox"/> University of Kentucky</p> <p><input type="checkbox"/> Other</p> <p>If Other specify</p> <p>Financing/funding</p> <p>Legislative</p> <p>Training/Workforce</p> <p>Import/Export opportunities</p> <p>Visit Lex Partnership and/or Opportunities</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Open discussion</p> <p>Follow up items</p>
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# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.2) EXISTING BUSINESS RETENTION AND EXPANSION NETWORKING GROUPS

Commerce Lexington has a proven track record of being the go-to convener for Central Kentucky and Lexington's business community.

In partnership with Awesome Inc. and Bluegrass Area Development District, Commerce Lexington invites you to join....

### TECH EMPLOYER ROUNDTABLE DISCUSSION

Thursday, March 17 - 12-2pm

Come prepared to share:

- Key positions vital for success in tech industry.
- Job titles, Seniority levels, Skills, Experience.
- Current Job openings

Commerce Lexington  
330 East Main Street  
2nd Floor Conference Room  
Lunch Provided



Tech Network

### Mayor Linda Gorton's CEO Cocktail Network Event Run of Show

VisitLEX  
Historic Courthouse  
215 W. Main Street  
4:30 – 6:30pm

3:00pm	Commerce Lexington team arrives to deliver gifts, bags, banners, centerpieces.
3:30pm	Bayou Bluegrass Catering arrives to set up food, beverages, and bar.
4:30pm	Guests arrive.
4:45pm	Welcome and Thank you from Lexington-Fayette Urban County Gov't and city.
	Mayor Linda Gorton, LFUCG
4:50pm	Mayor Introduces Bob Quick
4:50pm	Welcome and Thank you from Commerce Lexington.
	Bob Quick, Commerce Lexington
4:55pm	Bob Introduces Mary Quinn
4:55pm	Welcome and Thank you from VisitLEX.
	Mary Quinn Ramez, VisitLEX
5:00pm	Bob Introduces Bourbon Tasting Experience – Bayou Bluegrass Catering
5:00pm	Bourbon Tasting Experience (30 mins)
6:30pm	Event Concludes – Guests leave with a gift bag.

## New Years' Railsolutions

Join us to kickoff 2024 with industry experts from R.J. Corman, Norfolk Southern and CSX Transportation to learn more about railroads, rail transportation, and why your company may be interested in utilizing rail to transport goods.

Wednesday, January 17, 2024  
11 a.m. until 1 p.m.  
Lunch Provided

Hosted by:  
Big Ass Fans - 2348 Innovation Drive Lexington

Please RSVP by January 12  
fmc@farland@commercelexington.com

# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.3) SMALL BUSINESS OWNER CONNECTIONS AND NETWORKING

### (2.5) MINORITY OWNED BUSINESS DEVELOPMENT

### (2.6) WOMEN OWNED BUSINESS DEVELOPMENT

### (2.7) VETERAN OWNED BUSINESS DEVELOPMENT

### OPPORTUNITY EXCHANGE

For over 20 years Commerce Lexington has hosted the Opportunity Exchange, a networking event held twice a year that promotes business opportunities for small, minority, women, and veteran owned businesses. These events have helped countless business owners with procurement representatives from some of the largest companies in the Greater Lexington Region.



**Spring Opportunity Exchange**  
Presented by Equity Solutions Group

March 23, 2023 | The Campbell House  
4:30-6:30 P.M.

**Guest Speakers**



Myron Thompson  
Chief Operating Officer  
Fayette County Public Schools



Joe Frazier  
Executive Director  
Center for Diversity, Equity & Inclusion  
Kentucky Chamber

Commerce Lexington's 2023 Spring Opportunity Exchange will be held on Thursday, March 23rd, from 4:30 p.m. - 6:30 p.m. at the Campbell House Lexington, Cuno Collection by Hilton, 1875 South Broadway Road. This Opportunity Exchange will feature two guest speakers along with great networking and interaction for minority-owned and small businesses in the Lexington community.

[www.commercelexington.com/events](http://www.commercelexington.com/events)

**commerce  
lexington**

## C

## Evidence of Ability to Perform the Requested Tasks

**C.1 – C.3**

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.5) MINORITY OWNED BUSINESS DEVELOPMENT MINORITY BUSINESS ACCELERATOR PROGRAM

The mission of Commerce Lexington's Minority Business Accelerator is to accelerate the development of sizable minority business enterprises (MBEs) that have achieved revenues between \$250,000 and \$6 million, and to strengthen and expand the regional minority entrepreneurial community. The initiative was created from the findings of the 2009 Joint Economic Inclusion Study commissioned by Commerce Lexington and the Lexington-Fayette Urban League. The MBA was launched in June of 2013. The participants have achieved over \$50 million in contracts and procurement since the program's launch.

## MINORITY BUSINESS ACCELERATOR PROGRAM

The mission of the Minority Business Accelerator Program is to accelerate the development of sizable minority business enterprises (MBEs) and to strengthen and expand the regional minority entrepreneurial community. The MBA will actively seek to improve the readiness of minority businesses while increasing the recognition of the value of ethnic minority-owned businesses as suppliers, customers, and investment opportunities. Since its inception in 2013, this program has produced direct business to the MBA members, achieving over \$50 million in contracts and procurement. Current Accelerator members are listed below:

**ELAINE ALLEN LLC.**  
Elaine Allen provides comprehensive construction management services that provide the best results for your specific project needs and requirements. Elaine Allen offers the following construction services: Project Management, Cost Estimating, Scheduling, Contract Administration and Change Order Management.

**Bishop E. Carter, IV, Owner**  
Bishop.Carter@ElaineAllenLLC.com  
Phone (859)221-1563 | www.elaineallenllc.com

**HELPING HAND, LLC.**  
Helping Hand, LLC, provides an array of apartment services that yields comfort for college students and assistance to college housing managers across the country. The upgraded living services provided include Valet Waste Services, Moving Services, Cleaning services, and Apartment Turn Services.

**Chase Minnifield, Owner**  
info@helpinghandllc.net  
2456 Palumbo Drive, Lexington, KY 40509  
Phone (859)576-6187 | www.helpinghandllc.net.

**EQUITY SOLUTIONS GROUP**  
A certified MBE with headquarters in Lexington, Kentucky, Equity Solutions Group, LLC (ESG), is a strategic sourcing firm with an emphasis on expense reduction while ensuring competitive participation.

**Raymond Daniels, Co-Founder, President and CEO**  
support@esgconsultingllc.com  
Phone: (800) 215-0175 |  
https://esgconsultingllc.com

**PATRIOT GROUP, LLC**  
Leveraging over seventy-five years of industry experience, Patriot Group, LLC is Kentucky's premier minority owned independent insurance agency. Patriot Group focuses on providing insurance products and risk management solutions for businesses. Highly skilled in commercial insurance and risk management, they represent clients that operate locally, nationally and internationally. Patriot Group provides their clients with the tools needed to make informed decisions that mitigate risk.

**Lawrence Herring, Founder & President**  
lherring@patriotinsurance.com  
1591 Winchester Rd., Lexington, KY 40505  
Phone (502)576-6187 | www.patriotinsurance.com

**FACILITY MAINTENANCE & SERVICES GROUP, LLC.**  
Facility Maintenance & Services Group, LLC, provides top quality maintenance, janitorial and cleaning services to clients who appreciate professionalism and quality work. They provide employment opportunities to individuals who enjoy working in the field. The company specializes in Commercial Cleaning, Pressure Washing, Construction Cleanup, High Dusting, Residential Cleaning, and Grounds Keeping.

**Frank Hall, Owner**  
info@facilitymsg.com  
2121 Richmond Rd, Lexington, KY 40502  
Phone (833)225-3267 | www.facilitymsg.com

**PRINTCORE, INC.**  
Printcore Inc. is committed to providing top-quality printing and packaging products. With over 20 years of experience in the printing and packaging arena, we are a one-stop shop for our customers.

**Ray Woods, Owner**  
rayw@printcoreinc.com  
woodsray2@hotmail.com  
Phone: (859)351-4586  
https://www.printcoreinc.com

## C

## Evidence of Ability to Perform the Requested Tasks

**C.1 – C.3**

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

**(2.5) MINORITY OWNED BUSINESS DEVELOPMENT****(2.6) WOMEN OWNED BUSINESS DEVELOPMENT****(2.7) VETERAN OWNED BUSINESS DEVELOPMENT****ACCESS LOAN PROGRAM**

Since its inception in 2001, the innovative Access Loan Program has facilitated over \$25 million dollars in approved loans for small business start-ups and expansions. The program also has partnerships with other chambers and economic development agencies in 19 counties throughout Central Kentucky for a total of 26 participating lenders. The framework of this program was used in 2020 and 2021 when Commerce Lexington managed the city's Small Business Economic Recovery programs, distributing nearly \$6.9 million to local small, minority-owned, women-owned, and veteran-owned businesses.

**commerce  
lexington.**

**WANT TO EXPAND YOUR BUSINESS?  
NEED TO FUND YOUR START UP?**

The Access Loan Program provides easier access to the financing and helpful business advice that you need to start or grow your business. This program is committed to fostering economic growth and enhancing business opportunities for minorities, women, and small businesses. The Access Loan Program has been responsible for over \$24.9 million in financing for the start or expansion of area small businesses since its inception in 2001.

**APPLY NOW**

Contact: Tyrone Tyra  
Sr. Vice President  
Community & Minority Business Development  
Commerce Lexington Inc. | 859-226-1621

**ACCESS LOAN  
PROGRAM**

**OPEN**

Visit Our Website  
[www.commercelexington.com](http://www.commercelexington.com)



# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.5) MINORITY OWNED BUSINESS DEVELOPMENT

### (2.6) WOMEN OWNED BUSINESS DEVELOPMENT

### (2.7) VETERAN OWNED BUSINESS DEVELOPMENT

#### MONEY SMART

Commerce Lexington, a newly minted Federal Deposit Insurance Corporation (FDIC) Money Smart Alliance member, biannually offers the Money Smart for Small Business classes which cover financial literacy topics such as Managing Cash Flows, Organizational Types, and Financial Management. Over the past three years, these sessions have grown tremendously, with the largest class to date, averaging twenty-seven participants each week, consisting of both aspiring and existing business owners. To date, the program has had 80 participants receive certification.



Brian T. Ruth  
March 11

Over the last few weeks, I participated in a program sponsored by Commerce Lexington Inc. called Money Smart for Small Business. The classes were taught by Dale Morgan, the president and CEO of Foundation47, LLC. Dale, along with other special guests, taught a large class about business organization types, tax strategies, cash flow management, and much more. We learned a lot! Plus, this provided an excellent opportunity to network with local small business owners. It was definitely worth the time spent. Big thanks to Dale, the special guests, Commerce Lexington staff, and the amazing cooks that fed the participants delicious meals! I hope this program continues for years to come.

Dale Morgan and 10 others





# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

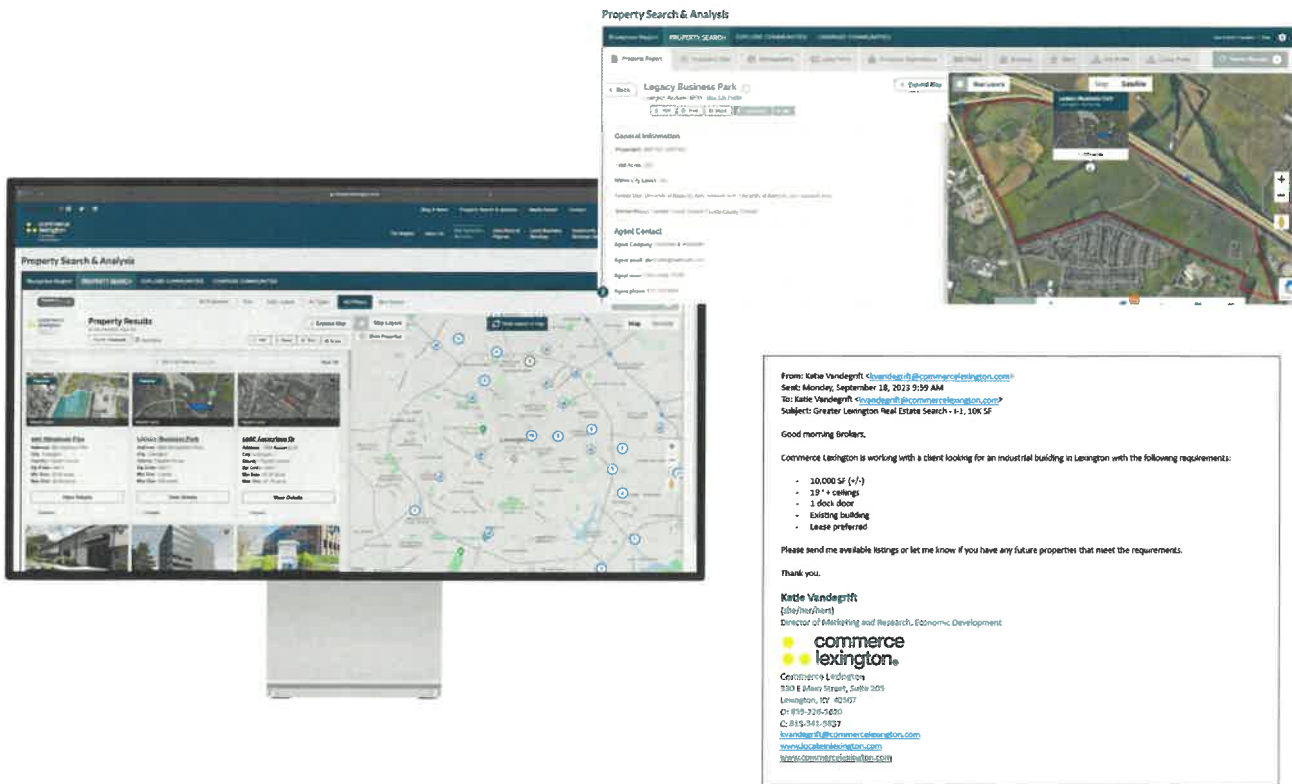
Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

### (2.8) AVAILABLE ECONOMIC DEVELOPMENT PROPERTY REGISTER

Commerce Lexington maintains a comprehensive real estate inventory system for Lexington and the region, providing detailed site and building information for new prospect activity and existing business expansion projects. The team utilizes ZoomProspector to maintain the property database, which serves as an easy-to-use virtual resource for Commerce Lexington, the Lexington Economic Partnership, real estate brokers, and site selection consultants. Having up-to-date property information as well as access to enhanced intelligence components in one location enhances the opportunity for Lexington to be considered during the site selection process.



**Property Search & Analysis**

**Property Results**

**Legacy Business Park**

**From: Katie Vandegrift <kvandegrift@commercelexington.com>**  
**Sent: Monday, September 18, 2023 9:59 AM**  
**To: Katie Vandegrift <kvandegrift@commercelexington.com>**  
**Subject: Greater Lexington Real Estate Search - 1-1, 10K SF**

Good morning brokers,

Commerce Lexington is working with a client looking for an industrial building in Lexington with the following requirements:

- 10,000 SF +/-
- 12' + ceilings
- 1 dock door
- Existing building
- Lease preferred

Please send me available listings or let me know if you have any future properties that meet the requirements.

Thank you.

**Katie Vandegrift**  
 (katievandegrift)  
 Director of Marketing and Research, Economic Development

**commerce lexington**

Commerce Lexington  
 5300 E. Main Street, Suite 205  
 Lexington, KY 40507  
 O: 619-216-5600  
 C: 615-341-2827  
[katievandegrift@commercelexington.com](mailto:katievandegrift@commercelexington.com)  
[www.commercelexington.com](http://www.commercelexington.com)  
[www.researchlexington.com](http://www.researchlexington.com)

# C

## Evidence of Ability to Perform the Requested Tasks

### C.1 – C.3

Examples of relevant past worked products and successful project examples of documents created.

Presentation(s).

Other work products, etc.

**Jacob Isaac-Lowry, CEO,  
FlyWire Cameras**

"The team at Commerce Lexington has been an invaluable resource for our company. Specifically, by connecting us with local organizations able to help meet our immediate business needs such as the World Trade Center - who helped us successfully kick off a new project in Montevideo, Uruguay in January. The Commerce Lex team has also been a great resource for surfacing local funding opportunities such as the Bluegrass AgTech Development Fund!"

### (2.11) AG-TECH AND AGRI BUSINESS DEVELOPMENT

Commerce Lexington shares relevant information with the AgTech community, including but not limited to conferences, local, state, and federal grants, networking events, educational opportunities, and more to encourage growth within the AgTech and AgBio sectors. Commerce Lexington attended the launch of the Bluegrass AgTech Development Corp and responded to Lexington-Fayette Urban County Government Mayor's office request to share program details and grant opportunities with the existing Ag industry in Fayette County. Numerous companies responded with interest, leading Commerce Lexington to facilitate meetings with the Development Corp administration team. The meetings encouraged local ag companies to apply for the Challenge Grant. Award announcements are pending the Bluegrass AgTech Development Corp timeline.



D

Proposed Fee for Each Component/Category

INVEST IN US

For over 30 years, the business community and the Lexington-Fayette Urban County Government have worked to improve the economic vitality of Lexington-Fayette County. With the major loss of IBM jobs in the late 80's, the City's revenue was in jeopardy. Hundreds of jobs were lost, the payroll taxes were in decline. It was a turning point for Lexington. The city and the business community came together to create a plan to market the community for economic development and new job creation. The foundation for new job recreation began in earnest during those years. Together a marketing entity was formed and eventually merged with Commerce Lexington to combine resources, staff, and minds.

To meet the growing needs of Lexington, the marketing strategies evolved. We began robust community/minority business, existing business & workforce programs.

Our team has been nimble and redirected as we saw the community needs change. City funding has fluctuated. Recent decreases in funding for economic development directly impacts the ability of our team to provide services, programs and assistance that will help existing companies' workforce needs and new businesses create jobs, provide much-needed tax revenue for the city, and improve our economy going forward.

Below is our proposed investment—based upon reflection of previous budgets and the necessary funds to provide the services outlined in the RFP.

Scope of Work Proposed fees

Business Development

2.1 New Business Development	\$150,000.00
2.2 Existing Business Retention & Expansion	\$100,000.00
2.3, 2.5-2.7 Minority Business Development	\$81,000.00
2.8 Available Economic Development Property Register	\$50,000.00
2.11 AgTech and Agribusiness Development	\$30,000.00

Total Investment	\$411,000.00
------------------	--------------

## E

## Working Draft Budget

<b>E. Working Budget</b>	
<b>TOTAL</b>	<b>\$411,000.00</b>
<b>2.1 New Business Development</b>	<b>\$150,000.00</b>
Trade Shows and Consultant Events	\$45,000.00
Advertising and Marketing - Print and Digital	\$25,000.00
Direct Business to Business Lead Generation	\$20,000.00
Retainer with European Consulting Group	\$30,000.00
Admin	\$30,000.00
<b>2.2 Existing Business Retention and Expansion</b>	<b>\$100,000.00</b>
Networking Events	\$5,000.00
Admin	\$95,000.00
<b>2.3 Small Business Owner Connections and Networking</b>	<b>\$30,000.00</b>
Networking Events	\$20,950.00
Advertising and Marketing - Print and Digital	\$3,050.00
Admin	\$6,000.00
<b>2.5 Minority Business Development</b>	<b>\$40,000.00</b>
Membership & Dues, Travel	\$6,800.00
Classes	\$9,400.00
Advertising and Marketing - Print and Digital	\$15,800.00
Admin	\$8,000.00
<b>2.6 Women Owned Business Development</b>	<b>\$7,000.00</b>
Membership & Dues	\$1,500.00
Networking Event	\$2,575.00
Advertising and Marketing - Print and Digital	\$1,525.00
Admin	\$1,400.00
<b>2.7 Veteran Owned Business Development</b>	<b>\$4,000.00</b>
Networking Event	\$1,675.00
Advertising and Marketing - Print and Digital	\$1,525.00
Admin	\$800.00
<b>2.8 Available Economic Development Property Register</b>	<b>\$50,000.00</b>
Property Database	\$12,000.00
Educational Memberships (C2ER / CPAL)	\$5,000.00
Website Maintenance	\$23,000.00
Admin	\$10,000.00
<b>2.11 Ag-Tech and Agri Business Development (New and Existing)</b>	<b>\$30,000.00</b>
Trade Shows and Consultant Events	\$10,000.00
Advertising and Marketing - Print and Digital	\$10,000.00
Local Events and Existing Business Outreach	\$4,000.00
Admin	\$6,000.00

# F

## Conflict of Interest Disclosure

Commerce Lexington does not have a conflict of interest.



# THANK YOU

Our team is extremely passionate about Lexington and the success of our business community. We have years of economic development experience, as well as an in-depth knowledge of the people and the culture. We are smart, savvy and strategic thinkers. We are all about progress and we get things done. Lexington is our home, and it is a privilege to be a part of the growth, development and successes of this place that is so personal to us. We have deep-seeded roots here, including long-term professional relationships that we constantly cultivate and use to leverage a multitude of opportunities. We have enjoyed a long and prosperous relationship with our local government and together have achieved great things for Lexington and the Commonwealth. We look forward to continuing our relationship and moving our city forward. We appreciate the opportunity to participate in this RFP and thank you for your consideration.



**Gina Greathouse**

*Executive Vice President, Economic Development*

[ggreathouse@commercelexington.com](mailto:ggreathouse@commercelexington.com)

859-226-1623

# APPENDIX A



## Lexington Economic Partnership **Proposed Work Plan**

Pending Purchase of Service Agreement Funding

Scope of Work Category	Task	Responsible	Time-Frame	Description	Goal	Status
2.1	Review and refinement of new business recruitment plan and execution of plan	NG/GG	Meet with LFUCG in July 2024 to establish timeline / meeting schedule	Collaborate with Mayor's Office of Development to develop a timeline and tasks for implementation of the plan.	Plan Implementation	
2.1	Coordinate new business prospect activity and site visits for Lexington Economic Partnership.	NG	ongoing	The economic development team will work with the appropriate partners on project activity, as well as arranging site visits (visits from companies outside of Lexington to our city) for our clients. We will coordinate any assistance needed prior to the visit and provide detailed follow-up. Collaborate with ED partners when appropriate for client meetings and special events, programs and projects. Coordinate Economic Development incentive packages with KCED & LFUCG as needed.	75	
2.1	Conduct an internal monthly briefings with Mayor's Chief Development Officer (Deal Day).	CLEX team	monthly	Strategic confidential project/prospect updates from team members including: Gina, Nikki, Cheryl, Katie, Fallon and Tyrone. All client activity is considered confidential until the client is ready to disclose. Team members update Executive Pulse database on ongoing basis.	12	
2.1	Work with the UK Office of Technology Commercialization/New Ventures and the Small Business Development Center with clients and special projects.	GG/NG/CK	ongoing /	Activity working with UK Tech Transfer with respect to Bio attraction and retention efforts. Collaborating with them to attend the International Bio Show annually highlighting the currently Bio landscape and attracting new business opportunities.	N/A	
2.1	Engage with SITE SELECTION CONSULTANTS	NG/GG	ongoing	Through a variety of events to market Lexington and stay on the short list for projects and RFPs	125	
2.1	Social media campaign to consultants	KV	ongoing	Post on Facebook, twitter, and LinkedIn - real estate, notable events, downsidings, etc...	12	
2.1	Send email campaign to consultants - send a "fast fact" about Lexington quarterly to key consultants.	NG	Quarterly	Send quarterly email. Emails contain info on new announcements, available real estate, rankings, and other newsworthy events in Lexington.	4	
2.1	Plan one marketing trip to major market with focus on meeting with consultants one-on-one or holding a reception/luncheon event.	NG	May	Use Applied Marketing to assist with making appointments. Chief Development Officer, C-Suite representative from KCED invite, Mayor when available.	1	
2.1	Evaluate and attend select trade shows	NG	ongoing	SelectUSA Investment Tradeshow, aimed at recruiting foreign direct investment to the United States, Site Selectors Guild, Medical Device and Design, Biotech Industry Organization, IEDC, and ACCE	2	
2.1	Area Development Consultants Forum & Fall Women in Economic Development Conference	NG	March and October	Sponsor and attend the Area Development Workshop Forum. Evaluate sponsorship and attend the Area Development Women's Forum. Both events provide opportunity for professional development whilst amongst 15 - 20 economic development consultants.	2	
2.1	Join Southern Economic Development Council and evaluate attendance at the Annual Conference.	GG/NG	July	The Southern Economic Development Council is North America's oldest and largest regional economic development association. The annual conference brings together 500 economic development professionals and site selection consultants for educational content and networking events.	1	
2.1	Attend Select USA	NG	June	SelectUSA Investment Tradeshow, aimed at recruiting foreign direct investment to the United States. Assists US EDOs in competing globally for investment opportunities by providing a platform for international marketing	1	
2.1	Participate in KYUnited (KAED Marketing Effort)	GG/NG	KAED is pausing marketing efforts in 2024 while the realign.	KYUnited typically offers 6 trips a year - each cost \$1,200 to participate. Will attend key locations as budget is determined. They offered one event in conjunction with Area Development Workshop in Louisville in March before deciding to pause for remainder of 2024.	2	
2.1	Attend Kentucky Association for Economic Development Spring and Fall Conferences	CLEX team	April and November	KAED brings 2 - 4 site selection consultants to each conference so our team has the opportunity to network.	2	
2.1	Evaluate Membership and possibly attend the TBIC Annual Conference.	NG	August	Industrial Asset Management Council's fall forum will explore the emerging trends, strategies, and opportunities that will shape the future of industrial real estate.	1	
2.1	Evaluate membership and possibly attend the International Assets Management Council (IAMC) Fall Forum	NG	September	The Fall Forum will explore the emerging trends, strategies, and opportunities that will shape the future of industrial real estate, empowering your department and your company to become leaner, faster, and stronger than ever before.	1	
2.1	Place ads in the Keaneland Magazine twice a year.	KV	April and October	Spring and Fall - Targeting high-level executives.	2	
2.1	Print Advertising	KV	TBD	Place a limited variety of ads/advertisements in site selection magazines, Business Facilities Site Seekers Guide, Directory listings in the Site Selection annual guide. Support the Kentucky Guide to Economic Development. Support of the Equine Industry - Banner Ad during the Land Rover 3 Day event.	2	
2.1	Update and analyze data	KV	ongoing	Ongoing and always in process. Used to promote Lexington as a great place to do business. Use Census data, studies, etc.	as needed	
2.1	Update Business Prospectus to distribute to clients	KV	June/July	Updated gradually as new data is released. Most recent comprehensive edition was done in 2023. Complete reviews/updates happen annually (Summer).	1	
2.1	Update Bluegrass Rankings as new rankings are released	KV	ongoing	Updated as new rankings are released. Complete reviews/updates happen annually (Fall).	as needed	
2.1	Organize and compile data for responses to RFI/RFPs - expand	KV	ongoing	RFPs are completed as they come to CLEX	as needed	
2.1	Promote and update LocatelineLexington.com website	KV	ongoing	LocatelineLexington.com is promoted regularly through data requests responses, LinkedIn and Facebook. It is additionally promoted in all publications. The Lexington Economic Partnership will have a dedicated page as the new website is built out, with property listings and data specific to Lexington built into the page.	as needed	
2.2	Facilitate meetings of the Lexington Economic Partnership	CK	ongoing	Contact/Outreach 200+ existing businesses annually to identify potential expansions, identify leads for new-sourcing opportunities, potential conventions/meetings for Visitor Industries, workforce and training needs, coordinate incentives with KCED & LFUCG, and assist company to identify best practices.	100	
2.2	Assist existing businesses with expansion, retention, and downsizing activities, coordinate community partners to address EB needs / Issues (i.e. Mercor Road)	CK	As Needed	We learn about existing and anticipated projects from our existing business visits, through direct contact and/or word of mouth. We work closely with companies on their expansion needs. We also assist companies that may be in dire need or fear closing, with a goal to provide the resource and/or help prevent the closure of that business.	As Needed	

Scope of Work Category	Task	Responsible	Time-Frame	Description	Goal	Status
2.2	Visit existing businesses headquartered in other states (example: Webasto HQ in Michigan)	CK, GG	Annually	Many businesses are headquartered in other states. We visit with these headquarters to ensure they are aware of Lexington's resources that are available for their success in addition to demonstrate our gratitude for their commitment to Lexington.	1	
2.2	Initiate and organize Local Government Days.	CK, GG, AJ	Bi-Annually	The goal of Local Government day is to help council members, and other LFUCG staff, better know businesses operating in Lexington and to demonstrate the role Commerce Lexington plays with those businesses.	2	
2.2	Manufacturer's Network Group	CK	Bi-Annually	Collaborate with associations and organizations to coordinate networking events that connect the manufacturing industry to share best practices, resources, and other mechanisms to support the sectors growth.	2	
2.3 2.5 2.6 2.7	Invitation to DEI events and recognition in MB Resource Guide	TT, FM	ongoing	Available to all minority-owned, women-owned, and veteran-owned business members.	ongoing	
2.3 2.5 2.6 2.7	Seek new opportunities for funding CMBD priorities	TT, FM	ongoing	Begins January 1st annually	as needed	
2.5	Participate in the Minority Business Expo Board of Directors	TT, FM	Quarterly	Board member	4	
2.5 2.6 2.7	Community Partner with FCPS	TT, FM	ongoing	Active involvement in outreach	as needed	
2.5 2.6 2.7	Community Partner with UK Economic Inclusion Team	TT, FM	ongoing	Active involvement in outreach and sponsorship for UK-Turner Construction Diversity Accelerator Program and other programming.	ongoing	
2.5 2.6 2.7	Money Smart Classes	TT, FM	October/November	Financial Literacy classes targeting small and minority business owners (held in the Fall)	12-15 participants	
2.5 2.6 2.7	Money Smart Classes	TT, FM	January/February	Financial Literacy classes targeting small and minority business owners (held in the Winter)	12-15 participants	
2.5	Annual Hispanic-Owned Small Business Outreach	TT, FM	Annually	Partnership with Forcht Bank to grow Hispanic business relationships	as needed	
2.5 2.6 2.7	Introduce new MBEs to LFUCG Minority Enterprise Business Liaison	TT, FM	ongoing		ongoing	
2.6	Implement session for Women-Owned Businesses	TT, FM	Annually	Host targeted women-owned small business event once per year, including local partners and collaborators.	1	
2.7	Implement session for Veteran-Owned Businesses	TT, FM	Annually	Host targeted veteran-owned small business event once per year, including local partners and collaborators.	1	
2.8	Maintain and update building and site database for industrial and office property in Lexington	KV	ongoing	Maintain Zoom Prospector Property Register on loatekincbington.com website- Updates as new listings are received - Industrial and Office. Updates feed directly to KCED's database and LGE&KU databases.	continual awareness of available properties	
2.8	Lexington Property Tour	KV	quarterly	Tour city to learn of new buildings on the market	4	
2.8	Active Listing Tours	KV	monthly	Meet with a commercial real estate broker each month to tour featured active listings	12	
2.8	Participate in CPAL meetings to network with real estate brokers, learn of new properties, and educate real estate community on our database/website.	KV	monthly	Attend monthly meetings	12	
2.8	Bluegrass Region Community Engagement Tours	KV	monthly	Meet with economic development partners throughout the year to learn of leads and industry trends. ED partners include: construction, utility companies, real estate professionals, and Bluegrass Alliance members.	12	
2.8	C2ER Membership / Conference	KV	Annually	Schedule and conduct a meeting to discuss the current state of the agribusiness environment.	1	
2.11	Meet with the Director of Agriculture Development	CLX team	July/August 2024	Coordinate with Director of Ag Development to create a plan outlining strategies to attract agtech and other agricultural businesses to Lexington-Fayette County.	gather baseline data	
2.11	Develop Recruitment Plan	CLX team	Q2 FY2025	Asst with compiling a list of businesses that meet the criteria for Bluegrass AgTech Development Corp programming	TBD	
2.11	Connecting Businesses with Bluegrass AgTech Development Corp	CLX team	ongoing	Help organize meetings between qualifying businesses and Bluegrass AgTech Development Corp representatives.	ongoing	
2.11	Connect Businesses with Bluegrass AgTech Development Corp	CLX team	TBD	Work with the Director of Ag Development to develop a marketing strategy / plan	as needed	
2.11	Development of Marketing Materials	CLX team	TBD	Coordinate with the Director of Ag Development to define objectives of in-person events	TBD	
2.11	Events	CLX team	TBD	Include AgTech businesses in the Lexington Economic Partnership BRE program	TBD	
2.11	Business Retention and Support Efforts	CLX team	ongoing		ongoing	



Commerce Lexington will  
incorporate LFUCG Economic  
Development Partnership Services  
into the Event Planning and  
Preparation tracking document  
(see example below) within 30  
days of new Purchase of Service  
Agreement.



## EXAMPLE

### Event Planning and Preparation 2024

MONTH	DATE	EVENT	PLANNING MONTH	MARKET	LOCATION	Team Member	# of Attendees	NOTES
March	16th	Kentucky United Event (opening day of ADC)	January	Lexington	Out of Market	HQ - K&ED Organized		
April	17-19th	Consultant Connect	January	Lexington/Regional	Lexington	HQ		COMPLETE
April	22-25th	KAED Spring Conference	January	Lexington	Lake Cumberland	HQ - K&ED Organized		COMPLETE
April	29th	Ted Abernathy Economic Development - Regional Leadership	January	Regional	BCTC - AMC - Georgetown	QD	100	COMPLETE
	TBD	Global HQ CEO	January	Lexington	Lexington	CK, QD, KA		3/28 - Convo w/ KA on 3/27
June	15-20th	Leadership Visit	January	Lexington	Salt Lake City, UT	QD, TT		
June	11-14th	C&ER	January	Lexington	Norfolk, VA	KV		4/21 Ticket and Hotel booked. KV is good to go!
June		Website Updates	January	Lexington/Regional	Lexington	KV/QD/RB		3/23 In progress - Bi-weekly migs - working on site map
August	2nd	Minority Business Expo	January	Lexington	Lexington	CK, TT, FM		Monthly meetings
April	30th	Tech Network	February	Lexington	Lexington	CK		COMPLETE
April	8	Bluegrass Alliance Bi-monthly	February	Regional	Mt. Sterling	KV	9	COMPLETE
May	1st	Meet n Greet - Cabinet for Economic Development	February	Lexington/Regional	Frankfort	CLX ED Team, TT		COMPLETE
		Example Implement Additional Items as Funded by LFUCG / approved RFP						
May	8th	Bluegrass Alliance Out of Market Consultant Event	February	Regional	Indianapolis, IN	HQ - Truly Applied Mktg.	15-20 consultants	3/23 HQ chose event venue. 3/26 - Contract assigned. Goals to be determined.
May	8th	Regional Leadership Council	March	Regional	TBD	AL, QD, KV		8/2 KA submitted CLX table the event.
May	TBD	Councilmembers Business Tour	March	Lexington	Lexington (Coldstream)	CK, AJ		
		Example Implement Additional Items as Funded by LFUCG / approved RFP						
August	7	Regional Leaders - ED Simulation	March	Regional	LBK Customer Experience Center	KV		3/26 Create event and of April. Save the Date necessary. Determine Venue. LBK Customer Experience?
June	22-28th	Select USA	March	Regional	Washington, DC	HQ		3/23: HQ has registered & been accepted. Hotel booked. Need to purchase plane ticket.
Fall	TBD	Legacy Business Park Groundbreaking	March	Lexington	Legacy Business Park	ED Team		3/27 - LFUCG monthly project meeting shared announcement date.
July	30	Manufacturing Network	March	Lexington	Lexington Legends	CK		5/6 - CK working with Caroline Scott at NAM to organize event.
		Example Implement Additional Items as Funded by LFUCG / approved RFP						
July	TBD	Biotech Network	March	Lexington	Lexington	CK		3/26: Considering Bio InT Recap at event or Millon Boyer CEO present why Lexington. Goal: Determine Chair of Bio Network W/EC CK contact M6 for dates to present.
June	20	Bluegrass Alliance	April	Regional	Columbia Gas - Lexington	KV		5/10/2024 - Scheduled. Phyllis B. on radar for presentation. Regional Assets, Past, Current, Future.
July	24-27th	ACCCE	May	Lexington	Denver, CO	TT		5/10/2024 - Tyrone to find flight and ticket information
June	24	Global HQ CEO	May	Lexington	Lexington	CK, QD, KA		June 24 @ Lexington Opera House 4:30pm
August	TBD	EB and Consultant Visit	May	Lexington	Orville, OH/ Detroit, MI	CLX ED		May - CK find a Out of State Company to Visit. Coordinate information with team.
August		Bluegrass Alliance 101	June	Regional	Berea	KV		Dates pending - 8/1, 8/11, 8/22
September		Ten Investor Event	June	Lexington	Lexington	FM, EP, AC		