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117 Putnam Drive ♦ Eatonton, GA 31024 ♦ Tel: 706-485-1884  
[www.putnamdevelopmentauthority.com](http://www.putnamdevelopmentauthority.com)

**Agenda**  
**Monday, September 14, 2020 ♦ 9:00 AM**  
*Via Conference Call\**

\*This meeting is being held by conference call in accordance with the Georgia Open Meetings Law O.C.G.A. §50-14-1 (g) which provides for a virtual meeting under circumstances necessitated by emergency conditions.

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/466117253>

You can also dial in using your phone.

United States: +1 (224) 501-3412

Access Code: 466-117-253

**Opening**

1. Call to Order

**Minutes**

2. Approval of Minutes
  - a. August 14, 2020 Regular Meeting
  - b. August 14, 2020 Executive Session

**Financials**

3. Approval of Financials - August 2020

**Reports**

4. Interim Economic Development Director Report

**Regular Business**

5. Ratification of Insurance for old Hotel Eatonton
6. Discussion of Branding Proposal
7. South Industrial Park Update
8. Rock Eagle Technology Park and GDOT Update

The Putnam Development Authority reserves the right to continue the meeting to another time and place in the event the number of people in attendance at the meeting, including the PDA members, staff, and members of the public exceeds the legal limits. The meeting cannot be closed to the public except by a majority vote of a quorum present for the meeting. The authority can vote to go into an executive session on a legally exempt matter during a public meeting even if not advertised or listed on the agenda. Individuals with disabilities who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of the meeting or the facilities are required to contact the ADA Compliance Officer, at least three business days in advance of the meeting at 706-485-2776 to allow the County to make reasonable accommodations for those persons.

**Other Business**

- 9. Other Business

**Next Meeting Items**

- 10. Next Meeting Items

**Executive Session**

- 11. Enter Executive Session as allowed by O.C.G.A. 50-14-4 for Personnel, Litigation, or Real Estate
- 12. Reopen Meeting and execute Affidavit concerning the subject matter of the closed portion of the meeting
- 13. Action, if any, resulting from the Executive Session

**Closing**

- 14. Adjournment

The Putnam Development Authority reserves the right to continue the meeting to another time and place in the event the number of people in attendance at the meeting, including the PDA members, staff, and members of the public exceeds the legal limits. The meeting cannot be closed to the public except by a majority vote of a quorum present for the meeting. The authority can vote to go into an executive session on a legally exempt matter during a public meeting even if not advertised or listed on the agenda. Individuals with disabilities who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of the meeting or the facilities are required to contact the ADA Compliance Officer, at least three business days in advance of the meeting at 706-485-2776 to allow the County to make reasonable accommodations for those persons.

**File Attachments for Item:**

2. Approval of Minutes

a. August 14, 2020 Regular Meeting

b. August 14, 2020 Executive Session



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### Minutes

**Friday, August 14, 2020 ♦ 9:00 AM**

Putnam County Administration Building – Room 204

The Putnam Development Authority met on Friday, August 14, 2020 at approximately 9:00 AM via conference call.

#### *PRESENT*

Chairman Walt Rocker III  
 Member Patty Burns  
 Member Mylle Mangum  
 Member Eugene Smith

#### *MEMBERS ABSENT*

Member John Wojtas

#### *OTHERS PRESENT*

Attorney Kevin Brown  
 Interim Economic Development Director Pat Topping  
 County Clerk Lynn Butterworth

#### **Opening**

1. Call to Order

Chairman Rocker called the meeting to order at approximately 9:03 a.m.  
 (Copy of agenda made a part of the minutes.)

#### **Minutes**

2. Approval of Minutes

- a. July 20, 2020 Regular Meeting
- b. July 20, 2020 Executive Session

**Motion to approve the minutes of the July 20, 2020 Executive Session and the July 20, 2020 Regular Meeting with one correction to the Interim Economic Development Director's Report: item 3-Project Club needs 123,000 square feet (not 132 square feet).**

**Motion made by Member Smith, Seconded by Member Mangum.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

## Financials

### 3. Approval of Financials - July 2020

Member Burns reviewed the financials.

#### **Motion to approve the July 2020 Financials.**

**Motion made by Member Burns, Seconded by Member Smith.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

(Copy of financials made a part of the minutes.)

## Reports

### 4. Interim Economic Development Director's Report

Interim EDD Topping reporting the following:

- Statewide Project Activity
  - 36 new and expansion projects
  - \$559 million investment
  - 3229 new jobs
- Partners Contacted
- Business & Industry Company Contacts
  - Interfor - expansion update
  - Cosmo Cabinets - workforce expansion
- Project Status - 5 active projects
  - Project Club – Manufacturing – Investment \$20,000,000 – 100 jobs
  - Project Lake – Distribution Center – Investment TBD
  - Project Anchor – Hotel – Investment \$50,000,000
  - Project Scott – Mixed Use – Investment \$210,000,000
  - Project Cosmo – Manufacturing – Investment TBD
- Website Visitor Sessions and Statistics
- Social Media
  - 534 Facebook Followers
  - 59 Linked-In Followers
  - 270 Instagram Followers
  - 34 Twitter Followers
- Events Attended and Upcoming Events

**Regular Business**

5. Putnam General Hospital Referendum

Bob Betzel and Alan Horton participated in the meeting representing Putnam General Hospital. Mr. Horton advised the authority about the upcoming referendum to ask voters to support the county commissioners implementing a 1 mill property tax to enable the hospital to retire debt. This would be for a maximum of six years or an amount not to exceed \$7.8M. The hospital is working to educate the community and asked for the endorsement of the PDA to use in advertisements promoting the referendum. The Chamber of Commerce has already voted in favor of supporting this referendum.

**Motion to affirm support of Putnam General Hospital, which plays a crucial role in the PDA’s mission of economic development, in seeking additional public financial assistance for the Hospital’s needs.**

**Motion made by Member Mangum, Seconded by Member Burns.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum**

**Voting Abstaining: Member Smith**

6. Approval of Rental Agreement between the Putnam Development Authority and State Properties Commission on behalf of the Technical College System of Georgia

Attorney Brown talked to Jeff Scruggs, VP of CGTC and asked if the college would be able to help with costs of building maintenance. As the tenant, they are open to it, but have not been able to confirm this with the State Properties Commission. The authority would like the board of commissioners to contract with the PDA to pay for major items.

**Motion to present the Rental Agreement between the Putnam Development Authority and State Properties Commission on behalf of the Technical College System of Georgia to the county commission to ask if they are aware of it and if they want the authority to undertake the liability and is the commission willing to reimburse authority as costs occur.**

**Motion made by Member Smith, Seconded by Member Burns.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

(Copy of proposed agreement made a part of the minutes.)

7. FY2021 Budget Report

The board of commissioners will be holding a budget public hearing on Tuesday, August 18, 2020 and will be approving the FY21 budget on August 28, 2020. No action was taken.

8. Interfor Update

This item was discussed during the EDD Report.

9. Authorization for Chairman to sign documents from Georgia Department of Transportation

- a. Option for Right of Way
- b. Right of Entry

**Motion to authorize the chairman to sign the Option for Right of Way and Right of Entry documents from the Georgia Department of Transportation subject to Georgia Fall Line's concurrence.**

**Motion made by Member Burns, Seconded by Member Smith.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

(Copy of documents made a part of the minutes.)

**Other Business**

10. Other Business

EDD Topping commented on two authority member requests from the July 20, 2020 meeting:

- updated social media statistics were included in his EDD report
- third party branding evaluations - EDD Topping has reached out to a company and will contact a few more

**Next Meeting Items**

11. Next Meeting Items

Addition to the next meeting: third party branding evaluation update from EDD Topping

**Executive Session**

12. Enter Executive Session as allowed by O.C.G.A. 50-14-4, if necessary, for Personnel, Litigation, or Real Estate

**Motion to enter Executive Session as allowed by O.C.G.A. 50-14-4 for litigation and real estate and personnel purposes.**

**Motion made by Member Burns, Seconded by Member Mangum.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum**

(Member Smith was not available)

Meeting closed at approximately 10:01 a.m.

13. Reopen meeting and execute Affidavit concerning the subject matter of the closed portion of the meeting

**Motion to reopen the meeting and execute the affidavit concerning the subject matter of the closed portion of the meeting.**

**Motion made by Member Burns, Seconded by Member Smith.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

Meeting reopened at approximately 10:37 a.m.

14. Action, if any, resulting from the Executive Session

**Motion to authorize the chairman and Economic Development Director to proceed with the job description and advertisement as discussed in Executive Session.**

**Motion made by Member Mangum, Seconded by Member Burns.**

**Voting Yea: Chairman Rocker, Member Burns, Member Mangum, Member Smith**

**Closing**

15. Adjournment

Chairman Rocker adjourned the meeting at approximately 10:38 a.m.

ATTEST:

Lynn Butterworth  
County Clerk

Walt Rocker III  
Chairman



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The draft minutes of the August 14, 2020 Executive Session are available for Board Member review in the Clerk's office.

**File Attachments for Item:**

3. Approval of Financials - August 2020



Putnam County, GA

# Income Statement Account Summary

For Fiscal: 2020 Period Ending: 08/31/2020

		Original Total Budget	Current Total Budget	MTD Activity	YTD Activity	Budget Remaining
<b>Fund: 101 - GENERAL FUND</b>						
<b>Expense</b>						
<a href="#">101-75201-511100</a>	Full-time Staff	68,139.00	10,389.00	0.00	10,419.20	-30.20
<a href="#">101-75201-512101</a>	Insurance Benefits	7,890.00	7,890.00	0.00	535.62	7,354.38
<a href="#">101-75201-512201</a>	Social Security	5,213.00	5,213.00	0.00	794.25	4,418.75
<a href="#">101-75201-512401</a>	Retirement Contributions	8,850.00	11,931.00	0.00	11,931.00	0.00
<a href="#">101-75201-512701</a>	Workers Compensation	220.00	228.00	0.00	228.00	0.00
<a href="#">101-75201-512901</a>	Payroll Accrual	425.00	425.00	0.00	0.00	425.00
<a href="#">101-75201-521203</a>	Legal Services	20,000.00	20,000.00	0.00	12,606.72	7,393.28
<a href="#">101-75201-521205</a>	Testing/Physicals	0.00	15.00	0.00	15.00	0.00
<a href="#">101-75201-521206</a>	Accounting/Auditing	6,500.00	6,500.00	0.00	0.00	6,500.00
<a href="#">101-75201-521220</a>	Professional Services	20,000.00	97,750.00	0.00	36,154.45	61,595.55
<a href="#">101-75201-521301</a>	Computer Services	4,489.00	4,489.00	0.00	2,829.00	1,660.00
<a href="#">101-75201-522201</a>	Building & Ground Services	5,000.00	5,000.00	0.00	0.00	5,000.00
<a href="#">101-75201-522205</a>	Equipment Services	500.00	500.00	43.78	57.76	442.24
<a href="#">101-75201-522321</a>	Rental Expense	1,028.00	1,028.00	0.00	0.00	1,028.00
<a href="#">101-75201-523101</a>	General Insurance	6,900.00	6,900.00	3,689.00	6,041.00	859.00
<a href="#">101-75201-523201</a>	Telecommunications	1,500.00	1,500.00	-20.20	704.88	795.12
<a href="#">101-75201-523215</a>	Postage	250.00	250.00	0.00	27.85	222.15
<a href="#">101-75201-523301</a>	Advertising	24,000.00	20,896.00	0.00	749.28	20,146.72
<a href="#">101-75201-523401</a>	Printing & Binding	1,500.00	1,500.00	0.00	0.00	1,500.00
<a href="#">101-75201-523501</a>	Travel	6,150.00	6,150.00	0.00	6.00	6,144.00
<a href="#">101-75201-523601</a>	Dues & Fees	3,000.00	3,000.00	0.00	265.00	2,735.00
<a href="#">101-75201-523701</a>	Education	4,400.00	4,400.00	0.00	0.00	4,400.00
<a href="#">101-75201-523920</a>	Miscellaneous Services	20,000.00	0.00	0.00	0.00	0.00
<a href="#">101-75201-531101</a>	Office & General Supplies	600.00	600.00	0.00	20.00	580.00
<a href="#">101-75201-531110</a>	Building & Ground Supplies	2,000.00	2,000.00	0.00	0.00	2,000.00
<a href="#">101-75201-531231</a>	Electricity	1,500.00	1,500.00	45.56	510.88	989.12
<a href="#">101-75201-531301</a>	Meals For Special Events	2,500.00	2,500.00	0.00	81.53	2,418.47
<a href="#">101-75201-531401</a>	Books & Periodicals	250.00	250.00	0.00	0.00	250.00
<a href="#">101-75201-531601</a>	Small Equipment	2,500.00	2,500.00	0.00	0.00	2,500.00
	<b>Expense Total:</b>	<b>225,304.00</b>	<b>225,304.00</b>	<b>3,758.14</b>	<b>83,977.42</b>	<b>141,326.58</b>
	<b>Fund: 101 - GENERAL FUND Total:</b>	<b>225,304.00</b>	<b>225,304.00</b>	<b>3,758.14</b>	<b>83,977.42</b>	
	<b>Total Surplus (Deficit):</b>	<b>-225,304.00</b>	<b>-225,304.00</b>	<b>-3,758.14</b>	<b>-83,977.42</b>	



Putnam County, GA

12  
**Detail Report**  
**Account Detail**

Date Range: 10/01/2019 - 09/30/2020

Account	Name	Beginning Balance	Total Activity	Ending Balance			
<b>Fund: 101 - GENERAL FUND</b>							
<b>Expense</b>							
<a href="#">101-75201-511100</a>	Full-time Staff	0.00	10,419.20	10,419.20			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/10/2019	PYPKT02025	PYPKT02025 - PR PPE:		PYPKT02025 - PR PPE: 10-06-2019 CM -		2,801.42	2,801.42
10/24/2019	PYPKT02037	PYPKT02037 - PR PPE:		PYPKT02037 - PR PPE: 10/20/2019 CM -		2,801.42	5,602.84
11/07/2019	PYPKT02046	PYPKT02046 - PR PPE:		PYPKT02046 - PR PPE: 11-03-2019 CM -		4,816.36	10,419.20
<a href="#">101-75201-512101</a>	Insurance Benefits	0.00	535.62	535.62			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/01/2019	APPKT8726	INV0122601	133092	Economic Development	03465 - Greater Georgia Life Insurance Company	7.35	7.35
10/01/2019	GLPKT16798	JN10786		Dental Insurance		32.80	40.15
10/01/2019	GLPKT16798	JN10786		Medical Insurance		603.11	643.26
11/01/2019	GLPKT16955	JN10901		Medical Insurance		603.11	1,246.37
11/01/2019	GLPKT16955	JN10901		Dental Insurance		32.80	1,279.17
12/01/2019	GLPKT17160	JN11018		Medical Insurance		(705.28)	573.89
12/01/2019	GLPKT17160	JN11018		Dental Insurance		(38.27)	535.62
01/01/2020	GLPKT17289	JN11099		Dental Insurance		32.80	568.42
01/01/2020	GLPKT17292	JN11104		To correct error made in BCBS Insuranc		(32.80)	535.62
07/01/2020	GLPKT18460	JN11661		Medical Insurance		0.00	535.62
<a href="#">101-75201-512201</a>	Social Security	0.00	794.25	794.25			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/10/2019	PYPKT02025	PYPKT02025 - PR PPE:		PYPKT02025 - PR PPE: 10-06-2019 CM -		211.48	211.48
10/24/2019	PYPKT02037	PYPKT02037 - PR PPE:		PYPKT02037 - PR PPE: 10/20/2019 CM -		214.31	425.79
11/07/2019	PYPKT02046	PYPKT02046 - PR PPE:		PYPKT02046 - PR PPE: 11-03-2019 CM -		368.46	794.25

**Detail Report**

Date Range: 10/01/2019 - 09/13/2020

Account	Name	Beginning Balance	Total Activity	Ending Balance
<a href="#">101-75201-512401</a>	Retirement Contributions	0.00	11,931.00	11,931.00

Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/31/2019	GLPKT17038	JN10950		Monthly Retirement		885.00	885.00
11/30/2019	GLPKT17158	JN11011		Monthly Retirement		885.00	1,770.00
12/31/2019	GLPKT17280	JN11094		Monthly Retirement		885.00	2,655.00
01/31/2020	GLPKT17414	JN11159		Monthly Retirement		885.00	3,540.00
02/28/2020	GLPKT17472	JN11190		Monthly Retirement		885.00	4,425.00
03/31/2020	GLPKT17634	JN11270		Monthly Retirement		885.00	5,310.00
04/30/2020	GLPKT17660	JN11285		2020 Retirement Allocation		6,621.00	11,931.00

<a href="#">101-75201-512701</a>	Workers Compensation	0.00	228.00	228.00
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
03/31/2020	GLPKT17720	JN11315		2020 WC Insurance		228.00	228.00

<a href="#">101-75201-521203</a>	Legal Services	0.00	12,606.72	12,606.72
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/17/2019	APPKT8758	3355760	133294	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	1,250.00
11/22/2019	APPKT8866	3377167	133775	Legal Services/PDA	03560 - Seyfarth Shaw LLP	1,250.00	2,500.00
12/13/2019	APPKT9078	3394784	134835	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	3,750.00
01/22/2020	APPKT9010	3414479	134516	Legal Services/PDA	03560 - Seyfarth Shaw LLP	1,356.72	5,106.72
02/26/2020	APPKT9061	3434871	134756	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	6,356.72
03/31/2020	APPKT9206	3456218	135227	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	7,606.72
05/27/2020	APPKT9343	3499241	135854	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	8,856.72
06/13/2020	APPKT9343	3480458	135854	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	10,106.72
07/31/2020	APPKT9513	3544115	136537	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	11,356.72
07/31/2020	APPKT9513	3544121	136537	Legal Serv/PDA	03560 - Seyfarth Shaw LLP	1,250.00	12,606.72

<a href="#">101-75201-521205</a>	Testing/Physicals	0.00	15.00	15.00
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
07/21/2020	APPKT9437	2019 Wellness Exams	2742	2019 Wellness Exams	01103 - Putnam General Hospital	15.00	15.00
07/21/2020	APPKT9440	2019 Wellness Exams-	2742	Putnam General Hospital Reversal	01103 - Putnam General Hospital	(15.00)	0.00
07/21/2020	APPKT9441	2019 Wellness Exams	136256	Wellness Program Exams	01103 - Putnam General Hospital	15.00	15.00



**Detail Report**

Date Range: 10/01/2019 - 09/15/2020

Account	Name	Beginning Balance	Total Activity	Ending Balance
<a href="#">101-75201-521301</a>	Computer Services	0.00	2,829.00	2,829.00

Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/02/2019	APPKT8805	11202	133484	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	69.00
11/04/2019	APPKT8829	11285	133567	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	138.00
12/01/2019	APPKT8871	11379	133721	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	207.00
01/05/2020	APPKT8928	11561	134069	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	276.00
02/01/2020	APPKT9001	11819	134375	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	345.00
03/02/2020	APPKT9084	12079	134792	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	414.00
04/02/2020	APPKT9181	12397	135121	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	483.00
05/01/2020	APPKT9263	12677	135377	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	552.00
06/01/2020	APPKT9315	12979	135647	PDA - Cogentes	03655 - Responsive Technology Partners, Inc	69.00	621.00
06/30/2020	APPKT9416	INV0130010	136136	IBACKUP.COM PRO SOFTNET.Butterwort	01348 - Bank of America	55.50	676.50
07/01/2020	APPKT9425	13297	136208	Computer Serv/PDA	03655 - Responsive Technology Partners, Inc	472.50	1,149.00
07/22/2020	APPKT9443	4182	136288	Website Maint/PDA	01028 - Middle Georgia Regional Commission	1,680.00	2,829.00

<a href="#">101-75201-522205</a>	Equipment Services	0.00	57.76	57.76
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/12/2019	APPKT8763	IN817278	133257	Equip Svcs/Dist Comm/Exe Ofc/HR/Fire-	01115 - Xerox Business Solutions Southeast LLC	13.98	13.98
08/21/2020	APPKT9546	IN1084490	136700	Equip Services/Dist Comm-Exe Off-HR-P	01115 - Xerox Business Solutions Southeast LLC	43.78	57.76

<a href="#">101-75201-522321</a>	Rental Expense	0.00	0.00	0.00
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
03/10/2020	APPKT9101	INV0126460	134889	Rental Exp/Putnam Dev Auth	01306 - Farmers & Merchants Bank	28.00	28.00
03/10/2020	APPKT9432	INV0126460-R	134889	Farmers & Merchants Bank Reversal	01306 - Farmers & Merchants Bank	(28.00)	0.00

<a href="#">101-75201-523101</a>	General Insurance	0.00	6,041.00	6,041.00
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
01/08/2020	APPKT8940	111505	134071	Directors & Officers Liability Insurance/	03284 - Craig-Massee Insurance	2,029.00	2,029.00
02/03/2020	APPKT9010	INV0125005	134472	General Insurance/PDA	03284 - Craig-Massee Insurance	323.00	2,352.00
08/17/2020	APPKT9536	INV0130957	136697	20sbaam6161/PDA	04109 - Twin City Fire Insurance Company	3,689.00	6,041.00

**Detail Report**

Date Range: 10/01/2019 - 09/16/2020

Account	Name	Beginning Balance	Total Activity	Ending Balance
<a href="#">101-75201-523201</a>	Telecommunications	0.00	729.88	729.88

Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/01/2019	APPKT8707	18529	133003	Development Authority	03044 - Localloop, Inc	25.00	25.00
10/13/2019	APPKT8759	9840075800	133308	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	62.70	87.70
11/01/2019	APPKT8784	18899	133431	Development Authority	03044 - Localloop, Inc	25.00	112.70
11/13/2019	APPKT8837	9842124019	133684	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	62.70	175.40
12/01/2019	APPKT8861	19283	133748	Development Authority	03044 - Localloop, Inc	25.00	200.40
12/13/2019	APPKT8904	9844195450	134021	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	33.12	233.52
01/01/2020	APPKT8925	19614	134090	Development Authority	03044 - Localloop, Inc	25.00	258.52
01/13/2020	APPKT8966	9846271886	134269	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	46.63	305.15
02/01/2020	APPKT8999	19960	134401	Development Authority	03044 - Localloop, Inc	25.00	330.15
02/13/2020	APPKT9037	9848342894	134672	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	46.63	376.78
03/01/2020	APPKT9064	20317	134735	Development Authority	03044 - Localloop, Inc	25.00	401.78
03/13/2020	APPKT9126	9850434340	135014	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	46.63	448.41
04/01/2020	APPKT9158	20675	135065	Development Authority	03044 - Localloop, Inc	25.00	473.41
04/13/2020	APPKT9229	9852518928	135304	706-816-8099 Terry Schwindler	01191 - Verizon Wireless	41.51	514.92
05/01/2020	APPKT9251	21003	135405	Development Authority	03044 - Localloop, Inc	25.00	539.92
05/13/2020	APPKT9304	9854575274	135619	706-816-8099 Putnam Development Au	01191 - Verizon Wireless	41.51	581.43
06/01/2020	APPKT9317	21385	135667	Development Authority	03044 - Localloop, Inc	25.00	606.43
06/13/2020	APPKT9357	9856617181	135933	706-816-8099 Putnam Development Au	01191 - Verizon Wireless	46.51	652.94
07/01/2020	APPKT9378	21764	135999	Development Authority	03044 - Localloop, Inc	25.00	677.94
07/13/2020	APPKT9429	9858662720	136251	706-816-8099 Putnam Development Au	01191 - Verizon Wireless	47.14	725.08
08/01/2020	APPKT9459	22122	136352	Development Authority	03044 - Localloop, Inc	25.00	750.08
08/13/2020	APPKT9524	9860717150	136612	706-816-8099 Putnam Development Au	01191 - Verizon Wireless	(45.20)	704.88
09/01/2020	APPKT9543	22507	136665	Development Authority	03044 - Localloop, Inc	25.00	729.88

<a href="#">101-75201-523215</a>	Postage	0.00	27.85	27.85
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
12/31/2019	APPKT8958	INV0124806	134131	USPS PO 1228380024.Butterworth	01348 - Bank of America	25.85	25.85
07/31/2020	APPKT9509	INV0130795	136420	USPS PO 1228380024.Butterworth	01348 - Bank of America	2.00	27.85

<a href="#">101-75201-523301</a>	Advertising	0.00	749.28	749.28
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Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/31/2019	APPKT8803	INV0123364	133515	Advertising/Dist.Comm,P&D,PDA and Tr	01179 - Smith Communications, Inc.	280.84	280.84
11/30/2019	APPKT8878	1949A	133850	Advertising/Transit-PDA	01179 - Smith Communications, Inc.	468.44	749.28
05/31/2020	APPKT9326	INV0127859	135779	Advertising Dist, Comm, Public Rel, PDA	01179 - Smith Communications, Inc.	50.00	799.28
05/31/2020	GLPKT18349	JN11609		To correct entry from PDA to Dist Com		(50.00)	749.28

**Detail Report**

Date Range: 10/01/2019 - 09/17/2020

Account	Name	Beginning Balance	Total Activity	Ending Balance			
<a href="#">101-75201-523501</a>	Travel	0.00	6.00	6.00			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/31/2019	APPKT8821	INV0123942	133539	26312 - CITY OF ATLANTA.Schwindler	01348 - Bank of America	6.00	6.00
<a href="#">101-75201-523601</a>	Dues & Fees	0.00	265.00	265.00			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/24/2019	APPKT8765	INV0123276	133388	Dues & Fees/PDA	04136 - John Wojtas	265.00	265.00
<a href="#">101-75201-531101</a>	Office & General Supplies	0.00	20.00	20.00			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
06/06/2020	APPKT9328	6.6.20PCBC	135768	PCHS Graphics-P.Topping-Bus Cards/PD	03743 - Putnam County High School	20.00	20.00
<a href="#">101-75201-531231</a>	Electricity	0.00	510.88	510.88			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/18/2019	APPKT8758	INV0123264	133304	Electricity/PDA	01045 - Tri-County EMC	47.46	47.46
11/15/2019	APPKT8816	INV0123458	133632	Electricity/PDA	01045 - Tri-County EMC	48.05	95.51
12/17/2019	APPKT8889	INV0124341	133931	Elect/PDA	01045 - Tri-County EMC	45.80	141.31
01/08/2020	APPKT8965	INV0124894	134266	Electricity/PDA	01045 - Tri-County EMC	47.44	188.75
02/08/2020	APPKT9033	INV0125972	134598	Electricity/PDA	01045 - Tri-County EMC	47.29	236.04
03/08/2020	APPKT9109	INV0126596	134939	Electricity/PDA	01045 - Tri-County EMC	46.43	282.47
04/08/2020	APPKT9204	INV0127035	135235	Electricity/PDA	01045 - Tri-County EMC	46.29	328.76
05/08/2020	APPKT9293	INV0127759	135571	Electricity/PDA	01045 - Tri-County EMC	45.71	374.47
06/08/2020	APPKT9343	INV0127888	135871	Electricity/PDA	01045 - Tri-County EMC	45.57	420.04
07/08/2020	APPKT9410	INV0128498	136188	Electricity/PDA	01045 - Tri-County EMC	45.28	465.32
08/08/2020	APPKT9519	INV0130919	136543	Electricity/PDA	01045 - Tri-County EMC	45.56	510.88
<a href="#">101-75201-531301</a>	Meals For Special Events	0.00	81.53	81.53			
<b>Post Date</b>	<b>Packet Number</b>	<b>Source Transaction</b>	<b>Pmt Number</b>	<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>Running Balance</b>
10/31/2019	APPKT8821	INV0123939	133539	IN GEORGIA ECONOMIC DEVE.Schwind	01348 - Bank of America	40.00	40.00
10/31/2019	APPKT8821	INV0123940	133539	DEL TACO #1206.Schwindler	01348 - Bank of America	4.27	44.27
10/31/2019	APPKT8821	INV0123941	133539	TST LALORE CAFE.Schwindler	01348 - Bank of America	37.26	81.53
<b>Total Expense:</b>		<b>Beginning Balance:</b> 0.00	<b>Total Activity:</b> 84,002.42		<b>Ending Balance:</b> 84,002.42		
<b>Total Fund: 101 - GENERAL FUND :</b>		<b>Beginning Balance:</b> 0.00	<b>Total Activity:</b> 84,002.42		<b>Ending Balance:</b> 84,002.42		

**Detail Report**

Date Range: 10/01/2019 - 09/18/20

Account

Name

Beginning Balance

Total Activity

Ending Balance

Fund: 328 - SPLOST #8 Fund

**Expense**

[328-75201-542600](#)

PDA Capital Purchases

0.00

0.00

0.00

Post Date	Packet Number	Source Transaction	Pmt Number	Description	Vendor	Amount	Running Balance
10/01/2019	GLPKT16939	JN10889		To correct entry from SPLOST 8 Cash to		95,579.00	95,579.00
10/01/2019	GLPKT16992	JN10926		Previous JE to move/correct entry was		3,000.00	98,579.00
10/01/2019	GLPKT16996	JN10927		To correct entry		0.70	98,579.70
10/01/2019	GLPKT17568	JN11239		To transfer contribution to PDA from FY		(98,579.70)	0.00

**Total Expense:** Beginning Balance: 0.00 Total Activity: 0.00 Ending Balance: 0.00

**Total Fund: 328 - SPLOST #8 Fund:** Beginning Balance: 0.00 Total Activity: 0.00 Ending Balance: 0.00

**Grand Totals:** Beginning Balance: 0.00 Total Activity: 84,002.42 Ending Balance: 84,002.42

# Fund Summary

<b>Fund</b>	<b>Beginning Balance</b>	<b>Total Activity</b>	<b>Ending Balance</b>
101 - GENERAL FUND	0.00	84,002.42	84,002.42
328 - SPLOST #8 Fund	0.00	0.00	0.00
<b>Grand Total:</b>	<b>0.00</b>	<b>84,002.42</b>	<b>84,002.42</b>

**Balance Sheet**

As of August 31, 2020

	<u>Aug 31, 20</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
10001 · Checking-FMB	504,498.16
10050 · One Georgia Funds	50.00
10300 · Certificate of Deposit 42072	110,240.31
10600 · Certificate of Deposit-24251	82,389.12
<b>Total Checking/Savings</b>	<u>697,177.59</u>
<b>Other Current Assets</b>	
11700 · CIP	25,357.50
12007 · Prepaid Insurance	3,896.00
<b>Total Other Current Assets</b>	<u>29,253.50</u>
<b>Total Current Assets</b>	<u>726,431.09</u>
<b>Fixed Assets</b>	
11100 · 10 ac. N. Park	200,000.00
11200 · 5 ac. N. Park	100,000.00
11225 · Land	19,106.00
11250 · Building-Tech College	1,000,000.00
11300 · Tech. College Property	455,962.60
11350 · Rock Eagle Land Improvements	660,561.00
11355 · Rock Eagle Rech. Accum Deprecia	-62,386.40
11500 · 142 Ac. Indust Blvd	300,000.00
11600 · 130 Ac. RE Tech. Park	1,029,600.00
11751 · building-Old Hotel	123,536.00
<b>Total Fixed Assets</b>	<u>3,826,379.20</u>
<b>TOTAL ASSETS</b>	<u><b>4,552,810.29</b></u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Other Current Liabilities</b>	
11360 · Accum Depr-Building	352,083.00
18050 · Accrued Payroll	667.00
<b>Total Other Current Liabilities</b>	<u>352,750.00</u>
<b>Total Current Liabilities</b>	<u>352,750.00</u>
<b>Total Liabilities</b>	<u>352,750.00</u>
<b>Equity</b>	
30000 · Opening Balance Equity	3,367,924.20
32000 · Unrestricted Net Assets	698,994.09
Net Income	133,142.00
<b>Total Equity</b>	<u>4,200,060.29</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><b>4,552,810.29</b></u>

**Putnam Development Authority**  
**Profit & Loss YTD Comparison**  
**August 2020**

	<u>Aug 20</u>	<u>Oct '19 - Aug 20</u>
<b>Income</b>		
<b>44500 · Grants</b>		
44530 · Tri County	0.00	3,500.00
44546 · Community Affairs	0.00	239,592.35
<b>Total 44500 · Grants</b>	0.00	243,092.35
<b>46400 · Other Types of Income</b>		
46430 · Miscellaneous Revenue	0.00	7,880.44
<b>Total 46400 · Other Types of Income</b>	0.00	7,880.44
<b>47001 · Contributed Capital</b>	0.00	142,642.00
<b>Total Income</b>	0.00	393,614.79
<b>Expense</b>		
<b>64000 · Projects</b>		
64001 · SIP Project	0.00	239,592.35
<b>Total 64000 · Projects</b>	0.00	239,592.35
<b>65144 · Salaries</b>	0.00	12,800.00
<b>66000 · Miscellaneous</b>	0.00	8,080.44
<b>Total Expense</b>	0.00	260,472.79
<b>Net Income</b>	<b>0.00</b>	<b>133,142.00</b>

**File Attachments for Item:**

5. Ratification of Insurance for old Hotel Eatonton

**Lynn Butterworth**

---

**From:** Walter C. Rucker, III [REDACTED] >  
**Sent:** Friday, September 4, 2020 9:19 AM  
**To:** [REDACTED] 'Patty Burns'; [REDACTED]; g [REDACTED]  
**Cc:** Lynn Butterworth; kbrown@seyfarth.com  
**Subject:** Hotel Insurance

Board:

The County Administration informed us on Tuesday afternoon that the insurance on the hotel building had been cancelled. There was a period of time where the property was not covered. Pat immediately contacted Craig Massey Insurance Agency to get quotes for the coverage. Due to the holiday weekend coming up and the property's coverage lapse, we felt it necessary to bind coverage yesterday afternoon for a 6 month term. We can most likely get comparable coverage for less money through ACCG, but the application process takes time that we didn't have.

Coverage has been bound effective 9/3/20 for a term of 6 Months including Terrorism Coverage with a premium of \$3,789.74. We opted to include coverage for Terrorism, as we have heard that many insurance companies have considered the civil unrest and consequential burning of buildings as acts of terrorism; therefore, they have been refusing to pay claims on policies that do not have the Terrorism Coverage. If anyone has any questions, comments, or concerns, please let me know. It is not our intent to circumnavigate the board. We felt we didn't have a choice in the interim.

Thanks,

Walt Rucker

**File Attachments for Item:**

6. Discussion of Branding Proposal



PHOTO CREDIT: PDA Facebook

# Proposal for Services



PUTNAM DEVELOPMENT AUTHORITY – PUTNAM COUNTY, GEORGIA  
**re:Vision: Economic Development Strategic Plan**  
07.023.2020

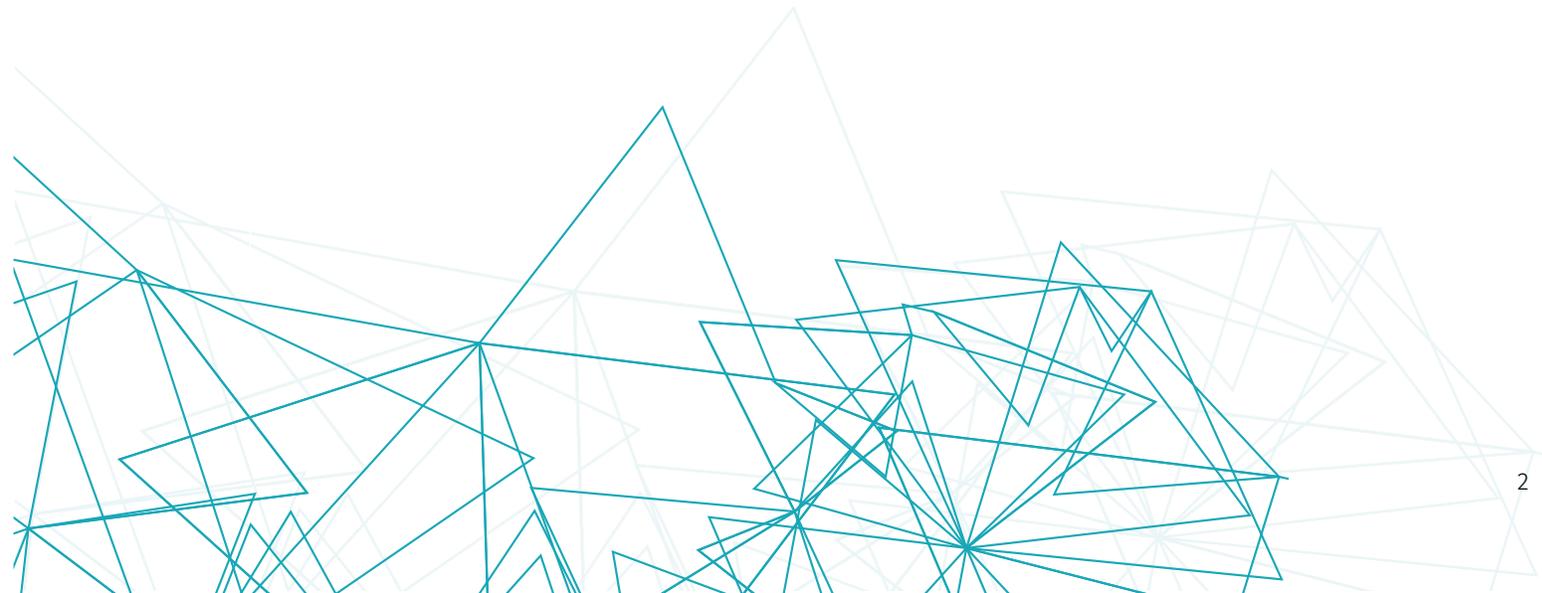
**GRAY SWOOPE**  
PRESIDENT & CEO

[Gray.Swoope@visionfirstadvisors.com](mailto:Gray.Swoope@visionfirstadvisors.com)



## Table of Contents

- 03** Cover Letter
- 04** Project Overview
- 05** Project Approach
- 08** Price Proposal
- 09** Meet the Team
- 10** Company Profile
- 12** VFA Advantage + Connections
- 13** VFA Team Bios





# Thank you for your consideration.

July 20, 2020

Pat Topping, Interim Economic Development Director  
Putnam Development Authority  
117 Putnam Drive  
Eatonton, GA 31024

Dear Pat,

Thank you for opportunity to submit a proposal to conduct re:Vision – a community performance program - for the Putnam Development Authority (PDA). This is a cost effective and accelerated strategic planning process that leverages our 100 years of combined experience to identify barriers to success and offer recommendations for improvement. Reassessing your regional economic status and needs along with ways to foster cross-organizational collaboration is even more important as communities and the nation begin to recover and reopen from the COVID-19 pandemic.

We bring a team of professionals who have lived in, worked in and worked for communities to achieve greater economic prosperity for businesses and residents alike. Today, as a location advisory and economic development firm, representing five Fortune 500 companies, we have the ability to view the community as an investment opportunity and can provide you the recommendations needed to be more proactive. We offer:

**Unbiased expertise.** As location advisors for corporations and five Fortune 500 companies, we will approach the assessment as if we were conducting a site search for a competitive project providing you with insight, findings and recommendations to improve Putnam’s regional competitiveness and economic development initiatives.

**Data driven results.** We will utilize local, regional, state and national data sets to identify trends to define competitive advantages and inform decisions to achieve measurable results.

**Realistic and implementable strategies.** We have been in the shoes of those working at the local level for the betterment of a community. As consultants we remain committed to delivering strategies and tactics that are realistic, attainable and implementable each with the potential for positive community growth across multiple entities.

We believe that successful strategies cannot rely on a cookie cutter formula but must be original and tailored to fit the different needs of each client. On the following pages you will find a suggested scope of work to fit your exact needs.

Please let us know if you should have any questions. We appreciate your consideration of VisionFirst and look forward to working together.

Sincerely,

Gray Swoope  
President & CEO

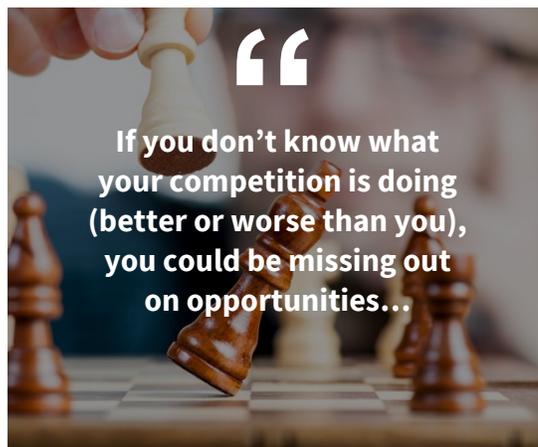


# Project Overview



## One of the most common questions we get as consultants is “how do our (properties, marketing materials, presentations or RFIs) compare to others?”

With clients in more than 30 states and well into our fifth year as a firm, we have developed a cost effective, yet thorough, review designed to answer your most common questions. As we’ve said, we’ve been in your shoes – local, regional and state levels, public sector and private corporations, community development and high-performance corporate organizations. Now as consultants, our team remains committed to delivering tactical, realistic, implementable strategies using a cost effective and accelerated strategic planning process.



Economic development organizations can only be so effective by using their internal benchmarks as guidelines. Understanding the economic development landscape is one of the most effective ways to gain traction in an ever-changing market and to develop a competitive location.

With 3,142 counties (and equivalents) across 50 states, how does your community measure up? More importantly, what does that rank mean in context of resources and opportunities in the market?

Utilizing more than 100 years of combined economic development experience, we will begin the process by assessing the current economic realities within the county. We will identify barriers to success and offer recommendations for improvement. VisionFirst will evaluate the following:



### COMMUNITY GATEWAYS

– physically + virtually



### PRODUCT REVIEW

– comprehensive: sites, buildings + talent



### COMMUNITY MARKETING & POSITIONING

– statistics + marketing



### DEAL STRUCTURING

– optimizing opportunities



### DELTA TEAM

– engaged, holistic leadership with a seat at the table



### ORGANIZATIONAL STRUCTURE

– maximizing efficiency



### RESOURCES

– capacity to compete

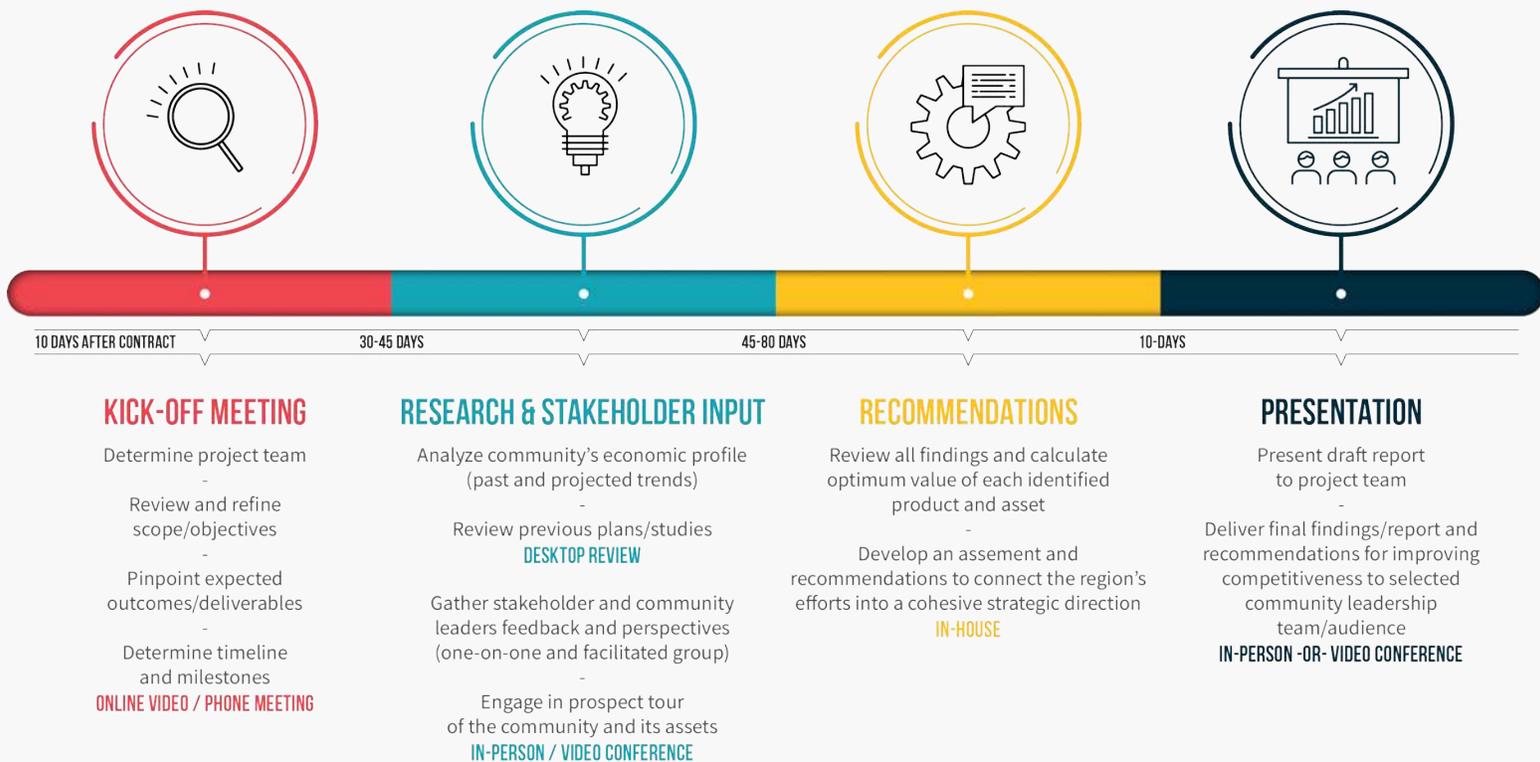


### LEADERSHIP

– expectations + responsibilities

# Project Approach

It is anticipated that Gray Swoope will lead the engagement along with Griff Salmon, Nancy Blum-Heintz, Greg Word, Brenda Lathan and Kathy Gelston. The approach to arrive at the final deliverable involves **four** phases.



## PHASE 01 KICK-OFF MEETING

It is important to begin the work by conducting a planning session between VisionFirst and project leadership. This kick-off meeting will help to identify who will assist VisionFirst in coordinating information and identifying key stakeholders for input. Our staff will facilitate a meeting via web conference with a review of the project objectives and deliverables. A firm timeline will be established with milestones for updates and progress.

*Project components to include:*

- Kick-off planning session.
- Gather and review of existing plans and data.
- Formulate schedule of meetings and members.
- **Deliverable:** Press release drafted announcing the start of the project and selection of VisionFirst Advisors five business days after the kick-off.

## PHASE 02 RESEARCH & STAKEHOLDER INPUT

### BENCHMARKING SNAPSHOT & DESKTOP REVIEW

Using site selection experience, VisionFirst will conduct benchmarking snapshot and desktop research on the community using validated data sources. This review process looks at established clusters and bases rankings on a variety of factors such as best practices of successful community programs, industry input, sites and buildings, commonalities in assets, etc. The ranking seeks to highlight where the community has a competitive advantage as well as where opportunities exist to improve the community’s competitive stance.

*Project components to include:*

- Meeting with staff to understand economic development organization leadership, resources to compete, civic engagement, past experiences on competitive projects, certified or shovel-ready sites, other product(s) that generate opportunity as well as talent pipeline and development.
- Benchmark the Putnam County to a 45-minute drive-time, state and nation to understand and identify opportunities as well as impacts to competitiveness.
- Collect and evaluate research and data analysis to provide a clear picture of the current economic outlook and opportunities surrounding the community and its workforce using research tools including JobsEQ, U.S. Census Bureau, National Association of Counties, the National Center for Education Statistics and other leading research entities.

### STAKEHOLDER INPUT

Stakeholder input provides invaluable insight that would not be attained from desktop research review and helps establish the foundation for the PDA’s goals and mission. It is anticipated that VisionFirst will conduct approximately eight-10 interviews over two-business days (location dependent on CDC guidelines). The meetings can include a combination of facilitated group discussions or one-on-one interviews. The targeted audiences would include civic and community leadership, business leadership and workforce providers as well as partner organizations. VisionFirst will look closely at each of the entities that support business growth and look at barriers to success.

*Project components to include:*

- Eight to 10 confidential interviews over two business days.
- Feedback will be documented, analyzed and studied to recognize trends and issues that support or impede success of the strategy.

### PROSPECT TOUR & MARKETING REVIEW

Site selection is typically a process of elimination. PDA will be asked to prepare a prospect tour of the community’s assets, allowing VisionFirst to gauge more clearly how the organization defines and showcases the regional competitive assets. VisionFirst staff will evaluate the team, organizations, product, presentation and technical sales abilities of positioning the community to win competitive deals. This project component will also include a review of itinerary and information packet and other tools (i.e. digital, GIS, technology and devices used for presentation) used during the sales process.

*Project components to include:*

- A one- to two-hour community asset and site/building tour (can be accomplished virtually)
- **Deliverable:** Best practices & recommendations for enhancements.

## PHASE 03 & 04 FORMULATE RECOMMENDATIONS & PRESENTATION DELIVERY

After analyzing information collected in the interviews, research data and other sources, VisionFirst will develop a strategic plan with eight to 10 recommendations to connect the community’s efforts into a cohesive strategy across multiple entities. VisionFirst will deliver the findings and the recommendations for improving competitiveness. Steps to begin implementing the strategies will be included in the final deliverable to help ensure a path to success.

*Plan components and deliverables:*

- Benchmarking snapshot (Fig 01) and desktop data review.
- Key findings from stakeholder input.
- Community marketing and positioning feedback.
- Strategic plan with eight-10 implementable recommendations.
- Presentation of final report in-person or via video conference.

**FIGURE 01**  
SAMPLE BENCHMARKING SNAPSHOT

The competitiveness snapshot looks at **established clusters** and bases rankings on a variety of factors such as best practices of successful community programs, industry input, commonalities in assets, etc. The ranking seeks to highlight **where the Region has a competitive advantage** as well as **where opportunities exist to improve the community’s competitive stance.**



# Price Proposal



Based on our understanding of the engagement, VisionFirst proposes a flat professional fee of **\$20,000**. VisionFirst will be paid for ordinary out-of-pocket expenses, including items such as non-local transportation, travel and other incidental expenses which will be approved by the PDA and not to exceed 10 percent of the fee. This fee is based on the estimated time and experience of the individuals performing the work. VisionFirst is committed to meeting the project time and budget requirements. This price proposal is valid for 60 days from the date of submission.

# MEET OUR TEAM



## Strategy starts with a vision first.

**Gray Swoope**

President & Chief Executive Officer  
TALLAHASSEE, FLORIDA



**Griff Salmon**

Principal  
ORLANDO, FLORIDA



**Nancy Blum-Heintz**

Senior Consultant  
TALLAHASSEE, FLORIDA



**Greg Word**

Senior Consultant  
JACKSON, MISSISSIPPI



**Kathy Gelston**

Financial Analyst  
JACKSON, MISSISSIPPI



**Brenda Lathan**

Senior Consultant  
JACKSON, MISSISSIPPI



**Nicole Costello**

Office Manager  
TALLAHASSEE, FLORIDA

**Tallahassee**  
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3800 ESPLANADE WAY, SUITE 195  
TALLAHASSEE, FLORIDA 32311

**Orlando**  
(407) 775-2960

4767 NEW BROAD STREET  
ORLANDO, FLORIDA 32814

**Jackson**  
(601) 292-9417

RENAISSANCE AT COLONY PARK  
1020 HIGHLAND COLONY PARKWAY, SUITE 1400  
RIDGELAND, MISSISSIPPI 39157

[VISIONFIRSTADVISORS.COM](http://VISIONFIRSTADVISORS.COM)

**Gray Swoope  
launched  
VisionFirst Advisors  
over five years ago  
after 30 years  
of leading public  
& private economic  
development  
organizations  
in three states.**

---





30+

STATES REPRESENTED  
IN OUR CLIENT BASE

5

FORTUNE 500  
COMPANIES REPRESENTED

3

OFFICE  
LOCATIONS

100+

COLLECTIVE YEARS  
IN THE FIELD



### WHO WE ARE

**VisionFirst Advisors has established itself as a go-to firm in the economic development consulting field with a variety of clients from 30+ states and five Fortune 500 companies.**

VisionFirst is a customer-driven consulting firm, acting seamlessly as an extension of the client team to develop strategy, solve problems, and deliver results while mitigating risks and barriers. We know that no two projects are the same and our approach is tailored to each of our clients.

### WHAT WE DO

**We maximize your competitiveness**

*We have the skills to bring innovative thought and perspective to your project, delivering a clear vision for strategic success.*

Corporations and communities face a myriad of challenges to remain competitive. VisionFirst maximizes client competitiveness, leveraging an extensive and far-reaching network of key connections - attaching resources to drive to goals, synthesizing ideas into action, and designing solutions that achieve tangible results. A sampling of our services includes:

 <b>Economic Development Strategy</b>	 <b>Location Advisory</b>
 <b>Strategic Solutions</b>	 <b>Incentives Negotiation</b>
 <b>Objective-Driven Marketing &amp; Comm</b>	 <b>Compliance</b>
 <b>Reviewing, Analyzing &amp; Reporting</b>	<b>LABOR MARKETS COMMUNITY COMPETITIVE ASSETS FACILITATED SESSIONS</b>

In addition to Gray, VisionFirst is solidified by a team of professionals that have worked together at the executive level of state economic development entities for years and are now growing the private practice. The same axioms for success exist today as they did years ago, when they started collectively working together:

**RESPECT**

+

**TRUST**

+

**REPUTATION**

+

**RESULTS**

These truths are part of the VisionFirst culture and are represented through our client work.

As advisors, we recognize that our actions, as representatives, intentional or unintentional, are a reflection onto our clients.

[VisionFirstAdvisors.com](http://VisionFirstAdvisors.com)

# VisionFirst Advantage

We, as a firm, look at today’s most complex economic development challenges, listen to our client’s vision, form a strategy to achieve objectives, connect people that can make a difference and deliver value to our client.

We develop a tailored strategy that analyzes conditions and charts a clear course of action to reach objectives. That process includes making sure the right team is in place for necessary execution. We act to deliver results that are clear, measurable and add undeniable value for our client.

## VisionFirst brings a distinguished team to the project.

VisionFirst represents some of America’s leading companies including five on the Fortune 500. Our team’s capacity is the result of demonstrated expertise in:

- Convening institutions, community leaders, stakeholders and taxpayers to create synergies for transformational community impact.
- Understanding the economic development market and the importance of leveraging available funding and assets.
- Helping economic and community development professionals create and sustain high-performing teams that lead to significant increases in performance and positioning.
- Cross-walking targeted industry sectors to strategic investments in human capital and talent pipeline to compete in a global marketplace.
- Leveraging marketing and communications strategies to increase the business development project pipeline.
- Serving as a trusted partner with confidential site selection projects and leveraging that knowledge to help communities.



*Sample of Clients »*





## Gray Swoope

President & Chief Executive Officer  
TALLAHASSEE, FLORIDA

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### AREAS OF EXPERTISE

- 30 Years of Leading Site Selection, State, Regional & Local Economic Development
- Economic Development Risk Mitigation
- Leverage of Economic Development for Greater Impact
- Experience in Helping States & Communities Invest in Infrastructure & Talent
- Building Community Capacity to Leverage Funds
- Compliance Processes & Procedures

A recognized leader in economic development and site selection, Gray Swoope is president and chief executive officer of VisionFirst Advisors. After a successful 30-year career in economic development, Gray launched the VisionFirst consulting practice in 2015. The firm, a wholly owned subsidiary of Butler Snow LLP, partners with a diverse base of private and public sector clients to develop effective pathways for success.

Prior to starting VisionFirst, Gray served in Florida Governor Rick Scott's administration (2011-2015) as secretary of commerce and president and CEO of its public/private economic development organization, Enterprise Florida, Inc. Under his leadership, Enterprise Florida elevated its economic development presence and delivered the best results in the organization's history. Florida announced competitive project wins during his tenure that included Amazon, Bristol-Myers Squibb, Hertz, Navy Federal Credit Union, Northrop Grumman and Verizon.

Before joining Governor Scott, Gray served as the executive director of the Mississippi Development Authority (MDA) under then Governor and current VisionFirst board chair, Haley Barbour. During his tenure at MDA, Gray played a vital role in recruiting companies such as Toyota, PACCAR, GE Aviation and SeverCorr (now Steel Dynamics) to the state. In addition, Gray's leadership following Hurricane Katrina was critical to Mississippi's recovery efforts. MDA acted as the state's fiscal agent for \$5.4 billion of the federal recovery package appropriated through the Department of Housing and Urban Development. The MDA team created many of the recovery programs being used today for natural disasters like Hurricanes Sandy, Harvey, Irma and Florence.

Gray is passionate about economic development, having served at all levels representing both urban and rural regions. A constant student of the profession, he never stops the pursuit of learning and applying this knowledge for success in today's fast-paced economy. Gray earned both undergraduate and graduate-degrees from Mississippi State University.



## Griff Salmon

Principal  
ORLANDO, FLORIDA

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### AREAS OF EXPERTISE

- Location Advisory
- Asset Review & Inventory
- Stakeholder & Board Management
- Business Development & Retention
- Global Trade

Griff serves as a principal for VisionFirst Advisors in Orlando. His extensive background in operations and business development allows him to offer a unique perspective to economic development organizations and companies looking to expand or relocate. Prior to joining VisionFirst, Griff served as the executive vice president and chief operating officer for Enterprise Florida (EFI), where under his leadership the business development team announced project wins such as GE, Amazon and Lockheed Martin. In addition, Griff effectively managed the organization’s divisions to strategically focus resources while his collaborative management style led to partnerships with a statewide network of regional and local economic development organizations.

Griff also served as director of the Mississippi Development Authority’s (MDA) Global Business division. At MDA, the business development team announced projects from companies such as GE Aviation, Toyota, PACCAR and McKesson. Griff was also congressional liaison for MDA’s Federal Department of Defense and Congressional Liaison Bureau where he worked to maintain military presence in the state as well as expand capabilities to secure future missions as part of the federal government’s Base Realignment and Closure Act.

Griff earned a master’s degree in public policy and administration at Mississippi State University and a B.S. from Millsaps College.



## Nancy Blum-Heintz

Senior Consultant  
TALLAHASSEE, FLORIDA

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### AREAS OF EXPERTISE

- Strategic & Crisis Communications
- Workforce & Demographic Research
- Community Strategy
- Public Records & Transparency Policies
- Strategic Planning & Best Practices

Nancy brings nearly two decades of executive-level marketing, communications, government relations and economic development expertise to VisionFirst. Nancy previously served as the national director of communications for the Foundation for Excellence in Education (ExcelinEd), a leader in education reform that designs policy and implementation strategies to improve our nation's educational attainment and workforce competencies.

Nancy worked alongside VisionFirst's principals when she served as vice president of strategic alignment and communications at Enterprise Florida (EFI). In that position, she developed policies and strategies for the organization to adhere to Florida's strict public records laws while at the same time balancing necessary client confidentiality.

Nancy succeeded at bringing greater strategic vision to communications by expanding the use of proactive communications, strategic outreach and social media to improve media coverage and website engagement.

Nancy moved to the EFI position after serving as chief communications officer for the Department of Economic Opportunity (DEO). She has also served in leadership roles at several state agencies in Florida including the Department of Health and the Department of Environmental Protection. While at the Department of Environmental Protection, Nancy led issue management campaigns for high profile environmental events such as Everglades restoration, the Apalachicola- Chattahoochee-Flint River System water disputes as well as the Deepwater Horizon oil spill.

Nancy earned her bachelor's degree from Florida State University and is a certified user of Chmura's JobsEQ.



**Greg Word**  
Senior Consultant  
JACKSON, MISSISSIPPI

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**AREAS OF EXPERTISE**

- Collaborative Management
- Graphic Design, Branding & Marketing
- Research & Analysis
- Community Campaign Strategy
- Asset Review & Inventory
- GIS-Mapping & 3-D Modeling

Greg brings a breadth of experience that is both broad and specialized in product development, research and analysis, industrial building and site evaluations, lead generation, economic research packages, GIS-based mapping as well as 3-D modeling and virtual reality profiles. He has been recognized for his work in marketing and design ranging from branding, identity and logo design to prospect- centered packaging, proposals, digital renderings, print and digital advertisements as well as interactive presentations.

Greg most recently served as senior vice president of Economic Development for the Greater Jackson Alliance. In this role, the organization was recognized by Community System’s Digital 25 as an “organization that best uses digital technology to differentiate its community online to better serve businesses.” Most recently, he was recognized as North America’s Top 50 Economic Developers by Consultant Connect. Prior to joining the Alliance, he was bureau manager of Business Intelligence and Support for the Mississippi Development Authority. Greg also served as manager technical/graphic services for North Mississippi Industrial Development Association. In these roles, his involvement in economic development teams helped produce numerous successful projects resulting in more than \$3 billion in investment and thousands of announced jobs.

A graduate of Mississippi State University, Greg currently serves on the board of directors for the Mississippi Economic Development Council as Past President.



## Kathy Gelston

Financial Analyst  
JACKSON, MISSISSIPPI

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### AREAS OF EXPERTISE

- Government Finance
- Deep Understanding of State Taxation
- Incentives Contracting & Compliance
- Public/Private Partnerships
- Complex Financial Mechanisms

With close to 30 years of executive-level public-sector experience, Kathy brings to VisionFirst a depth of understanding of public and private-sector finance particularly in the execution and compliance of economic development programs. Kathy has the unique ability to explain incredible complex financial mechanisms in a way that both the media and taxpayers can understand.

Prior to joining VisionFirst, Kathy served as associate vice president of corporate engagement and economic development at Mississippi State University working with industry to identify university and business partnership opportunities in research, training, or problem resolution. As a member of the executive management team for the Office of Research and Economic Development for the university, Kathy set research policy, managed the university research park as well as several university level research centers, provided technical assistance and identified university opportunities for projects considering location or expansion in the state.

Before her tenure at the university, Kathy served as chief financial officer for the Mississippi Development Authority (MDA), the state’s primary economic development entity, overseeing the agency’s Financial Resources and Accounting and Finance divisions. She was responsible for the agency’s legislative activities, coordinating state-funded incentive programs, and developing incentive packages for industry locating or expanding in the state.

Previously, Kathy worked at KPMG, where she served as the Mississippi specialist and a state and local tax manager for two years, and at the Mississippi Department of Revenue, where she worked for 12 years. She served as deputy director of audit and compliance while at the agency.



## Brenda Lathan

Senior Consultant  
JACKSON, MISSISSIPPI

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### AREAS OF EXPERTISE

- Regional and Rural Development
- Product Development
- Retail Development
- Project Management
- Business Retention and Expansion

Brenda is an economic developer specializing in rural and regional economic development, most recently serving as senior vice president for the highly successful Golden Triangle Development Link in Mississippi.

Brenda focuses on improving community competitiveness through her commitment to meeting customer and project demands. With more than 20 years experience, she has been recognized for her achievements in product and retail development. While with the Link, she contributed to a portfolio of economic development projects resulting in more than \$6 billion in capital investment and the creation of more than 6,000 new jobs.

Active in the community, Brenda was recognized by the Mississippi Business Journal as one of Mississippi's Top 50 Business Women and she has served on the Board of Directors for the Mississippi Economic Development Council as well as the International Council of Shopping Centers.

Brenda is a graduate of the Mississippi University for Women. She also attended Oklahoma University's Economic Development Institute and the International Council of Shopping Center's Retail Development Program at Penn State's Wharton School of Business.



## Nicole Costello

Office Manager  
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### AREAS OF EXPERTISE

- Financial Controls & Accounting Best Practices
- State & Local Purchasing Procedures
- Contract Management
- Client Communications
- Organizational Controls & Operations

Nicole brings nearly a decade of banking and high-level administrative services to VisionFirst. In her position as office manager, she serves as the backbone of VisionFirst by implementing policies and procedures while also managing accounts payable, receivables and monthly billing.

Prior to joining VisionFirst, Nicole previously worked in retail banking and residential lending at BB&T, JP Morgan Chase and Wachovia Bank. For Nicole, customer service has always been the key to creating successful relationships and results and she brings that perspective to VisionFirst.

Nicole graduated from Florida State University with a bachelor's degree in Economics. She also is a licensed real estate professional.